

**AMENDMENT NO. 8
TO AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS**

THIS AMENDMENT is made and entered into this 28th day of August, 2026, between **Santa Fe County** (the “County”), and **Communities in Schools** (the “Contractor”).

WHEREAS, on February 8, 2022, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the “Agreement”) to provide for the Contractor’s provision of navigation services and make flexible funds available to individuals who are low income and in need of Contractor’s services; and

WHEREAS, Article 15 (No Oral Modifications; Written Amendments required) of the Agreement allows the parties to amend the Agreement by an instrument in writing signed by the parties; and

WHEREAS, Amendments Nos. 1 through 7 increased the compensation payable to the Contractor and extended the term to February 8, 2027; and

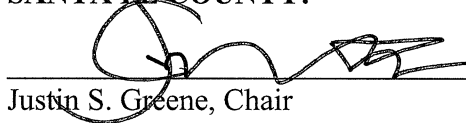
WHEREAS, by this Amendment No. 8 the parties agree to amend the Agreement to increase the compensation payable to the Contractor.

NOW THEREFORE, the parties agree to amend the Agreement as follows:

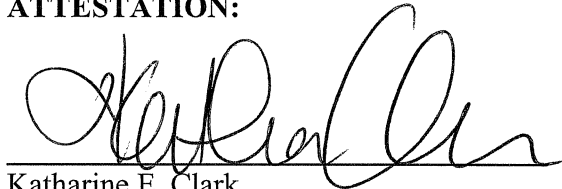
1. Article 3.A.2 (Compensation, Invoicing and Set-Off), insert a subparagraph iii to read:
 - iii. By Amendment No. 8 the expenditure of the additional funding of \$77,125 will be designated for the same purposes as indicated above; that is, \$62,500 for navigation services and \$14,625 available as flexible funds.
2. Article 3.A.3 (Compensation, Invoicing and Set-Off) insert a subparagraph c to read:
 - c. By Amendment No. 8 the compensation payable to the Contractor is increased by the sum of \$77,125. The total amount of funds payable to the Contractor for the term of this Agreement will not exceed **\$691,125.00**, *inclusive* of NM GRT.
3. All other provisions of the Agreement not specifically amended or modified by Amendment Nos. 1 through 7 and this Amendment No. 8 will remain in full force and effect.

IN WITNESS WHEREOF, the parties have duly executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:


Justin S. Greene, Chair
Santa Fe County Board of County Commissioners

ATTESTATION:


Katharine E. Clark
Santa Fe County Clerk

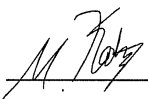
08/28/2026
Date

Approved as to form:

Roberta D. Joe for W.B.
Walker Boyd
Santa Fe County Attorney

7/27/2026
Date

CONTRACTOR – Communities In Schools



7/27/26
Date

**AMENDMENT NO. 7
TO THE AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS**

THIS AMENDMENT is made this 3rd day of February 2026, between ,
Santa Fe County (the "County") and **Communities in Schools** (the "Contractor").

WHEREAS, on February 28, 2022, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the "Agreement") to provide for the Contractor's provision of CONNECT navigation services and make the use of flexible funds available to benefit the Contractor's clients; and

WHEREAS, Amendments Nos. 1 through 6 increased the compensation payable to the Contractor and extended the term to February 8, 2026; and

WHEREAS, the Contractor's services under this Agreement are not professional services as that term is defined in NMSA 1978, Section 13-1-76, of the Procurement Code and the contract amount is \$25,000 or more, therefore, the term is not limited to four years; and

WHEREAS, by this Amendment No. 7 the parties agree to extend the term to February 28, 2027.

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Article 4 (Effective Date and Term) insert a subparagraph c to read:
 - c. By Amendment No. 7 the term is extended to February 8, 2027.
2. All other provisions of the Agreement not specifically amended or modified by Amendment Nos. 1 through 6 and this Amendment No. 7 will remain in full force and effect.

IN WITNESS WHEREOF, the parties have executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:



Gregory S. Shaffer
Santa Fe County Manager

Approved as to form:

Roberta D. Joe for W.B.

Walker Boyd
Santa Fe County Attorney

2/3/2026
Date

1/27/2026
Date

CONTRACTOR - Communities in Schools

Natalie Deibel

Natalie Deibel (Feb 2, 2026 19:04:43 MST)

Signature

02/02/2026

Date

2022 0152 CSD CIS Amendment No. 7 (legal signed)

Final Audit Report

2026-02-03

Created:	2026-02-03
By:	Communities in Schools (acctg@cisnm.org)
Status:	Signed
Transaction ID:	CBJCHBCAABAAQz1dn45lzHok-mCbscw-J1rr366FYEk4

"2022 0152 CSD CIS Amendment No. 7 (legal signed)" History



Document created by Communities in Schools (acctg@cisnm.org)

2026-02-03 - 2:04:06 AM GMT



Document emailed to deibeln6@gmail.com for signature

2026-02-03 - 2:04:10 AM GMT



Email viewed by deibeln6@gmail.com

2026-02-03 - 2:04:24 AM GMT



Signer deibeln6@gmail.com entered name at signing as Natalie Deibel

2026-02-03 - 2:04:41 AM GMT



Document e-signed by Natalie Deibel (deibeln6@gmail.com)

Signature Date: 2026-02-03 - 2:04:43 AM GMT - Time Source: server



Agreement completed.

2026-02-03 - 2:04:43 AM GMT



Adobe Acrobat Sign

**AMENDMENT NO. 6
TO THE AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS NEW MEXICO**

This Amendment is made this 29th day of, JULY 2025, between **Santa Fe County** (the "County") and **Communities in Schools New Mexico** (the "Contractor").

WHEREAS, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the "Agreement") on February 8, 2022, to provide for the Contractor's provision of navigation services and make flexible funds available to individuals who are low income and in need of Contractor's services; and

WHEREAS, Amendment Nos. 1 through 5 increased the compensation payable to the Contractor and extended to the term to February 8, 2026; and

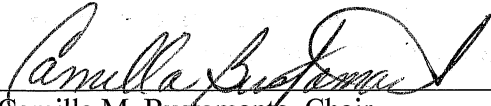
WHEREAS, by this Amendment No. 6 the parties agree to amend the Agreement to increase the compensation payable to the Contractor.

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Article 3.A.1 (Compensation, Invoicing, and Set Off) insert a subparagraph c to read:
 - c. By Amendment No. 6 the expenditure of the additional funding of \$77,125.00 will be designated for the same purposes as indicated above; that \$62,500.00 for navigation services and \$14,625.00 for flexible funds.
2. Article 3.A.2 (Compensation, Invoicing, and Set Off) insert a subparagraph c to read:
 - c. By Amendment No. 6 the compensation payable to the Contractor is increased by the sum of \$77,125.00. The total amount of funds payable to the Contractor for the term of this Agreement will not exceed **\$614,000.00**, *inclusive* of NM GRT.
3. All other provisions of the Agreement not specifically amended or modified by Amendment Nos. 1 through 5 and this Amendment No. 6 will remain in full force and effect.

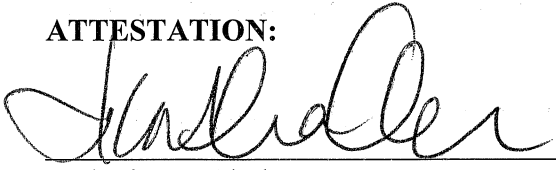
IN WITNESS WHEREOF, the parties have executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:



Camilla M. Bustamante, Chair
Santa Fe Board of County Commissioners

ATTESTATION:



Katharine E. Clark
Santa Fe County Clerk

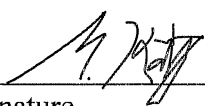
07/30/25
Date

Approved as to form:

Roberta D. Joe for W.B.
Walker Boyd
Santa Fe County Attorney

July 10, 2025
Date

CONTRACTOR— COMMUNITIES IN SCHOOLS NEW MEXICO



Signature

7/22/25
Date

**AMENDMENT NO. 5
TO THE AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS**

This Amendment is made this 31st day of March 2025, between **Santa Fe County** (the "County") and **Communities in Schools** (the "Contractor").

WHEREAS, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the "Agreement") on February 8, 2022, to provide for the Contractor's provision of CONNECT navigation services and make the use of flexible funds available to benefit the Contractor's clients; and

WHEREAS, Amendments Nos. 1 through 4 increased the compensation payable to the Contractor and extended the term to February 8, 2025; and

WHEREAS, according to Article 15 (No Oral Modifications, Written Amendments Required) of the Agreement, the Agreement may be amended by an instrument in writing signed by the parties; and

WHEREAS, by this Amendment No. 5 the parties agree to amend the Agreement to extend the term of the Agreement to February 8, 2026.

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Article 4 (Effective Date and Term) insert a subparagraph b to read:
 - a. By Amendment No. 5 the term is extended to February 8, 2026.
2. All other provisions of the Agreement not specifically amended or modified by Amendment Nos. 1 through 4 and this Amendment No. 5 will remain in full force and effect.

IN WITNESS WHEREOF, the parties have executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:



Gregory S. Shaffer
Santa Fe County Manager

3/31/2025

Date

Approved as to form:

Roberta D. Joe for W.B.

Walker Boyd

Santa Fe County Attorney

February 10, 2025

Date

CONTRACTOR - Communities in Schools


Signature

March 27, 2025

Date



Amendment No. 4 to Agreement No.2022-0152-CSD/TVR

**AMENDMENT NO. 4
TO THE AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS NEW MEXICO**

This Amendment is made this 10th day of September 2024, between **Santa Fe County** (the "County") and **Communities in Schools New Mexico** (the "Contractor").

WHEREAS, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the "Agreement") on February 8, 2022, to provide for the Contractor's provision of emergency services that are reimbursable from flexible funds to assist individuals who are low income and in need of such services; and

WHEREAS, Amendment No. 1 increased the compensation payable to the Contractor; Amendment Nos. 2 and 3 increased the compensation payable to the Contractor and extended to the term to February 8, 2025; and

WHEREAS, by this Amendment No. 4 the parties agree to amend the Agreement to increase the compensation payable to the Contractor.

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Article 3.A.1 (Compensation, Invoicing, and Set Off) insert a subparagraph b to read:
 - b. By Amendment No. 4 the expenditure of the additional funding of \$77,125.00 will be designated for the same purposes as indicated above; that \$62,500.00 for navigation services and \$14,625.00 for flexible funds.
2. Article 3.A.2 (Compensation, Invoicing, and Set Off) insert a subparagraph b to read:
 - b. By Amendment No. 4 the compensation payable to the Contractor is increased by the sum of \$77,125.00. The total amount of funds payable to the Contractor for the term of this Agreement will not exceed **\$536,875.00**, *inclusive* of NM GRT.
3. All other provisions of the Agreement not specifically amended or modified by Amendment Nos. 1 through 3 and this Amendment No. 4 will remain in full force and effect.

SFC CLERK RECORDED 9/13/2024

Amendment No. 4 to Agreement No.2022-0152-CSD/TVR

IN WITNESS WHEREOF, the parties have executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:



Hank Hughes, Chair
Santa Fe Board of County Commissioners



ATTESTATION:



Katharine E. Clark
Santa Fe County Clerk

Sept 12/2024
Date

Approved as to form:

Roberta D. Joe for J.Y.

Jeff Young
Santa Fe County Attorney

August 22, 2024
Date

CONTRACTOR— COMMUNITIES IN SCHOOLS NEW MEXICO

DocuSigned by:

0805963E88D64D0...
Signature

8/26/2024
Date

**AMENDMENT NO. 3
TO THE AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS**

This Amendment is made this _____ day of _____ 2024, between **Santa Fe County** (the “County”) and **Communities in Schools** (the “Contractor”).

