

**AMENDMENT NO. 1  
TO STANDARD AGREEMENT A-15880 BETWEEN  
COUNTY OF MONTEREY AND EVALCORP**

**THIS AMENDMENT** is made to the AGREEMENT A-15880 for evaluation services by and between **EVALCORP**, hereinafter "CONTRACTOR", and the **County of Monterey**, a political subdivision of the State of California (hereinafter referred to as "COUNTY."

**WHEREAS**, the COUNTY entered into STANDARD AGREEMENT A-15880 with CONTRACTOR in the amount of \$1474,000 for the term of July 1, 2022 to June 30, 2026, for services necessary to conduct comprehensive evaluations and assessments of the Mental Health (MHSA) funded strategies/projects' implementation and resulting impacts, and to issue a report of findings to the State Department of Health Care Services, the Monterey County Behavioral Health Commission, the Board of Supervisors, and the public.

**WHEREAS**, the COUNTY and CONTRACTOR wish to amend the AGREEMENT to revise the EXHIBIT A: SCOPE OF SERVICES/PAYMENT PROVISIONS; and the EXHIBIT B: INVOICE FORM.

**NOW THEREFORE**, the COUNTY and CONTRACTOR hereby agree to amend AGREEMENT in the following manner:

1. EXHIBIT A-1: SCOPE OF SERVICES/PAYMENT PROVISIONS is incorporated into the Agreement to reflect the additional services to be provided beginning July 1, 2023 through June 30, 2026. All references in the Agreement to EXHIBIT A shall be construed to refer to EXHIBITS A and A-1. In addition, the Section B. COMPENSATION/ PAYMENT is adjusted to reflect the additional hours of evaluation services to be provided beginning July 1, 2023 through June 30, 2026.
2. EXHIBIT B-1: INVOICE FORM replaces EXHIBIT B. All references in the Agreement to EXHIBIT B shall be construed to refer to EXHIBIT B-1. This EXHIBIT B-1 modifies the maximum amount payable under this AGREEMENT from the current total of \$1,474,000 to \$2,404,000.
3. Except as provided herein, all remaining terms, conditions and provisions of the AGREEMENT are unchanged and unaffected by this AMENDMENT and shall continue in full force and effect as set forth in the AGREEMENT.
4. This Amendment No. 1 shall be effective July 1, 2023.

5. A copy of this AMENDMENT No. 1 shall be attached to the original AGREEMENT executed by the COUNTY on June 29, 2022.

(The remainder of this page is intentionally left blank.)

IN WITNESS WHEREOF, COUNTY and CONTRACTOR have executed this Amendment No. 1 to Agreement A-15880 as of the day and year written below.

**COUNTY OF MONTEREY**

By: Debra Wilson  
Contracts/Purchasing Officer  
6/17/2024 | 1:20 PM PDT

By: \_\_\_\_\_  
Department Head

Date: \_\_\_\_\_

Approved as to Form <sup>1</sup>  
By: Shane Elin Strong  
County Counsel  
6/17/2024 | 12:18 PM PDT

Approved as to Fiscal Provisions<sup>2</sup>  
By: Jennifer Forsyth  
Auditor-Controller  
6/17/2024 | 12:54 PM PDT

Approved as to Liability Provisions<sup>3</sup>  
By: \_\_\_\_\_  
Risk Management  
Date: \_\_\_\_\_

**CONTRACTOR**

EVALCORP  
Contractor's Business Name\*

By: Kristen Donovan, President  
(Signature of Chair, President, or Vice-President)\*  
Kristen Donovan, President/Principal Co

Name and Title  
Date: 6/17/2024 | 2:24 PM PDT

By: Ken Tomlison, Chief Financial Officer  
(Signature of Secretary, Asst. Secretary, CFO, Treasurer or Asst. Treasurer)\*

Ken Tomlison, Chief Financial Officer  
Name and Title

Date: 6/19/2024 | 8:53 AM PDT

\*INSTRUCTIONS: If CONTRACTOR is a corporation, including limited liability and non-profit corporations, the full legal name of the corporation shall be set forth above together with the signatures of two specified officers. If CONTRACTOR is a partnership, the name of the partnership shall be set forth above together with the signature of a partner who has authority to execute this Agreement on behalf of the partnership.

<sup>1</sup> Approval by County Counsel is required.  
<sup>2</sup> Approval by Auditor-Controller is required  
<sup>3</sup> Approval by Risk Management is necessary only if changes are made in Sections XI or XII.

**EXHIBIT A-1**

**To the Agreement by and between  
County of Monterey, Health Department, Behavioral Health Bureau,  
hereinafter referred to as "County"**

**AND**

**EVALCORP, hereinafter referred to as "CONTRACTOR"**

**SCOPE OF SERVICES/PAYMENT PROVISIONS**

**Term: July 1, 2023 - June 30, 2026**

**A. SCOPE OF SERVICES**

The Monterey County Health Department's Behavioral Health Bureau is tasked with conducting a comprehensive evaluation. This evaluation is designed to assess the implementations and resulting impacts of the Mental Health Services Act (MHSA) funded strategies and projects. The findings will be shared with the State Department of Health Care Services, the County of Monterey Behavioral Health Commission, the County of Monterey Board of Supervisors, and the public, underscoring the importance of this process.

