

## AGREEMENT

**SERVICES AGREEMENT**

**THIS SERVICES AGREEMENT** ("Agreement") is made as of this \_\_\_ day of \_\_\_\_\_, 2022 ("Effective Date"), by and between Pinellas County, a political subdivision of the State of Florida ("County"), and Unite USA, Inc. DBA Unite Us ("Contractor") (individually, "Party," collectively, "Parties").

**WITNESSETH:**

**WHEREAS**, the County requested proposals pursuant to (22-0101-P) No. for Coordinated Access Model services; and

**WHEREAS**, based upon the County's assessment of Contractor's proposal, the County selected the Contractor to provide the Services as defined herein; and

**WHEREAS**, Contractor represents that it has the experience and expertise to perform the Services as set forth in this Agreement.

**NOW, THEREFORE**, in consideration of the above recitals, the mutual covenants, agreements, terms and conditions herein, and other good and valuable consideration, the receipt and sufficiency of which is hereby mutually acknowledged, the Parties agree as follows:

**1. Definitions.**

- A. **"Agreement"** means this Agreement, including all Exhibits, which are expressly incorporated herein by reference, and any amendments thereto.
- B. **"County Confidential Information"** means any County information deemed confidential and/or exempt from Section 119.07, Florida Statutes, and Section 24(a), Article 1 of the Florida Constitution, or other applicable law, including, but not limited to data or information referenced in the HIPPA Business Associate Agreement, and any other information designated in writing by the County as County Confidential Information.
- C. **"Contractor Confidential Information"** means any Contractor information that is designated as confidential and/or exempt by Florida's public records law, including information that constitutes a trade secret pursuant to Chapter 688, Florida Statutes, and is designated in this Agreement or in writing as a trade secret by Contractor (unless otherwise determined to be a public record by applicable Florida law). Notwithstanding the foregoing, Contractor Confidential Information does not include information that: (i) becomes public other than as a result of a disclosure by the County in breach of the Agreement; (ii) becomes available to the County on a non-confidential basis from a source other than Contractor, which is not prohibited from disclosing such information by obligation to Contractor; (iii) is known by the County prior to its receipt from Contractor without any obligation or confidentiality with respect thereto; or (iv) is developed by the County independently of any disclosures made by Contractor. For the avoidance of doubt, the Unite Us Platform shall be deemed Confidential Information.
- D. **"Contractor Personnel"** means all employees of Contractor, and all employees of subcontractors of Contractor, including, but not limited to temporary and/or leased employees, who are providing the Services at any time during the project term.
- E. **"Unite Us Platform"** shall mean the proprietary software developed by Unite Us to coordinate electronic referrals and case management tasks between health and social service organizations on a common platform."
- F. **"Services"** means the work, duties and obligations to be carried out and performed safely by Contractor under this Agreement, as described throughout this Agreement and as specifically described in the Statement of Work Exhibit attached hereto and incorporated herein by reference. As used in this Agreement, Services shall include any component task, subtask, service, or function inherent, necessary, or a customary part of the Services, but not specifically described in this Agreement, and shall include the provision of all standard day-to-day administrative, overhead, and internal expenses, including costs of bonds and insurance as required herein, labor, materials, equipment, safety equipment, products, office supplies, consumables, tools, postage, computer hardware/software, telephone charges, copier usage, fax charges, travel, lodging, and per diem and all other costs required to perform Services except as otherwise specifically provided in this Agreement.

## 2. Execution of Agreement

The execution of this Agreement is expressly limited by the Terms and Conditions hereon. County and the Contractor are not bound by additional provisions or provisions at variance herewith that may appear in the Contractor's quotation, estimate, scope of work, or any other such related documents, acknowledgement in force, or any other communication from Contractor to or from County unless such provision is expressly set forth herein.

## 3. Conditions Precedent

This Agreement, and the Parties' rights and obligations herein, are contingent upon and subject to the Contractor securing and/or providing the performance security, if required, and the insurance coverage(s) required, within 10 days of the Effective Date. No Services shall be performed by the Contractor and the County shall not incur any obligations of any type until Contractor satisfies these conditions. Unless waived in writing by the County, in the event the Contractor fails to satisfy the conditions precedent within the time required herein, the Agreement shall be deemed not to have been entered into and shall be null and void.

## 4. Services

- A. **Services** - The County retains Contractor, and Contractor agrees to provide the Services. All Services shall be performed to the satisfaction of the County and shall be subject to the provisions and terms contained herein and the Exhibits attached hereto.
- B. **Services Requiring Prior Approval** - Contractor shall not commence work on any Services requiring prior written authorization in the Statement of Work without approval from the Director of Human Services or their designee.
- C. **Additional Services** - From the Effective Date and for the duration of the project, the County may elect to have Contractor perform Services that are not specifically described in the Statement of Work attached hereto but are related to the Services ("Additional Services"), in which event Contractor shall perform such Additional Services for the compensation specified in the Statement of Work attached hereto. Contractor shall commence performing the applicable Additional Services promptly upon receipt of written approval as provided herein.
- D. **De-scoping of Services** - The County reserves the right to de-scope Services upon a mutually executed amendment. Contractor and the County shall enter into a written amendment reducing the appropriate Services Fee for the impacted Services by a sum equal to the amount associated with the de-scoped Services as defined in the payment schedule in this Agreement, if applicable, or as determined by mutual written consent of both Parties based upon the scope of work performed prior to issuance of notification.
- E. **Independent Contractor Status and Compliance with the Immigration Reform and Control Act** - Contractor is and shall remain an independent contractor and is neither agent, employee, partner, nor joint venturer of County. Contractor acknowledges that it is responsible for complying with the provisions of the Immigration Reform and Control Act of 1986 located at 8 U.S.C. 1324, et seq, and regulations relating thereto, as either may be amended from time to time. Failure to comply with the above provisions shall be considered a material breach of the Agreement.
- F. **Non-Exclusive Services** - Award of this Agreement imposes no obligation on the County to utilize the Contractor for all goods and/or services of this type, which may develop during the agreement period. This is a non-exclusive Agreement. During the term of this Agreement, and any extensions thereof, the County reserves the right to contract for another provider for similar goods and/or services as it determines necessary in its sole discretion.
- G. **Project Monitoring** - During the term of the Agreement, Contractor shall cooperate with the County, either directly or through its representatives, in monitoring Contractor's progress and performance of this Agreement.

## 5. Term of Agreement

- A. **Initial Term** - The term of this Agreement shall commence on **the Effective Date** and shall remain in full force and for **48** month(s), or until termination of the Agreement, whichever occurs first.
- B. **Term Extension** - The Parties may extend the term of this Agreement for three (3) additional twenty-four (24) month periods pursuant to the same terms, conditions, and pricing set forth in the Agreement by mutually executing an amendment to this Agreement, as provided herein.

## 6. Compensation and Method of Payment

- A. **Services Fee** - As total compensation for the Services, the County shall pay the Contractor the sums as provided in this Section ("Services Fee"), pursuant to the terms and conditions as provided in this Agreement. It is acknowledged and agreed by Contractor that this compensation constitutes a limitation upon County's obligation to compensate Contractor for such Services required by this Agreement but does not constitute a limitation upon Contractor's obligation to perform all of the Services required by this Agreement. In no event will the Services Fee paid exceed the not-to-exceed sums set out in subsections below, unless the Parties agree to increase this sum by written amendment as authorized in the Amendment Section of this Agreement.
- B. **Spending Cap and Payment Structure** - The County agrees to pay the Contractor the total not-to-exceed sum of **\$9,158,372.76** for Services completed and accepted herein if applicable, payable on a fixed-fee basis for the deliverables described in the Statement of Work of this agreement and consistent with Exhibit F, payable in annual not-to-exceed amounts as follows:
- Year 1 - \$2,215,467.00 (October 1, 2022 – September 29, 2023)  
Year 2 - \$2,241,828.51 (October 1, 2023 – September 29, 2024)  
Year 3 - \$2,318,683.37 (October 1, 2024 – September 29, 2025)  
Year 4 - \$2,382,393.87 (October 1, 2025 – September 29, 2026)
- C. **Travel Expenses** - The Services Fee includes all travel, lodging and per diem expenses incurred by Contractor in performing the Services.
- D. **Taxes** - Contractor acknowledges that the County is not subject to any state or federal sales, use, transportation and certain excise taxes.
- E. **Payments and Invoicing** - Contractor shall submit invoices for payments due as provided herein and authorized reimbursable expenses incurred with such documentation as required by County. Invoices shall be submitted to the designated person as set out in the Notices Section herein.  
For time and materials Services, all Contractor Personnel shall maintain logs of time worked, and each invoice shall state the date and number of hours worked for Services authorized to be billed on a time and materials basis. All payments shall be made in accordance with the requirements of Section 218.70 et seq., Florida Statutes, "The Local Government Prompt Payment Act." The County may dispute any payments invoiced by Contractor in accordance with the County's Invoice Payments Dispute Resolution Process established in accordance with Section 218.76, Florida Statutes, and any such disputes shall be resolved in accordance with the County's Dispute Resolution Process.

## 7. Personnel

- A. **E-Verify** - The contractor and subcontractor must register with and use the E-verify system in accordance with Florida Statute 448.095. A contractor and subcontractor may not enter into a contract with the County unless each party registers with and uses the E-verify system. If a contractor enters a contract with a subcontractor, the subcontractor must provide the contractor with an affidavit stating that the Subcontractor does not employ, contract with, or subcontract with unauthorized aliens. The contractor must maintain a copy of the affidavit for the duration of the contract. If the County, Contractor, or Subcontractor has a good faith belief that a person or entity with which it is contracting has knowingly violated Florida Statute 448.09(1) shall immediately terminate the contract with the person or entity. If the County has a good faith belief that a Subcontractor knowingly violated this provision, but the Contractor otherwise complied with this provision, the County will notify the Contractor and order that the Contractor immediately terminate the contract with the Subcontractor. A contract terminated under the provisions of this section is not a breach of contract and may not be considered such. Any contract termination under the provisions of this section may be challenged to Section 448.095(2)(d), Florida Statute. Contractor acknowledges upon termination of this agreement by the County for violation of this section by Contractor, Contractor may not be awarded a public contract for at least one (1) year. Contractor acknowledges that Contractor is liable for any additional costs incurred by the County as a result of termination of any contract for a violation of this section. Contractor or Subcontractor shall insert in any subcontracts the clauses set forth in this section, requiring the subcontracts to include these clauses in any lower tier subcontracts. Contractor shall be responsible for compliance by any Subcontractor or Lower Tier Subcontractor with the clause set for in this section.
- B. **Qualified Personnel** - Contractor agrees that each person performing Services in connection with this Agreement shall have the qualifications and shall fulfill the requirements set forth in this Agreement.

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- C. **Approval and Replacement of Personnel** - The County shall have the right to approve all Contractor Personnel assigned to provide the Services, which approval shall not be unreasonably withheld. Prior to commencing the Services, the Contractor shall provide at least ten (10) days written notice of the names and qualifications of the Contractor Personnel assigned to perform Services pursuant to the Agreement. Thereafter, during the term of this Agreement, the Contractor shall promptly and as required by the County provide written notice of the names and qualifications of any additional Contractor Personnel assigned to perform Services. The County, on a reasonable basis, shall have the right to require the removal and replacement of any of the Contractor Personnel performing Services, at any time during the term of the Agreement. The County will notify Contractor in writing in the event the County requires such action. Contractor shall accomplish any such removal within forty-eight (48) hours after receipt of notice from the County and shall promptly replace such person with another person, acceptable to the County, with sufficient knowledge and expertise to perform the Services assigned to such individual in accordance with this Agreement. In situations where individual Contractor Personnel are prohibited by applicable law from providing Services, removal and replacement of such Contractor Personnel shall be immediate and not subject to such forty-eight (48) hour replacement timeframe and the provisions of the Termination Section of this Agreement shall apply if minimum required staffing is not maintained.

**8. Termination****A. Contractor Default Provisions and Remedies of County**

1. **Events of Default** - Any of the following shall constitute a "Contractor Event of Default" hereunder:
  - i. Contractor fails to establish sufficient subcontracted agreement(s) as specified in Exhibit A, Statement of Work.
  - ii. Contractor fails to maintain the staffing necessary to perform the Services as required in the Agreement, fails to perform the Services as specified in the Agreement, or fails to complete the Services within the completion dates as specified in the Agreement;
  - iii. Contractor breaches Confidential Information Section of this Agreement;
  - iv. Contractor fails to gain acceptance of goods and/or services deliverable, for 2 consecutive iterations; or
  - v. Contractor fails to perform or observe any of the other material provisions of this Agreement.
2. **Cure Provisions** - Upon the occurrence of a Contractor Event of Default as set out above, the County shall provide written notice of such Contractor Event of Default to Contractor ("Notice to Cure"), and Contractor shall have 30 calendar days after the date of a Notice to Cure to correct, cure, and/or remedy the Contractor Event of Default described in the written notice.
3. **Termination for Cause by the County** - In the event that Contractor fails to cure a Contractor Event of Default as authorized herein, or upon the occurrence of a Contractor Event of Default as specified in Termination – Contractor Default Provisions and Remedies of County – Events of Default Section of this Agreement, the County may terminate this Agreement in whole or in part, effective upon receipt by Contractor of written notice of termination pursuant to this provision, and may pursue such remedies at law or in equity as may be available to the County.

**B. County Default Provisions and Remedies of Contractor**

1. **Events of Default** - Any of the following shall constitute a "County Event of Default" hereunder:
  - i. the County fails to make timely undisputed payments as described in this Agreement;
  - ii. the County breaches Confidential Information Section of this Agreement; or
  - iii. the County fails to perform any of the other material provisions of this Agreement.
2. **Cure Provisions** - Upon the occurrence of a County Event of Default as set out above, Contractor shall provide written notice of such County Event of Default to the County ("Notice to Cure"), and the County shall have thirty (30) calendar days after the date of a Notice to Cure to correct, cure, and/or remedy the County Event of Default described in the written notice.
3. **Termination for Cause by Contractor** - In the event the County fails to cure a County Event of Default as authorized herein, Contractor may terminate this Agreement in whole or in part effective on receipt by the County of written notice of termination pursuant to this provision, and may pursue such remedies at law or in equity as may be available to the Contractor.

**C. Termination for Convenience**

1. Notwithstanding any other provision herein, beginning two (2) years after the effective date, the County may terminate this Agreement, without cause, by giving 30 days advance written notice to the Contractor of its election to terminate this Agreement pursuant to this provision.

**9. Time is of the Essence**

Time is of the essence with respect to all provisions of this Agreement that specify a time for performance, including the Services as described in the Exhibits attached hereto; provided, however, that the foregoing shall not be construed to limit a Party's cure period allowed in the Agreement.