WHEREAS, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the “Agreement”) on February 8, 2022, to provide for the Contractor’s provision of CONNECT navigation services and make the use of flexible funds available to benefit the Contractor’s clients; and

WHEREAS, Amendments Nos. 1 and 2 increased the compensation payable to the Contractor; and

WHEREAS, the term of the Agreement expired February 8, 2024, however, the County would like to continue to benefit from the Contractor’s services; and

WHEREAS, by this Amendment No. 3 the parties agree to amend the Agreement to extend the term of the Agreement to February 8, 2025.

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Article 4 (Effective Date and Term) insert a subparagraph a to read:
 - a. By Amendment No. 3 the term of this Agreement is extended to February 8, 2025.
2. All other provisions of the Agreement not specifically amended or modified by Amendment Nos. 1, 2 and this Amendment No. 3 will remain in full force and effect.

IN WITNESS WHEREOF, the parties have executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:



Gregory S. Shaffer
Santa Fe County Manager

5/52024

Date

Approved as to form:

Roberta D. Joe for J.Y.
Jeff Young
Santa Fe County Attorney

May 2, 2024

Date

CONTRACTOR— Communities in Schools



Signature and title

Executive Director

May 3, 2024
Date

Michelle Katz, Executive Director
Print name and title

Santa Fe County Purchasing Process Request Form

Date Submitted:	4/18/24	Requesting User Agency:	CSD
Name & Phone of Contact Person:	Jennifer N. Romero 995-9526 or Gina Capener 992-9830		
Contract Tracking #/Buyer (Purchasing)	2022-0152-CSD/TVR Communities in Schools New Mexico	BCC Approval? Yes ☐ No X Please indicate date	

AGENCY REQUEST: (Lease, MOU, Grant, Professional Services Agreement, Construction, Application, etc.) Describe the County, Public and/or Agency need. Describe what you are attempting to purchase, obtain or accomplish. Attach additional information relating to your request (scope of work, specifications, bid items on etc.)

REQUEST: The Community Services Department (CSD) requests to amend (Amendment No. 3) the current Agreement No. 2022-0152-CSD/TVR between Santa Fe County and Communities in Schools New Mexico to extend the term of the contract to June 30, 2024.

Does this request require IT approval? ☐ Yes ☐ No **If yes, is the approved work order attached?** ☐ Yes ☐ No

PURCHASING STATUS:

FINANCIAL / BUDGETARY INFORMATION: (If applicable, include a breakdown of project cost estimates; is funding already appropriated? If this action will result in revenue to the County, include the total compensation and timetable. Include funding information (GF, GRT, Grant, Grant Match, In Kind requirements, etc.)

<u>Grants</u>	<u>Capital, Fund & Cost Center Approval</u>	<u>Budget Approval:</u>
Is this grant related? ☐ Yes ☒ No	Is this a capital project? ☐ Yes ☒ No	
If yes: provide fund(s) _____	Capital approval: _____	
Grant approval: _____	Fund/Cost Center approval: _____	

Please provide account number(s) for this request: n/a

LEGAL FORM: (Is this a new contract or an amendment or change of a previously submitted procurement or contract? Identify any known liabilities and/or risks to the County.

LEGAL APPROVAL: (sign and date)

FINANCE DIRECTOR APPROVAL: (sign and date)


Gregory S. Shaffer, County Manager 5/5/2024

COUNTY MANAGER APPROVAL: (sign and date)

Amendment No. 2 to Agreement No.2022-0152-CSD/TVR

**AMENDMENT NO. 2
TO THE AGREEMENT BETWEEN SANTA FE COUNTY
AND COMMUNITIES IN SCHOOLS NEW MEXICO**

This Amendment is made this 6 day of July 2023, between **Santa Fe County** (the "County") and **Communities in Schools New Mexico** (the "Contractor").

WHEREAS, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (the "Agreement") on February 8, 2022, to provide for the Contractor's provision of navigation services that provide support for struggling students and their families, and other services that help improve their lives by use of assessment of needs, planning, support, monitoring and evaluation; and

WHEREAS, in 2022 the County was the recipient of funds under the American Rescue Plan Act or "ARPA" and ARPA funds were the funding source for the Agreement in 2022. The APRA funds could be used only for certain purposes allowed under ARPA and had to be expended by a certain date; and

WHEREAS, the Agreement was amended in December 2022, to provide for additional compensation for the Contractor to continue to provide services. The additional compensation were County funds, not ARPA funds, and therefore the expenditure of funds was not limited to purposes authorized by ARPA; and

WHEREAS, by this Amendment No. 2 the County wishes to have the Contractor continue to provide services and increase the compensation payable to the Contractor by the sum of \$67,375.00 in County funds.

NOW, THEREFORE, the parties agree to amend the Agreement as follows:

1. Article 3.A.2. (Compensation, Invoicing, and Set Off) insert a subparagraph ^a(j) to read:

YH ^a(j) By Amendment No. 2 the expenditure of the additional funding of \$67,375.00 will be designated for the same purposes as indicated above; that is \$62,500.00 for navigation services and \$4,875.00 for flexible funds.

2. Article 3.A.3. (Compensation, Invoicing, and Set Off) insert a subparagraph a to read:

- a. By Amendment No. 2 the compensation payable to the Contractor is increased by the sum of \$67,375.00. The total amount of funds payable to the Contractor for the term of this Agreement will not exceed \$459,750.00, inclusive of NM GRT.

Amendment No. 2 to Agreement No.2022-0152-CSD/TVR

3. All other provisions of the Agreement not specifically amended or modified by Amendment No. 1 and this Amendment No. 2 will remain in full force and effect.

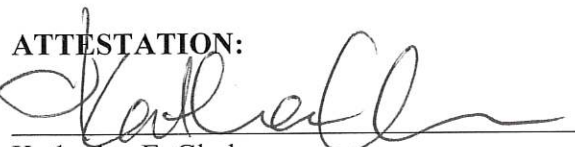
IN WITNESS WHEREOF, the parties have executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:



Anna Hansen, Chair
Santa Fe Board of County Commissioners

ATTESTATION:



Katharine E. Clark
Santa Fe County Clerk

07/11/23
Date

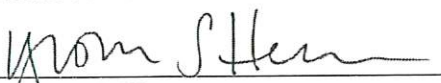


Approved as to form:

Roberta D. Joe for J.Y.
Jeff Young
Santa Fe County Attorney

June 14, 2023
Date

Finance Division:



Yvonne S. Herrera
Finance Director

6/15/2023
Date

CONTRACTOR— Communities in Schools New Mexico

DocuSigned by:


0805963F88D64D0...
Signature
Michelle Katz Interim Executive Director

Print name and title

7/6/2023
Date

**AMENDMENT NO. 1
TO AGREEMENT BETWEEN
SANTA FE COUNTY AND COMMUNITIES IN SCHOOLS NEW MEXICO**

THIS AMENDMENT is made and entered into this 3rd day of ~~December~~ 2022 by and between Santa Fe County, hereinafter the "County", and Communities in Schools New Mexico, hereinafter the "Contractor."

WHEREAS, pursuant to NMSA 1978, Section 13-1-98. 1 (B) (Hospital and health care exemption), the procurement of these navigation services by this contractor were deemed to be exempt from competitive solicitation because these services are part of the County's Accountable Health Community (AHC) initiative; and

WHEREAS, on February 8, 2022, the County and Contractor entered into Agreement No. 2022-0152-CSD/TVR (Agreement) as part of the comprehensive Accountable Health Community Navigation Services Initiative also known as CONNECT to provide for Contractor's provision of services for individuals impacted by the COVID-19 virus pandemic with funds from the America Rescue Plan Act or "ARPA"; and

WHEREAS, the County wishes to use County funds to compensate this Contractor for services provided to individuals who may not have been impacted by the COVID-19 virus pandemic; and

WHEREAS, the parties desire to enter into this Amendment No. 1 to increase the compensation payable to the Contractor in the amount of \$67,375.00.

NOW THEREFORE, both parties agree as follows:

1. Article 3 A.1: (Compensation, Invoicing and Set-Off) is amended by inserting the following as subpart (a) to read:

(a) During the term of July 1, 2022 to June 30, 2023, the Contractor shall be compensated as follows:

Contractor's compensation is based on rate of \$2,500.00 per person per year with a minimum of 115 HCAP-eligible patients served with navigation services.

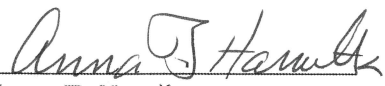
1. Of the total compensation of \$392,375.00 available during the term of July 1, 2022 to June 30, 2023, a sum of \$287,500.00 is available on a reimbursement basis to compensate Contractor for services provided to clients who met the criteria of the HCAP (see Santa Fe County Resolution No. 2014-47).
2. Of the total compensation of \$392,375.00 available during the term of July 1, 2022 to June 30, 2023, a sum of no more than \$104,875.00 in Emergency Flexible Funds (the "EFP"), is available on a reimbursement basis solely for expenditures directly related to providing resources or goods to assist clients to mitigate risks, and otherwise non-reimbursable social services for medically indigent County residents without which their social determinants of health would not be met, or, services

provided would not be effective. From the EFF amount of \$104,875.00, *no funds shall be issued directly to Contractor's clients* and the EFF may only be utilized by the Contractor after all other resources of revenue have been sought and exhausted. The Contractor shall submit request for reimbursement on a quarterly basis.

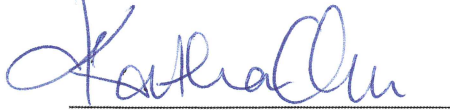
3. By Amendment No. 1 to this Agreement, the total amount payable to the Contractor for the period of July 1, 2022 through June 30, 2023 shall not exceed \$392,375.00, inclusive of NM gross receipts tax.
2. All other provisions of the Agreement not specifically amended or modified by this Amendment No. 1 shall remain in full force and effect.

IN WITNESS WHEREOF, the parties have duly executed this Amendment as of the date of last signature by the parties.

SANTA FE COUNTY:


Anna T. Hamilton
Santa Fe County Board of County Commissioners

ATTESTATION:


Katharine E. Clark
Santa Fe County Clerk

12/12/22
Date



Approved as to form:

Roberta D. Joe for J.Y.
Jeff Young
Santa Fe County Attorney

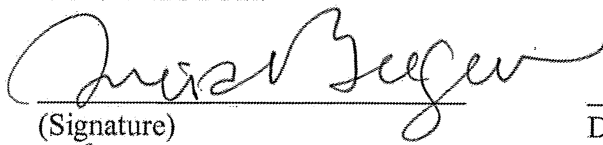
12/1/2022
Date

Finance Division:


Yvonne S. Herrera
Finance Director

12/1/2022
Date

CONTRACTOR:

 12/6/22

(Signature)

Date

Julia Bergen, Executive Director

(Print Name & title)

**SERVICE AGREEMENT
BETWEEN SANTA FE COUNTY AND COMMUNITIES IN SCHOOLS NEW MEXICO**

THIS AGREEMENT is made and entered into on this 8th day of February, 2022, between **Santa Fe County** (hereinafter "County"), a political subdivision of the state of New Mexico, and **Communities in Schools New Mexico** (hereinafter "Contractor").

WHEREAS, the Santa Fe County Community Services Department (CSD) implemented a program called the Accountable Health Community Navigation Services Initiative also known as CONNECT; and

WHEREAS, the purpose of CONNECT is to provide funding assistance to organizations who provide services to individuals or clients who are in high-risk or high-need populations due to social determinants that have influenced a person's health and well-being; and

WHEREAS, CONNECT helps residents and citizens to navigate available community services and clinical care and offers providers access to data and information to better serve the health needs of residents and citizens; and

WHEREAS, pursuant to NMSA 1978, Section 13-1-98 (1) (B) ((Hospital and health care exemption), the Procurement Manager has determined that the procurement of these services to be provided by this Contractor are exempt from a competitive solicitation; and

WHEREAS, in response to the public health emergency (COVID-19 virus pandemic), the County is a recipient of American Rescue Plan Act (ARPA) funds for relief and recovery from the COVID-19 pandemic, including addressing negative economic impacts to individuals and households affected by the pandemic; and

WHEREAS, the County wishes to use ARPA funds to compensate this Contractor whose services will help to mitigate the negative effects of the pandemic, using ARPA funding.

