

### THIRD AMENDMENT

This Amendment made and entered into this  8  day of  June , 2021 by and between Pinellas County, a political subdivision of the State of Florida, hereinafter referred to as "County," and KPMG, LLP, Denver, CO hereinafter referred to as "Contractor," (individually referred to as "Party", collectively "Parties").

#### WITNESSETH:

WHEREAS, the County and the Contractor entered into an agreement on December 10, 2019, pursuant to Pinellas County Contract No. 190-0003-LI (hereinafter "Agreement") pursuant to which the Contractor agreed to provide innovative solutions to elevate the system of care to include the integration of primary health care, behavioral health care, justice and homeless services, and other critical services for County; and

WHEREAS, Section 21 of the Agreement permits modification by mutual written agreement of the parties; and

WHEREAS, the County and the Contractor now wish to modify the Agreement in order to provide for an increase to the contract price and a twelve (12) month time extension , at the same prices, terms, and conditions;

NOW THEREFORE, the Parties agree that the Agreement is amended as follows:

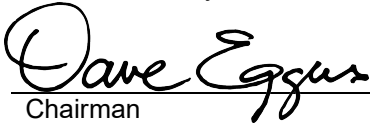
1. The term of the Agreement is extended to July 31, 2022.
2. A supplemental Statement of Work, Staffing and Fees schedule, and Systems Implementation Addendum is attached as Addendum 2, effective June 8, 2021 and expiring on July 31, 2022.
3. Section 5 Compensation and Method of Payment, subsection B, is revised to the following: The County agrees to pay the Contractor the not-to-exceed sum of \$2,119,742.00 for Services completed and accepted as provided in Section 15 of the Standard Services Agreement, Addendum 1, and Addendum 2 contained herein.
4. Except as changed or modified herein, all provisions and conditions of the original Agreement and any amendments thereto shall remain in full force and effect.

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

IN WITNESS WHEREOF the Parties herein have executed this Third Amendment as of the day and year first written above.

PINELLAS COUNTY, FLORIDA  
By and through its

Board of County Commissioners

  
Chairman

ATTEST:  
KEN BURKE

  
Deputy Clerk



CONTRACTOR:

  
Authorized Signature

William Zizic  
Printed Authorized Signature

Managing Director  
Title Authorized Signature

**APPROVED AS TO FORM**

By: Keiah Townsend  
Office of the County Attorney

## Coordinated Access Model KPMG Statement of Work

Revised 05/20/2021

### Purpose/Background

Pinellas County (County) engaged KPMG in December 2019 to undergo a five-month project to scan the behavioral health system, interview stakeholders, review leading practices, and deliver to the County a new vision to improve the system of care around behavioral health in Pinellas. This led to the strategic report, "Elevate Behavioral Health," which outlined recommendations to move the County in a new direction in patient-centric services, enhanced governance, funding prioritization, and performance management aimed at improved outcomes for the County's residents.

KPMG's report provided two foundational recommendations to transform Behavioral Health Services in Pinellas County:

1. Establish a systemic performance management approach collectively with all funders and contractual Optimal Data Set (ODS) requirement for all providers
2. Establish a robust Coordinated Access Model with a 1-800 number, standardized screening, triage, and scheduling practices, and evaluation of current provider systems

After the delivery of the report, KPMG worked with Pinellas County to develop a deeper understanding of the required activities to successfully implement an Optimal Data Set (ODS). This collaboration has included benchmarking, best practice research, cost and needs analysis, and workshops with Human Services and KPMG staff.

The next phase of work is to support the County's development of a Coordinated Access Model (CAM) and procurement of a vendor to deliver this service to the Pinellas County community. The work described herein seeks to support the County's designing of the framework, soliciting the market for providers, and ultimately procuring a vendor that can deliver the required services.

State Vendors and Conflicts. The Client is aware that Contractor may be providing assurance, tax and/or advisory services to other actual or potential contractors of the Client. Contractor will perform an internal search for any potential client conflicts relating to any of the Client's contractors identified by the Client as having a role in connection with Contractor's performance of this Contract. Contractor will advise the Client of any conflicts of interest that could prevent it from performing the Contract. However, Contractor is a large firm that is engaged by new clients on a daily basis and as a result it cannot guarantee that, following its conflict search, an engagement for any other related party will not be accepted somewhere else in Contractor's firm. Should any new information come to Contractor's attention, Contractor will promptly inform the Client. Contractor shall perform this Contract in accordance with applicable professional standards. In the event a potential conflict is identified, in order to mitigate such a conflict, KPMG will cease work until your consent is received or an alternative course of action is mutually agreed upon.