**10. Confidential Information and Public Records**

- A. County Confidential Information** - Contractor shall not disclose to any third-party County Confidential Information that Contractor, through its Contractor Personnel, has access to or has received from the County pursuant to its performance of Services pursuant to the Agreement, unless approved in writing by the County Contract Manager. All such County Confidential Information will be held in trust and confidence from the date of disclosure by the County, and discussions involving such County Confidential Information shall be limited to Contractor Personnel as is necessary to complete the Services.
- B. Contractor Confidential Information** - All Contractor Confidential Information received by the County from Contractor will be held in trust and confidence from the date of disclosure by Contractor and discussions involving such Contractor Confidential Information shall be limited to the members of the County's staff and the County's subcontractors who require such information in the performance of this Agreement. The County acknowledges and agrees to respect the copyrights, registrations, trade secrets and other proprietary rights of Contractor in the Contractor Confidential Information during and after the term of the Agreement and shall at all times maintain the confidentiality of the Contractor Confidential Information provided to the County, subject to federal law and the laws of the State of Florida related to public records disclosure. Contractor shall be solely responsible for taking any and all action it deems necessary to protect its Contractor Confidential Information except as provided herein. Contractor acknowledges that the County is subject to public records legislation, including but not limited to Chapter 119, Florida Statutes, and the Florida Rules of Judicial Administration, and that any of the County's obligations under this Section may be superseded by its obligations under any requirements of said laws.
- C. Public Records** - Contractor acknowledges that information and data it manages as part of the services may be public records in accordance with Chapter 119, Florida Statutes and Pinellas County public records policies. Contractor agrees that prior to providing services it will implement policies and procedures to maintain, produce, secure, and retain public records in accordance with applicable laws, regulations, and County policies, including but not limited to the Section 119.0701, Florida Statutes. Notwithstanding any other provision of this Agreement relating to compensation, the Contractor agrees to charge the County, and/or any third parties requesting public records only such fees allowed by Section 119.07, Florida Statutes, and County policy for locating and producing public records during the term of this Agreement.

**If the contractor has questions regarding the application of Chapter 119, Florida Statutes, to the contractor's duty to provide public records relating to this agreement, the contractor shall contact:**

**Pinellas County Board of County Commissioners**

**Purchasing and Risk Management Division**

**400 S. Ft. Harrison Ave, 6th Floor,**

**Clearwater, FL 33756**

**AGREEMENT****Public Records Liaison****Phone: 727-464-3237****Email: [mcchartier@pinellascounty.org](mailto:mcchartier@pinellascounty.org)****11. Audit**

Contractor shall retain all records relating to this Agreement for a period of at least 5 years after final payment is made. All records shall be kept in such a way as will permit their inspection pursuant to Chapter 119, Florida Statutes. In addition, County reserves the right to examine and/or audit such records.

**12. Compliance with Laws**

Contractor shall comply with all applicable federal, state, county and local laws, ordinances, rules and regulations in the performance of its obligations under this Agreement, including the procurement of permits and certificates where required, and including but not limited to laws related to Workers Compensation, Americans with Disabilities Act (ADA), Section 504 of the Rehabilitation Act of 1973, Minority Business Enterprise (MBE), occupational safety and health and the environment, equal employment opportunity, privacy of medical records and information, as applicable. Failure to comply with any of the above provisions shall be considered a material breach of the Agreement.

**13. Digital Accessibility**

Contractor acknowledges and warrants that all digital content and services provided under this contract conforms and shall continue to conform during the Term of this Agreement to the W3C Web Content Accessibility Guidelines, version 2.0 ("WCAG 2.0") at conformance Level A and AA. If all digital content and services does not fully conform to WCAG 2.0 A and AA, Contractor shall advise Pinellas County in writing of the nonconformance prior to execution of this Agreement and shall provide Pinellas County a plan to achieve conformance to WCAG 2.0 A and AA, including but not limited to, an intended timeline for conformance. Failure to achieve conformance, as determined in Pinellas County's sole discretion, on its intended timeline shall be considered a material breach of this Agreement and grounds for termination by Pinellas County.

If during the Term of this Agreement, Contractor fails to maintain compliance with WCAG 2.0 A and AA or Pinellas County otherwise identifies an issue related to accessibility of the product (the "Accessibility Issue") that renders the product inaccessible, then Pinellas County shall notify Contractor of non-compliance. Within 30 days of Contractor's receipt of a non-compliance notice ("Notice"), Contractor and Pinellas County shall meet and mutually agree upon an appropriate timeline for resolution of the Accessibility Issue(s) ("Initial Meeting").

Should Contractor:

- i. fail to acknowledge receipt of the notice within 30 days of receipt of the Notice;
- ii. unreasonably and solely withhold agreement regarding a timeline for resolution for more than 30 days following the Initial Meeting; or
- iii. fail to materially resolve the Accessibility Issue(s) within the agreed-upon timeline,

Failure to comply with the requirements of this section shall constitute a material breach of this Agreement and shall be grounds for termination of this Agreement by Pinellas County and subject Contractor to the Liability and Insurance – Indemnification Section of this Agreement, "Indemnification."

**14. Public Entities Crimes**

Contractor is directed to the Florida Public Entities Crime Act, Section 287.133, Florida Statutes, as well as Florida Statute 287.135 regarding Scrutinized Companies, and represents to County that Contractor is qualified to transact business with public entities in Florida, and to enter into and fully perform this Agreement subject to the provisions stated therein. Failure to comply with any of the above provisions shall be considered a material breach of the Agreement.

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**15. Liability and Insurance**

- A. **Insurance** - Contractor shall comply with the insurance requirements set out in the Insurance Exhibit, attached hereto and incorporated herein by reference.
- B. **Indemnification** - Contractor agrees to indemnify, pay the cost of defense, including attorney's fees, and hold harmless the County, its officers, employees and agents from all damages, suits, actions or claims, including reasonable attorney's fees incurred by the County, of any character brought on account of any injuries or damages received or sustained by any person, persons, or property, or in any way relating to or arising from the Agreement; or on account of any act or omission, neglect or misconduct of Contractor; or by, or on account of, any claim or amounts recovered under the Workers' Compensation Law; or of any other laws, regulations, ordinance, order or decree; or arising from or by reason of any actual or claimed trademark, patent or copyright infringement or litigation based thereon; or for any violation of requirements of the Americans with Disabilities Act of 1990, as may be amended, and all rules and regulations issued pursuant thereto (collectively the "ADA") except when such injury, damage, or violation was caused by the sole negligence of the County.
- C. **Liability** - Neither the County nor Contractor shall make any express or implied agreements, guaranties or representations, or incur any debt, in the name of or on behalf of the other Party. Neither the County nor Contractor shall be obligated by or have any liability under any agreements or representations made by the other that are not expressly authorized hereunder. The County shall have no liability or obligation for any damages to any person or property directly or indirectly arising out of the operation by Contractor of its business, whether caused by Contractor's negligence or willful action or failure to act.
- D. **Contractor's Taxes** - The County will have no liability for any sales, service, value added, use, excise, gross receipts, property, workers' compensation, unemployment compensation, withholding or other taxes, whether levied upon Contractor or Contractor's assets, or upon the County in connection with Services performed or business conducted by Contractor. Payment of all such taxes and liabilities shall be the responsibility of Contractor.

**16. County's Funding**

The Agreement is not a general obligation of the County. It is understood that neither this Agreement nor any representation by any County employee or officer creates any obligation to appropriate or make monies available for the purpose of the Agreement beyond the fiscal year in which this Agreement is executed. No liability shall be incurred by the County, or any department, beyond the monies budgeted and available for this purpose. If funds are not appropriated by the County for any or all of this Agreement, the County shall not be obligated to pay any sums provided pursuant to this Agreement beyond the portion for which funds are appropriated. The County agrees to promptly notify Contractor in writing of such failure of appropriation, and upon receipt of such notice, this Agreement, and all rights and obligations contained herein, shall terminate without liability or penalty to the County.

**17. Orders**

Within the term of this Agreement, County may place one or more orders for goods and/or services at the prices listed on the Price Schedule Exhibit attached hereto, and which is incorporated by reference hereto.

**18. Name Changes**

The Contractor is responsible for immediately notifying the County of any company name change, which would cause invoicing to change from the name used at the time of the original Agreement.

<b>AGREEMENT</b>
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**19. Acceptance of Services**

For all Services deliverables that require County acceptance as provided in the Statement of Work, not including the provision of the Unite Us Platform, the County, through the Human Services Department Director or designee, will have 10 calendar days to review the deliverable(s) after receipt or completion of same by Contractor, and either accept or reject the deliverable(s) by written notice to **Unite USA Inc.** If a deliverable is rejected, the written notice from the County will specify any required changes, deficiencies, and/or additions necessary. Contractor shall then have 7 calendar days to revise the deliverable(s) to resubmit and/or complete the deliverable(s) for review and approval by the County, who will then have 7 calendar days to review and approve, or reject the deliverable(s); provided however, that Contractor shall not be responsible for any delays in the overall project schedule that result from the County's failure to timely approve or reject deliverable(s) as provided herein. Upon final acceptance of the deliverable(s), the County will accept the deliverable(s) in writing.

**20. Subcontracting/Assignment**

- A. **Subcontracting** - Contractor is fully responsible for completion of the Services required by this Agreement and for completion of all subcontractor work, if authorized as provided herein. Contractor shall not subcontract any work under this Agreement to any subcontractor other than the subcontractors specified in the proposal and previously approved by the County, without the prior written consent of the County, which shall be determined by the County in its sole discretion.
- B. **Assignment** - This Agreement, and any rights or obligations hereunder, shall not be assigned, transferred or delegated to any other person or entity. Any purported assignment in violation of this section shall be null and void.

**21. Survival**

The provisions of this Agreement shall survive the expiration or termination of this Agreement.

**22. Notices**

All notices, authorizations, and requests in connection with this Agreement shall be deemed given on the day they are: (1) deposited in the U.S. mail, postage prepaid, certified or registered, return receipt requested; or (2) sent by air express courier (e.g., Federal Express, Airborne, etc.), charges prepaid, return receipt requested; or (3) sent via email and addressed as set forth below, which designated person(s) may be amended by either Party by giving written notice to the other Party:

For County:

Human Services Department Contracts Division  
440 Court Street, 2<sup>nd</sup> Floor  
Clearwater, FL 33756

Attn: Abigail Stanton

with a copy to:

Attn: Merry Celeste,  
Purchasing and Risk Management Division Director  
Pinellas County Purchasing Department  
400 South Fort Harrison Avenue  
Clearwater, FL 33756

For Contractor:

Unite USA Inc  
217 Broadway, Floor 8  
New York, NY 10007

Attn: Finance; General Counsel



**AGREEMENT****23. Conflict of Interest**

- A. The Contractor represents that it presently has no interest and shall acquire no interest, either direct or indirect, which would conflict in any manner with the performance of the Services required hereunder, and that no person having any such interest shall be employed by Contractor during the agreement term and any extensions.
- B. The Contractor shall promptly notify the County in writing of any business association, interest, or other circumstance which constitutes a conflict of interest as provided herein. If the Contractor is in doubt as to whether a prospective business association, interest, or other circumstance constitutes a conflict of interest, the Contractor may identify the prospective business association, interest or circumstance, the nature of work that the Contractor may undertake and request an opinion as to whether the business association, interest or circumstance constitutes a conflict of interest if entered into by the Contractor. The County agrees to notify the Contractor of its opinion within (10) calendar days of receipt of notification by the Contractor, which shall be binding on the Contractor.

**24. Right to Ownership**

All work created, originated and/or prepared by Contractor in performing Services pursuant to the Agreement, to the extent that such work, products, documentation, materials or information are described in or required by the Services (collectively, the "Work Product"), shall be County's property when completed and accepted, if acceptance is required in this Agreement, and the County has made payment of the sums due therefore. Notwithstanding anything in the immediately preceding sentence to the contrary, Work Product does not include any of Contractor's intellectual property (that is owned or licensed prior to this Contract) or Third Party intellectual property (that is owned or licensed prior to this Contract). The ideas, concepts, know-how or techniques developed during the course of this Agreement by the Contractor or jointly by Contractor and the County may be used by the County without obligation of notice or accounting to the Contractor. Information generated or developed as part of the CAM implementation and operation including, but not limited to, aggregate and client level data, associated program documents, reports, records, web domains and content, marketing materials, phone lines, and other material developed specifically for CAM shall be considered property of the County. Any data, information or other materials furnished by the County for use by Contractor under this Agreement shall remain the sole property of the County. Notwithstanding the foregoing, Contractor is the sole and exclusive owner of the Unite Us Platform, a commercially available, off-the-shelf software platform, including all functionality described herein.

**25. Amendment**

This Agreement may be amended by mutual written agreement of the Parties hereto.

**26. Severability**

The terms and conditions of this Agreement shall be deemed to be severable. Consequently, if any clause, term, or condition hereof shall be held to be illegal or void, such determination shall not affect the validity or legality of the remaining terms and conditions, and notwithstanding any such determination, this Agreement shall continue in full force and effect unless the particular clause, term, or condition held to be illegal or void renders the balance of the Agreement impossible to perform.

**27. Applicable Law and Venue**

This Agreement and any and all purchases made hereunder shall be governed by and construed in accordance with the laws of the State of Florida (without regard to principles of conflicts of laws). The Parties agree that all actions or proceedings arising in connection with this Agreement shall be tried and litigated exclusively in the state or federal (if permitted by law and a Party elects to file an action in federal court) courts located in or for Pinellas County, Florida. This choice of venue is intended by the Parties to be mandatory and not permissive in nature, and to preclude the possibility of litigation between the Parties with respect to, or arising out of, this Agreement in any jurisdiction other than that specified in this section. Each Party waives any right it may have to assert the doctrine of forum non-conveniens or similar doctrine or to object to venue with respect to any proceeding brought in accordance with this section.

**28. Waiver**

No waiver by either Party of any breach or violation of any covenant, term, condition, or provision of this Agreement or of the provisions of any ordinance or law, shall be construed to waive any other term, covenant, condition, provisions, ordinance or law, or of any subsequent breach or violation of the same.

**29. Due Authority**

Each Party to this Agreement represents and warrants that: (i) it has the full right and authority and has obtained all necessary approvals to enter into this Agreement; (ii) each person executing this Agreement on behalf of the Party is authorized to do so; (iii) this Agreement constitutes a valid and legally binding obligation of the Party, enforceable in accordance with its terms.

**30. No Third-Party Beneficiary**

The Parties hereto acknowledge and agree that there are no third-party beneficiaries to this Agreement. Persons or entities not a party to this Agreement may not claim any benefit from this Agreement or as third-party beneficiaries hereto.

**31. Force Majeure**

"Force Majeure Event" means any act or event that (i) prevents a Party (the "Nonperforming Party") from performing its obligations or satisfying a condition to the other Party's (the "Performing Party") obligations under this Agreement, (ii) is beyond the reasonable control of and not the fault of the Nonperforming Party, and (iii) the Nonperforming Party has not, through commercially reasonable efforts, been able to avoid or overcome. Force Majeure Event(s) do not include economic hardship, changes in market conditions or insufficiency of funds. If a Force Majeure Event occurs, the Nonperforming Party is excused from the performance and thereby prevented from satisfying any conditions precedent to the Performing Party's performance that cannot be satisfied, in each case to the extent limited or prevented by the Force Majeure Event. The Nonperforming Party must promptly notify the Performing Party upon the occurrence of a Force Majeure Event. When the Nonperforming Party is able to resume its performance or satisfy the conditions precedent to the Performing Party's obligations, the Nonperforming Party will resume performance under this Agreement without undue delay. Each Party will use commercially reasonable efforts to mitigate the effect of a Force Majeure Event.