NOW THEREFORE, it is agreed between the parties:

1. SCOPE OF SERVICES

A. Contractor shall:

1. Provide two full time case manager(s)/navigator(s) to provide navigation services by the Contractor to Santa Fe Public School students and families. The Contractor's navigator shall be experienced and qualified and engage in continued educational opportunities on an annual basis to increase professional qualifications.
2. Screen for demographics and social needs of patients using categories and the screening tool described in Appendix A.
3. Assess clients' social determinants of health, including safe and secure housing, nutritional food, reliable utilities and transportation and access to health insurance.

4. Provide navigation services to students and their families, including assisting individuals to access immediate needs related to shelter, medical services, benefits enrollment, food, clothing, hygiene, and referral to services to meet longer term needs (job skills training and placement, literacy and life skills, legal support and advocacy), using the screening tool, Unite Us platform and other coordinated entry systems.
5. Contractor's navigator shall participate in facilitated trainings offered by CSD.
6. Deliver navigation services tailored to the individual's priorities that are culturally relevant and based on a team approach of service delivery that documents cross-agency collaboration.
7. Develop a primary navigation plan with the individual, or ensure a warm hand off to another CONNECT partner agency navigator who will do so. The navigation plan sets appropriate goals, such as: addressing safe and secure housing, food, utilities and transportation, health system enrollment, access and navigation; education and literacy; prevention care and treatment; chronic disease management; and effective social and community referrals.
8. Identify community and social resources tailored to the individual's needs and develop and facilitate a network/team to address priorities of the navigation plan, develop sustainable relationships with community resources, provide and document a warm hand-off. Referrals will be complete if a sustained relationship has been verified by the individual service providers and documented by the Contractor's navigator.
9. Using the Unite Us platform, provide the CSD with quarterly data on the social determinants of health, demographics, and ER and jail utilization of clients served.
10. Using the Unite Us platform, participate in data sharing with other community and social organizations on activities related to navigation plans with consent of the clients served and participate in negotiating agreements with community partners. Share aggregate and non-medical client data with other County funded partners and the CSD.
11. Using Share NM, post the organization's community education, outreach and training events on a community calendar, and register and update organization information as needed.
12. Assure that all employees receive training on the Health Insurance Portability and Accountability of 1996 (HIPAA) standards, P.L. 104-191, and the HIPAA Privacy Rule, 45 CFR Part 160, 162, and 164, and strictly adhere to all HIPAA requirements and policies.
13. Adhere to Flexible Fund protocols developed and provided by the County to serve as a payer of last resort for one-time expenses related to social determinants of health as defined in Appendix B.
14. Ensure clients served are eligible for the Santa Fe County Health Care Assistance Program as defined by Santa Fe County Resolution No. 2014-47.

B. The County shall:

1. Provide Contractor with a login to the Unite Us platform so Contractor can access and use Unite Us.
2. Reimburse Contractor at a rate of \$2,500.00 per individual served, up to a total amount of \$225,000.00.

3. Reimburse Contractor for expenses made to access funds according to the Flexible Fund guidelines established in the Navigation Protocols (Attachment A), up to a total amount of \$100,000.00.
4. Provide training and on-going technical assistance on the use of the Unite Us platform.

2. ADDITIONAL SERVICES

A. The parties agree that all tasks set forth in Section 1 (Scope of Services) of this Agreement shall be completed in full, to the satisfaction of the County, in accordance with professional standards and for the amount set forth in Section 3 (Compensation, Invoicing and Set-off) of this Agreement, and for no other cost, amount, fee or expense.

B. The County may from time to time request changes in the Scope of Services to be performed hereunder. Such changes, including any increase or decrease in the amount of the Contractor's compensation, which are mutually agreed upon by and between the County and the Contractor, shall be incorporated in a written amendment to this agreement.

3. COMPENSATION, INVOICING, AND SET-OFF

A. In consideration of its obligations under this Agreement the Contractor shall be compensated as follows:

1. Of the total available compensation of \$325,000.00 for services provided under this Agreement, an amount not to exceed \$225,000.00 is available to reimburse Contractor for navigation services provided to clients who met the criteria of the Santa Fe County Health Care Assistance Program (HCAP) (see Santa Fe County Resolution No. 2014-47). The amount of \$225,000.00 is calculated based on a minimum of 90 HCAP-eligible clients being served or provided with navigation services at the rate of \$2,500.00 per client.

2. Of the total available compensation of \$325,000.00 for services provided under this Agreement, an amount not to exceed \$100,000.00 shall be available to reimburse the Contractor solely for costs relating to addressing emergency circumstances faced by an indigent client and that are related to social determinants of health. *No funds under this Agreement shall be issued directly to Contractor's clients.* Funds under this Agreement may be utilized by the Contractor after all other resources of revenue have been sought and exhausted. The Contractor shall submit the request for reimbursement on a quarterly basis.

3. The total amount of funds payable to the Contractor under this Agreement shall not exceed a total of **\$325,000.00**, inclusive of NM GRT.

4. This amount is a maximum and not a guarantee that the services to be performed by Contractor under this Agreement shall equal the amount stated herein. The parties do not intend for the Contractor to continue to provide services without compensation when the total compensation amount is reached. The County will notify the Contractor when the services provided under this Agreement reach the

total compensation amount. In no event will the Contractor be paid for services provided in excess of the total compensation amount without this Agreement being amended in writing.

B. Contractor shall submit a written request for payment to the County when payment is due under this Agreement. Upon the County's receipt of the written request, the County shall issue a written certification of complete or partial acceptance or rejection of the contractual items or services for which payment is sought.

1. The County's representative for certification of acceptance or rejection of contractual items and services shall be **Jennifer N. Romero, Health Care Assistance Administrative Program Manager, (505) 995-9526, email jnromero@santafecountynm.gov**, or such other individual as may be designated in the absence of the County representative.

2. The Contractor acknowledges and agrees that the County may not make any payment hereunder unless and until it has issued a written certification accepting the contractual items or services.

3. Within 30 days of the issuance of a written certification accepting the contractual items or services, the County shall tender payment for the accepted items or services. In the event the County fails to tender payment within 30 days of the written certification accepting the items or services, the County shall pay late payment charges of 1.5% per month, until the amount due is paid in full.

C. In the event the Contractor breaches this Agreement, the County may, without penalty, withhold any payments due the Contractor for the purpose of set-off until such time as the County determines the exact amount of damages it suffered as a result of the breach.

D. Payment under this Agreement shall not foreclose the right of the County to recover excessive or illegal payment.

4. EFFECTIVE DATE AND TERM

This Agreement shall, upon due execution by all parties, become effective as of the date of last signature by the parties and shall terminate two years from such date, unless earlier terminated pursuant to Section 5 (Termination) or Section 6 (Appropriations and Authorizations). The County has the option to extend the term of this Agreement not to exceed four years in total.

5. TERMINATION

A. Termination of Agreement for Cause. Either party may terminate the Agreement based upon any material breach of this Agreement by the other party. The non-breaching party shall give the breaching party written notice of termination specifying the grounds for the termination. The termination shall be effective 30 days from the breaching party's receipt of the notice of termination, during which time the breaching party shall have the right to cure the breach. If, however, the breach cannot with due diligence be cured within 30 days, the breaching party shall have a reasonable time to cure the breach, provided that, within 30 days of its receipt of the written notice of termination, the breaching party began to cure the breach and advised the non-breaching

party in writing that it intended to cure.

B. Termination for Convenience of the County. The County may, in its discretion, terminate this Agreement at any time for any reason by giving the Contractor written notice of termination. The notice shall specify the effective date of termination, which shall not be less than 15 days from the Contractor's receipt of the notice. The County shall pay the Contractor for acceptable work, determined in accordance with the specifications and standards set forth in this Agreement, performed before the effective date of termination but shall not be liable for any work performed after the effective date of termination.

6. APPROPRIATIONS AND AUTHORIZATIONS

This Agreement is contingent upon sufficient appropriations and authorizations being made for performance of this Agreement by the Board of County Commissioners of the County and/or, if state funds or federal funds are involved, the Legislature of the State of New Mexico, or the governing administrative body of the federal funds. If sufficient appropriations and authorizations are not made in this or future fiscal years, this Agreement shall terminate upon written notice by the County to the Contractor. Such termination shall be without penalty to the County, and the County shall have no duty to reimburse the Contractor for expenditures made in the performance of this Agreement. The County is expressly not committed to expenditure of any funds until such time as they are programmed, budgeted, encumbered and approved for expenditure by the County. The County's decision as to whether sufficient appropriations and authorizations have been made for the fulfillment of this Agreement shall be final and not subject to challenge by the Contractor in any way or forum, including a lawsuit.

7. INDEPENDENT CONTRACTOR

The Contractor and its agents and employees are independent contractors and are not employees or agents of the County. Accordingly, the Contractor and its agents and employees shall not accrue leave, participate in retirement plans, insurance plans, or liability bonding, use County vehicles, or participate in any other benefits afforded to employees of the County. Except as may be expressly authorized elsewhere in this Agreement, the Contractor has no authority to bind, represent, or otherwise act on behalf of the County and agrees not to purport to do so.

8. ASSIGNMENT

The Contractor shall not assign or transfer any interest in this Agreement or assign any claims for money due or to become due under this Agreement without the advance written approval of the County. Any attempted assignment or transfer without the County's advance written approval shall be null and void and without any legal effect.

9. SUBCONTRACTING

The Contractor shall not subcontract or delegate any portion of the services to be performed

under this Agreement without the advance written approval of the County. Any attempted subcontracting or delegating without the County's advance written approval shall be null and void and without any legal effect.

10. PERSONNEL

A. All work performed under this Agreement shall be performed by the Contractor or under its supervision.

B. The Contractor represents that it has, or will secure at its own expense, all personnel required to discharge its obligations under this Agreement. Such personnel (i) shall not be employees of or have any contractual relationships with the County and (ii) shall be fully qualified and licensed or otherwise authorized or permitted under federal, state, and local law to perform such work.

11. RELEASE

Upon its receipt of all payments due under this Agreement, the Contractor releases the County, its elected officials, officers, agents and employees from all liabilities, claims, and obligations whatsoever arising from or under or relating to this Agreement.

12. CONFIDENTIALITY

Any confidential information provided to or developed by the Contractor in the performance of this Agreement shall be kept confidential and shall not be made available to any individual or organization by the Contractor without the prior written approval of the County.

13. PUBLICATION, REPRODUCTION, AND USE OF MATERIAL

A. The County has the unrestricted right to publish, disclose, distribute and otherwise use, in whole or in part, any reports, data, or other material prepared under or pursuant to this Agreement.

14. CONFLICT OF INTEREST

The Contractor represents that it has no and shall not acquire any interest, direct or indirect, that would conflict in any manner or degree with the performance of its obligations under this Agreement.

15. NO ORAL MODIFICATIONS; WRITTEN AMENDMENTS REQUIRED

This Agreement may not be modified, altered, changed, or amended orally but, rather, only by an instrument in writing executed by the parties hereto. The Contractor specifically acknowledges and agrees that the County shall not be responsible for any changes to Section 1 (Scope of Services), of this Agreement unless such changes are set forth in a duly executed written amendment to this Agreement.

