

## FIFTH AMENDMENT

This Amendment made and entered into this 17th day of January, 2023, 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") in 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 a time extension to December 31, 2023, and additional funding in the amount of \$1,295,000.00 to support the implementation of the Behavioral Health Coordinated Access Model in Pinellas County;

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

1. The term of the Agreement is hereby extended from July 31, 2023, to December 31, 2023.
2. A supplemental Statement of Work, including Activities and Deliverables, Projected Timeline and Cost, and Staffing for Coordinated Access Model (CAM) Implementation is attached hereto as Addendum 3, and is effective October 20, 2022 and expires December 31, 2023. Following the execution of this Amendment, reimbursement for service and costs rendered by the Contractor on or after October 20, 2022, may be invoiced.
3. Section 5 Compensation and Method of Payment, subsection B, is revised to reflect an increase to the contract expenditure in the amount of \$1,295,000.00. The section is amended to state the following:

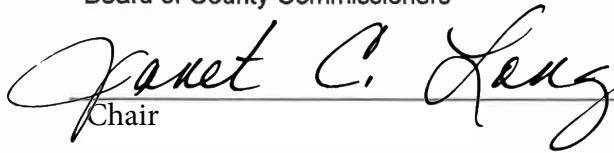
The County agrees to pay the Contractor the total not-to-exceed sum of \$3,414,742.00 for Services completed and accepted as provided in Section 15 of the Standard Services Agreement, Addendum 1, Addendum 2, and Addendum 3 contained herein.

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 Fifth Amendment as of the day and year first written above.

PINELLAS COUNTY, FLORIDA  
by and through its  
Board of County Commissioners

  
Chair

CONTRACTOR:

  
Authorized Signature

ATTEST:  
KEN BURKE

  
Deputy Clerk

Brendan Davis

Printed Authorized Signature

Managing Director

Title Authorized Signature



APPROVED AS TO FORM

By:   
Office of the County Attorney

## Addendum 3: Coordinated Access Model KPMG Statement of Work

Revised 02/2022

### Purpose/Background

In December 2019, Pinellas County (County) engaged KPMG to undergo a five-month project to evaluate the County's 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 (CAM) with a 1-800 number, standardized screening, triage, and scheduling practices, and evaluation of current provider systems

In the first phase of implementation for the CAM, KPMG worked with Pinellas County to develop core requirements for the CAM through extensive stakeholder engagement, interviews, surveys, a jurisdictional scan/leading practice review, and three facilitated design workshops. KPMG then supported the County in developing an RFP to solicit a vendor for the implementation of a CAM in line with the above requirements, which was issued in November 2021. KPMG also provided subject matter input and project support to the County's Evaluation Committee in its review of vendor submissions. KPMG will also support the County for 12 weeks during the initiation of implementation following vendor selection.

This Statement of Work outlines activities to support the full implementation of the CAM in Pinellas County. The project will involve the following four interwoven work streams:

1. **Project Oversight and Vendor Support:** KPMG will work with the County and the vendor to evaluate the vendor's implementation plan, key milestones and outcomes in order to help ensure that the design developed in the previous phase of work is carried through to implementation.
2. **Performance Support and Outcome Monitoring:** KPMG will assess the efficacy of the implementation activities by the chosen provider and resulting system performance throughout the first year of implementation. KPMG will help establish efficient methods across the two projects to support the strategic

reporting of CAM performance and outcomes. KPMG will also support Human Services in integrating data and visualizations from the CAM into the ODS dashboard, as desired.

3. **Testing:** KPMG will support the selected vendor throughout the piloting and testing phases of CAM implementation, including assisting with change management efforts, pilot and testing support, and helping with stakeholder engagement to mitigate any barriers to implementation, and conduct an independent review of the outcomes.
4. **Support CAM Expansion Efforts:** KPMG will work with the County to create a roadmap for the CAM expansion to additional levels of care beyond the initial implementation at "Tier 3" care for adults.

State Vendors and Conflicts. The County is aware that Contractor may be providing assurance, tax and/or advisory services to other actual or potential contractors of the County. Contractor will perform an internal search for any potential County conflicts relating to any of the County's contractors identified by the County as having a role in connection with Contractor's performance of this Contract. Contractor will advise the County of any conflicts of interest that could prevent it from performing the Contract. However, Contractor is a large firm that is engaged by new Countys 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 County. 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 Countys, 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:

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

5. **Consumer Choice:** Empower residents to access the care they need from providers they prefer

## Activities and Deliverables

### Project Oversight and Vendor Support

<b>Objective(s)</b>	Leverage KPMG’s integration with the County and providers to accelerate successful deployment of the CAM through co-management of the implementation process
<b>Activities</b>	<ul style="list-style-type: none"> <li>▪ Support the County in tracking and managing vendor activities, including implementation targets selected, adherence to these targets, risks and issues identified and progress against implementation outcomes</li> <li>▪ Support the County in tracking and managing provider integration in the CAM, providing subject matter and communication support as needed</li> <li>▪ Provide routine project management status updates to Human Services, PICA, and County leadership</li> <li>▪ Review alignment of CAM implementation to the requirements developed through the CAM Design process and detailed in the RFP</li> </ul>
<b>Deliverable(s)</b>	<ul style="list-style-type: none"> <li>• Monthly project management status updates</li> <li>• Excel tracker of vendor milestones and progress against implementation plan, including risks/issues identified</li> </ul>
<b>Timing</b>	52 weeks