## CAM Overview

A Coordinated Access Model (CAM) allows for increased transparency in how clients, families, caregivers, and professionals can access the appropriate services within the system. This requires Pinellas County and its partners to design and then build the CAM infrastructure, including a 1-800 number; standardized screening, triage and scheduled referral practices; and an evaluation of the current systems in place by providers to ensure interoperability and exchange of information to allow for a consolidated view of consumer demand, level of need, available capacity, and access to care. The Coordinated Access Model is designed to enable:

- **Centralized Intake:** Develop and implement a centralized, technology-enabled intake pathway to improve access to care (e.g. a hotline, website)
- **Standardized Practices:** Standardize screening, triage, and referral processes to monitor the transition of clients to the appropriate level of care (i.e. LOCUS tool)
- **Performance Management:** Conduct data collection, quality control, and performance management activities to assess connections to services across care providers
- **Strategic Planning:** Lead system-level strategic planning efforts to maximize the use of available resources
- **Consumer Choice:** Empower residents to access the care they need from providers they prefer

The project will involve the following four interwoven work streams:

1. *CAM Design*
2. *RFP Development Support*
3. *Review and analyze vendor responses*
4. *Implementation Initiation Support*

## Activities and Deliverables

### 1. *CAM Design*

Pinellas County Human Services has expressed an interest in contracting with a third-party vendor to procure Coordinated Access services. To facilitate the procurement of an effective Coordinated Access Model, KPMG shall assist the County in developing the CAM framework to inform requirements of the RFP.

<b>Objective(s):</b> <ul style="list-style-type: none"><li>— Develop the Coordinated Access Model framework</li><li>— Draft inputs to RFP requirements based on CAM framework</li></ul>
<b>Activities:</b> <ul style="list-style-type: none"><li>— Benchmark and leading practice analysis of peer county CAM systems, staffing models, funding prioritization, and contracting mechanisms</li><li>— Define CAM parameters and determine recommended requirements through at least 2-3 facilitated work groups</li><li>— Design &amp; Develop CAM framework, including governance and organizational structure as well as cost-benefit of a set of 3-4 CAM options, with County leadership</li><li>— Conduct between 5-10 Industry Executive Interviews using KPMG's executive access program and partners</li></ul>

<p>and presented validation by County</p> <ul style="list-style-type: none"> <li>— Support County in a market sounding event, as approved by the County, which could be facilitated by a traditional RFI developed with support by KPMG, live vendor interviews and presentations facilitated by KPMG, or survey, or a combination of methods based upon results</li> <li>— Recommend technology framework and visioning for case management and integration among service providers</li> <li>— Validate CAM strategy and design with County leadership</li> </ul>
<p>Deliverables:</p> <ul style="list-style-type: none"> <li>— Monthly report and slide presentation that documents phased activities</li> <li>— CAM model framework and presentation for County leadership and Board of Commissioners</li> <li>— Input to level of service requirements for potential CAM vendor</li> </ul>
<p>Timing: 12 weeks</p>

**2. RFP Development Support**

This phase of work will support the development of the procurement lifecycle. KPMG will work with and support the County’s normal procurement process to integrate the requirements developed in phase I into a formal solicitation document.

<p><b>Objective(s):</b></p> <ul style="list-style-type: none"> <li>— Lead in the development of a scope of work and support the refining of RFP requirements in line with CAM design</li> <li>— Support to finalize the proposed solicitation and provide a recommended scoring rubric and instructions</li> </ul>
<p><b>Activities:</b></p> <ul style="list-style-type: none"> <li>— KPMG will develop the technical specifications, statement of need and background of the RFP</li> <li>— The County will include contractual terms and all applicable forms needed in a solicitation process of this type</li> <li>— The County will be responsible for all legal components of the solicitation and the required format and structure of the RFP in accordance with local rules and ordinances</li> <li>— The County will direct KPMG in the execution of standard practices in its procurement process and timelines associated with a solicitation of this complexity</li> <li>— The County administration will work with KPMG to develop budget estimates for the acquisition of services. KPMG will take no role that will be perceived as advocating or lobbying for specific policies or budgets to the County commission</li> <li>— With approval from the County, KPMG will integrate the requirements framework developed in Phase I into the procurement solicitation documents</li> <li>— Inform the development of a scoring matrix for vendor submissions, based on criteria and weightings accepted and approved by County</li> </ul>
<p><b>Deliverables:</b></p> <ul style="list-style-type: none"> <li>— Monthly report and slide presentation that documents phased activities</li> <li>— Input to County’s RFP scope of work and requirements for procuring CAM vendors</li> <li>— Input to County’s scoring matrix to evaluate CAM vendor submissions</li> </ul>
<p>Timing: 8 weeks</p>