The evaluation of the MHSA programs requires an infrastructure, including data collection tools and processes, to capture evaluation data aligned with state requirements and county-specific needs. An analysis of the data and summary of findings is presented in a variety of annual and multi-year reports for the following MHSA components and Annual CPPP:

- 1) Community Services and Support (CSS) - The funding for this component is utilized to provide direct services to adults and older adults with serious mental illness and children and youth with serious emotional disturbance per W&I §5600.3. These services play a crucial role in our community, ensuring that those in need receive the necessary support and care.
  - a. The services of this amendment will greatly enhance the development of evaluation plans and data collection tools for programs and activities of the CSS component.
- 2) Prevention and Early Intervention (PEI)—PEI consists of programs designed to prevent mental illness from becoming severe and disabling, with an emphasis on improving timely access to services for the underserved.
  - a. The services of this amendment will continue and enhance the data collection and evaluation of the PEI programs and activities.
- 3) Innovation (INN)—The INN component includes projects designed to test time-limited or changing mental health practices that have not yet been demonstrated as effective. The County's INN projects focus on increasing access to underserved groups, improving the quality of services, including measurable outcomes, and increasing access to mental health services.
  - a. The services of this amendment will enhance the creations and development of evaluation plans and data collection tools for the INN projects, with a large portion of

work focused on the new Rainbow Connections, a five-year/\$7M project, consisting of a collaboration between the County and various CBOs.

- 4) Additionally, the MHSA requires an annual Community Program Planning Process (CPPP) to inform how counties construct their MHSA Three-Year Program and Expenditure Plans and Annual Updates.
  - a. The services of this amendment include enhancing the ongoing activities of the annual CPPP, thereby increasing the community and stakeholder participation, data collection and analysis, and reporting.

The Monterey County Health Department, Behavioral Health Bureau (MCBH) needs to enhance the Mental Health Service Act (MHSA) provider coordination, data collection, and reporting. This is a part of our ongoing commitment to improving the effectiveness and efficiency of the MHSA Community Program Planning Process (CPPP). Through a structured, collaborative, inclusive approach, we are developing and implementing enhanced MHSA provider coordination, data collection, and reporting for each of the MHSA components, including evolving Innovation projects. These improvements will enhance the service coordination and data integration across MHSA components and increase the effectiveness and efficiency of the annual CPPP. We are also continuing the development and implementation of additional data collection tools and fostering ongoing and robust collaboration with MHSA staff to support the scheduling, and promotion of additional CPPP data collection activities. Furthermore, we are strengthening our coordination with providers, stakeholders, and community members to maintain and build communication lines and working relationships with CPPP partners.

The primary services and deliverables are outlined below.

**1. CONTRACTOR RESPONSIBILITIES:**

See Scope of Services, Deliverables and Timeline.

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## EVALCORP

**JULY 1, 2023- JUNE 30, 2026**

1. County of Monterey MHSAs Enhanced Provider Coordination, Data Collection and Reporting
  - a. Coordinate with MHSAs-funded mental health service providers to ensure clarity on data collection and reporting needs.
  - b. Prepare for and facilitate meetings with MHSAs-funded mental health service providers to enhance data collection, reporting compliance, and data/information sharing across the system countywide.
  - c. Confirm that data collection from MHSAs-funded mental health service providers align with current and future Mental Health Services Oversight and Accountability Commission (MHSOAC) and the Department of Health Care Services (DHCS) requirements.
  - d. Develop and revise data collection tools consistent with any changes to MHSOAC and DHCS requirements for funded programs.
  - e. Assist MCBH in developing and maintaining database(s) to streamline data management and reporting and inform decision-making.
  - f. Provide ongoing technical assistance to County mental health service providers pertaining to high-quality, valid, and reliable process and outcome/impact data collection and reporting (in compliance with MHSOAC and DHCS requirements and regulations), as needed.
  - g. Provide County with technical assistance and support in preparing for and responding to MHSOAC audits.
2. County of Monterey MHSAs Enhanced Community Engagement for Community Program Planning Process (CPPP) Coordination
  - a. Update and develop additional data collection tools to meet CPPP data collection needs.
  - b. Increase collaboration with MHSAs staff to support the scheduling and promotion of additional CPPP data collection activities (e.g., stakeholder focus groups, listening sessions, and in-person focus groups), as needed.
  - c. Increase the coordination of data collection activities directly with host sites, maintaining communication lines and working relationships with CPPP partners. Establish and maintain distribution lists to execute in future CPPP cycles.
  - d. Communicate regularly with CPPP partners and participants to update them on additional CPPP activities (e.g., Listening Sessions, public comment periods).
  - e. Update and create analysis plans and conduct all qualitative and quantitative analysis of current and additional CPPP data collection activities.
  - f. Continue and update summary of findings for all CPPP data collection strategies in concert with MCBH.
  - g. Facilitate check-in meetings with MCBH monthly, or as needed.
  - h. Maintain ongoing correspondence and communication to ensure MCBH is apprised of any challenges that arise throughout the implementation of the needs assessment and data collection processes.