16. ENTIRE AGREEMENT; INTEGRATION

This Agreement incorporates all the agreements, covenants, and understandings between the parties hereto concerning the subject matter hereof, and all such agreements, covenants and understandings have been merged into this written Agreement. No prior or contemporaneous agreement, covenant or understandings, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

17. NOTICE OF PENALTIES

The Procurement Code, NMSA 1978, Sections 13-1-28 through 13-1-199, imposes civil and criminal penalties for its violation. In addition, New Mexico criminal statutes impose felony penalties for bribes, gratuities, and kickbacks.

18. EQUAL EMPLOYMENT OPPORTUNITY COMPLIANCE; NON-DISCRIMINATION

A. The Contractor shall abide by all federal, state, and local laws, ordinances, and rules and regulations pertaining to equal employment opportunity and unlawful discrimination. Without in any way limiting the foregoing general obligation, the Contractor specifically agrees not to discriminate against any person with regard to employment with the Contractor or participation in any program or activities or services offered pursuant to this Agreement on the grounds of race, age, religion, color, national origin, ancestry, sex, physical or mental handicap, serious medical condition, spousal affiliation, sexual orientation, or gender identity.

B. The Contractor acknowledges and agrees that failure to comply with this Section shall constitute a material breach of this Agreement.

19. COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW

A. In performing its obligations hereunder, the Contractor shall comply with all applicable laws, ordinances, and regulations.

B. Contractor shall comply with the requirements of Santa Fe County Ordinance 2014-1 (Establishing a Living Wage).

C. This Agreement shall be construed in accordance with the substantive laws of the State of New Mexico, without regard to its choice of law rules. Contractor and the County agree that the exclusive forum for any litigation between them arising out of or related to this Agreement shall be state district court of New Mexico, located in Santa Fe County.

20. RECORDS AND INSPECTIONS

A. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this

Agreement or that was required to be submitted to the County as part of the procurement process, the Contractor agrees to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under this Agreement; (ii) allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with generally accepted accounting principles (GAAP).

B. To the extent its books and records relate to (i) its performance of this Agreement or any subcontract entered into pursuant to it or (ii) cost or pricing data (if any) set forth in this Agreement or that was required to be submitted to County as part of the procurement process, the Contractor also agrees to require any subcontractor it may hire to perform its obligations under this Agreement to (i) maintain such books and records during the term of this Agreement and for a period of six years from the date of final payment under the subcontract; (ii) to allow the County or its designee to audit such books and records at reasonable times and upon reasonable notice; and (iii) to keep such books and records in accordance with GAAP.

21. INDEMNIFICATION

A. The Contractor shall defend, indemnify, and hold harmless the County and its elected officials, agents, and employees from any losses, liabilities, damages, demands, suits, causes of action, judgments, costs or expenses (including but not limited to court costs and attorneys' fees) resulting from or directly or indirectly arising out of the Contractor's performance or non-performance of its obligations under this Agreement, including but not limited to the Contractor's breach of any representation or warranty made herein.

B. The Contractor agrees that the County shall have the right to control and participate in the defense of any such demand, suit, or cause of action concerning matters that relate to the County and that such suit will not be settled without the County's consent, such consent not to be unreasonably withheld. If a conflict exists between the interests of the County and the Contractor in such demand, suit, or cause of action, the County may retain its own counsel to represent the County's interest.

C. The Contractor's obligations under this section shall not be limited by the provisions of any insurance policy the Contractor is required to maintain under this Agreement.

22. SEVERABILITY

If any term or condition of this Agreement shall be held invalid or non-enforceable by any court of competent jurisdiction, the remainder of this Agreement shall not be affected and shall be valid and enforceable to the fullest extent of the law.

23. NOTICES

Any notice required to be given to either party by this Agreement shall be in writing and shall be delivered in person, by courier service or by U.S. mail, either first class or certified, return receipt requested, postage prepaid, as follows:

To the County: Santa Fe County
Community Services Department
Attn: Jennifer N. Romero, Program Manager
100 Catron Street
Santa Fe, New Mexico 87501

To the Contractor: Communities in Schools New Mexico
Attn: Julia Bergen
PO Box 367
Santa Fe, NM 87504

24. CONTRACTOR'S REPRESENTATIONS AND WARRANTIES

The Contractor hereby represents and warrants that:

A. This Agreement has been duly authorized by the Contractor, the person executing this Agreement has authority to do so, and, once executed by the Contractor, this Agreement shall constitute a binding obligation of the Contractor.

B. This Agreement and Contractor's obligations hereunder do not conflict with Contractor's governing agreement or purpose.

C. Contractor is legally registered and is properly licensed by the State of New Mexico to provide services anticipated by this Agreement and shall maintain such registration and licensure in good standing throughout the duration of the Agreement.

25. FACSIMILE SIGNATURES

The parties hereto agree that a facsimile signature has the same force and effect as an original for all purposes.

26. NO THIRD-PARTY BENEFICIARIES

This Agreement was not intended to and does not create any rights in any persons not a party hereto.

27. INSURANCE

A. General Conditions. The Contractor shall submit evidence of insurance as is required herein. Policies of insurance shall be written by companies authorized to write such insurance in New Mexico.

B. General Liability Insurance, Including Automobile. The Contractor shall procure and maintain during the life of this Agreement a comprehensive general liability and automobile insurance policy with liability limits in amounts not less than \$1,000,000.00 combined single limits of liability for bodily injury, including death, and property damage for any one occurrence. Said

policies of insurance shall include coverage for all operations performed for the County by the Contractor; coverage for the use of all owned, non-owned, hired automobiles, vehicles and other equipment, both on and off work; and contractual liability coverage under which this Agreement is an insured contract. The County of Santa Fe shall be a named additional insured on the policy.

C. Workers' Compensation Insurance. The Contractor shall comply with the provisions of the Workers' Compensation Act.

D. Increased Limits. If, during the life of this Agreement, the Legislature of the State of New Mexico increases the maximum limits of liability under the Tort Claims Act (NMSA 1978, Sections 41-4-1 through 41-4-29, as amended), the Contractor shall increase the maximum limits of any insurance required herein.

28. PERMITS, FEES, AND LICENSES

Contractor shall procure all permits and licenses, pay all charges, fees, and royalties, and give all notices necessary and incidental to the due and lawful performance of its obligations hereunder.

29. NEW MEXICO TORT CLAIMS ACT

No provision of this Agreement modifies or waives any sovereign immunity or limitation of liability enjoyed by County or its "public employees" at common law or under the New Mexico Tort Claims Act, NMSA 1978, Section 41-4-1, et seq.

30. CAMPAIGN CONTRIBUTION DISCLOSURE FORM

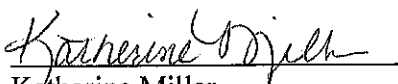
The Contractor agrees to compute and submit simultaneous with execution of this Agreement a Campaign Contribution Disclosure form approved by the County.

31. SURVIVAL

The provisions of following paragraphs shall survive termination of this Agreement: INDEMNIFICATION; RECORDS AND INSPECTION; RELEASE; CONFIDENTIALITY; PUBLICATION, REPRODUCTION, AND USE OF MATERIAL; COPYRIGHT; COMPLIANCE WITH APPLICABLE LAW; CHOICE OF LAW; NO THIRD-PARTY BENEFICIARIES; and SURVIVAL.

IN WITNESS WHEREOF, the parties have duly executed this Agreement as of the date of last signature by the parties.

SANTA FE COUNTY:


Katherine Miller
Santa Fe County Manager

2.8.2022
Date

Approved as to form:

Roberta D. Joe for G.S.S.

Gregory S. Shaffer
Santa Fe County Attorney

January 18, 2022

Date

Finance Division:

Yvonne S. Herrera

Yvonne S. Herrera
Finance Director

2/2/2022

Date

CONTRACTOR:

Julia Bergen

Julia Bergen
Executive Director
Communities In Schools of New Mexico

January 25, 2022

Date

Name: _____

Navigator: _____

Date: _____

1. What is your living situation today?

- ☐ I have a steady place to live
- ☐ I have a place to live today, but I am worried about losing it in the future
- ☐ I do not have a steady place to live (I am temporarily staying with others, in a hotel, in a shelter, living outside on the street, on a beach, in a car, abandoned building, bus or train station, or in a park)

2. Think about the place you live. Do you have problems with any of the following? (Choose all that apply)

- | | | |
|---|---|--|
| ☐ Pests such as bugs, ants or mice | ☐ Lack of heat | ☐ Water leaks |
| ☐ Mold | ☐ Oven or stove not working | ☐ None of the above |
| ☐ Lead paint or pipes | ☐ Smoke detectors missing or not working | |

3. Within the past 12 months, you worried that your food would run out before you got money to buy more.

- ☐ Often true ☐ Sometimes true ☐ Never true

4. Within the past 12 months, the food you bought just didn't last and you didn't have money to get more.

- ☐ Often true ☐ Sometimes true ☐ Never true

5. In the past 12 months, has lack of reliable transportation kept you from medical appointments, meetings, work or from getting things needed for daily living?

- ☐ Yes ☐ No

6. In the past 12 months, has the electric, gas, oil, or water company threatened to shut off services in your home?

☐ Yes ☐ No ☐ Already shut off

7. How often does anyone, including family and friends, physically hurt you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

8. How often does anyone, including family and friends, insult or talk down to you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

9. How often does anyone, including family and friends, threaten you with harm?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

10. How often does anyone, including family and friends, scream or curse at you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

11. Do you have any kind of health care coverage, including health insurance, prepaid plans such as HMOs, or government plans such as Medicare or Indian Health Services?

☐ Yes ☐ No ☐ Don't Know

If "Yes," what insurance do you have:

☐ Medicaid
☐ Medicare
☐ Veterans Administration
☐ Indian Health Service

☐ Other through my employer
Name: _____
☐ Other that I pay for myself
Name: _____

12. Do you have any sources of income?

- ☐ Yes ☐ No

If "yes," what are your sources of income?

- | | |
|--|---|
| ☐ Alimony or other spousal support | ☐ State-specific Disability Income |
| ☐ Business Income | ☐ Supplemental Security Income (SSI) |
| ☐ Child Support | ☐ Temporary Assistance for Needy Families (TANF) |
| ☐ Earned Income (wages, salaries, tips, etc.) | ☐ Unemployment Insurance |
| ☐ Pensions and/or annuities | ☐ VA Non-Service-Connected Disability Pension |
| ☐ Private Disability Insurance | ☐ VA Retirement Pension |
| ☐ Rental Income | ☐ VA Service-Connected Disability Compensation |
| ☐ Retirement Account Distributions | ☐ Workers Compensation |
| ☐ Social Security Disability Insurance (SSDI) | ☐ Other Source |
| ☐ Social Security Retirement/Survivors Income | |
| ☐ State-specific Cash Assistance | |

If "other," please explain:

13. What is your total annual income?

14. If you are a student, what is your status?

☐ Student, full-time

☐ Student, part-time

15. What is the highest level of education you have achieved?

☐ Less than a high school diploma

☐ Associate's Degree*

☐ GED/High School Diploma

☐ Bachelor's Degree*

☐ Some College, No Degree*

☐ Master's Degree*

☐ Trade/Technical/Vocational
Training*

☐ Professional Degree/Doctorate*

*What was the focus of your degree or certification?

16. How many children live with you in your household?

if 0, go to Q19

if 1+, go to Q17

☐ 0

☐ 1

☐ 2

☐ 3

☐ 4

☐ 5

☐ 6

☐ 7

☐ 8

☐ 9

☐ 10 or more

17. Do you need child care now or in the next 6 months?

if yes, go to Q18

if no, go to Q19

☐ Yes

☐ No

18. Please select the childcare need for any of the following:

☐ Infants (birth - 12 months)

☐ Pre-K (4 - 5 years)

☐ Toddlers (1 - 2 years)

☐ Before/after school care for school
aged children

☐ Pre-school (3 years)

19. Do you speak a language other than English at home?☐ Yes☐ No**20. What is the primary language you speak?**☐ English☐ Spanish☐ Navajo☐ Pueblo☐ Other☐ Other: _____

The additional SDOH questions are supplemental, to be asked at the discretion of the navigator and are not mandatory.

