

## PROFESSIONAL SERVICES AGREEMENT

**THIS AGREEMENT** is made and entered into this day of July 1, 2023 by and between the **CITY OF MISSOULA, MONTANA**, a municipal corporation organized and existing under the laws of the State of Montana, 435 Ryman St., Missoula, MT 59802, referred to here as “City,” and Missoula Aging Services, 337 Stephens Ave., Missoula, Montana 59801, hereinafter referred to as “Contractor.”

### RECITALS

WHEREAS, the City desires to utilize Contractor to furnish independent services in connection with promoting the independence, dignity and health of older adults, people with disabilities, and those that care for them in the Missoula community, including those services described within the Section or the Attachment to this contract entitled, “Scope of Work & Compensation;” and

WHEREAS, Contractor has represented to the City that Contractor has the necessary expertise to furnish said services and has available to Contractor the necessary staff and resources to perform the independent services in a timely manner consistent with the nature of the project.

NOW THEREFORE, in consideration of the mutual covenants and agreements herein contained, the parties agree as follows:

1. **Purpose:** City desires to have Contractor to serve as an Aging and Disability Resource Center for the City of Missoula to launch new initiatives and programs, in accordance with the Scope of Work attached as Exhibit A.
2. **Effective Date:** This Agreement is effective upon the date of its execution by both parties and will terminate on the day of June 30, 2024, or upon 30 days’ notice by the City to Contractor of its desire to terminate the Agreement by giving such notice to Contractor’s designated liaison identified below.
3. **Scope of Work:**
  - a. Contractor will perform the work and provide the services in accordance with the requirements of the Scope of Work attached as Exhibit A, Section 1; and
  - b. If authorized in writing as provided in this subsection, Contractor shall also furnish additional services. To the extent additional services have been identified at the time of executing this Agreement, they are itemized in Exhibit A and will be paid for by City as indicated in Section 4. As further additional services are requested of Contractor, this Agreement may be modified and subject to mutual consent by execution of an addendum by authorized representatives of both parties, setting forth the additional scope of services, their performance time schedule, and the compensation for such services.

4. **Payment:**

a. City agrees to pay Contractor for services outlined in Exhibit A, Section 1 in accordance with the terms and conditions laid out in Exhibit A, Section 2 – Compensation, and Contractor shall be compensated for additional services authorized pursuant to Section 3.b. above, which have not been identified at the time of executing this Agreement as more particularly described in a fully approved and executed addendum to this Agreement. Payment for work beyond that described in Exhibit A or as contained in a fully approved and executed addendum to this Agreement is expressly denied without prior written authorization from City. Such authorization must include signature of the Mayor.

b. Contractor shall submit statements for basic and additional services rendered. City shall pay Contractor within 30 days of receipt of an itemized invoice for the services rendered or shall notify Contractor of any dispute by City concerning the performance of any services and the basis therefore and shall pay Contractor within thirty days for the services not in dispute. If any items are disputed by City, Contractor and representatives of City shall meet and confer regarding the disputed items within ten business days after City notifies Contractor of the services in dispute. City shall pay for any disputed services for which the dispute has been resolved to the satisfaction of the City within thirty days after such resolution.

5. **Independent Contractor Status:** The parties agree that Consultant, is an independent contractor for purposes of this agreement and the parties agree that Consultant is and shall be an independent contractor when performing services pursuant to this agreement. Consultant is not subject to the terms and provisions of the City's personnel policies handbook and may not be considered a City employee for workers' compensation or any other purpose. Consultant is not authorized to represent the City or otherwise bind the City in any dealings between Consultant and any third parties.

Consultant shall comply with the applicable requirements of the Workers' Compensation Act, Title 39, Chapter 71, MCA, and the Occupational Disease Act of Montana, Title 39, Chapter 71, MCA. Consultant shall maintain workers' compensation coverage for all members and employees of Consultant's business, except for those members who are exempted by law.

Consultant shall furnish the City with copies showing one of the following: (1) a binder for workers' compensation coverage by an insurer licensed and authorized to provide workers' compensation insurance in the State of Montana; or (2) proof of exemption from workers' compensation granted by law for independent contractors.