**32. Order of Precedence**

All Exhibits attached and listed, or incorporated by reference below are incorporated in their entirety into, and form part of this Agreement and will have priority in the order listed

- A. Pinellas County Services Agreement, including all Exhibits and Attachments
- B. Pinellas County RFP 22-0101-P, Section B, Special Conditions and Section E, Specifications
- C. Unite Us RFP proposal dated December 8, 2021

In the event of an inconsistency in this Agreement and any of the attached Exhibits attached or incorporated by reference the terms set forth in this Standard Services Agreement will prevail. In the event there is a conflict between the terms of the Pinellas County Services Agreement then the conflict shall be resolved according to the following order of priority: any terms required as a condition of grant funds will have first priority; then the terms of this Standard Services Agreement; and then the terms of any remaining Exhibits.

**33. Entirety**

This Agreement constitutes the entire Agreement between the Parties and supersedes all prior negotiations, representations or agreements either oral or written.

(Signature Page Follows)

**Client-Centered Coordinated Access Model (CAM)**

**AGREEMENT**

**IN WITNESS WHEREOF**, the Parties hereto have executed this Agreement the day and year first written.

**PINELLAS COUNTY**, a political subdivision of the State of Florida **PINELLAS COUNTY** acting by and through the

**Board of County Commissioners**

**Unite USA, Inc DBA Unite Us**

By: \_\_\_\_\_

By: \_\_\_\_\_

DocuSigned by:  
*Andre L'Heureux*  
781F4C9843184D1...

Signature

Signature

Andre L'Heureux

Print Name

Print Name

COO

Title

Title

9/22/2022

Date

Date

**APPROVED AS TO FORM**

By: Keiah Townsend  
Office of the County Attorney

**EXHIBIT A - STATEMENT OF WORK****A. Program Summary**

Contractor: Unite USA, Inc. dba Unite Us (Unite Us)

Program Name: Coordinated Access Model

Priority Area: Behavioral Health and Substance Use Disorder Services

Agreement Term: From execution of agreement until September 30, 2027.

Target Population: County residents seeking high intensity community-based behavioral health services

Type of Intervention: Unite Us will provide a robust **Coordinated Access Model (CAM)** that allows for standardization, greater efficiency, and increased transparency in how consumers, families, caregivers, and professionals can access the right services within Pinellas County's behavioral health system. The **objectives of the CAM** are to (1) improve access to care (2) improve management of demand, (3) improve transparency of information, (4) minimize service duplication of intake services allowing for one initial intake that all agencies can utilize, and (5) improve consistency in consumer experience. The CAM will strive to ensure effective and efficient utilization of community services and resources funded by the Pinellas Integrated Care Alliance (PICA), a collaboration including Pinellas County Government, Pinellas County Sheriff's Office, Juvenile Welfare Board, Central Florida Behavioral Health Network, and the Department of Health in Pinellas.

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**Exhibit A**  
**Statement of Work**

**B. Program Staff and Services**

**I. Program Staff**

1. Unite Us will onboard and/or contract for staff to provide operational support for the CAM.
2. The CAM will utilize a staffing mix including master's prepared clinicians, licensed Master's level Clinicians, and Coordinators (who are Bachelor level in Social Work or Social Services). If the vendor is unable to recruit individuals at a Master level, recruitment can shift towards those with a Bachelor's level degree who have *significant experience (5-6 years)* at County discretion and approval.
3. Master level positions will conduct screening, initial assessment, and navigate the system for consumers and providers. The Coordinators will support answering telephone calls, supporting callers seeking general information and directing calls accordingly. CAM staff will be bilingual or multi-lingual (e.g., Spanish, Vietnamese, Haitian Creole) or have access to a translator or effective, real-time translation services.
4. Staff will be highly skilled and knowledgeable regarding, (1) the variety of service providers/services offered by those funded by PICA and private providers as they onboard to be a CAM partner and (2) a thorough understanding of services offered to consumers that are either not insured or insured. Program staff shall operate in alignment based on standardized training and established policy and procedure document that will be maintained by Unite Us or the on-boarding or contracted for services organization, as a guiding process, supporting staff in dynamically addressing questions, concerns, and operational guidelines. The policy and procedure document will be reviewed quarterly with the County.
5. Unite Us is responsible for ensuring standardized training is provided on an ongoing basis (e.g., monthly) to all users of the CAM in order to foster a consistent knowledge base and standardization in consumer experience. This will consist of users of the Shared Platform, which includes CAM staff as well as service providers conducting screening and initial assessment. The vendor will conduct frequent evaluations on application of standardized tools and improve upon identified gaps through training.

**II. Subcontracted Services**

1. In support of the optimal development and operation of the CAM, Unite Us shall on-board or contract for services such as clinical development and support services, as identified herein.
  2. Unite Us is fully responsible for completion of the services required by this Agreement and for completion of all subcontractor work. See "Standard Services Agreement", Section 20 (A).
  3. At the time of execution of this Agreement, University of South Florida (USF) is the only subcontractor approved to work with Unite Us for the CAM including
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**Exhibit A**  
**Statement of Work**

the following provisions:

- a) The administrative rate offered to USF shall not exceed ten percent (10%) of USF's contracted rate, as indicated in the Payment Schedule- Exhibit F.
  - b) At the time of execution, subcontractor is approved to perform duties described in parts B.I.5., B.III.1. d., B.IV.5-6., and B.VI.1-3 of this Agreement.
4. The County, through its Human Services Director or designee, must provide prior written consent for the use of any other subcontractor. Said consent shall be determined by the County in its sole discretion.

**III. Program Services and Procedures**

**1. Unite Us Platform**

- a) Overview. Unite Us has developed proprietary software to coordinate electronic referrals and case management tasks between health and social service organizations on a common platform (the "Unite Us Platform"). Subject to Pinellas County's payment of the fees set forth below, Unite Us shall provide for Pinellas County end-user licenses to use the Unite Us Platform within Pinellas County, Florida (the "Territory") during the Initial Term (as defined below) and manage the coordinated care network. Unite Us shall provide the County with 100 web-based licenses to the Unite Us Platform for use by County's Designated Providers (as defined in Exhibit D) during the Initial Term, provided that such licenses shall not be provided to (a) any entity that provides competitive services to those provided by Unite Us, with the exception of 211 Tampa Bay Cares Inc. as long as they are participating in the CAM, or (b) health systems, health plans, or government agencies with the exception of those health systems, health plans, or government agencies that are designated as partners of and working with the CAM. Additional licenses may be purchased at the County's sole discretion at the rates set forth in the Fee Schedule.
- b) Unite Us Insights. Unite Us will provide Pinellas County with up to three (3) licenses during the Initial Term to access network-level, de-identified data via the Unite Us Network Activity Dashboard and Health Equity Dashboard, and user-level information on Pinellas County's Unite Us Platform users via the Workforce Management Dashboard.
- c) Premium Support. Unite Us will enable the CAM to send referrals other than those related to mental and behavioral health directly to Unite Us for triage and care coordination to the appropriate CBOs within the Territory. For purposes of this Agreement, "CBOs" means any nonprofit social service organization (other than health systems, health plans and government agencies) primarily providing services that are not clinical in

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nature. The fees set forth below cover coordination of up to 50 referrals per week. The County and Unite Us will work together to mutually agree upon criteria to identify clients in need of premium support to achieve equity in care results.

- d) Weekly Data Delivery. Unite Us, and any approved subcontractor, shall provide client-level, identifiable data for individuals on the Unite Us Platform served or referred by County's Designated Providers or the CAM within the Territory on a weekly cadence via SFTP to be implemented on a mutually agreed timeline, subject to applicable law.

2. Intake Services

- a) The CAM will provide intake services for clients to facilitate effective access to care providers. Intake processes will include the following six communication channels:
    - i. A 1-800 number: Unite Us will on-board or contract for this service and implement the 1-800 number. At the termination of the contract, the 1-800 number and relevant data/materials will revert to the County. Unite Us will provide transition support to allow smooth operation of the CAM at the termination of the contract.
    - ii. Website: Unite Us will on-board or contract for the designing, developing, implementing, and operating a website with the County supporting in marketing. In the event of contract lapse or termination, the website, domain, and relevant data/materials will revert to the County. Unite Us will provide transition support to allow smooth operation of the CAM at the termination of the contract.
    - iii. E-referral Form: E-referrals will be embedded into the website.
    - iv. Online Chat: Clients will have the ability to initiate a secure chat to access CAM intake services via the website.
    - v. Text-Based: Clients will have the ability to opt-in to text-based communications. A link to Qualtrics will be texted to patients to access customer service surveys.
    - vi. Virtual Contact through Service Providers: Virtual communications will be conducted through Microsoft Teams, with each provider given a Teams link.
  - b) The CAM will provide a *live response* to consumers, emergency services, service providers and other professionals. When a live response is not feasible due to high call demand, consumers and emergency services will be prioritized based on a triage system. When necessary, and as a last measure, lowest risk clients will be called back within a timely manner.
  - c) The CAM will utilize standardized risk assessment tools such as PHQ9, GAD, Columbia, CAGE, the GAINS (GAINS will be administered as appropriate in the provider's office) and other tools agreed upon or identified by the County.
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3. Operational Hours: The CAM will be operational from 8AM – 10PM EST (see discussion of integration with crisis services below). Calls received outside of the Operation Hours will be tracked and transferred to the 211, 988 line, or other source at the County’s discretion and approval. Unite Us will provide monthly reports regarding call volume during non-operating hours to continually assess appropriateness of operational hours and modify as mutually agreeable.

**IV. Shared Platform**

1. At intake, the CAM will triage consumers to the appropriate level of care, with e-scheduling for participating care providers: The CAM will establish clearly defined referral pathways and processes and require timely responses by providers. In this initial phase, the CAM will engage with service providers that are funded under the Pinellas Integrated Care Alliance (PICA); however, the goal is to build the service provider list to include private practice clinicians and private hospitals in future phases of work in addition to other public-funded agencies funded outside of PICA. The CAM will offer e-scheduling of first appointment with participating providers based on reported wait times and client choice, as well as linkages to supportive services when deemed clinically appropriate (including social welfare programs, NAMI, housing services, etc.).
  2. The CAM will have e-referral, virtual screening, e-scheduling, automated text and email notification for scheduled appointments and reminders, and automated satisfaction surveys sent via email and text to consumers and service providers both (1) post screening and (2) post initial assessment.
  3. Virtual screening will include calls directly from consumers as well as intake from referral sources including but not limited to 911, EMS, and the Sheriff’s Department. Future working sessions will be conducted between crisis service agencies (e.g. National Suicide Line/ 988, Crisis Stabilization Units) and the CAM to develop referral pathways
  4. Satisfaction surveys may be delivered through a platform such as Qualtrics.
  5. E-scheduling will be dependent upon the providers sharing their availability with Us and/ or the contracted service.
  6. Consumer information, screening, initial assessment, crisis/safety plans will be collected only once, and inputted and *stored* into a *shared platform* that is managed by the CAM, however, service providers can access this information to retrieve and input data. Sharing information with the goal of streamlining communication with service providers will fostered through the adherence to Personal Health Information privacy requirements, which will be a requirement upon engaging with the consumer. The vision is for consumers to only “tell their story once.”
  7. Designated Providers shall be provided access to use the Unite Us platform to indicate whether a consumer followed through on their referral. Once service
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## **Exhibit A**

### **Statement of Work**

is initiated (e.g., intake and therapeutic intervention), the CAM shared platform will enable service providers to send automated updates to notify the CAM on progress, including but not limited to the following automated communication capabilities: consumer attended, consumer rescheduled, or consumer did not show up.

#### **V. Integration with Crisis Care and Other Service Providers**

1. Unite Us will on-board or contract for services and work to integrate the CAM into crisis services. Planning meetings will need to take place with key service providers to review draft pathways developed during the design phase and develop detailed algorithms with roles and responsibilities to facilitate this integration.
2. Unite Us shall engage NAMI to develop referral pathways from the CAM to peer and family support services. Unite Us will on-board or contract for services to develop a Management Plan with clients that can include structured contact in addition to linkage to NAMI as a support while they await Providers' appointment.

#### **VI. Telepsychiatry**

1. The CAM will offer telepsychiatry visits through the Unite Us subcontracted clinical provider using its existing consultation telepsychiatry model, which involves a HIPAA-compliant video session with the patient, their PCP, and the telepsychiatry provider. In this model, the telepsychiatry provider will assess the patient's symptoms and provide treatment recommendations to the PCP. The telepsychiatry visit is initiated at the request of the PCP who retains management of the patient including prescribing of any psychotherapeutic medication.
2. Unite Us shall provide telepsychiatry sessions for Psychiatric and Prescription recommendations when deemed clinically appropriate, e.g., for those exiting the justice system and require a bridge until their outpatient services are initiated.
3. For those clients who do not have a PCP of record, Unite Us shall work to facilitate a referral to psychiatry services, work with community behavioral health centers located in Pinellas County as close as possible to the client home address, to schedule appointments for psychiatry services. Unite Us will secure appointment slots with those community behavioral health centers to allow for the client to be seen within 24 hours in order to avoid a deterioration of the condition. The goal is to provide behavioral health services as soon as possible and avoid the utilization of the ER and/or crisis units.

#### **VII. Advertising and Marketing**

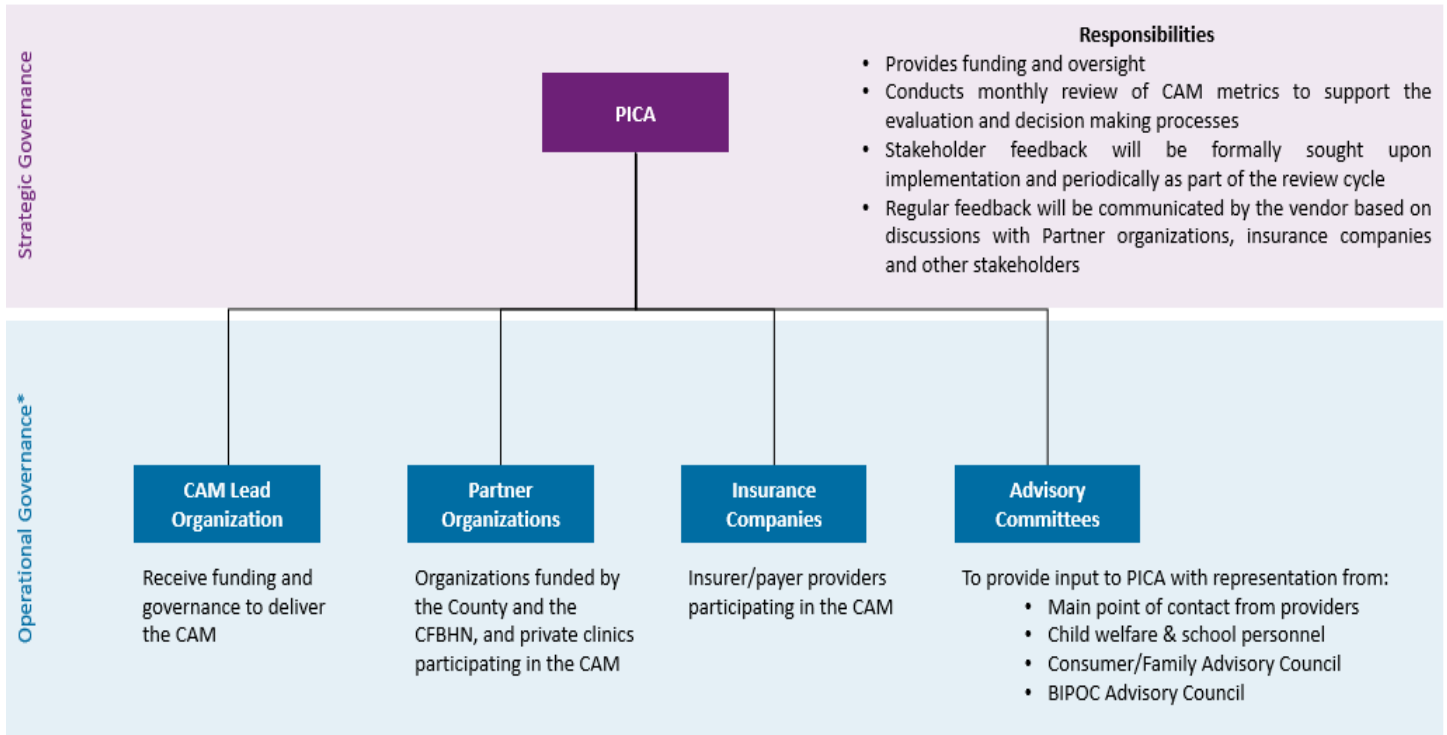
In line with the phased approach to CAM implementation, advertising/marketing will begin by targeting adults seeking outpatient behavioral health services and then expand to other age groups e.g., child and adolescents and seniors. The CAM will work collaboratively and in an integrated manner with organizations that are already imbedded within BIPOC communities while leveraging existing relationships and trust.