SCOPE OF SERVICES	DELIVERABLE(S)	TIMELINE
<b>Part 1. Evaluation Infrastructure &amp; Tool Development/Implementation</b>		
a) MHSa PEI Programs enhance the data collection, analysis, and reporting. For greater transparency of program performance and increased accessibility of program information/data for MCBH staff/leadership.	<ul style="list-style-type: none"> <li>• Provide individual program reports that report on PEI program data collection inventory, including demos, referrals, and survey counts.</li> <li>• Process data (process objectives/goals) and make findings/reports accessible to MHSa Staff</li> </ul>	July 1 2023 – June 30, 2026
b) MHSa INN enhance the data collection, analysis, and reporting for INN projects (i.e., Rainbow Connections)  c) Evaluation of both process and outcome metrics for INN projects/programs.  d) Creation of reports that satisfy the INN reporting regulations and provide insight on program implementation (process metrics). Increasing the levels of provider support.	<ul style="list-style-type: none"> <li>• Implementation of evaluation planning for all INN projects/programs.</li> <li>• Produce data collection plans for providers.</li> <li>• Review provider contracts and other documents that can inform evaluation.</li> <li>• Create custom evaluation tools for all aspects of an evaluation.</li> <li>• Quarterly data quality reviews to MCBH</li> <li>• Presentations of INN program evaluation.</li> <li>• Adaptive provider consultation</li> </ul>	July 1, 2023 to June 30, 2026
e) MHSa CSS –Develop data collection tools and collection of data, analysis, and reporting for all CSS programs.  f) Provide assistance with tool development and data collection.  g) Analysis of collected data.  h) Provider support and technical assistance.  i) Increase accessibility of program information/data for MCBH staff/leadership.	<ul style="list-style-type: none"> <li>• Review of provider contracts and other documents that can inform evaluation.</li> <li>• Tool development for data collection.</li> <li>• Provider communication and technical assistance</li> <li>• Presentations of CSS program data</li> </ul>	July 1, 2023 to June 30, 2026
j) Ad Hoc	<ul style="list-style-type: none"> <li>• Support MCBH with DHCS and MHSOAC reporting needs, as needed.</li> <li>• When possible, coordination with fiscal department as contracts/funding sources shift</li> <li>• Support system /structure development to increase the flow of information.</li> </ul>	July 1, 2023 to June 30, 2026

**EXHIBIT B: Invoice Form**

	<b>Invoice Number :</b> _____
<b>Contractor :</b> EVALCORP	
<b>Address Line 1</b> 15614 Alton Parkway, Suite 450	<b>County PO No.:</b> _____
<b>Address Line 2</b> Irvine, CA 92618	
	<b>Invoice Period :</b> _____
<b>Tel. No.:</b> 949-271-6437	
<b>Fax No.:</b> 949-271-6301	
<b>Contract Term:</b> _____	<b>Final Invoice :</b> (Check if Yes) <input type="checkbox"/>
<b>BH Division :</b> Mental Health Services	<b>BH Control Number</b> _____

CONTRACTOR PERSONNEL & TOTAL BILLABLE HOURS	PROJECT DELIVERABLE(S) DURING INVOICE PERIOD	PROGRAM CODE	FUNCTION CODE	Total Maximum Annual Amount FY 2023-24	Dollar Amount Requested this Period	Dollar Amount Requested to Date	Dollar Amount Remaining	% of Total Contract Amount
Project Director @ \$120.00 off site, \$142.20 On-site Managers \$100.00 off-site, \$118.50 on-site Research Assistants 72.00 hours @ \$65.00 off-site, \$77.05 on-site  TOTALS	Please see attached detail for services and deliverables provided during the month of _____	MHSAADMIN	CSS-00	678,500.00			\$ 678,500.00	100.00%
		MHSAPREVEI	PEI-00					
		MHSAINN	INN-00					
<b>TOTALS</b>				<b>\$ 678,500.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 678,500.00</b>	<b>100%</b>

I certify that the information provided above is, to the best of my knowledge, complete and accurate; the amount requested for reimbursement is in accordance with the contract approved for services provided under the provision of that contract. Full justification and backup records for those claims are maintained in our office at the address indicated.

Signature: \_\_\_\_\_  
 Title: \_\_\_\_\_

Date: \_\_\_\_\_  
 Telephone: \_\_\_\_\_

Send to:	Behavioral Health Administration
	<a href="mailto:MCHDBHFinance@co.monterey.ca.us">MCHDBHFinance@co.monterey.ca.us</a>

Behavioral Health Authorization for Payment	
Authorized Signatory _____	Date _____