6. **Indemnity and Insurance:** For other than professional services rendered, to the fullest extent permitted by law, Consultant agrees to defend, indemnify, and hold the City harmless against claims, demands, suits, damages, losses, and expenses connected therewith that may be asserted or claimed against, recovered from or suffered by the City by reason of any injury or loss, including but not limited to, personal injury, including bodily injury or death, property

damage, occasioned by, growing out of, or in any way arising or resulting from any intentional or negligent act on the part of Consultant or Consultant's agents or employees.

For the professional services rendered, to the fullest extent permitted by law, Consultant agrees to indemnify and hold the City harmless against claims, demands, suits, damages, losses, and expenses, including reasonable defense attorney fees, to the extent caused by the negligence or willful misconduct of the Consultant or Consultant's agents or employees.

For this purpose, Consultant shall provide City with proof of Consultant's liability insurance issued by a reliable company or companies for personal injury and property damage in amounts not less than as follows:

- Workers' Compensation—statutory
- Employers' Liability—\$750,000 per occurrence; \$1,500,000 annual aggregate
- Commercial General Liability—\$750,000 per occurrence; \$1,500,000 annual aggregate
- Automobile Liability—\$750,000 property damage/bodily injury; \$1,500,000 annual aggregate
- Professional Errors and Omissions Liability—\$750,000 per claim; \$1,500,000 annual aggregate

City shall be included or named as an additional or named insured on the Commercial General and Automobile Liability policies. The insurance must be in a form suitable to City.

**7. Professional Service:** Consultant agrees that all services and work performed under this agreement will be accomplished in a professional manner, in accordance with the accepted standards of Contractor's profession.

**8. Compliance with Laws:** Consultant agrees to comply with all federal, state and local laws, ordinances, rules and regulations.

**9. Nondiscrimination and Affirmative Action:** Consultant agrees and shall comply with the following Non-Discrimination and Affirmative Action policies:

**NON-DISCRIMINATION.** All hiring shall be on the basis of merit and qualification and there shall be no discrimination in employment on the basis of race, ancestry, color, physical or mental disability, religion, national origin, sex, age, marital or familial status, creed, ex-offender status, physical condition, political belief, public assistance status, sexual orientation, or gender identity/expression, except where these criteria are reasonable bona fide occupational qualifications.

**AFFIRMATIVE ACTION POLICY.** Contractors, subcontractors, sub grantees, and other firms doing business with the City of Missoula must be in compliance with the City of Missoula’s Affirmative Action Plan, and Title 49 Montana Codes Annotated, entitled “Human Rights” or forfeit the right to continue such business dealings.

**The City’s Affirmative Action Policy Statement is:**

The Mayor of the City of Missoula or the Mayor’s designee may adopt an affirmative action plan to provide all persons equal opportunity for employment without regard to race, ancestry, color, handicap, religion, creed, national origin, sex, age, sexual orientation, gender identity or expression, or marital status. In keeping with this commitment, we are assigning to all department heads and their staff the responsibility to actively facilitate equal employment opportunity for all present employees, applicants, and trainees. This responsibility shall include assurance that employment decisions are based on furthering the principle of equal employment opportunity by imposing only valid requirements for employment and assuring that all human resource actions are administered on the basis of job necessity.

Specific responsibility for developing, implementing, monitoring and reporting are assigned to the City Personnel staff under the supervision and direction of the Chief Administrative Officer and the Mayor.

It is the policy of the City of Missoula to eliminate any practice or procedure that discriminates illegally or has an adverse impact on an “affected” class. Equal opportunity shall be provided for all City employees during their terms of employment. All applicants for City employment shall be employed on the basis of their qualifications and abilities.

The City of Missoula, where practical, shall utilize minority owned enterprises and shall ensure that subcontractors and vendors comply with this policy. Failure of subcontractors and vendors to comply with this policy statement shall jeopardize initial, continued, or renewed funds.

Our commitment is intended to promote equal opportunity in all employment practices and provide a positive program of affirmative action for the City of Missoula, its employees, program participants, trainees and applicants.