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## Exhibit A Statement of Work

### VIII. Governance and Responsibility

The following graph outlines the CAM governance and responsibilities:



### C. Objects and Deliverables

#### I. Objective.

1. The desired outcome is the establishment of a Coordinated Access Model to streamline access to care for persons experiencing behavioral health issues.
2. The CAM is intended to:
  - a) Enable consumer and family -centered services delivery in collaboration with delivery partners.
  - b) Support the provision of high-quality clinical outcomes.
  - c) Empower consumers, CAM staff, and service providers to:
    - i. Have clarity on how to make decisions about care needs and be transparent to support self-management and self-advocacy
    - ii. Understand service options, processes, and clinical tools to empower consumers/families/caregivers to make their own choices
    - iii. Be respected for their role in the consumer, family, and caregiver service journey
    - iv. Be used to their fullest capacity to support timely and effective access and service delivery
  - d) Be effective, efficient and adaptable to accommodate changes in governance, policy, funding, and consumer needs
  - e) Be results driven, holding itself and others accountable through strong

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governance processes, a common set of performance indicators, and transparent reporting mechanisms

- f) Enable equitable access to services, regardless of race, color, religion, culture, creed, sexual orientation, gender identity, national origin, ancestry, age, geography, disability, and other social determinants of health

**II. Schedule of Deliverables**

It has been agreed that all age groups will be provided services during the initial “soft launch” and go-live of the CAM. However, targeted marketing for child and adolescent will be phased in from initial go-live for adults. After that, targeted marketing for seniors will follow. At no point in this process will any calls be turned away or not serviced from the initial “soft launch.” The dates set forth below are subject to change and are contingent on Unite Us and County mutually working together to complete each Activity.

Activity	Start Date	End Date	Week Length	Notes
This Agreement with Pinellas and Subcontractor Agreement with USF Executed	7/1/2022	10/11/2022	-	
Pre-Implementation Planning - Cross functional project team - Kickoff meeting - Roles & Responsibilities	9/19/2022	10/31/2022	2	
Implementation Planning - Hire critical Workforce - Develop CAM SOPs - Procure & deploy technology solutions (Unite Us, Phone System, website, text, chat, etc.)	10/3/2022	12/30/2022	12	CAM SOP will be approved by Pinellas County and will be continuously updated based on feedback and evidence-based best practices
Engagement - Provider demo - Provider workflows - Provider orientation - Also includes CAM staff	11/28/2022	12/30/2022	5	This will be a continuous and iterative process. Note: 5 weeks due to holidays

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<p>Onboarding</p> <ul style="list-style-type: none"> <li>- Onboard providers</li> <li>- Build providers &amp; orgs</li> <li>- Train providers</li> <li>- Also includes CAM staff</li> </ul>	1/2/2023	1/20/2023	3	This will be a continuous and iterative process
<p>Prep for Soft Launch</p> <ul style="list-style-type: none"> <li>- Conduct internal test for all systems (website, text, phone, surveys, etc.)</li> <li>- Conduct external test for all systems</li> <li>- Make necessary adjustments</li> </ul>	1/23/2023	2/3/2023	2	
<p>Distribute marketing collateral &amp; educational sessions for law enforcement, local gov't, PCPs</p>	1/23/2023	2/3/2023	2	Adult age group only for soft launch. Will expand to all additional age groups, during go-live
<p>Soft Launch Go-Live</p> <ul style="list-style-type: none"> <li>- Test all systems</li> <li>- Conduct</li> </ul>	2/6/2023	3/17/2023	6	
<p>Post Soft Launch</p> <ul style="list-style-type: none"> <li>- Adjustments</li> </ul>	3/20/2023	3/31/2023	2	CAM will still be live
Prep for Go-Live	4/3/2023	4/14/2023	2	
Go-Live (Adults)	4/18/2023	9/1/2023		
Go-Live (Youth)	6/15/2023	9/1/2023		
Go-Live (Seniors)	8/15/2023	9/1/2023		
<p>Semi-annual progress review and monthly deliverable update</p>	9/1/2023	9/30/2023	4	No less than every (6) months the activities/deliverables will be reviewed and mutually agreed upon updates shall be made.
Continued Full Operation	9/1/2023	9/30/2026		

## Exhibit A Statement of Work

Initiate contract renewal and/or transition to Pinellas County or designated vendor	1/1/2026	9/30/2026		
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### III. Performance Measure Reporting

At a minimum, the vendor will track the below key performance measures related to the CAM. This information will be provided to the County in both an aggregate format as well as client identifying information. Processes and protocols will outline that clients will need to opt out of their information being shared with funders and service providers otherwise it is an automatic process of opting in:

Outcome Metrics	Process Metrics	Implementation Metrics
<ul style="list-style-type: none"> <li>▪ <b>Consumer Matching:</b> Proportion of consumers admitted to appropriate services</li> <li>▪ <b>No Show Rate:</b> for first appointment scheduled by the CAM</li> <li>▪ <b>Satisfaction Rate:</b> <ul style="list-style-type: none"> <li>▪ Consumer, family and caregiver satisfaction with CAM services</li> <li>▪ Provider satisfaction with CAM services</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>▪ Total contacts (e.g., calls, live chats that may not result in a referral/self-referral) received</li> <li>▪ Total number of referrals received</li> <li>▪ Total number of consumers screened/assessed</li> <li>▪ Total consumers receiving services after referral by the CAM</li> <li>▪ <b>Response Rate:</b> <ul style="list-style-type: none"> <li>▪ Live response/answer rate</li> <li>▪ Time from e-referral to screening (e.g., response time within 24 hours)</li> <li>▪ Percentage of screening that resulted in e-scheduling at the time of screening (e.g., 100%)</li> </ul> </li> <li>▪ Percentage of dropped calls</li> <li>▪ Total number of consumers re-contacting the CAM to be referred to a different service provider within a certain time frame (e.g., 3 months)</li> <li>▪ Total number of referral sources on behalf of the consumer re-contacting the CAM to be referred to a different service provider within a certain time frame (e.g., 3 months)</li> <li>▪ <b>Follow-up Rate:</b> Total number of consumers who receive follow up by the CAM after initial contact</li> <li>▪ Total number of referral categories contacting the CAM for the same consumer</li> </ul>	<ul style="list-style-type: none"> <li>▪ Total percentage of private clinicians/clinics who have been onboarded to the CAM (for child &amp; adolescent, adults, seniors)</li> <li>▪ Total percentage of providers sharing information electronically via the CAM</li> <li>▪ Number of complaints received by service providers</li> <li>▪ Number of complaints received by consumers, families and caregivers</li> <li>▪ Number of Outcome and Process metrics that are not meeting target (once they are set)</li> </ul>

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**IV. Reporting Requirements**

The COUNTY reserves the right to amend these data elements, performance measures, or reports as necessary to ensure that the overall programmatic purpose is demonstrated, quantified, and achieved. The report formats shall be prescribed and provided by the COUNTY.

1. Initial Implementation. The vendor will report the above Outcome and Process metrics on a weekly basis.
2. Regular Operations. The vendor will report the above metrics on a daily, monthly, quarterly and annual basis. Daily metric reporting will cover wait time data, call volumes and response rate, while client satisfaction rates can be reported quarterly. Each metric will have a reporting timeline agreed upon between Unite Us and the County upon kick off.
3. To align with the governance structure, the metrics will be shared at PICA for review, insights and to determine any action required. PICA will also utilize the data in population health planning.
4. The vendor will maintain a real-time data dashboard that allows for “at-a-glance” program information including, but not limited to call wait times, average wait times, call volume, peak call times, expressed needs, etc.
5. The vendor will maintain a data export function to provide detailed, identifiable and non-identifiable information to the County as the program funder.

**D. Additional Terms and Conditions**

**I. Invoices**

1. All invoices must be submitted on a monthly basis following the end of each month of service and shall consist of an invoice for one-twelfth of the annual contracted amount (monthly amount) for the services provided per Exhibit F, Payment Schedule, signed by an authorized Unite Us representative, and accompanied by a monthly project status report including updates and progress on contract activities and deliverables, as applicable and required by COUNTY.
2. Invoices shall be sent electronically to the Contract Manager on a monthly basis within thirty (30) days of the end of the month. The COUNTY shall not reimburse the UNITE US for any expenditures in excess of the amount budgeted without prior approval or notification. Invoicing due dates may be shortened as necessary to meet fiscal year deadlines or grant requirements.

**II. HIPAA**

1. UNITE US (Business Associate) agrees to execute a HIPAA Business Associate Agreement upon execution of this Agreement. (Exhibit B)
2. UNITE US agrees to use and disclose Protected Health Information in compliance with the Standards for Privacy, Security and Breach Notification of Individually Identifiable Health Information (45 C.F.R. Parts 160 and 164) under the Health Information Portability and Accountability Act of 1996 (HIPAA) and the Health Information Technology for Economic and Clinical Health Act (HITECH

**Exhibit A**  
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Act) and shall disclose any policies, rules or regulations enforcing these provisions upon request.

**III. Release of Information**

As a condition of receipt of a funding award from the COUNTY, UNITE US will ensure appropriate client releases of information are collected and maintained to support referrals and coordination of care. Additionally, UNITE US agrees to use and promote the use of a standard, community-wide Patient Authorization for Disclosure of Health Information - Multiparty Release of Information Form, upon request. This release covers general medical as well as Human Immunodeficiency Virus/Acquired Immunodeficiency Syndrome (HIV/AIDS), psychiatric, psychological, substance abuse information from medical record(s) in accordance with Florida Statutes 394.459, 381.004, 395.3025, and 90.503; 42 CFR, Part 2; and the Health Insurance Portability and Accountability act of 1996 (HIPAA) 45 CFR parts 160 and 164.

**IV. Monitoring and Quality Assurance**

1. UNITE US will comply with the COUNTY and departmental policies and procedures as indicated herein.
  2. UNITE US will cooperate in monitoring site visits including, but not limited to, review of staff, fiscal and patient-level records, programmatic documents, and will provide related information at any reasonable time through reasonable methods.
  3. UNITE US will cooperate and actively participate in QA review as prescribed by the COUNTY including working with an Agent of the COUNTY in the event QA services are procured.
  4. UNITE US will submit other reasonable reports and information in such formats and at such times as may be prescribed by the COUNTY.
  5. UNITE US will submit reports on any monitoring of the program funded in whole or in part by the COUNTY that are conducted by federal, state or local governmental agencies or other funders within ten (10) days of the UNITE US's receipt of the monitoring report.
  6. If the UNITE US receives licensing and accreditation reviews, each review will be submitted to the COUNTY within ten (10) days of receipt by the UNITE US.
  7. All monitoring reports will be as detailed as may be reasonably requested by the COUNTY and will be deemed incomplete if not satisfactory to the COUNTY as determined in its sole reasonable discretion. Reports will contain the information or be in the format as may be requested by the COUNTY. If approved by the COUNTY, the COUNTY will accept a report from another monitoring agency in lieu of reports customarily required by the COUNTY.
  8. Unite US shall maintain and provide the following documents upon request by the COUNTY within three (3) business days of receiving the request, as applicable:
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- a) Articles of Incorporation
- b) By-Laws
- c) Past twelve (12) months of financial statements and receipts
- d) Membership list of governing board
- e) All legally required licenses
- f) Latest agency financial audit and management letter
- g) Biographical data on the chief executive and program director
- h) Equal Employment Opportunity Program
- i) Inventory system – (equipment records)
- j) IRS Status Certification/501 (c) (3)
- k) Current job descriptions for staff positions and Organizational Chart
- l) Match documentation

V. **Emergency Response**

Unite Us shall implement and maintain a Continuity of Operation Plan in coordination with Pinellas County within 180 days of contract execution. The plan will provide detailed guidance on how Unite Us and its subcontractors will continue to perform the project's mission essential functions during a wide range of emergencies to ensure service delivery for Pinellas residents before, during, and after a disaster.

VI. **Assignment and Subcontracting**

1. This Agreement, and any rights or obligations hereunder, shall not be assigned, transferred or delegated to any other person or entity. Any purported assignment in violation of this section shall be null and void.
2. Unite US is fully responsible for completion of the Services required by this Agreement and for completion of all subcontractor work, if authorized as provided herein. Unite Us shall not subcontract any work under this Agreement to any subcontractor other than the subcontractors specified in the proposal (currently, University of South Florida) and previously approved by the COUNTY, without the prior written consent of the COUNTY, which shall be determined by the COUNTY in its sole discretion.

VII. **Amendment/Modification**

1. In addition to applicable federal, state and local statutes and regulations, this Agreement expresses the entire understanding of the parties concerning the matters covered herein. Unless specifically indicated herein, no addition to, or alteration of, the terms of this Agreement, whether by written or verbal understanding of the parties, their officers, agents or employees, shall be valid unless made in the form of a written amendment to this Agreement and formally approved by the parties.
  2. Budget or operational modifications that do not result in an increase of
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**Statement of Work**

funding, change the underlying public purpose of this Agreement or otherwise amend the terms of this Agreement shall be submitted in the format prescribed and provided by the COUNTY which is attached hereto and incorporated herein as Exhibit C.

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## **Exhibit B**

### **HIPAA Business Associate Agreement**

This Agreement (hereinafter referred to as AGREEMENT) is entered into by and between Pinellas County, a political subdivision of the State of Florida (hereinafter referred to as COVERED ENTITY) and the business associate named on the signature page hereof (hereinafter referred to as BUSINESS ASSOCIATE) (each hereinafter referred to as PARTY and collectively hereinafter referred to as the PARTIES) on the date last entered below.