### Performance Support and Outcome Monitoring

<b>Objective(s)</b>	<ul style="list-style-type: none"> <li>▪ Assess the efficacy of the implementation timeline and activities by the chosen provider and alignment with the requirements developed through the CAM Design process</li> <li>▪ Provide the County with an independent assessment of CAM implementation, effectiveness, and outcomes, placed within the context of the “Elevate Pinellas County” behavioral health system review and CAM Design process</li> </ul>
<b>Activities</b>	<ul style="list-style-type: none"> <li>▪ Collaborate with the selected vendor to manage relationships with providers and provide problem solving support to expedite implementation of the CAM, building on our existing relationships and experience in the County.</li> <li>▪ Develop recommended performance KPI’s aligned with the designed objectives of the CAM, customizing the list created during the CAM Design process in Year 1</li> <li>▪ Support integration of CAM-specific data into the ODS dashboard</li> <li>▪ Conduct an independent review of Year 1 system-wide outcomes of CAM project</li> <li>▪ Develop recommendations for programmatic improvement and/or adjustment based on data driven monitoring</li> </ul>
<b>Deliverable(s)</b>	<ul style="list-style-type: none"> <li>▪ CAM specific performance management framework</li> <li>▪ Subject matter support to the vendor, Human Services, and County leadership as required</li> <li>▪ Report documenting independent review of CAM outcomes following first year of implementation</li> </ul>

<b>Timing</b>	52 weeks
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## Testing

<b>Objective(s)</b>	Support the County and provider with pilot program testing
<b>Activities</b>	<ul style="list-style-type: none"> <li>▪ Assist in the design and selection of pilot programs for testing of the implemented solution</li> <li>▪ Coordinate with stakeholders around the programmatic needs of the pilots to be undertaken</li> <li>▪ Engage stakeholders routinely to troubleshoot and report on testing progress</li> <li>▪ Provide pilot specific status updates to Humans Services, County leadership, and PICA</li> </ul>
<b>Deliverable(s)</b>	<ul style="list-style-type: none"> <li>▪ Support County and vendor with creation of pilot design and roadmap document</li> <li>▪ Support delivery of pilot-specific reporting and status updates</li> <li>▪ Recommendations for improvements based on pilot outcomes</li> <li>▪ Conduct independent review of pilot outcomes</li> </ul>
<b>Timing</b>	16 weeks

## Expansion

<b>Objective(s)</b>	Support the County's CAM programmatic expansion efforts to "Tier 3" children, adolescents, and seniors following the initial implementation at "Tier 3" adults.
<b>Activities</b>	<ul style="list-style-type: none"> <li>▪ Recommend programmatic expansion roadmap and requirements beyond "Tier 3" adults</li> <li>▪ Assist in change management efforts with providers and County</li> <li>▪ Support County in engaging and integrating with vendor on stakeholder engagement to facilitate progress and adherence to desired timelines</li> </ul>
<b>Deliverable(s)</b>	Programmatic expansion roadmap and requirements recommendations
<b>Timing</b>	16 weeks

## Projected Timeline and Cost

The KPMG team will support the County's CAM Year Two Project for a period of 52 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	Estimated Timeframe	Estimated Cost by Phase
2.1 Project Oversight and Vendor Support	52 weeks	\$400,000

<b>2.2 Performance Support and Outcome Monitoring</b>	52 weeks	\$295,000
<b>2.3 Testing</b>	16 weeks	\$200,000
<b>2.4 Expansion</b>	16 weeks	\$200,000
<b>Projected Totals</b>	52 weeks	\$1,295,000

For tasks 2.1 and 2.2, fees will be billed monthly. For tasks 2.3 and tasks 2.4, 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.

Project	Phase	Timeline by Month											
		1	2	3	4	5	6	7	8	9	10	11	12
Coordinated Access Model (CAM)	Project Oversight and Vendor Support	[Solid Blue Bar]											
	Performance Support and Outcome Monitoring	[Solid Dark Blue Bar]											
	Testing	[Solid Blue Bar]				[White]							
	Expansion	[White]					[Solid Dark Blue Bar]						

## CAM Staffing

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

Resource*	Role
Bill Zizic, Managing Director	KPMG Project Executive
Caoimhe Thornton, Managing Director	KPMG Project Managing Director
Brendan Davis, Director	Engagement Director
Vivian Demian, Director	Behavioral Health & Facilitation Lead
KPMG Manager	Project Manager
Senior Associate	Project Support Staff
Associate	Project Support Staff

\* County expressly authorizes staffing from KPMG Global Services.