**10. Default and Termination:** If either party fails to comply with any condition of this agreement at the time or in the manner provided for, the other party, at its option, may terminate this agreement and be released from all obligations if the default is not cured within ten (10) days after written notice is provided to the defaulting party. Said notice shall set forth the items to be cured. Additionally, the non-defaulting party may bring suit for damages, specific performance, and any other remedy provided by law. These remedies are cumulative and not exclusive. Use of one remedy does not preclude use of the others. Notices shall be provided in writing and hand-delivered or mailed to the parties at the addresses set forth in the first paragraph of this agreement.

**11. Modification and Assignability:** This document contains the entire agreement between the parties and no statements, promises or inducements made by either party or agents of either

party, which are not contained in this written agreement, may be considered valid or binding. This agreement may not be enlarged, modified or altered except by written amendment signed by both parties hereto. The Consultant may not subcontract or assign Consultant's rights, including the right to compensation or duties arising under this agreement, without the prior written consent of City. Any subcontractor or assignee will be bound by all of the terms and conditions of this agreement.

**12. Ownership and Publication of Materials:** All reports, information, data, and other materials prepared by the Consultant pursuant to this agreement are the property of the City. The City has the exclusive and unrestricted authority to release, publish or otherwise use, in whole or part, information relating thereto. Any re-use without written verification or adaptation by the Consultant for the specific purpose intended will be at the City's sole risk and without liability or legal exposure to the Consultant. No material produced in whole or in part under this agreement may be copyrighted or patented in the United States or in any other country without the prior written approval of the City.

**13. Liaison:**

Designated liaison with Contractor is:

Kirsten Hands, Business and Finance Manager  
Office of Housing & Community Development  
435 Ryman Street  
Missoula, MT 59802  
(406) 552-6395

Contractor's designated liaison with City is:

Lisa Sheppard, CEO  
Missoula Aging Services  
337 Stephens Ave.  
Missoula, MT 59801  
(406) 728-7682

**14. Previous Agreements:** This Agreement constitutes the entire understanding of the parties and is intended as a final expression of their agreement and a complete statement of the terms thereof. There are no promises, terms, conditions, or obligations, other than contained herein. This Agreement shall supersede all previous communications, representations, or agreements, either oral or written, between the parties.

**15. Applicability:** This agreement and any extensions of it shall be governed and construed in accordance with the laws of the State of Montana.

(cont.)

**WITNESS**, the parties here have executed this instrument the day and year first above written.

**CONSULTANT:**  
Missoula Aging Services

**MAYOR**  
City of Missoula, Montana

\_\_\_\_\_  
Lisa Sheppard, CEO

\_\_\_\_\_  
Jordan Hess, Mayor

**ATTEST:**

**APPROVED AS TO FORM:**

\_\_\_\_\_  
Martha L. Rehbein, CMC, City Clerk

\_\_\_\_\_  
Ryan Sudbury, City Attorney

## **EXHIBIT A**

### **Scope of Work & Compensation**

#### **SECTION 1 - Scope of Work**

This is a formal request for funding for Missoula Aging Services from the Community Based Funding for Fiscal Year (FY) 2024. As agreed upon by the Mayor and City Council, we are requesting 1.8 mills to support the mission of Missoula Aging Services. Our mission is to promote the independence, dignity and health of older adults and those that care for them. Missoula Aging Services is the voice of older adults. We provide programs and services in our communities, empowering people to age with confidence and without fear.

MAS services most closely align with the City's strategic goals related to Livability and Safety and Wellness. The 2035 Our Missoula Growth Policy includes specific objectives to "support efforts that allow aging in place" and "encourage collaborative community efforts to address healthy aging." MAS is also committed to placing equity at the center of our internal practices, ensuring equitable outreach and service delivery to all older adults, and embracing our role in raising awareness about and combatting ageism.

We plan to use city funding to provide more than 20 programs to support older adults to age safely at home, secure benefits that improve access to health care and increase financial security, navigate the health and social care systems, connect to friends and family, engage in community life, and stay safe from exploitation and abuse. Examples include home-delivered Meals on wheels, community lunches, resource information, Medicare consultations, benefits assistance, in-home support, care management and Memory Care support, respite for caregivers, education, money management, volunteer and engagement opportunities, and advocacy for residents of nursing homes and assisted living facilities.