21. How hard is it for you to pay for the very basics like food, housing, medical care and heating? Would you say it is:☐ Very hard☐ Somewhat hard☐ Not hard at all**22. Do you want help finding or keeping work or a job?**☐ Yes, help finding
work☐ Yes, help keeping
work☐ I do not need or want
help**23. If for any reason you need help with day-to-day activities such as bathing, preparing meals, shopping, managing finances, etc., do you get the help you need?**☐ I don't need any help☐ I could use a little more help☐ I get all the help I need☐ I need a lot more help

24. How often do you feel lonely or isolated from those around you?

☐ Never ☐ Rarely ☐ Sometimes ☐ Fairly Often ☐ Frequently

25. Do you want help with school or training? For example, starting or completing job training or getting a high school diploma, GED or equivalent.

☐ Yes ☐ No

26. In the last 30 days, other than the activities you did for work, on average, how many days per week did you engage in moderate exercise (like walking fast, running, jogging, dancing, swimming, biking, or other similar activities)?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7

27. On average, how many minutes did you usually spend exercising at this level on one of those days?

☐ 0 ☐ 10 ☐ 20 ☐ 30 ☐ 40
☐ 50 ☐ 60 ☐ 90 ☐ 120 ☐ 150 or greater

The next questions relate to your experience with alcohol, cigarettes, and other drugs. Some of the substances are prescribed by a doctor (like pain medications), but only count those if you have taken them for reasons or in doses other than prescribed. One question is about illicit or illegal drug use, but we only ask in order to identify community services that may be available to help you.

28. During the past 30 days, how many days per week or per month did you have at least one drink of any alcoholic beverage such as beer, wine, a malt beverage or liquor? One drink is equivalent to a 12-ounce beer, a 5-ounce glass of wine, or a drink with one shot of liquor?

☐ _____ days per week ☐ No drinks in the past 30 days
☐ _____ days in the past 30 days

29. Considering all types of alcoholic beverages, how many times during the past 30 days did you have [5 for men/4 for women] or more drinks on an occasion?

☐ _____ number of time ☐ None ☐ Don't know/Not sure

30. How many times in the past 30 days have you used tobacco products (like cigarettes, cigars, snuff, chew, electronic cigarettes)?

☐ Every day ☐ Some days ☐ Never

31. How many times in the past 30 days have you used prescription drugs for non-medical reasons?

☐ Every day ☐ Some days ☐ Never

32. How many times in the past 30 days have you used illegal drugs?

☐ Every day ☐ Some days ☐ Never

Evaluation Screen

Name: _____

Navigator: _____

Date: _____

Has the Program Evaluation Consent Form been signed and uploaded?

☐ Yes

☐ No

If not, please ask for the individual for verbal assent to evaluate the community-wide impact of CONNECT.

Navigator script: *"We hope to grow to meet the needs of all residents of Santa Fe City and County over time. To do that we need to prove the value of CONNECT. One of the ways we do that is by helping residents like you - and you can help spread the word about our good work to people you know. Another way to prove value is by completing an evaluation that shows that when CONNECT provides community members with the assistance they need now it saves emergency, hospital, medical and jail costs later. You can help us prove that."*

(Note: Medical information from the New Mexico Health Information Exchange is protected by state and federal privacy laws and will not be made public and will not be shared with any other state, county or federal agencies.)

Assent:

"Will you allow Santa Fe County to electronically access health information and any records maintained by city or county public safety agencies in Santa Fe, to be used ONLY to evaluate the community-wide impact of CONNECT?"

☐ Yes

☐ No

1. Would you in general say that your health is:

☐ Excellent ☐ Very Good ☐ Good ☐ Fair ☐ Poor

2. Now thinking about your physical health, which includes physical illness and injury, for how many days during the past 30 days was your physical health not good?

☐ _____ number of days ☐ None

3. Now thinking about your mental health, which includes stress, depression, and problems with emotions, for how many days during the past 30 days was your mental health not good?

☐ _____ number of days ☐ None

4. During the past 30 days, for about how many days did poor physical or mental health keep you from doing your usual activities, such as self-care, work, or recreation?

☐ _____ number of days ☐ None ☐ N/A

5. Have you been in the hospital (in the last 30 days)?

☐ No ☐ Don't Know or refused

☐ Yes

If yes, when were you discharged? _____

6. Have you been in the ER (in the last 30 days)?

☐ No ☐ Don't Know or refused

☐ Yes

If yes, when were you discharged? _____

7. Have you been in jail/detention (in the last 30 days)?☐ No☐ Don't Know or refused☐ Yes

If yes, when were you discharged? _____

8. Has your phone number, email or home address changed since the last time we spoke?☐ No☐ Yes, *update client's FaceSheet*

Appendix B

CONNECT Navigation Protocols on Uses of Flexible Funds (revised September 17, 2021)

FLEXIBLE FUND: A Flexible Fund is available to respond to an enrolled person's emerging or immediate crisis involving housing, transportation, utilities, access to food, personal safety, or other unmet SDOH, and activities related to achieving the goals documented in a navigation plan. A list of pre-approved uses is provided in Exhibit A.

Other uses may be allowed by prior written approval of the contract managers for the City and County. Flexible Funds are intended to serve as the *payor of last resort*, not to supplant other available funding sources. Flexible Funds can be used for episodes that are time limited. The navigator must demonstrate a source of ongoing funding to avoid repeated use for the same request and document in a navigation plan.

When distributing Flexible Funds, navigators are encouraged to exercise discretion and be innovative. To extend the available funds, navigators should seek community partners to donate or partially fund the purchase and encourage the individual to contribute to the extent possible.

Any person enrolled is eligible to receive Flexible Funds. There is no limit on the number of items or frequency per contract year of Flexible Funds that an individual may receive except as specified in Exhibit A where expenditure caps are listed. A person may not receive funds for the same item more than once from the same partner organization, and the navigation service cannot expend or commit more funds than are present in the account for Flexible Funds at the time of the request. There is a cap of \$25,000 per individual in their lifetime and caps on specific items as listed in Exhibit A. Exceeding caps on certain items may be allowed with prior written approval of the contract managers for the City and County.

A navigator may obtain an item with Flexible Funds and give it to the individual or accompany the individual and pay for an item with Flexible Funds but cannot give Flexible Funds to the individual to pay for an item.

Flexible Funds cannot be used for any purpose not specified in this policy. The disbursement of Flexible Funds is tracked in the Unite Us System and documented in a navigation plan as each case is closed. Receipts must be uploaded into the platform and correspond with the invoice submitted to the City or County. The receipts must be titled with the name of the individual, the date and the service category of the expenditure and uploaded within the reporting term that the purchase is made.

Best practice for documenting Flexible Fund expenditures is within 24 hours. Please refer to the Network Standards for a detailed description of how to document expenditures in the Unite Us platform.

It is the responsibility of each organization to review these protocols regularly. Terms are subject to change.

If you have any questions regarding this policy, contact the contract managers:

COUNTY: Jennifer Romero, jnromero@santafecountynm.gov

CITY: Christa Hernandez, chernandez@santafenm.gov

EXHIBIT A

HOUSING:	Rent (up to 3 months per calendar year)
	Sleeping mat
	Sleeping bag
	Mold remediation
	Pest removal
	Housing repairs, appliance replacement or safety modifications related to plumbing and water leaks, electrical, heat, oven, hot water heater, smoke detectors or grab bars (\$2,000 max)
	Fees for identification needed to obtain housing
	Hotel (up to 3 months per calendar year)
	NO:
	Security Deposit
	Tent
TRANSPORTATION:	Bus pass
	Fuel for vehicles
	Uber and Lyft gift cards
	Fees for Driver's License or identification needed to obtain license
	Vehicle repairs and parts to keep vehicle roadworthy (\$1,500 max per vehicle)
	Car seat
	Vehicle insurance (up to 6 months)
	Bicycle parts and repair
UTILITIES:	Gas card (identification required for use)
	Pellets
	Firewood
	Propane
	Fan
	Gas, Electric, Water Bill, Phone, Internet payment (up to 3 months)
	Flashlight
	Fees for identification needed to obtain utilities
	Smoke and Carbon Monoxide detectors
FOOD:	Groceries
	Hot meal
	MoGro membership
	Baby formula
	Breast feeding supplies
	Pre-natal vitamins
	Fees for identification needed for SNAP application
	Grocery card (identification required for use)

INTERPERSONAL

SAFETY:

Train, bus fare for safe destination

Court fees such as filing fees for new birth certificate, social security card, and ID/Driver's License

Asylum application fee

Fee for name change needed for safety

OTHER:

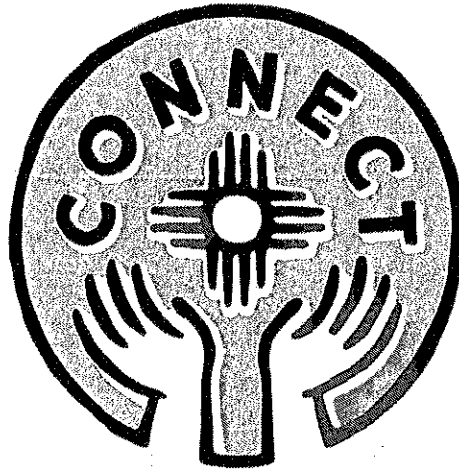
Weather-appropriate clothing

Expenses related to education and securing employment (e.g., registration fees, clothing for work, computer, cap and gown for graduation, certifications, education/vocational tuition (max \$1,000)

Childcare assistance (up to 3 months)

Medical bills, prescriptions and durable medical equipment will not be paid for.

Attachment A



COMMUNITY
is our Greatest Resource

CONNECT Navigation Protocols

Fiscal Year 2022

A SANTA FE COUNTY + CITY OF SANTA FE
COMMUNITY PARTNERSHIP

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“The Accountable Health Community (now referred to as CONNECT) respects the people of Santa Fe City and County, serving the community with compassion and resourcefulness, creating a network of trust to effect health and well-being for all.”

-Value Statement developed by navigators 7/24/18

INTRODUCTION

CONNECT is a network of navigators at clinics, hospitals, schools, community service organizations and city and county programs that link people to the services and resources. Santa Fe City and Santa Fe County recognize the need to address Social Determinants of Health (SDOH) that impact health outcomes for residents. The World Health Organization defines social determinants as “the conditions in which people are born, grow, work, live, and age, and the wider set of forces and systems shaping the conditions of daily life.” Social Determinants include access to health care, housing, healthy food, transportation, and other social and material supports.

To focus on this priority, Santa Fe City and County Community Services Departments fund community organizations for delivery of navigation services to address factors that influence health by linking residents to goods and services that address these unmet needs. Benchmarks include reductions in jail recidivism, emergency department utilization and hospitalizations while improving individual and population health.

CONNECT is based on the Accountable Health Community (AHC) model developed by the Centers for Medicaid and Medicare Services (CMS). In an effort to align with current national trends we chose to use the CMS Social Determinant of Health Screening Tool while tailoring the initiative to the strengths and needs of our community.

Using an “any door” philosophy, organizations in the network screen Santa Fe City and County residents at any door of programs in our network rather than single points of entry in health care systems. Like the CMS model, people who screen positive on the assessment tool

uniformly used by participating organizations, receive assistance to meet SDOH needs. We refer to this assistance-particularly when accompanied with discussion, prioritization of SDOH needs and plan development-as navigation. Navigation is further defined as an activity which solidly links residents to needed resources via evidence-based practices by qualified, culturally competent staff.

For the first two and a half years the network was called the Accountable Health Community and was funded by Santa Fe County. In July of 2019 the Community Services Departments of both the County and the City of Santa Fe partnered to expand the program by adding additional organizations and creating a leadership team. As a result of facilitated discussions with stakeholders and partnership with the City, the name was changed to CONNECT in March of 2020.