**WHEREAS**, BUSINESS ASSOCIATE performs functions, activities, or services for, or on behalf of COVERED ENTITY, and BUSINESS ASSOCIATE receives, has access to or creates Health Information in order to perform such functions, activities or services; and

**WHEREAS**, COVERED ENTITY is subject to the Administrative Simplification requirements of the Health Insurance Portability and Accountability Act of 1996 and regulations promulgated there under (hereinafter referred to as HIPAA), including but not limited to, the Standards for Privacy of Individually Identifiable Health Information and the Security Standards for the Protection of Electronic Protected Health Information found at 45 Code of Federal Regulations Parts 160, 162 and 164; and

**WHEREAS**, HIPAA requires COVERED ENTITY to enter into a contract with BUSINESS ASSOCIATE to provide for the protection of the privacy and security of Health Information, and HIPAA prohibits the disclosure to or use of Health Information by BUSINESS ASSOCIATE if such a contract is not in place; and

**WHEREAS**, as a result of the requirements of the Health Information Technology for Economic and Clinical Health Act (hereinafter referred to as HITECH ACT), as incorporated in the American Recovery and Reinvestment Act of 2009, and its implementing regulations and guidance issued by the Secretary of the U.S. Department of Health and Human Services (hereinafter referred to as SECRETARY), all as amended from time to time, the PARTIES agree to this AGREEMENT in order to document the PARTIES' obligations under the HITECH ACT.

**NOW, THEREFORE**, in consideration of the foregoing, and for other good and valuable consideration, the receipt and adequacy of which is hereby acknowledged, the PARTIES agree as follows:

#### **ARTICLE I**

#### **DEFINITIONS**

1.1 "Business Associate" shall generally have the same meaning as the term "business associate" at 45 CFR 160.103, and in reference to the party to this agreement, shall mean Unite USA, Inc dba Unite Us.

1.2 "Covered Entity" shall generally have the same meaning as the term "covered entity" at 45 CFR 160.103, and in reference to the party to this agreement, shall mean Pinellas County by and through its Department of Human Services.

**Exhibit B**  
**HIPAA Business Associate Agreement**

1.3 “Disclose” and “Disclosure” shall mean, with respect to Health Information, the release, transfer, provision of access to, or divulging in any other manner of Health Information outside BUSINESS ASSOCIATE’s internal operations or to other than its employees.

1.4 “Health Information” shall mean information that: (a) relates to the past, present or future physical or mental health or condition of an individual; the provision of health care to an individual, or the past, present or future payment for the provision of health care to an individual; (b) identifies the individual (or for which there is a reasonable basis for believing that the information can be used to identify the individual); and (c) is received by BUSINESS ASSOCIATE from or on behalf of COVERED ENTITY, or is created by BUSINESS ASSOCIATE, or is made accessible to BUSINESS ASSOCIATE by COVERED ENTITY.

1.5 “HIPAA Rules”. “HIPAA Rules” shall mean the Privacy, Security, Breach Notification, and Enforcement Rules at 45 CFR Part 160 and Part 164.

1.6 “Privacy Regulations” shall mean the Standards for Privacy of Covered Individually Identifiable Health Information, 45 Code of Federal Regulations Parts 160 and 164, promulgated under HIPAA.

1.7 “Services” shall mean the services provided by BUSINESS ASSOCIATE pursuant to the Underlying Agreement, or if no such agreement is in effect, the services BUSINESS ASSOCIATE performs with respect to the COVERED ENTITY.

1.8 “Underlying Agreement” shall mean the services agreement executed by the COVERED ENTITY and BUSINESS ASSOCIATE, if any.

1.9 “Use” or “Uses” shall mean, with respect to Health Information, the sharing, employment, application, utilization, examination or analysis of such Health Information within BUSINESS ASSOCIATE’s internal operations.

1.10 Catch-all definition: The following terms used in this Agreement shall have the same meaning as those terms in the HIPAA Rules: Breach, Data Aggregation, Designated Record Set, Disclosure, Health Care Operations, Individual, Minimum Necessary, Notice of Privacy Practices, Protected Health Information, Required By Law, Secretary, Security Incident, Subcontractor, Unsecured Protected Health Information, and Use, unless otherwise specifically defined or referred under this Agreement.

**Exhibit B**  
**HIPAA Business Associate Agreement**

ARTICLE II

OBLIGATIONS OF BUSINESS ASSOCIATE

2.1 Initial Effective Date of Performance. The obligations created under this AGREEMENT shall become effective immediately upon execution of this AGREEMENT or the agreement to which it is appended.

2.2 Obligations and Activities of Business Associate. Business Associate agrees to:

- a. Not use or disclose protected health information other than as permitted or required by the Agreement or as required by law.
- b. Use appropriate safeguards and comply with Subpart C of 45 CFR Part 164 with respect to electronic protected health information, to prevent use or disclosure of protected health information other than as provided for by the Agreement.
- c. Report to covered entity any unauthorized acquisition, access, use or disclosure of protected health information not provided for by the Agreement of which it becomes aware, including breaches of unsecured protected health information as required at 45 CFR 164.410, and any security incident of which it becomes aware.
- d. In accordance with 45 CFR 164.502(e)(1)(ii) and 164.308(b)(2), if applicable, ensure that any subcontractors that create, receive, maintain, or transmit protected health information on behalf of the business associate agree to the same restrictions, conditions, and requirements that apply to the business associate with respect to such information.
- e. Make available protected health information in a designated record set to the COVERED ENTITY as necessary to satisfy covered entity's obligations under 45 CFR 164.524.
- f. Make any amendment(s) to protected health information in a designated record set as directed or agreed to by the covered entity pursuant to 45 CFR 164.526 or take other measures as necessary to satisfy covered entity's obligations under 45 CFR 164.526.
- g. Maintain and make available the information required to provide an accounting of disclosures to the "covered entity" as necessary to satisfy covered entity's obligations under 45 CFR 164.528.
- h. To the extent the business associate is to carry out one or more of covered entity's obligation(s) under Subpart E of 45 CFR Part 164, comply with the requirements of Subpart E that apply to the covered entity in the performance of such obligation(s).

**Exhibit B**  
**HIPAA Business Associate Agreement**

- i. Make its internal practices, books, and records available to the Secretary for purposes of determining compliance with the HIPAA Rules.

2.3 Permitted Uses and Disclosures of Health Information. BUSINESS ASSOCIATE is authorized to:

- a. Use and Disclose Health Information as necessary to perform Services for, or on behalf of COVERED ENTITY.
- b. Use Health Information to create aggregated or de-identified information consistent with the requirements of the Privacy Regulations.
- c. Use or Disclose Health Information (including aggregated or de-identified information) as otherwise directed by COVERED ENTITY provided that COVERED ENTITY shall not request BUSINESS ASSOCIATE to use or disclose Health Information in a manner that would not be permissible if done by COVERED ENTITY.
- d. To the extent required by the HITECH ACT, BUSINESS ASSOCIATE shall limit its use, disclosure or request of PHI to the Limited Data Set or, if needed, to the minimum necessary to accomplish the intended use, disclosure or request, respectively. Effective on the date the SECRETARY issues guidance on what constitutes "minimum necessary" for purposes of HIPAA, BUSINESS ASSOCIATE shall limit its use, disclosure or request of PHI to only the minimum necessary as set forth in such guidance.
- e. BUSINESS ASSOCIATE shall not use Health Information for any other purpose that would violate Subpart E of 45 CFR Part 164, except that if necessary, BUSINESS ASSOCIATE may use Health Information for the proper management and administration of BUSINESS ASSOCIATE or to carry out its legal responsibilities; provided that any use or disclosure described herein will not violate the Privacy Regulations or Florida law if done by COVERED ENTITY. Except as otherwise limited in this Agreement, BUSINESS ASSOCIATE may disclose Health Information for the proper management and administration of the BUSINESS ASSOCIATE, provided that with respect to any such disclosure either: (a) the disclosure is required by law (within the meaning of the Privacy Regulations) or (b) the disclosure would not otherwise violate Florida law and BUSINESS ASSOCIATE obtains reasonable written assurances from the person to whom the information is to be disclosed that such person will hold the information in confidence and will not use or further disclose such information except as required by law or for the purpose(s) for which it was disclosed by BUSINESS ASSOCIATE to such person, and that such person will notify BUSINESS ASSOCIATE of any instances of which it is aware in which the confidentiality of the information has been breached.

2.4 Compliance with Security Provisions. BUSINESS ASSOCIATE shall:

- a. Implement and maintain administrative safeguards as required by 45 CFR § 164.308, physical safeguards as required by 45 CFR § 164.310 and technical safeguards as required by 45 CFR § 164.312.
- b. Implement and document reasonable and appropriate policies and

**Exhibit B**  
**HIPAA Business Associate Agreement**

procedures as required by 45 CFR § 164.316.

c. Be in compliance with all requirements of the HITECH ACT related to security and applicable as if BUSINESS ASSOCIATE were a covered entity, as such term is defined in HIPAA.

d. BUSINESS ASSOCIATE shall use its best efforts to implement and maintain technologies and methodologies that render PHI unusable, unreadable or indecipherable to unauthorized individuals as specified in the HITECH ACT.

2.5 Compliance with Privacy Provisions. BUSINESS ASSOCIATE shall only use and disclose PHI in compliance with each applicable requirement of 45 CFR § 164.504(e). BUSINESS ASSOCIATE shall comply with all requirements of the HITECH ACT related to privacy and applicable as if BUSINESS ASSOCIATE were a covered entity, as such term is defined in HIPAA.

2.6 Mitigation. BUSINESS ASSOCIATE agrees to mitigate, to the extent practicable, any harmful effect that is known to BUSINESS ASSOCIATE of a use or disclosure of Health Information by BUSINESS ASSOCIATE in violation of the requirements of this AGREEMENT.

2.7 Breach of Unsecured PHI. The provisions of this Section are effective with respect to the discovery of a breach of unsecured PHI occurring on or after September 23, 2009.

a. With respect to any unauthorized acquisition, access, use or disclosure of COVERED ENTITY's PHI by BUSINESS ASSOCIATE, its agents or subcontractors, BUSINESS ASSOCIATE shall:

- 1) Investigate such unauthorized acquisition, access, use or disclosure;
- 2) Determine whether such unauthorized acquisition, access, use or disclosure constitutes a reportable breach under the HITECH ACT; and
- 3) Document and retain its findings under clauses 1) and 2) of this Section.

b. BUSINESS ASSOCIATE shall notify COVERED ENTITY of all suspected breaches within five (5) business days of discovery. If the BUSINESS ASSOCIATE discovers that a reportable breach has occurred, BUSINESS ASSOCIATE shall notify COVERED ENTITY of such reportable breach in writing within three (3) days of the date BUSINESS ASSOCIATE discovers and determines that such breach is reportable. BUSINESS ASSOCIATE shall notify COVERED ENTITY immediately upon discovering a reportable breach of more than 500 individuals.

c. BUSINESS ASSOCIATE shall be deemed to have discovered a breach as of

## **Exhibit B**

### **HIPAA Business Associate Agreement**

the first day that breach is either known to BUSINESS ASSOCIATE or any of its employees, officers or agents, other than the person who committed the breach, or by through exercise of reasonable diligence, should have been known to BUSINESS ASSOCIATE or any of its employees, officers or agents, other than the person who committed the breach.

d. To the extent the information is available to BUSINESS ASSOCIATE, it's written notice shall include the information required by 45 CFR §164.410.

e. BUSINESS ASSOCIATE shall promptly supplement the written report with additional information regarding the breach as it obtains such information.

f. BUSINESS ASSOCIATE shall cooperate with COVERED ENTITY in meeting the COVERED ENTITY's obligations under the HITECH ACT with respect to such breach. COVERED ENTITY shall have sole control over the timing and method of providing notification of such breach to the affected individual(s), the SECRETARY and, if applicable, the media, as required by the HITECH ACT.

g. BUSINESS ASSOCIATE shall reimburse COVERED ENTITY for its reasonable costs and expenses in providing the notification, including, but not limited to, any administrative costs associated with providing notice, printing and mailing costs, and costs of mitigating the harm for affected individuals whose PHI has or may have been compromised as a result of the breach. In order to be reimbursed by BUSINESS ASSOCIATE, COVERED ENTITY must provide to BUSINESS ASSOCIATE a written accounting of COVERED ENTITY's actual costs and to the extent applicable, copies of receipts or bills with respect thereto.

2.8 Availability of Internal Practices, Books and Records. BUSINESS ASSOCIATE agrees to make its internal practices, books and records relating to the use and disclosure of Health Information available to the SECRETARY, for purposes of determining COVERED ENTITY's compliance with the Privacy Regulations.

2.9 Agreement to Restriction on Disclosure. If COVERED ENTITY is required to comply with a restriction on the disclosure of PHI pursuant to Section 13405 of the HITECH ACT, then COVERED ENTITY shall, to the extent needed to comply with such restriction, provide written notice to BUSINESS ASSOCIATE of the name of the individual requesting the restriction and the PHI affected thereby. BUSINESS ASSOCIATE shall, upon receipt of such notification, not disclose the identified PHI to any health plan for the purposes of carrying out payment or health care operations, except as otherwise required by law.

**Exhibit B**  
**HIPAA Business Associate Agreement**

2.10 Accounting of Disclosures. Upon COVERED ENTITY's request, BUSINESS ASSOCIATE shall:

a. Provide to COVERED ENTITY an accounting of each disclosure of Health Information made by BUSINESS ASSOCIATE or its employees, agents, representatives, or subcontractors as required by the Privacy Regulations. For each Disclosure that requires an accounting under this Section 2.10, BUSINESS ASSOCIATE shall track the information required by the Privacy Regulations and shall securely maintain the information for six (6) years from the date of the Disclosure.

b. If BUSINESS ASSOCIATE is deemed to use or maintain an Electronic Health Record on behalf of COVERED ENTITY, then BUSINESS ASSOCIATE shall maintain an accounting of any disclosures made through an Electronic Health Record for treatment, payment, and health care operations, as applicable. Such accounting shall comply with the requirements of the HITECH ACT.

c. Upon request by COVERED ENTITY, BUSINESS ASSOCIATE shall provide such accounting to COVERED ENTITY in the time and manner specified by the HITECH ACT.

d. Where COVERED ENTITY responds to an individual's request for an accounting of disclosures made through an Electronic Health Record by providing the requesting individual with a list of all business associates acting on behalf of COVERED ENTITY; BUSINESS ASSOCIATE shall provide such accounting directly to the requesting individual in the time and manner specified by the HITECH ACT.

2.11 Use of Subcontractors and Agents. BUSINESS ASSOCIATE shall require each of its agents and subcontractors that receive Health Information from BUSINESS ASSOCIATE to execute a written agreement obligating the agent or subcontractor to comply with all the terms of this AGREEMENT with respect to such Health Information.

2.12 Access to Electronic Health Records.

a. If BUSINESS ASSOCIATE is deemed to use or maintain an Electronic Health Record on behalf of COVERED ENTITY with respect to PHI, BUSINESS ASSOCIATE shall provide an individual with a copy of the information contained in such Electronic Health Record in an electronic format and, if the individual so chooses, transmit such copy directly to an entity or person designated by the individual upon request, to the extent an individual has the right to request a copy of the PHI maintained in such Electronic Health Record pursuant to 45 CFR § 164.524 and makes such a request to BUSINESS ASSOCIATE.

b. BUSINESS ASSOCIATE may charge a fee to the individual for providing a copy of such information, but such fee may not exceed BUSINESS ASSOCIATE's labor costs in responding to the request for the copy.