MAS clients represent a vulnerable and growing population. Montana is the 6<sup>th</sup> "oldest" state in the nation in the number of older adults per capita. In the Missoula area, the number of residents 60 and older has increased 46% over the last decade, with another 38% increase projected between 2020 and 2050. One-quarter of Missoulians are 60+, and approximately 1 in 3 households in our area includes an older adult. Using the Elder Index™, half of all older Montanans are economically insecure. Additionally, according to the recently completed [Community Assessment Survey of Older Adults \(CASOA\)](#), about 1/3 of older adults in our area report having some difficulty with activities of daily living, and more than half need help with housework and home/yard maintenance.

Health, social and financial stressors common for older adults prior to the pandemic have been exponentially exacerbated by Covid and its economic aftermath, leaving many older Missoulians isolated, in need of assistance and struggling to make ends meet on fixed incomes.

Older adults are also proud Missoulians who are essential to the vibrancy and well-being of our community. They report feeling safe and enjoying a good quality of life overall, and they plan to live out their lives here. 80% volunteer their time and talents, and they contribute \$705 million annually to our local economy. Supporting their continued engagement is essential to their health and to that

of our community as a whole.

MAS serves approximately 6,200 individuals annually. Through the third quarter of FY 23, we answered 22,000 calls for information and assistance, provided Medicare consultations and benefits screenings for 3,300 people, served more than 82,000 Meals on Wheels, supported 26,411 community lunches in partnership with area Senior centers, offered in-home services to 63 households, provided care management to more than 80 people with complex needs or dementia, and engaged with more than 250 volunteers. With broad stakeholder input, we also completed a 4-Year Area Plan on Aging effective Oct 2023-Sep 2027.

**In the coming year, we will continue to provide and strengthen our core services.** We will also focus on the following:

- *Developing new models to assist older adults to age at home.* Due to the ongoing and dire shortage of direct care workers, we are exploring promising approaches, including worker-owned cooperatives, volunteer-based solutions, peer-to-peer programs, and supported neighboring. We are also looking at the enhanced role technology can play in reducing the need for hands-on assistance.
- *Increasing opportunities for older adults to engage with others and the community* to lessen social isolation and loneliness, create additional avenues for meaningful contribution, and mitigate ageism.
- *Inviting community partners, including the City, to participate in a transformative impact strategic planning process* centered on our vision to "empower people to age with confidence and without fear."

Missoula Aging Services remains committed to serving older adults and people with disabilities in our community.

**A. Roles and Responsibilities**

- i. **City Leadership and Elected Officials** within the implementation of adopted policies and plans. City staff will manage all communication with leadership and elected officials and will directly report on progress that results from contractual work.
- ii. **City of Missoula Staff Leads** consists of the assigned grant administrator and support from the Department of Housing and Community Development. Staff serve to coordinate and facilitate the execution of the contract, payment of invoices, and collection of progress reporting; making sure the grantee is making progress towards the goals outlined in the scope work.
- iii. **Contractors** are responsible in accomplishing the defined work plan objectives that support the City of Missoula's goals. They will communicate and collaborate directly with the identified Staff Leads.

**B. Code of Conduct**

- i. **Purpose.** The intent of the Code of Conduct is to set the City of Missoula expectations for partners, stakeholders, and contractors.
- ii. **Good faith.** All parties agree to act in a good faith effort. All accept that other participants bring with them the legitimate purposes and goals of their organizations. The work within this collaboration will remain as outlined in this contractual agreement. Any



additional work that the contractor wishes to take on will be at their own will, and will occur without additional resource, including the support of staff time, from the City of Missoula.

- iii. **Exchange of information.** All parties agree to exchange information in good faith and provide information in advance of meetings where such information will be necessary. All agree not to divulge information shared by others in confidence outside of the group.

## **SECTION 2 - Compensation**

- A. For the satisfactory completion of the Scope of Work, the City will pay the Contractor the sum not to exceed \$368,844.95 between July 1, 2023 and June 30, 2024. The City agrees to pay the Contractor for actual portions of the work completed for each task described under the Scope of Work.
- B. Contractor is required to submit an end-of-year progress report in order for the City to closeout this sub-award and remit final payment.