The vision of CONNECT is: All City and County residents regardless of income have access to high-quality health care and are linked to the resources they need for health and well-being.

Goals include:

- Residents and providers collectively identify problems and co-create solutions.
- Navigators link residents to resources within a cohesive provider network.
- Social, economic, and physical environmental resources are available to all residents.
- Information systems are coordinated. Data is collected, monitored and evaluated to improve services and population health while reducing health care costs.

Eligibility differs based on whether a partner organization is contracted by the City or County. Contractors with the City of Santa Fe offer screening for social determinants and navigation services to all City residents and there are no eligibility requirements.

Navigation services provided by organizations contracted through the County are available to Santa Fe County residents who qualify for the Santa Fe County Health Care Assistance Program, eligibility for which is based on financial status as required by Santa Fe County Resolution No. 2014-47 (Resolution 2014-47).

Current income guidelines are as follows:

PERSONS IN FAMILY	1	2	3	4	5	6	7	8
INCOME	\$40,900	\$46,750	\$52,600	\$58,400	\$63,100	\$67,750	\$72,450	\$77,100

CONNECT navigators use protocols, network standards and an on-line referral platform (Unite Us) to develop inter and intra-agency workflows that utilize and facilitate a network/team approach to address priorities of the individual. The goal is to build a responsive team with the right resources to address health related needs, reduce duplication of service, clearly identify and delineate responsibility to achieve goals, and provide opportunities for regular updates with other navigators and agencies involved for better coordination of service.

The Flexible Fund serves as a payor of last resort for emerging and emergency needs. With a goal of averting a crisis, the fund quickly addresses unmet resource needs. A list of approved expenditures is found on pages 15-17 in this document. Additional funding is being sought to provide a wider range of resources to more people in need.

Navigation Protocols provide guidelines for organizations contracted by both the County and City. Instructions that differ and are specific to County or City contractors are otherwise clearly marked.

MEET OUR NETWORK

The CONNECT Network has grown significantly in four years. The network started in July of 2017 with thirteen navigators from eight organizations.

Growing the network to include more organizations and creating a larger and more cohesive provider network in our community is a foundational goal. In July of 2019, partnership with the City of Santa Fe allowed for twenty navigators from thirteen additional organizations to join the network and use the Unite Us platform. The County and City partnership aligns contracts, streamlines protocols, and creates a larger network with a common vision and is hoped to be a model for replication and planned growth.

Today the network has over 200 navigators from almost 60 community programs. For an up-to-date list of CONNECT organizations and navigators refer to the "My Network" tab in the Unite Us platform.

As a response to COVID-19, more City and County funded organizations joined the network to provide short term navigation and Flexible Funding for COVID-19 related needs. A public facing portal was added to allow people to self-refer and receive navigation from hub navigators comprised of City and County employees. City and County youth funded organizations and navigators joined the network in 2020 and La Sala Crisis Center joined in 2021. Christus St. Vincent Hospital and the First Judicial District Court are the latest to join.

NAVIGATION: LET'S GET STARTED!

Three levels of navigation are funded and responsibilities vary in each tier.

Tier I focuses on safety net service delivery. Tier 1 navigators provide individuals with units or items of service delivery such as food, clothing, hours of counseling, etc. and send and close referral loops. Tier I funded organizations are encouraged to attend monthly navigation meetings and must fully participate in collaborating with other agencies.

Tier II focuses not only on safety net service delivery and closing referral loops, but also on screening and navigation services. Tier II navigators will screen for needs and connect individuals to safety net services and navigate them to other priority community services. The SDOH Screening Tool determines unmet needs. Navigators coordinate care and services using the Unite Us platform (as well as other resources outside the platform when necessary), leading to greater holistic and person-centered care captured on a Navigation Plan. Tier II navigators attend monthly navigation meetings and fully participate in collaborating with other agencies.

Tier III focuses on providing services other than navigation. Organizations are required to allow a city, county or partner agency navigator to be present if a need arises or participate in events for outreach and to collaborate when appropriate.

Tier I and Tier II navigators in the network have licenses to use the Unite Us platform. The cost of the license is covered by the funder. The Unite Us platform supports and documents the daily work of the navigators and allows for consistent data collection and reporting of social determinants and related outcomes.

Please refer to the pdf titled **CONNECT Network Standards** dated January 2022 for information on best practices, data standards, expected workflow and referral and response standards for using the Unite Us platform. The information applies to navigators within the network who have a license to use the platform.

The **CONNECT Digital File** includes Network Standards and supplemental information of use to navigators. The file is emailed to every navigator either at the beginning of the fiscal year or when navigators join the network during the year. It provides digital versions of the SDOH Screening Tool, the Evaluation Screen, the Unite Us Consent and Consent for Health Information Exchange for program evaluation in English and Spanish and navigation plan templates that can be printed. The file is not intended to supplant the Unite Us platform but to replicate some of the forms found on it. We recognize internet access and some locations where navigation occurs aren't conducive to using an on-line platform. Paper forms allow navigators to collect information to be uploaded or entered at a later time.

SCREENING

Screening and enrollment occur at any CONNECT site or partner service organization that has a working agreement, navigators and/or clinic contract with Santa Fe County or the City of Santa Fe Community Services Departments. A self-referral portal is available on the City and County

websites allowing people to refer into the network on their own. Hub navigators provide screening, intake and navigation for people who self-refer.

Individuals are screened by navigators to identify un-met Social Determinants of Health. The **SDOH Screening Tool** is used during the intake process and throughout service provision to identify social needs of the individual. Repeat visits to the screening tool questions are suggested as people's circumstances and needs change over time. Navigators are encouraged to use their discretion and adapt the screening tool questions to suit the individual and their level of comfort at the moment. Building trust with the individual and creating a safe environment to talk is an important aspect of providing navigation. Some of the questions of the screen may trigger responses for people with trauma. Please adapt the intake to accommodate the person. This should be completed one time and every 12 months or at a life changing event.

Electronic versions of the SDOH Screening Tool in English and Spanish are available and included in the CONNECT Digital File.

In Fiscal Years 2018-19 the following Social Determinants of Health were included in the screening:

Safe Housing	Reliable Transportation	Reliable Utilities
Access to Nutritious Food	Personal Safety	

In Fiscal Year 2020 additional SDOH questions have been added that address:

Finances	Employment	Family/Community Support
Education	Physical Activity	Substance Use
Mental Health	Disabilities	

The additional SDOH questions are supplemental, to be asked at the discretion of the navigator and not mandatory.

The Navigator shall proceed to enroll the individual if an individual:

- (1) screens positive for any of the above and,
- (2) is a Santa Fe City or County resident and,
- (3) if a County resident qualifies for the Santa Fe County Health Care Assistance Program

ENROLLMENT

The person will be considered enrolled if the individual:

- (1) screens positive for any of the Social Determinants of Health on the SDOH Screen and,
- (2) would like assistance to address unmet needs and,

(3) signs a **Unite Us Consent** and a paper copy of the **NM Health Information Exchange (HIE) Consent** or provides a verbal assent for the HIE is documented for program evaluation. If a person declines signing the consent for Unite Us the enrolling organization will keep paper copies of the Client Record, SDOH Screen, Evaluation Screen and receipts for Flexible Fund use. In such instances, referrals will not be sent via Unite Us, but will need to be completed via email or by phone.

As an individual is enrolled, the **Evaluation Screen** is completed by all navigators. The screen asks questions used for program evaluation and should be asked one time a month as navigators see individuals after initial enrollment. It is suggested that navigators use calendar reminders to nudge yourself to ask the Evaluation Screen questions each month with individuals who you are providing ongoing navigation to.

The **COVID-19 Screen** should be completed by all navigators and is particularly important if flexible funds/one-time financial assistance are being utilized.

The consent for program evaluation can be completed by verbal assent and documented in Unite Us. Alternately, if a verbal assent is not documented, the **Health Information Exchange Consent** is found in the Digital File and should be signed by the individual during intake. The consent or assent provides permission by the individual for program evaluators to electronically access information from the New Mexico Health Information Exchange. The medical information will be protected by state and federal privacy laws, will not be made public, and will only be used to evaluate the impact of CONNECT.

A script for the Health Information Exchange (HIE) Consent for program evaluation is included in the CONNECT Digital File. The script describes how information is bundled together, or aggregated, enabling evaluators to look at the positive impact of our work. Assure the individual that their data would be used in the aggregate to assess the impact of CONNECT on the health of our community. No individual or identifying data will be used by CONNECT, shared with any state, county or federal agencies, or made public.

Both signed consents are in effect until the individual withdraws permission in writing or opts out of the NM Health Information Exchange. Navigators will upload a signed copy of the program evaluation consent in the Unite Us platform on the Upload Page if verbal assent is not documented in the Unite Us platform.

If an individual does not want to sign either consent navigation services may still be provided. Contact the contract manager for advice on how to document your work in order to invoice for services provided.

At enrollment the individual will be asked to identify organizations they have current or previous relationships with to determine possible referral sites or inclusion on the navigation/care team and documented in the Unite Us platform on the Profile Page.

NAVIGATION PLAN DEVELOPMENT

A **Navigation Plan** will be developed for individuals provided with navigation, based on the SDOH Screening Tool results and/or referrals generated by Unite Us and will include measurable goals based on the individual's priorities. The plan is developed after completing the SDOH screen and having a conversation with the individual to discuss priorities.

The navigation plan notes priorities, the primary navigator conducting the intake, and the care/navigation team. Navigators from community service partners who are listed on the care team are providing resources and services to the individual. Tier 1 navigators are also encouraged but not required to develop a Navigation Plan with the individual. The Navigation Plan should be completed and uploaded into the platform within 30 days of enrollment. Training for navigation planning will be provided by CONNECT on a semi-annual basis.

The Navigation Plan will include the following components:

- Name of primary navigator and organization developing the plan
- Measurable goals
- Signatures of the individual and the primary navigator (if plan is completed in person)
- Date of plan development
- Review date of Navigation Plan

Goals will follow the SMART model of being Specific, Measurable, Achievable, Relevant and Time-bound.

- 1. Specific** - Consider who, what, when, where, why and how in developing the goal.
- 2. Measurable** - Include a numeric or descriptive measurement.
- 3. Achievable** - Consider the resources needed and set a realistic goal.
- 4. Relevant** - Make sure the goal is results focused and links with the mission.
- 5. Time-bound** - Set a realistic deadline.

Community partner organizations may use CONNECT Navigation Plans or the organization's plan as long as the above plan components are included. Two Navigation Plan templates are included in the Digital File and a Navigation Plan is in the Unite Us platform in the Forms tab. A completed plan should be uploaded to the Unite Us platform and a copy provided to the individual.

PATHWAYS TO SUCCESS

The following steps or pathways addressing housing, food, transportation, utilities and personal safety are guides created by navigators to successfully address each domain and may help in navigation planning.



HOUSING

Step 1. Develop a relationship with the individual. Document history of homelessness, medical and behavioral health needs if any that need to be addressed in emergency, short (30 day) and long-term housing options.

Step 2. What programs does the individual or family qualify for? Review housing resources at the local and federal level that include veteran, senior and low-income housing options. Some vouchers for permanent supportive housing only become available if a person is chronically homeless; that is, a documented period of one year within the last three.

If the person and/or family screen positive for a housing need make a referral in the Unite Us platform to the New Mexico Coalition to End Homelessness for a VI-SPDAT screen to determine eligibility for housing options and to be added to the Homeless Management Information System (HMIS) data base. Check with resources in surrounding counties if housing vouchers are available. Identify potential barriers to housing. Are there previous evictions, legal or medical issues? Does the individual have an ID?