**Exhibit B**  
**HIPAA Business Associate Agreement**

c. The provisions of 45 CFR § 164.524, including the exceptions to the requirement to provide a copy of PHI shall otherwise apply and BUSINESS ASSOCIATE shall comply therewith as if BUSINESS ASSOCIATE were the COVERED ENTITY.

d. At COVERED ENTITY's request, BUSINESS ASSOCIATE shall provide COVERED ENTITY with a copy of an individual's PHI maintained in an Electronic Health Record in an electronic format in a time and manner designated by COVERED ENTITY in order for COVERED ENTITY to comply with 45 CFR

§ 164.524, as amended by the HITECH ACT.

2.13 Limitations on Use of PHI for Marketing Purposes.

a. BUSINESS ASSOCIATE shall not use or disclose PHI for the purpose of making a communication about a product or service that encourages recipients of the communication to purchase or use the product or service, unless such communication:

1) Complies with the requirements the definition of marketing contained in 45 CFR § 164.501; and

2) Complies with the requirements of Subparagraphs a, b or c of Section 13406(a)(2) of the HITECH ACT.

b. COVERED ENTITY shall cooperate with BUSINESS ASSOCIATE to determine if the foregoing requirements are met with respect to any such marketing communication.

**ARTICLE III**

**TERM AND TERMINATION**

3.1 Term. Subject to the provisions of Sections 3.2 and 3.3, the term of this AGREEMENT shall be the term of the Underlying Agreement.

3.2 Termination of AGREEMENT.

a. Upon becoming aware of a pattern of activity or practice of either PARTY that constitutes a material breach or violation of obligations under the AGREEMENT, the non-breaching PARTY shall immediately notify the PARTY in breach.

b. Notification shall be provided in writing and shall specify the nature of the breach.

c. With respect to such breach or violation, upon receiving notice of the

**Exhibit B**  
**HIPAA Business Associate Agreement**

violation the non-breaching PARTY shall:

- 1) Allow the breaching PARTY thirty (30) days to take reasonable steps to cure such breach or end such violation; and
- 2) Terminate this AGREEMENT, if cure is either not possible or unsuccessful; and
- 3) Report the breach or violation to the SECRETARY if such termination is not feasible.

d. Upon termination of this AGREEMENT for any reason, BUSINESS ASSOCIATE shall return or destroy all PHI consistent with Section 3.4 as follows:

- 1) BUSINESS ASSOCIATE shall destroy PHI in a manner that renders the PHI unusable, unreadable or indecipherable to unauthorized individuals as specified in the HITECH ACT and shall certify in writing to COVERED ENTITY that such PHI has been destroyed in compliance with such standards; or
- 2) Return of PHI shall be made in a mutually agreed upon format and timeframe and at no additional cost to BUSINESS ASSOCIATE.

e. Where return or destruction are not feasible, BUSINESS ASSOCIATE shall continue to extend the protections of the AGREEMENT to such PHI and limit further uses and disclosures of such PHI to those purposes that make the return or destruction of such PHI not feasible.

3.3 Termination for Breach. COVERED ENTITY may terminate the Underlying Agreement and this AGREEMENT upon thirty (30) days written notice in the event: (a) BUSINESS ASSOCIATE does not promptly enter into negotiations to amend this AGREEMENT when requested by COVERED ENTITY pursuant to Section 4.2 or (b) BUSINESS ASSOCIATE does not enter into an amendment to this AGREEMENT providing assurances regarding the safeguarding of Health Information that the COVERED ENTITY, deems sufficient to satisfy the standards and requirements of HIPAA and the HITECH ACT.

3.4 Disposition of Health Information Upon Termination or Expiration. Upon termination or expiration of this AGREEMENT, BUSINESS ASSOCIATE shall either return or destroy, in COVERED ENTITY's sole discretion and in accordance with any instructions by COVERED ENTITY, all Health Information in the possession or control of BUSINESS ASSOCIATE and its agents and subcontractors. In such event, BUSINESS ASSOCIATE shall retain no copies of such Health Information. If BUSINESS ASSOCIATE determines that neither return nor destruction of Health Information is feasible, BUSINESS ASSOCIATE shall notify COVERED ENTITY of the conditions that make return or destruction infeasible, and may retain Health Information provided that BUSINESS ASSOCIATE: (a) continues to comply with the provisions of this AGREEMENT for as long as it retains Health Information, and (b) further limits uses and disclosures of Health Information to those

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**HIPAA Business Associate Agreement**

purposes that make the return or destruction of Health Information infeasible.

ARTICLE IV

MISCELLANEOUS

4.1 Indemnification. Notwithstanding anything to the contrary in the Underlying Agreement, BUSINESS ASSOCIATE agrees to indemnify, defend and hold harmless COVERED ENTITY and COVERED ENTITY's employees, directors, officers, subcontractors or agents against all damages, losses, lost profits, fines, penalties, costs or expenses (including reasonable attorneys' fees) and all liability to third parties arising from any breach of this AGREEMENT by BUSINESS ASSOCIATE or its employees, directors, officers, subcontractors, agents or other members of BUSINESS ASSOCIATE's workforce. BUSINESS ASSOCIATE's obligation to indemnify shall survive the expiration or termination of this AGREEMENT.

4.2 Amendment to Comply with Law. The PARTIES acknowledge that state and federal laws relating to electronic data security and privacy are rapidly evolving and that amendment of this AGREEMENT may be required to provide for procedures to ensure compliance with such developments. The PARTIES specifically agree to take such action as is necessary to implement the standards and requirements of HIPAA, the HITECH ACT and other applicable laws relating to the security or confidentiality of Health Information. The PARTIES understand and agree that COVERED ENTITY must receive satisfactory written assurance from BUSINESS ASSOCIATE that BUSINESS ASSOCIATE will adequately safeguard all Health Information that it receives or creates on behalf of COVERED ENTITY. Upon COVERED ENTITY's request, BUSINESS ASSOCIATE agrees to promptly enter into negotiations with COVERED ENTITY, concerning the terms of any amendment to this AGREEMENT embodying written assurances consistent with the standards and requirements of HIPAA, the HITECH ACT or other applicable laws.

4.3 Modification of Agreement. No alteration, amendment, or modification of this AGREEMENT shall be valid or effective unless in writing and signed the PARTIES.

4.4 Non-Waiver. A failure of any PARTY to enforce at any time any term, provision or condition of this AGREEMENT, or to exercise any right or option herein, shall in no way operate as a waiver thereof, nor shall any single or partial exercise preclude any other right or option herein. Waiver of any term, provision or condition of this AGREEMENT shall not be valid unless in writing, signed by the waiving PARTY and only to the extent set forth in such writing.

4.5 Agreement Drafted By All Parties. This AGREEMENT is the result of arm's length negotiations between the PARTIES and shall be construed to have been drafted by all PARTIES such that any ambiguities in this AGREEMENT shall not be construed against either PARTY.

4.6 Severability. If any provision of this AGREEMENT is found to be invalid or unenforceable by any court, such provision shall be ineffective only to the extent that it is in contravention of applicable laws without invalidating the remaining provisions hereof.

**Exhibit B**  
**HIPAA Business Associate Agreement**

4.7 No Third Party Beneficiaries. There are no third party beneficiaries to this AGREEMENT.

4.8 Counterparts. This AGREEMENT may be executed in one or more counterparts, each of which shall be deemed an original and will become effective and binding upon the PARTIES as of the effective date at such time as all the signatories hereto have signed a counterpart of this AGREEMENT.

4.9 Notices. The PARTIES designate the following to accept notice on their behalf:

If to BUSINESS ASSOCIATE:

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If to COVERED ENTITY:

Abigail Stanton, HIPAA Privacy Officer  
440 Court Street, 2<sup>nd</sup> Floor  
Clearwater, FL 33756

4.10 Applicable Law and Venue. This AGREEMENT shall be governed by and construed in accordance with the laws of the State of Florida. The PARTIES agree that all actions or proceedings arising in connection with this AGREEMENT shall be tried and litigated exclusively in the state or federal courts located in or nearest to Pinellas County, Florida.

4.11 Interpretation. This AGREEMENT shall be construed in a manner that will cause the PARTIES to comply with the requirements of HIPAA and the HITECH ACT.

## Exhibit B HIPAA Business Associate Agreement

IN WITNESS WHEREOF, each of the undersigned has caused this AGREEMENT to be duly executed in its name and on its behalf effective as of this \_\_\_\_\_ day of \_\_\_\_\_, 2022.

**COVERED ENTITY:** \_\_\_\_\_

**BUSINESS ASSOCIATE:** \_\_\_\_\_

Pinellas County Human Services

Unite Us

By: \_\_\_\_\_

Print Name: Karen B. Yatchum

Print Title: Director

DocuSigned by:  
*Andre L'Heureux*  
781F4C9843184D1...

By: \_\_\_\_\_

Print Name: Andre L'Heureux

Print Title: COO

**EXHIBIT C**

**Example Agreement Modification Request**



**Agreement Modification Request**  
**Human Services and Justice Coordination**

*For budget reallocation or minor agreement language modifications.*

<b>Authorized Official:</b>	<b>Date of Request:</b>
<b>Agency Name:</b>	<b>Effective Date:</b>
<b>Program Name:</b>	<b>Modification Number:</b>

**A. REQUESTED MODIFICATION:** Why is this change needed and what will be impacted by this change (staff, supplies, operations)? Please reference appropriate agreement section.

**B. BUDGET MODIFICATION:** Use chart as applicable and complete the Revised Annual Budget Form documenting the new revised budget.



Program Budget Category:	Original Contract Amount:	Amount Modified – Increase & Decrease	New Budget Amount:	Amount Expended as of Effective Date:	Modified Budget Balance:
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
			\$ 0.00		\$ 0.00
<b>Contract Total:</b>	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

<b>Agency Authorized Signature:</b>		<b>Date:</b>
<b>Name &amp; Title:</b>		

PINELLAS COUNTY HUMAN SERVICES – OFFICE USE ONLY		
<b>PROJECT MANAGER</b> certifies this modification is in line with the Contract Scope and Budget:		<b>Date</b>
Approval <b>GRANT/CONTRACT MANAGER</b>		<b>Date</b>
Approval <b>CONTRACTS DIVISION DIRECTOR</b>		<b>Date</b>
Approval <b>HUMAN SERVICES DEPARTMENT DIRECTOR</b>		<b>Date</b>

## **EXHIBIT D**

### **Designated Participating Providers**

Designated Participating Providers will initially include:

1. Pinellas County Human Services
2. Pinellas County Safety and Emergency Services
3. Pinellas Integrated Care Alliance (PICA) Team
4. Pinellas County Sheriff's Office (PCSO), including Jail Health Services and Safe Harbor
5. Central Florida Behavioral Health Network (CFBHN)
6. Florida Department of Health, Pinellas County Health Department
7. Juvenile Welfare Board of Pinellas, Inc.
8. Florida Department of Children and Families
9. Public Defender, 6<sup>th</sup> Judicial Circuit
10. Sixth Judicial Circuit of Florida
11. Pinellas County School Board
12. City of St. Petersburg
13. Clearwater Police Department
14. VA Bay Pines Health Care System
15. Personal Enrichment Through Mental Health Services, Inc. (PEMHS)
16. Directions for Mental Health, Inc. dba Directions for Living
17. Operation PAR, Inc.
18. Westcare-Gulfcoast Florida, Inc.
19. Suncoast Center, Inc.
20. Boley Centers, Inc.
21. Gulf Coast Jewish Family and Community Services, Inc.
22. Community Health Centers of Pinellas, Inc. dba Evara Health
23. Agency for Community Treatment Services, Inc.
24. NAMI Pinellas County Florida, Inc.
25. Largo Medical Center, Inc. dba HCA Florida Largo Hospital
26. Galecare, Inc. dba HCA Florida Northside Hospital
27. Baycare Behavioral Health, Inc.
28. Homeless Leadership Alliance of Pinellas, Inc.
29. 211 Tampa Bay Cares, Inc.
30. Homeless Emergency Project, Inc. dba Homeless Empowerment Program
31. ALPHA House of Pinellas County, Inc.
32. Catholic Charities, Diocese of St. Petersburg, Inc.
33. Community Action Stops Abuse, Inc. (CASA)
34. Daystar Life Center, Inc.
35. Family Support Services of Suncoast, LLC
36. Family Resources, Inc.
37. Society of Saint Vincent De Paul South Pinellas, Inc.
38. Van Gogh's Palette, Inc. dba Vincent House
39. Faith and Action for Strength Together, Inc. (FAST)
40. Foundation for Healthy St. Petersburg, Inc.

Additional Designated Providers can be added by mutual agreement of County and Unite Us

## **EXHIBIT E - INSURANCE REQUIREMENTS**

### **LIMITATIONS ON LIABILITY:**

By submitting a Proposal, the Proposer acknowledges and agrees that the services will be provided without any limitation on Proposer's liability. The County objects to and shall not be bound by any term or provision that purports to limit the Proposer's liability to any specified amount in the performance of the services. Proposer shall state any exceptions to this provision in its response, including specifying the proposed limits of liability in the stated exception to be included in the Services Agreement. Proposer is deemed to have accepted and agreed to provide the services without any limitation on Proposer's liability that Proposer does not take exception to in its response. Notwithstanding any exceptions by Proposer, the County reserves the right to declare its prohibition on any limitation on Proposer's liability as non-negotiable, to disqualify any Proposal that includes exceptions to this prohibition on any limitation on Proposer's liability, and to proceed with another responsive, responsible proposal, as determined by the County in its sole discretion.

### **INDEMNIFICATION:**

By submitting a Proposal, the Proposer acknowledges and agrees to be bound by and subject to the County's indemnification provisions as set out in the Services Agreement. The County objects to and shall not be bound by any term or provision that purports to modify or amend the Proposer's indemnification obligations in the Services Agreement, or requires the County to indemnify and/or hold the Proposer harmless in any way related to the services. Proposer shall state any exceptions to this provision in the response, including specifying the proposed revisions to the Services Agreement indemnification provisions, or the proposed indemnification from the County to the Proposer to be included in the Services Agreement. Proposer is deemed to have accepted and agreed to provide the services subject to the Services Agreement indemnification provisions that Proposer does not take exception to in its response. Notwithstanding any exceptions by Proposer, the County reserves the right to declare its indemnification requirements as non-negotiable, to disqualify any Proposal that includes exceptions to this paragraph, and to proceed with another responsive, responsible proposal, as determined by the County in its sole discretion.

### **INSURANCE:**

The recommended Proposer must provide a certificate of insurance and endorsement in accordance with the insurance requirements listed below, prior to award of contract. Failure to provide the required insurance within the requested timeframe may result in your submittal being deemed non-responsive.

The contracted Proposer shall obtain and maintain, and require any sub-contractors to obtain and maintain, at all times during its performance of the Agreement, insurance of the types and in the amounts set forth. For projects with a Completed Operations exposure, Contractor shall maintain coverage and provide evidence of insurance for two (2) years beyond final acceptance. All insurance policies shall be from responsible companies duly authorized to do business in the State of Florida and have an AM Best rating of A- VIII or better.