**3. Review and analyze vendor responses**

KPMG will support the County in evaluating the vendor submissions and presentations. This may involve facilitating County’s completion of the vendor scoring and shortlisting processes. KPMG will facilitate the compilation of County stakeholder scoring in the evaluation process to support final decision-making by the County.

<b>Objective(s):</b> — Facilitate County selection of CAM vendor best positioned to serve the needs of the County
<b>Activities:</b> — Support County’s scoring panel and recommended expertise and diverse perspectives needed to help support selection of a CAM vendor — Create tracking and evaluation tool for review of all vendor submissions for use by County stakeholders in the scoring process — Review and analyze all vendor submissions based on County-approved criteria and information requirements to provide strengths and weaknesses of each vendor — Facilitate the compilation of County-completed evaluations for support to final decision-marking of the County
<b>Deliverables:</b> — Summary report of County-scored vendor submissions providing a structured review of strengths, weaknesses, and costs of each option
Timing: 12 weeks

**4. Implementation Initiation Support**

KPMG will support the County in onboarding the vendor once the County makes its final selection. The initial set of activities will include:

<b>Objective(s):</b> — Support the County’s efforts to finalize contractual obligations with the selected vendor in accordance with the County’s approved CAM service design — Support to County’s efforts to onboard and operationalize County’s selected CAM service vendor in accordance with the County’s approved CAM service design
<b>Activities:</b> — Provide support to the County procurement team by performing research and change impact analysis if modifications are made to the CAM design to facilitate contract finalization Work with County to develop communications plan, strategy and materials regarding implementing and operationalizing the CAM vendor selected — Support County in analyzing risks and issues with the vendor-proposed implementation plan to stand up the CAM service — Tracking database to maintain a record of amendments that impact CAM design — Assist in the development of a communications plan for rolling out vendor selection

**Deliverables:**

- Monthly report and slide presentation that documents phased activities in support of the county and vendor's implementation planning

**Timing:** 12 weeks

## CAM Period of Performance & Projected Timeline

The KPMG team will support the County’s CAM Year One Project for a period of 44 weeks. This work plan is dependent on the County personnel availability, project schedule adherence, data availability and support in coordinating engagement with relevant stakeholders.

Work Stream Phase	Projected Hours	Estimated Timeframe	Estimated Cost by Phase
CAM Design	1000	12 weeks	\$350,000
RFP Development Support	400	8 weeks	\$130,000
Review and Analyze Vendor Responses	800	12 weeks	\$310,000
Implementation Initiation Support	800	12 weeks	\$310,000
<b>Projected Totals</b>	<b>3000</b>	<b>44 weeks</b>	<b>\$1,100,000</b>

Project	Phase	Timeline by Month										
		1	2	3	4	5	6	7	8	9	10	11
Coordinated Access Model (CAM)	✓ CAM System Design	█	█	█	█							
	✓ RFP Development Support				█	█						
	✓ Review and evaluate vendor responses						█	█	█	█		
	✓ Implementation Initiation Support										█	█



## CAM Staffing and Fees

For successful design to implementation and testing of the coordinated access model, KPMG will provide a dedicated team with specialized capabilities, including but not limited to:

Resource*	Role	Projected Hours
Bill Zizic, Managing Director	KPMG Project Executive	100
Brendan Davis, Director	Engagement Director	150
Vivian Demian, Exec. Director, KPMG Canada	Behavioral Health & Facilitation Lead	350
TBD based on phase	Subject Matter Professionals	100
KPMG Manager	Project Manager	650
KPMG Manager	Behavioral Health Subject Matter Specialist	650
Senior Associate	Project Support Staff	750
Research Associate	Research & Benchmarking	250
<b>Total Billable Fees</b>	<b>\$1,100,000</b>	<b>3000</b>

\* Client expressly authorizes staffing from KPMG Canada and KPMG Global Services.

Fees will be billed on a phase basis, where 50% of each phase will be billed at the mid-point of the estimated timeline by phase, and the remaining 50% will be billed upon acceptance of phase deliverables by the County.