Step 3. Collect documents that include: identification, credit history, income status, bank statements. Provide assistance with applications and prepare individual for appointments and interviews. Make copies of documents for the individual and for organization files, following organization policies for file storage.

Step 4. Navigator and individual contact appropriate organization(s), schedule an appointment, meet and discuss housing options. Navigator confirms that individual attended appointment and has at the very least been put on a waiting list for housing and/or resolved immediate housing crisis.

Step 5. Navigator maintains contact through-out the application process, schedules regular appointments to check in while individual is on waiting lists. Provide follow-up for a year to ensure housing voucher renewal (if relevant) is completed within correct time frame, rent is paid, and property is maintained.

Step 6. Anticipate and develop goals to address emergency, interim and long-term options for housing.

Use Flexible Funds for:

- Rent (up to 3 months per calendar year)
- Sleeping mat
- Sleeping bag
- Mold remediation
- Pest removal
- Housing repairs, appliance replacement or safety modifications related to plumbing and water leaks, electrical, heat, oven, hot water heater, smoke detectors or grab bars (\$2,000 max)
- Fees for identification needed to obtain housing
- Hotel (up to 3 months per calendar year)

NO:

- Security Deposit
- Tent

Final Step: The pathway is completed when the individual is housed with adequate support services for 3 months.



FOOD

Step 1. Assess the need and possible solutions for immediate and long-term access to healthy food. Navigator talks with individual about programs they may be eligible for and uses the Unite Us Platform to make referrals and share in-network food resources. The SHARE/ New Mexico resource directory can be used to print and provide options as well. (SNAP, WIC, food distribution sites, prepared meal delivery services and drop-in meal sites).

Please note documentation status can exclude people. Check options available specifically for people who are not US citizens.

Use Flexible Funds for:

- Groceries
- Hot meal
- MoGro membership
- Baby formula
- Breast feeding supplies
- Pre-natal vitamins

- Fees for identification needed for SNAP application
Grocery card (identification required for use)

Step 2. If eligible for SNAP, the navigator assists with application and in-person or phone interview with Income Support Division at Human Services Department.

Step 3. Whether or not eligible for SNAP benefits, Navigator explores with the individual all possible food distribution and meal sites and how to access them with local transportation options. Navigator provides referrals to programs with specific age or health requirements.

Step 4. Navigator accompanies individual to first visit of site. (warm hand-off, if agency policy permits)

Step 5. Navigator meets with individual to assess progress and barriers and to develop food goals in a navigation plan.

Final Step: The pathway is completed when the individual has reliably accessed healthy food resources for 1 month.



TRANSPORTATION

Step 1. Assess the need and possible solutions for immediate and long-term transportation.

Step 2. Review public transportation resources that are applicable to the individual. For County Contractors: If vehicle repair or parts are needed use Emergency Flexible Fund as leverage for in-kind or private contributions. Encourage the individual to pay whatever they can to contribute.

Use Flexible Funds for:

- Bus pass
- Fuel for vehicles
- Uber and Lyft gift cards
- Fees for Driver's License or identification needed to obtain license
- Vehicle repairs and parts to keep vehicle roadworthy (\$1,500 max per vehicle)
- Car seat
- Vehicle insurance (up to 6 months)
- Bicycle parts and repair
- Gas card (identification required for use)

Step 3. Create goals in a Navigation Plan with the individual to address ongoing transportation needs. Identify transportation options that address immediate and long-term transportation.

Final Step: The pathway is completed when the individual has reliable transportation for 1 month.



Step 1. Assess the need for assistance and eligibility to include personal and situational factors leading to the need.

Step 2. Apply for Low Income Home Energy Assistance Program (LIHEAP) at Human Services Department if LIHEAP eligible. Help the individual prepare for meeting with referral agency. Locate and copy required documentation, arrange childcare, secure transportation, review hours of operation, request for bills from utility companies. Confirm that the individual attended appointment and has potential solution.

Step 3. If not eligible or LIHEAP is unavailable:

- Seek assistance from other organizations, city and county resources

Use Flexible Funds for:

- Pellets
- Firewood
- Propane
- Fan
- Gas, Electric, Water Bill, Phone, Internet payment (up to 3 months)
- Flashlight
- Fees for identification needed to obtain utilities
- Smoke and Carbon Monoxide detectors

Step 4. Create goals in a navigation plan with individual to address ongoing utility needs. What is the root cause for not having utilities? Could the individual benefit from life skills for budgeting, problem solving, follow up? Would enrollment in PNM's budget billing program or heating season shut off protection be helpful?

Final Step: The pathway is completed when the individual secures and maintains utilities for 3 months.



INTERPERSONAL SAFETY

Step 1. Is there a safety issue based on the SDOH Screening Tool?

If yes, assess for immediate safety needs.

Is the individual injured? (Call 911)

Where is the person who inflicted harm?

Are there children or others in danger?

Step 2. Review resources for needs unique to the individual and family. If the individual or family has an immediate safety need ask the individual if you can assist to make a referral to Esperanza Shelter (800-473-5220). Ensure a warm hand-off that includes arranging or providing transportation to the emergency shelter coordinated with staff at the shelter.

Use Flexible Funds for:

- Train, bus fare for safe destination
- Court fees such as filing fees for new birth certificate, social security card,
- and ID/Driver's License
- Asylum application fee
- Fee for name change needed for safety

Step 3. Ask the individual if they want to report the abuse to the police. Review mandatory reporting requirements and report if there is reasonable cause for neglect or abuse of a child or vulnerable adult. If you aren't sure if there is reasonable cause, call the numbers below to ask a hypothetical question to help determine if there is reasonable cause.

REPORTING CHILD NEGLECT AND/OR ABUSE: Any person must report if a person "knows or has a reasonable suspicion that a child is an abused or a neglected child." New Mexico law allows confidential reports of child abuse and/or neglect to be made to a local law enforcement agency, the Department of Children, Youth and Families (CYFD) Statewide Central Intake (855-333-7233) or a tribal law enforcement or social services agency for and Indian child residing in Indian Country. [NMSA section 32A-4-3 A]

REPORTING ADULT NEGLECT AND/OR ABUSE: New Mexico has a "Duty to Report" provision in the Adult Protective Services Act (27-7-30) which states: "Any person, or financial institution, having reasonable cause to believe that an incapacitated adult is being abused, neglected or exploited shall immediately report that information to Adult Protective Services." Adult Protective Services remains on call for emergent reports of adult abuse, neglect, and exploitation 24 hours a day, 7 days a week.

If you suspect an adult is being abused, neglected, or exploited, call Adult Protective Services Statewide Intake, toll-free at **1-866-654-3219** or **1-505-476-4912**.

Step 4. Provide your contact information to the individual to encourage continuation of navigation services relating to the Navigation Plan.

Final Step: The pathway is completed when the individual or family feels safe, free from abuse and sustains mental and physical health for one month

FLEXIBLE FUND

A Flexible Fund is available to respond to an enrolled person's emerging or immediate crisis involving housing, transportation, utilities, access to food, personal safety, or other unmet SDOH, and activities related to achieving the goals documented in a navigation plan. A list of pre-approved uses is provided in Exhibit A.

Other uses may be allowed by prior written approval of the contract managers for the City and County. Flexible Funds are intended to serve as the *payor of last resort*, not to supplant other available funding sources. Flexible Funds can be used for episodes that are time limited. The navigator must demonstrate a source of ongoing funding to avoid repeated use for the same request and document in a navigation plan.

When distributing Flexible Funds, navigators are encouraged to exercise discretion and be innovative. To extend the available funds, navigators should seek community partners to donate or partially fund the purchase and encourage the individual to contribute to the extent possible.

Any person enrolled is eligible to receive Flexible Funds. There is no limit on the number of items or frequency per contract year of Flexible Funds that an individual may receive except as specified in Exhibit A where expenditure caps are listed. A person may not receive funds for the same item more than once from the same partner organization, and the navigation service cannot expend or commit more funds than are present in the account for Flexible Funds at the time of the request. There is a cap of \$25,000 per individual in their lifetime and caps on specific items as listed in Exhibit A. Exceeding caps on certain items may be allowed with prior written approval of the contract managers for the City and County.

A navigator may obtain an item with Flexible Funds and give it to the individual or accompany the individual and pay for an item with Flexible Funds but cannot give Flexible Funds to the individual to pay for an item.

Flexible Funds cannot be used for any purpose not specified in this policy. The disbursement of Flexible Funds is tracked in the Unite Us System and documented in a navigation plan as each case is closed. Receipts must be uploaded into the platform and correspond with the invoice submitted to

the City or County. The receipts must be titled with the name of the individual, the date and the service category of the expenditure and uploaded within the reporting term that the purchase is made.

Best practice for documenting Flexible Fund expenditures is within 24 hours. Please refer to the Network Standards for a detailed description of how to document expenditures in the Unite Us platform.

It is the responsibility of each organization to review these protocols regularly. Terms are subject to change.

If you have any questions regarding this policy, contact the contract managers:

COUNTY: Jennifer Romero, jnromero@santafecountynm.gov

CITY: Christa Hernandez, chernandez@santafenm.gov

EXHIBIT A

HOUSING: Rent (up to 3 months per calendar year)
Sleeping mat
Sleeping bag
Mold remediation
Pest removal
Housing repairs, appliance replacement or safety modifications related to plumbing and water leaks, electrical, heat, oven, hot water heater, smoke detectors or grab bars (\$2,000 max)
Fees for identification needed to obtain housing
Hotel (up to 3 months per calendar year)

NO:
Security Deposit
Tent

TRANSPORTATION: Bus pass
Fuel for vehicles
Uber and Lyft gift cards
Fees for Driver's License or identification needed to obtain license
Vehicle repairs and parts to keep vehicle roadworthy (\$1,500 max per vehicle)
Car seat
Vehicle insurance (up to 6 months)
Bicycle parts and repair
Gas card (identification required for use)

UTILITIES: Pellets
Firewood
Propane

Fan
Gas, Electric, Water Bill, Phone, Internet payment (up to 3 months)
Flashlight
Fees for identification needed to obtain utilities
Smoke and Carbon Monoxide detectors

FOOD: Groceries
Hot meal
MoGro membership
Baby formula
Breast feeding supplies
Pre-natal vitamins
Fees for identification needed for SNAP application
Grocery card (identification required for use)

INTERPERSONAL

SAFETY: Train, bus fare for safe destination
Court fees such as filing fees for new birth certificate, social security card,
and ID/Driver's License
Asylum application fee
Fee for name change needed for safety

OTHER: Weather-appropriate clothing
Expenses related to education and securing employment (e.g.,
registration fees, clothing for work, computer, cap and gown for graduation,
certifications, education/vocational tuition (max \$1,000)
Childcare assistance (up to 3 months)

Medical bills, prescriptions and durable medical equipment will not be paid for.

REPORTING and INVOICING REQUIREMENTS

The fiscal year is broken into four reporting quarters for both the County and City.

FISCAL YEAR SCHEDULE:

Quarter 1: July - September
Quarter 2: October - December
Quarter 3: January - March
Quarter 4: April - June

Invoices Due:

October 15th
January 15th
April 15th
July 5th

DATA

For County Contractors: The Unite Us platform collects and reports data. For each person enrolled, a **Client Record** will be created in the Unite Us platform to provide contact

information and demographic data. In addition, the **SDOH Screen** and **Evaluation Screen** and **signed consents (2)** will be completed for all people enrolled by the end of the quarter. In order to invoice for navigation services per person, a **case or referral** in the Unite Us platform must be created for new individuals. Individuals can only be invoiced for services provided one time within the contract year.

For City Contractors: Once a navigator with City funding receives a license to use Unite Us they will follow the service standards and protocols for CONNECT. Additional reports may be requested by the City for data not captured in Unite Us. Every effort by the CONNECT leadership team (a combination of City and County administrators) to reduce duplication of data entry, streamline processes, and increase consistency throughout the network despite funding source will be made.