- a) Proposal submittals should include, the Proposer's current Certificate(s) of Insurance. If Proposer does not currently meet insurance requirements, Proposer shall also include verification from their broker or agent that any required insurance not provided at that time of submittal will be in place prior to the award of contract.
- b) Upon selection of vendor for award, the selected Vendor shall email certificate that is compliant with the insurance requirements to **[dquinta@pinellascounty.org](mailto:dquinta@pinellascounty.org)** If the certificate received is compliant, no further action may be necessary. The Certificate(s) of Insurance shall be signed by authorized representatives of the insurance companies shown on the Certificate(s). **The Certificate holder section shall indicate Pinellas County, a Subdivision of the State of Florida, 400 S Fort Harrison Ave, Clearwater, FL 33756. Pinellas County shall be named as an Additional Insured for General Liability. A Waiver of Subrogation for Workers Compensation shall be provided if Workers Compensation coverage is a requirement.**
- c) Approval by the County of any Certificate(s) of Insurance does not constitute verification by the County that the insurance requirements have been satisfied or that the insurance policy shown on the Certificate(s) of Insurance is in compliance with the requirements of the Agreement. County reserves the right to require a certified copy of the entire insurance policy, including endorsement(s), at any time during the RFP and/or contract period. If any insurance provided pursuant to the Agreement expires or cancels prior to the completion of the Work, you will be notified by CTrax, the authorized vendor of Pinellas County. Upon notification, renewal Certificate(s) of Insurance and endorsement(s) shall be furnished to Pinellas County Risk Management at [InsuranceCerts@pinellascounty.org](mailto:InsuranceCerts@pinellascounty.org) and to CTrax c/o JDi Data at



[PinellasSupport@ididata.com](mailto:PinellasSupport@ididata.com) by the Proposer or their agent prior to the expiration date.

- (1) Proposer shall also notify County within twenty-four (24) hours after receipt, of any notices of expiration, cancellation, nonrenewal or adverse material change in coverage received by said Proposer from its insurer. Notice shall be given by email to Pinellas County Risk Management at [InsuranceCerts@pinellascounty.org](mailto:InsuranceCerts@pinellascounty.org). Nothing contained herein shall absolve Proposer of this requirement to provide notice.
  - (2) Should the Proposer, at any time, not maintain the insurance coverages required herein, the County may terminate the Agreement.
- d) The County reserves the right, but not the duty, to review and request a copy of the Contractor's most recent annual report or audited financial statement when a self-insured retention (SIR) or deductible exceeds \$50,000.
- e) If subcontracting is allowed under this RFP, the Prime Proposer shall obtain and maintain, at all times during its performance of the Agreement, insurance of the types and in the amounts set forth; and require any subcontractors to obtain and maintain, at all times during its performance of the Agreement, insurance limits as it may apply to the portion of the Work performed by the subcontractor; *but in no event will the insurance limits be less than \$500,000 for Workers' Compensation/Employers' Liability, and \$1,000,000 for General Liability and Auto Liability if required below.*
- (1) All subcontracts between Proposer and its subcontractors shall be in writing and are subject to the County's prior written approval. Further, all subcontracts shall (1) require each subcontractor to be bound to Proposer to the same extent Proposer is bound to the County by the terms of the Contract Documents, as those terms may apply to the portion of the Work to be performed by the subcontractor;
- f) provide for the assignment of the subcontracts from Proposer to the County at the election of Owner upon termination of the Contract; (3) provide that County will be an additional indemnified party of the subcontract; (4) provide that the County will be an additional insured on all insurance policies required to be provided by the subcontractor except workers compensation and professional liability; (5) provide waiver of subrogation in favor of the County and other insurance terms and/or conditions as outlined below; (6) assign all warranties directly to the County; and (7) identify the County as an intended third-party beneficiary of the subcontract. Proposer shall make available to each proposed subcontractor, prior to the execution of the subcontract, copies of the Contract Documents to which the subcontractor will be bound by this Section C and identify to the subcontractor any terms and conditions of the proposed subcontract which may be at variance with the Contract Documents. Each insurance policy and/or certificate shall include the following terms and/or conditions:
- (1) The Named Insured on the Certificate of Insurance and insurance policy must match the entity's name that responded to the solicitation and/or is signing the agreement with the County. If Proposer is a Joint Venture per Section A. titled Joint Venture of this RFP, Certificate of Insurance and Named Insured must show Joint Venture Legal Entity name and the Joint Venture must comply with the requirements of Section C with regard to limits, terms and conditions, including completed operations coverage.
  - (2) Companies issuing the insurance policy, or policies, shall have no recourse against County for payment of premiums or assessments for any deductibles which all are at the sole responsibility and risk of Contractor.
  - (3) The term "County" or "Pinellas County" shall include all Authorities, Boards, Bureaus, Commissions, Divisions, Departments and Constitutional offices of County and individual members, employees thereof in their official capacities, and/or while acting on behalf of Pinellas County.
  - (4) All policies shall be written on a primary, non-contributory basis.
- g) The minimum insurance requirements and limits for this Agreement, which shall remain in effect throughout its duration and for two (2) years beyond final acceptance for projects with a Completed Operations exposure, are as follows:

- (1) Workers' Compensation Insurance : Worker's Compensation Insurance is required if required pursuant to Florida law. If, pursuant to Florida law, Worker's Compensation Insurance is required, employer's liability, also known as Worker's Compensation Part B, is also required in the amounts set forth herein

Limit	Florida Statutory
Employers' Liability Limits	
Per Employee	\$ 500,000
Per Employee Disease	\$ 500,000
Policy Limit Disease	\$ 500,000

If Licensee/Vendor/Contractor is not required by Florida law, to carry Workers Compensation Insurance in order to perform the requirements of this Agreement, County Waiver Form for workers compensation must be executed, submitted, and accepted by Risk Management. Failure to obtain required Worker's Compensation Insurance without submitting and receiving a waiver from Risk Management constitutes a material breach of this Agreement.

- (2) Commercial General Liability Insurance including, but not limited to, Independent Contractor, Contractual Liability Premises/Operations, Products/Completed Operations, and Personal Injury.

Limits

Combined Single Limit Per Occurrence	\$ 1,000,000
Products/Completed Operations Aggregate	\$ 2,000,000
Personal Injury and Advertising Injury	\$ 1,000,000
General Aggregate	\$ 2,000,000

- (3) Professional Liability (Errors and Omissions) Insurance with at least minimum limits as follows. If "claims made" coverage is provided, "tail coverage" extending three (3) years beyond completion and acceptance of the project with proof of "tail coverage" to be submitted with the invoice for final payment. In lieu of "tail coverage", Proposer may submit annually to the County, for a three (3) year period, a current certificate of insurance providing "claims made" insurance with prior acts coverage in force with a retroactive date no later than commencement date of this contract.

- (4) Limits

Each Occurrence or Claim	\$ 2,000,000
General Aggregate	\$ 2,000,000

For acceptance of Professional Liability coverage included within another policy required herein, a statement notifying the certificate holder must be included on the certificate of insurance and the total amount of said coverage per occurrence must be greater than or equal to the amount of Professional Liability and other coverage combined.

- (5) Cyber Risk Liability (Network Security/Privacy Liability) Insurance including cloud computing and mobile devices, for protection of private or confidential information whether electronic or non-electronic, network security and privacy; privacy against liability for system attacks, digital asset loss, denial or loss of service, introduction, implantation or spread of malicious software code, security breach, unauthorized access and use; including regulatory action expenses; and notification and credit monitoring expenses with at least minimum limits as follows:

Limits

Each Occurrence	\$ 1,000,000
General Aggregate	\$ 1,000,000

For acceptance of Cyber Risk Liability coverage included within another policy required herein, a statement notifying the certificate holder must be included on the certificate of insurance and the total amount of said coverage per occurrence must be greater than or equal to the amount of Cyber Risk Liability and other coverage combined.

- (6) Property Insurance Proposer will be responsible for all damage to its own property, equipment and/or materials.

**EXHIBIT F - PAYMENT SCHEDULE**

Pinellas County CAM				
Service (Annual Costs Estimated Per 1,000 inquiries per month)	Y1 Cost	Y2 Cost	Y3 Cost	Y4 Cost
<b>Unite Us Services</b>				
<b>Technical Requirements, including:</b> Virtual communication channels between the CAM, providers and consumers, including EMS, 911 and Law Enforcement. HIPAA Compliant information sharing and security practices. A shared platform which streamlines intake and data sharing across the resource and referral network. E-referrals and E-scheduling Automated processes and tools for follow-up communications with consumers and care providers	\$230,000.00	\$216,300.00	\$222,789.00	\$229,472.67
<b>Virtual Intake Services, including:</b> Multiple consumer access points Standardized Screening and Assessment Streamlined provider access to Client Records Triage to Appropriate Level of Care	\$90,000.00	\$92,700.00	\$95,481.00	\$98,345.43
<b>Monitoring and Reporting</b>	\$92,500.00	\$95,275.00	\$98,133.25	\$101,077.25
<b>Advertising/Marketing</b>	\$10,000.00	\$2,000.00	\$2,060.00	\$2,121.80
<b>Inclusivity</b> Language Translation and IDD Accessibility BIPOC Community Engagement	\$3,500.00	\$3,605.00	\$3,713.15	\$3,824.54
<b>SUBTOTAL UNITE US SERVICES</b>	\$426,000.00	\$409,880.00	\$422,176.40	\$434,841.69
<b>Subcontracted Services</b>				
<b>Monitoring Client Follow-Through, including:</b> Automated Reminders Update on Referral Completion Customer Satisfaction Surveys Recurring Performance Reporting Provider Satisfaction Surveys Website	\$135,000.00	\$139,050.00	\$143,221.50	\$147,518.15
<b>Facilities, Staffing, Training</b>	\$592,600.00	\$610,378.00	\$628,689.34	\$647,550.02
<b>Telepsychiatry*</b>	\$60,000.00	\$61,800.00	\$63,654.00	\$65,563.62
<b>Subcontractor Administrative Cost (not to exceed 10%)</b>	\$78,760.00	\$81,122.80	\$83,556.48	\$86,063.18
<b>SUBTOTAL SUBCONTRACTED SERVICES</b>	\$866,360.00	\$892,350.80	\$919,121.32	\$946,694.97
<b>SUBTOTAL MINIMUM REQUIREMENTS (UNITE US AND SUBCONTRACTED)</b>	\$1,292,360.00	\$1,302,230.80	\$1,341,297.72	\$1,381,536.66
<b>Unspecified Costs** (5%)</b>	\$64,618.00	\$65,111.54	\$67,064.89	\$69,076.83
<b>Additional Licenses ***</b>	\$180,000.00	\$180,000.00	\$195,000.00	\$195,000.00
<b>ANNUAL TOTAL</b>	\$1,536,978.00	\$1,547,342.34	\$1,603,362.61	\$1,645,613.49
<b>GRAND CONTACT TOTAL:</b>	\$9,158,372.76			

Additional 500 inquiries per month			
Y1 Cost	Y2 Cost	Y3 Cost	Y4 Cost
<b>Unite Us Services</b>			
\$115,000.00	\$118,450.00	\$122,003.50	\$125,663.61
\$45,000.00	\$46,350.00	\$47,740.50	\$49,172.72
\$46,250.00	\$47,637.50	\$49,066.63	\$50,538.62
\$5,000.00	\$1,000.00	\$1,030.00	\$1,060.90
\$1,750.00	\$1,802.50	\$1,856.58	\$1,912.28
\$213,000.00	\$215,240.00	\$221,697.21	\$228,348.12
<b>Subcontracted Services</b>			
\$67,500.00	\$69,525.00	\$71,610.75	\$73,759.07
\$296,300.00	\$305,189.00	\$314,344.67	\$323,775.01
\$30,000.00	\$30,900.00	\$31,827.00	\$32,781.81
\$39,380.00	\$40,561.40	\$41,778.24	\$43,031.59
\$433,180.00	\$446,175.40	\$459,560.66	\$473,347.48
\$646,180.00	\$661,415.40	\$681,257.87	\$701,695.60
\$32,309.00	\$33,070.77	\$34,062.89	\$35,084.78
\$678,489.00	\$694,486.17	\$715,320.76	\$736,780.38

\* Telepsychiatry services provided by a psychiatrist are billable by the psychiatrist and primary care physicians as the referring source. However, when the client does not have insurance, the program will pay for the service. This includes telepsychiatry for adults and children

\*\* Unspecified costs are only available for services that may be required due to unexpected conditions or events. Unspecified costs are not guaranteed as part of the contract, must be properly authorized by the County before performed, and may not exceed 5% of the overall contract value.

\*\*\* Additional licenses are not guaranteed as part of the contract. Utilization of current licenses and need for additional licenses must be documented and the addition of licenses must be properly authorized by the County in writing. Licenses may be added in blocks of 10 at the rates indicated below.

Unite Us Platform Licenses	Y1-Y2 Cost Per License	Y3-Y4 Cost Per License
First 100 licenses pre-purchased in SOW	Included	Included
101 - 300 additional licenses	\$ 1,800.00	\$ 1,950.00
300+ additional licenses	\$ 1,700.00	\$ 1,700.00

## **EXHIBIT G - PAYMENT/INVOICES**

### **PAYMENT/INVOICES:**

Contractor shall submit invoices for payment due as provided herein with such documentation as required by Pinellas County and all payments shall be made in accordance with the requirements of Section 218.70 et. seq, Florida Statutes, "The Local Government Prompt Payment Act." Invoices shall be submitted to the address below unless instructed otherwise on the purchase order, or if no purchase order, by the ordering department:

Finance Division Accounts Payable  
Pinellas County Board of County Commissioners  
P. O. Box 2438  
Clearwater, FL 33757

Each invoice shall include, at a minimum, the Contractor's name, contact information and the standard purchase order number. In order to expedite payment, it is recommended the Contractor also include the information shown in below. The County may dispute any payments invoiced by CONTRACTOR in accordance with the County's Dispute Resolution Process for Invoiced Payments, established in accordance with Section 218.76, Florida Statutes, and any such disputes shall be resolved in accordance with the County's Dispute Resolution Process.

### **INVOICE INFORMATION:**

**Contractor Information** Company name, mailing address, phone number, contact name and email address as provided on the PO

**Remit To** Billing address to which you are requesting payment be sent

**Invoice Date** Creation date of the invoice

**Invoice Number** Company tracking number

**Shipping Address** Address where goods and/or services were delivered

**Ordering Department** Name of ordering department, including name and phone number of contact person

**PO Number** Standard purchase order number

**Ship Date** Date the goods/services were sent/provided

**Quantity** Quantity of goods or services billed

**Description** Description of services or goods delivered

**Unit Price** Unit price for the quantity of goods/services delivered

**Line Total** Amount due by line item

**Invoice Total** Sum of all of the line totals for the invoice

Pinellas County offers a credit card payment process (ePayables) through Bank of America. Pinellas County does not charge vendors to participate in the program; however, there may be a charge by the company that processes your credit card transactions. For more information please visit Pinellas County purchasing website at ([www.pinellascounty.org/purchase](http://www.pinellascounty.org/purchase)).

## **EXHIBIT H - DISPUTE RESOLUTION FOR PINELLAS COUNTY BOARD OF COUNTY COMMISSIONERS IN MATTERS OF INVOICE PAYMENTS:**

Payment of invoices for work performed for Pinellas County Board of County Commissioners (County) is made, by standard, in arrears in accordance with Section 218.70, et. seq., Florida Statutes, the Local Government Prompt Payment Act.

If a dispute should arise as a result of non-payment of a payment request or invoice the following Dispute Resolution process shall apply:

- A. Pinellas County shall notify a vendor in writing within 10 days after receipt of an improper invoice, that the invoice is improper. The notice should indicate what steps the vendor should undertake to correct the invoice and resubmit a proper invoice to the County. The steps taken by the vendor shall be that of initially contacting the requesting department to validate their invoice and receive a sign off from that entity that would indicate that the invoice in question is in keeping with the terms and conditions of the agreement. Once sign off is obtained, the vendor should then resubmit the invoice as a "Corrected Invoice" to the requesting department which will initiate the payment timeline.
  1. Requesting department for this purpose is defined as the County department for whom the work is performed.
  2. Proper invoice for this purpose is defined as an invoice submitted for work performed that meets prior agreed upon terms or conditions to the satisfaction of Pinellas County.
- B. Should a dispute result between the vendor and the County about payment of a payment request or an invoice then the vendor should submit their dissatisfaction in writing to the Requesting Department. Each Requesting Department shall assign a representative who shall act as a "Dispute Manager" to resolve the issue at departmental level.
- C. The Dispute Manager shall first initiate procedures to investigate the dispute and document the steps taken to resolve the issue in accordance with section 218.76 Florida Statutes. Such procedures shall be commenced no later than 45 days after the date on which the payment request or invoice was received by Pinellas County, and shall not extend beyond 60 days after the date on which the payment request or invoice was received by Pinellas County.
- D. The Dispute Manager should investigate and ascertain that the work, for which the payment request or invoice has been submitted, was performed to Pinellas County's satisfaction and duly accepted by the Proper Authority. Proper Authority for this purpose is defined as the Pinellas County representative who is designated as the approving authority for the work performed in the contractual document. The Dispute Manager shall perform the required investigation and arrive at a solution before or at the 60 days timeframe for resolution of the dispute, per section 218.76, Florida Statutes. The County Administrator or his or her designee shall be the final arbiter in resolving the issue before it becomes a legal matter. The County Administrator or his or her designee will issue their decision in writing.
- E. Pinellas County Dispute Resolution Procedures shall not be subject to Chapter 120 of the Florida Statutes. The procedures shall also, per section 218.76, Florida Statutes, not be intended as an administrative proceeding which would prohibit a court from ruling again on any action resulting from the dispute.
- F. Should the dispute be resolved in the County's favor interest charges begin to accrue 15 days after the final decision made by the County. Should the dispute be resolved in the vendor's favor the County shall pay interest as of the original date the payment was due.
- G. For any legal action to recover any fees due because of the application of sections 218.70 et. seq., Florida Statutes, an award shall be made to cover court costs and reasonable attorney fees, including those fees incurred as a result of an appeal, to the prevailing party. If it is found that the non-prevailing party held back any payment that was the reason for the dispute without having any reasonable lawful basis or fact to dispute the prevailing party's claim to those amounts.

**EXHIBIT I – AMERICAN RESCUE PLAN ACT GRANT REQUIREMENTS CONTRACT****CONTRACT PROVISIONS FOR CONTRACTS UNDER FEDERAL AWARDS  
BID OR PROPOSAL NUMBER: 22-0101-P  
BID OR PROPOSAL TITLE: Coordinated Access Model**

This solicitation is either fully or partially funded with federal funds from the Coronavirus Local Fiscal Recovery Funds made available under the American Rescue Plan Act (ARPA). In addition to other terms and conditions required by Pinellas County and the applicable federal agency, all contracts awarded to the qualified bidder are subject to the following provisions, as applicable to the services provided.

**Equal Employment Opportunity:** Except as otherwise provided under 41 CFR Part 60, all contracts that meet the definition of “federally assisted construction contract” in 41 CFR Part 60-1.3 must include the equal opportunity clause provided under 41 CFR 60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 CFR Part, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 CFR part 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.”

If this contract meets the definition of a “federally assisted construction contract”, during the performance of this contract, the Contractor agrees as follows:

- (1) The CONTRACTOR will not discriminate against any employee or applicant for employment because of race, color, religion, sex, or national origin. The CONTRACTOR will take affirmative action to ensure that applicants are employed, and that employees are treated during employment without regard to their race, color, religion, sex, or national origin. Such action shall include, but not be limited to the following: Employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship. The CONTRACTOR agrees to post in conspicuous places, available to employees and applicants for employment, notices to be provided setting forth the provisions of this nondiscrimination clause.
- (2) The CONTRACTOR will, in all solicitations or advertisements for employees placed by or on behalf of the Contractor, state that all qualified applicants will receive considerations for employment without regard to race, color, religion, sex, or national origin.
- (3) The CONTRACTOR will not discharge or in any other manner discriminate against any employee or applicant for employment because such employee or applicant has inquired about, discussed, or disclosed the compensation of the employee or applicant or another employee or applicant. This provision shall not apply to instances in which an employee who has access to the compensation information of other employees or applicants as a part of such employee's essential job functions discloses the compensation of such other employees or applicants to individuals who do not otherwise have access to such information, unless such disclosure is in response to a formal complaint or charge, in furtherance of an investigation, proceeding, hearing, or action, including an investigation conducted by the employer, or is consistent with the contractor's legal duty to furnish information.
- (4) The CONTRACTOR will send to each labor union or representative of workers with which he has a collective bargaining agreement or other contract or understanding, a notice to be provided advising the said labor union or workers' representatives of the Contractor's

commitments under this section, and shall post copies of the notice in conspicuous places available to employees and applicants for employment.

(5) The CONTRACTOR will comply with all provisions of Executive Order 11246 of September 24, 1965, and of the rules, regulations, and relevant orders of the Secretary of Labor.

(6) The CONTRACTOR will furnish all information and reports required by Executive Order 11246 of September 24, 1965, and by rules, regulations, and orders of the Secretary of Labor, or pursuant thereto, and will permit access to his books, records, and accounts by the administering agency and the Secretary of Labor for purposes of investigation to ascertain compliance with such rules, regulations, and orders.

(7) In the event of the CONTRACTOR's noncompliance with the nondiscrimination clauses of this contract or with any of the said rules, regulations, or orders, this contract may be canceled, terminated, or suspended in whole or in part and the CONTRACTOR may be declared ineligible for further Government contracts or federally assisted construction contracts in accordance with procedures authorized in Executive Order 11246 of September 24, 1965, and such other sanctions may be imposed and remedies invoked as provided in Executive Order 11246 of September 24, 1965, or by rule, regulation, or order of the Secretary of Labor, or as otherwise provided by law.

(8) The CONTRACTOR will include the portion of the sentence immediately preceding paragraph (1) and the provisions of paragraphs (1) through (7) in every subcontract unless exempted by rules, regulations, or orders of the Secretary of Labor issued pursuant to section 204 of Executive Order 11246 of September 24, 1965, so that such provisions will be binding upon each subcontractor.

**Davis-Bacon Act** as amended (40 U.S.C. 3141-3148): When required by federal program legislation, for all prime construction contracts awarded in excess of \$2,000, Contractors are required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, Contractors must be required to pay wages not less than once a week. If the applicable grant award contains Davis-Bacon provisions, the County will place a copy of the current prevailing wage determination issued by the Department of Labor in the solicitation document. The decision to award a contract shall be conditioned upon the acceptance of the wage determination [Appendix II to 2 CFR Part 200].

**Copeland Anti Kick Back Act:** If Davis-Bacon is applicable, CONTRACTOR shall also comply with all the requirements of 29 CFR Part 3 which are incorporated by reference to this contract. Contractors are prohibited from inducing by any means any person employed in the construction, completion or repair of public work to give up any part of the compensation to which he or she is otherwise entitled [Appendix II to 2 CFR Part 200].

**Contract Work Hours and Safety Standards Act (40 U.S.C. 3701–3708):** Where applicable, all contracts awarded **in excess of \$100,000** that involve the employment of mechanics or laborers must be in compliance with 40 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each CONTRACTOR is required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles



ordinarily available on the open market, or contracts for transportation or transmission of intelligence [Appendix II to 2 CFR Part 200].

**Clean Air Act (42 U.S.C. 7401–7671q.) and the Federal Water Pollution Control Act (33 U.S.C. 1251–1387):** As amended—The CONTRACTOR agrees to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. 7401–7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. 1251–1387). Violations must be reported to the federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA) [Appendix II to 2 CFR Part 200].

**Debarment and Suspension (Executive Orders 12549 and 12689):** A contract award (see 2 CFR 180.220) will not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 CFR 180 that implement Executive Orders 12549 (3 CFR part 1986 Comp., p. 189) and 12689 (3 CFR part 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. If applicable, the CONTRACTOR must verify that none of their subcontractors (for contracts expected to equal or exceed \$25,000), appear on the federal government’s Excluded Parties List. The Excluded Parties List is accessible at <http://www.sam.gov> [Appendix II to 2 CFR Part 200].

**Byrd Anti-Lobbying Amendment (31 U.S.C. 1352):** CONTRACTORS that apply or bid for an award **exceeding \$100,000** must submit a completed “Disclosure of Lobbying Activities” [Form SF-LLL]. Each tier certifies to the tier above that it will not and has not used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with *non-federal funds* that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. [Appendix II to 2 CFR Part 200]. **The bidder shall complete Form SF-LLL and submit with bid. Bidders may be deemed nonresponsive for failure to submit this certification.**

**Conflict of Interest** [2 CFR §200.112]: The CONTRACTOR must disclose in writing any potential conflict of interest to the Federal awarding agency or COUNTY in accordance with applicable Federal awarding agency policy.

**Mandatory Disclosures** [2 CFR §200.113]: The CONTRACTOR must disclose in writing all violations of federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the federal award. Failure to make required disclosures can result in any of the remedies described in 2 CFR §200.339 - Remedies for noncompliance, including suspension or debarment.

**Certifications and representations.** [2 CFR § 200.209]

Unless prohibited by the U.S. Constitution, Federal statutes or regulations, CONTRACTOR may be required to submit certifications and representations required by this agreement, Federal statutes, or regulations on an annual

basis. Submission may be required more frequently if the CONTRACTOR fails to meet a requirement of these provisions for contracts under federal awards.

**Protected Personally Identifiable Information (Protected PII) [CFR §200.303(e)]:**

The CONTRACTOR must take reasonable measures to safeguard protected personally identifiable information and other information the federal awarding agency or COUNTY designates as sensitive or the County considers sensitive consistent with other applicable federal, state, and local laws regarding privacy and obligations of confidentiality. Per 2 CFR § 200.82, Protected PII means an individual's first name or first initial and last name in combination with any one or more of types of information, including, but not limited to, social security number, passport number, credit card numbers, clearances, bank numbers, biometrics, date and place of birth, mother's maiden name, criminal, medical and financial records, educational transcripts. This does not include PII that is required by law to be disclosed.

**Prohibition on utilization of time and material type contracts [2 CFR §200.318 (j)**

(1): The COUNTY will not award contracts based on a time and material basis if the contract contains federal funding.

**Contracting with Small and Minority Businesses, Women's Business Enterprises, and Labor Surplus Area Firms [2 CFR § 200.321]:**

If using subcontractors, the CONTRACTOR must take all necessary affirmative steps to assure that minority businesses, women's business enterprises, and labor surplus area firms are used when possible. Affirmative steps must include:

(1) Placing qualified small and minority businesses and women's business enterprises on solicitation lists;

(2) Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources;

(3) Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;

(4) Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;

(5) Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.

(6) Affirmative Action Requirements per 41 CFR 60-4.1 Goals for Women and Minorities in Construction (for contracts in excess of \$10,000):

Goals and timetables for minority and female utilization may be set which shall be based on appropriate workforce, demographic or other relevant data and which shall cover construction projects or construction contracts performed in specific geographical areas. The goals, which shall be applicable to each construction trade in a covered Contractor's or subcontractor's entire workforce which is working in the area covered by the goals and timetables, shall be published as notices in the Federal Register, and shall be inserted by the contracting officers and applicants, as applicable, in the Notice required by 41 CFR 60-4.2. Covered construction Contractors performing construction work in geographical areas where they do not have a federal or federally assisted construction contract shall apply the minority and female goals established for the geographical area where the work is being performed.

Information regarding certified M/WBE firms can be obtained from:

- Florida Department of Management Services (Office of Supplier Diversity);
- Florida Department of Transportation;

- Minority Business Development Center in most large cities; and
- Local Government M/DBE programs in many large counties and cities.

**Domestic preferences for procurements.** [2 CFR § 200.322]

(a) As appropriate and to the extent consistent with law, the non-Federal entity should, to the greatest extent practicable under a Federal award, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards including all contracts and purchase orders for work or products under this award.

(b) For purposes of this section:

(1) “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States.

(2) “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

**Procurement of Recovered Materials** [2 CFR §200.323]: CONTRACTOR must comply with section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 CFR part 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

**Prohibition on utilization of cost plus a percentage of cost contracts** [2 CFR §200.324 (d)]: The COUNTY will not award contracts containing federal funding on a cost plus percentage of cost basis.

**Retention of Records** [2 CFR 200.334]: Financial records, supporting documents, statistical records, and all other records pertinent to a Federal award must be retained for a period of three years from the date of submission of the final expenditure report or invoice. Record retention may be required to be longer if any of the provisions of 2 CFR 200.334(a)-(f) apply.

**Access to Records** [2 CFR 200 § 200.337]: The County, Pass-through agency or Federal awarding agency have the right of timely and unrestricted access to any documents, papers or other records, including electronic records, of the CONTRACTOR which are pertinent to the Federal award in order to make audits, investigations, examinations, excerpts, transcripts, and copies of such documents. This right also includes timely and reasonable access to the CONTRACTOR’S personnel for the purpose of interview and discussion related to such documents. This right of access shall continue as long as records are required to be retained.

**Remedies for noncompliance.** [2 CFR § 200.339]

If CONTRACTOR fails to comply with the U.S. Constitution, Federal statutes, regulations or the terms and conditions of a Federal award, the Federal awarding agency or COUNTY may impose additional conditions, as described in 2 CFR § 200.208. If the Federal awarding agency or COUNTY determines that noncompliance cannot be remedied by imposing additional conditions, the Federal awarding agency or COUNTY may take one or more of the following actions, as appropriate in the circumstances:

- (a) Temporarily withhold cash payments pending correction of the deficiency by the CONTRACTOR or more severe enforcement action by the Federal awarding agency or COUNTY.
- (b) Disallow (that is, deny both use of funds and any applicable matching credit for) all or part of the cost of the activity or action not in compliance.
- (c) Wholly or partly suspend or terminate the Agreement.
- (d) Initiate suspension or debarment proceedings as authorized under 2 CFR part 180 and Federal awarding agency regulations (or in the case of the COUNTY, recommend such a proceeding be initiated by a Federal awarding agency).
- (e) Take other remedies that may be legally available.