REPORTS

For County Contractors: Data in Unite Us is exported by the County for all quarterly reports for contractors. At the end of the contract year (fiscal and contract years may differ) an **Annual Report** is due and should be emailed to Jennifer Romero by July 15. The annual report template is attached.

For City Contractors:

Grantees shall submit Quarterly Reports on the programmatic accomplishments made toward the goals of the grant agreement. Quarterly reports are due to the YOUTH AND FAMILY SERVICES DIVISION or COMMUNITY SERVICES DEPARTMENT Program Manager no later than the 15th of the month subsequent to the Quarter end date with the exception of the 4th quarter which is due July 5th. If the 15th falls on a weekend reports will be due the following Monday by close of business. Quarterly Reports shall include the following:

- A. Total Amount of funds received, Amount of funds received that were expended for programs; Number of adults served in the current quarter (if not already included in reporting template); reporting template with attachments or reporting as requested by DIVISION, DEPARTMENT or the COMMISSION.

Reports are due to:

Youth and Family Services Program Manager, Youth and Family Services Division Project Administrator, Youth and Family Services Division Data Consultant, and Aspen Solutions, LLC Data Consultant

Christa Hernandez, chernandez@santafenm.gov
Natalie Skogerboe, n.skogerboe@gmail.com

Michelle Gurule, magurule@santafenm.gov
Arianna Trott, arianna.trott@gmail.com

INVOICES

For County Contractors:

An invoice template has been created for County contractors. The invoice includes payment per person served and Flexible Funds expended. *Please note that Flexible Funds receipts must be uploaded to the Unite Us platform and must correspond with the amount invoiced to the County.* The receipts must be titled with the date, name of individual and the service category of the expenditure. Navigators please confer with the person responsible for invoicing to verify the total of Flexible Funds to be invoiced per quarter. The County will audit using the Unite Us platform throughout the year. Invoices should be emailed to:

Health Care Assistance Program Manager

Jennifer N. Romero, jnromero@santafecountynm.gov

For City Contractors:

Invoicing is required quarterly during the time reporting is due unless otherwise agreed upon by the City and contracting agency. The invoice template has been provided to all City Contractors. All contracts for Fiscal Year '21 are deliverable based contracts split into two tiers, Tier I is for services only and Tier II is either just navigator or Tier I plus navigation. Either tier follows a deliverable based contract, meaning reimbursement is based on the people served at a per person rate outlined in the agencies contract with the City.

Invoices are due to:

Youth and Family Services Program Manager, Youth and Family Services Division

Christa Hernandez, chernandez@santafenm.gov

Project Specialist, Youth and Family Services Division

Michelle Gurule, magurule@santafenm.gov

NAVIGATION MONTHLY MEETINGS

In an effort to strengthen communication, foster strong navigation teams, network identity, and increase navigation knowledge, navigation meetings are offered on the last Tuesday of every month for 1-2 hours. Although mandatory attendance isn't required, navigators are encouraged to participate in as many meetings as possible.

The structure of the meetings varies and, in response to the pandemic, virtual meetings are being utilized and the structure of the meetings have been adapted to meet current COVID safe practices. The following components are consistent elements of the monthly meetings.

Introductions and Updates Given the continued growth of the network introductions and updates provide the latest information about new attendees, recent organizational and network changes.

Educational Series: Education, Resources and Professional Growth Topics include learning about resources that address social determinants of health, best practices and educational opportunities for professional growth.

Networking Time to network is built into face to face meetings.

PROFESSIONAL DEVELOPMENT

The CONNECT leadership team is committed to providing ongoing professional development to strengthen and expand navigator's skill sets. Professional Development Classes will be offered on a quarterly basis. Continuing Education Units (CEU) will be available for trainings and topics are based on suggestions from navigators. In response to COVID-19, trainings will be available on-line unless otherwise specified. All trainings will be conducted by Mikahla Buetler, LPCC. Emails will be sent out with information about each training and registration information one month prior to the training date. Below is a listing of possible trainings that will happen throughout the year.

Trauma-Informed Care

This course on Trauma-Informed Care is designed as a broad overview of best practices in recognizing, assessing, and treating trauma. This includes a review of SAMHSA's TIP 57, an exploration into countertransference and self-regulation, and an opportunity for resource development. As an accommodation for COVID-19, this course will be available online. A didactic teaching method will be the main source of content with the opportunity for experiential and collaborative engagement. This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

Building Resilience

This experiential course on Building Resilience is designed to offer providers a personal practice in self-care and burnout prevention. This includes many self-regulatory practices that can be applied in work with clients. Participants will leave feeling refreshed and renewed, as well as retooled. As an accommodation for COVID-19, this course will be available online. Experiential learning will be the main methodology of content delivery with the opportunity for collaborative, and inquiry based discovery. This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

Shared Decision-Making in Treatment Planning

This course on Treatment Planning will focus on the shared decision-making model wherein providers and clients work together to form a course of action. Through psychoeducation, goalsetting strategies, and tracking tools, providers and clients can monitor the successes and

challenges of treatment. As an accommodation for COVID-19, this course will be available online. Inquiry-based teaching methodologies will have participants building appropriate treatment models for their specific practices. This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

Considerations for Effective Communication

This course on Communication is designed to examine a range of meta-communications and influences. Explorations in self-talk, communication styles, and effective communication techniques will offer participants strategies they can utilize with clients and coworkers alike. As an accommodation for COVID-19, this course will be available online. Highly experiential in nature, this course will have plenty of opportunities for practice! This course provides 3 continuing education credits. Participants must attend the entire course to receive a certificate.

CLINICAL GUIDANCE

CONNECT embraces person-centered planning and navigation services that support the person to identify and achieve their goals relating to unmet social determinants of health. Engaging individuals to participate in the network and navigation services can be difficult when working with individuals who have in the past or are currently experiencing trauma. Trauma is often unrecognized and is widespread. According to SAMHSA “trauma occurs as a result of violence, abuse, neglect, loss, disaster, war and other emotionally harmful experiences. Trauma has no boundaries with regard to age, gender, socioeconomic status, race, ethnicity, geography or sexual orientation.”

Navigators work every day with people who are vulnerable and are most likely experiencing trauma if they have screened positive for the need for housing, transportation, utilities, food or personal safety.

With a spirit of meeting people where they are both literally and figuratively, navigators must have a varied skill set. Navigators are not required to have a clinical background, nor are they necessarily supervised by clinicians. The complexity of challenges they face could benefit from a clinician’s guidance to create a safe environment for themselves and the individuals they serve.

Using a strength-based approach, Mikahla Beutler, LPPC, is available to provide training, navigation team development and clinical guidance. Individual and teamwork promotes trauma informed care, individual engagement, person centered planning, and create and maintain professional boundaries. Ms. Beutler will articulate, model and mentor a standard of care for navigators. Clinical guidance and professional development activities will provide time to debrief, to talk through difficult situations and learn from peers with facilitation and clinical guidance by a licensed professional.

As part of the CONNECT orientation each navigator will meet with Ms. Beutler within the first quarter of joining the network to learn more about ways to integrate self-care and clinical best practices into their work life.

Team Development, Meeting Facilitation, Case Consultation

To further support individual navigators and interdisciplinary team development, navigators may request the assistance of the clinician for phone consults, to facilitate interdisciplinary navigation meetings when the needs of the individual receiving services, or the dynamics of the team are complex. The clinician will also provide follow up with individual team members to debrief and troubleshoot next steps in difficult situations.

Office Hours are available by appointment every Tuesday and Thursday from 9 to 11 am, or at a time that is mutually agreed upon, for individual Case Consultation. Please email requests to Mikahla Beutler with "Clinical Guidance Request" in the subject line. Ms. Beutler will respond by email within 48 hours of receipt of the request and can be reached at (505) 663-6464 or emergesantafe@gmail.com.

COMMUNITY ENGAGEMENT

Community Engagement is: *"the process of working collaboratively with and through groups of people affiliated by geographic proximity, special interest, or similar situations to address issues affecting the wellbeing of those people. It is a powerful vehicle for bringing about environmental and behavioral changes that will improve the health of the community and its members. It often involves partnerships and coalitions that help mobilize resources and influence systems, change relationships among partners, and serve as catalysts for changing policies, programs, and practices."* (Centers for Disease Control and Prevention)

Advisory Committee

Lived experience drives innovation. Identifying, assessing and improving CONNECT and community policy from the perspective of the individual receiving services and resources is the goal. In Fiscal Year 2020, an Advisory Committee of people who have been or are enrolled in CONNECT was initiated. What's working, what's not and how to improve CONNECT and influence public policy is the emphasis of facilitated discussions. Quarterly meetings identify challenges and co-create solutions that affect CONNECT operations and city, county and state policies. Recruitment of individuals to serve is ongoing and meetings will be adapted to accommodate pandemic and social distancing orders, as necessary. We strive for equality in stakeholder recruitment and representation.

Meetings are structured to provide a comfortable and safe environment for individuals to share their experiences from moment of enrollment to navigation completion. A first-hand account will capture individual experiences with CONNECT. A facilitator from Chainbreaker Collective will guide the discussion to identify ideas for improvement. The insight and recommendations of people who have experienced the program will create solutions.

Through participation in the Advisory Committee, past and current participants of navigation services help inform the program and shape future program enhancements and revisions. Participant's voices help ensure that CONNECT incorporates feedback as part of lessons learned, ensure the effectiveness of the program and augment its impact.

To address and remove barriers to participation due to a number of obstacles that are common challenges to engaging low-income and underserved participants, food, transportation, on-site childcare and stipends are provided when public health orders allow. Meetings are held at locations that are accessible and on bus routes at times that are convenient for the majority of the membership.

During the pandemic virtual meetings will be scheduled. Tablets and internet connection will be provided to Advisory Committee members. CONNECT leadership will provide operational support of in-person or virtual meeting coordination and facilitation. Every effort is made to create safe spaces that facilitate honest discussion, collaboration and meetings are solution driven.

Applications for the Advisory Committee are accepted year round and we rely on navigators and current Advisory Committee members to recruit new members. Navigators will forward names and contact information of interested individuals to contract managers or assist individuals to answer and submit the application electronically. The application is included in the CONNECT Digital File. Email completed applications to Tomás Rivera tomas@chainbreaker.org at Chainbreaker Collective.

Empowerment, Collaboration and Feedback

The Gap Analysis conducted in 2017 identified trends in changing demographics and current needs of Santa Fe County residents and community stakeholders. Continued consultation with stakeholders and the broader community provides opportunities for collaboration to create opportunities for city, county and state policy change.

Individuals who receive CONNECT services, navigators and other stakeholders in the community can be partners in changing public policy. Stakeholder buy-in, grass roots organization and continued collaboration to bring people together to identify the needs of the community, coalesce stakeholders around prioritized issues and actions, and identify and support leaders and decision-making structures is essential to move identified public policy changes forward.

The cry of "Nothing for Us Without Us" still rings true in the realm of public policy change. Identifying stakeholders who are interested and want to create policy change is key to any organized effort. Membership of the Advisory Council, navigators and other stakeholders will identify priorities for policy change. Feedback loops will include sharing information between CONNECT Navigators, Planning and Advisory Committee members, City of Santa Fe stakeholder

and policy groups, Santa Fe County Health Policy and Planning Commission and Board of County Commissioners.

CONTACT US

CONNECT is committed to improving the experience of all stakeholders. Feedback helps tailor standards and protocols to the strengths and needs of our community and is encouraged and welcomed.

Please direct questions, concerns or suggestions for improvement to:

Santa Fe County Community Services Department, Health Care Assistance Program Manager

Jennifer N. Romero

(505) 995-9526

jnromero@santafecountynm.gov

Children and Youth Program Manager, Youth and Family Services Division

Christa Hernandez

(505) 955-6728

chernandez@santafenm.gov