

Agreement No. 26 -75100-C00333

AGREEMENT BETWEEN THE COUNTY OF SAN MATEO AND FOCUS STRATEGIES

This Agreement is entered into this April 7, 2026, by and between the County of San Mateo, a political subdivision of the state of California, hereinafter called "County," and Focus Strategies, hereinafter called "Contractor."

* * *

Whereas, pursuant to Section 31000 of the California Government Code, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof; and

Whereas, it is necessary and desirable that Contractor be retained for the purpose of providing consultation and technical assistance services for the San Mateo County Continuum of Care .

Now, therefore, it is agreed by the parties to this Agreement as follows:

1. Exhibits and Attachments

The following exhibits and attachments are attached to this Agreement and incorporated into this Agreement by this reference:

Exhibit A—Services

Exhibit B—Payments and Rates

Attachment I—§ 504 Compliance

2. Services to be performed by Contractor

In consideration of the payments set forth in this Agreement and in Exhibit B, Contractor shall perform services for County in accordance with the terms, conditions, and specifications set forth in this Agreement and in Exhibit A.

3. Payments

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B. County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed **THREE HUNDRED FIFTEEN THOUSAND DOLLARS (\$315,000)**. In the event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration. Contractor is not entitled to payment for work not performed as required by this agreement.

4. Term

Subject to compliance with all terms and conditions, the term of this Agreement shall be from Saturday, April 7, 2026 through Wednesday, June 30, 2027.

5. Termination

This Agreement may be terminated by Contractor or by the Director or his/her designee at any time without a requirement of good cause upon thirty (30) days' advance written notice to the other party. Subject to availability of funding, Contractor shall be entitled to receive payment for work/services provided prior to termination of the Agreement. Such payment shall be that prorated portion of the full payment determined by comparing the work/services actually completed to the work/services required by the Agreement.

County may terminate this Agreement or a portion of the services referenced in the Attachments and Exhibits based upon the unavailability of Federal, State, or County funds by providing written notice to Contractor as soon as is reasonably possible after County learns of said unavailability of outside funding.

County may terminate this Agreement for cause. In order to terminate for cause, County must first give Contractor notice of the alleged breach. Contractor shall have five business days after receipt of such notice to respond and a total of ten calendar days after receipt of such notice to cure the alleged breach. If Contractor fails to cure the breach within this period, County may immediately terminate this Agreement without further action. The option available in this paragraph is separate from the ability to terminate without cause with appropriate notice described above. In the event that County provides notice of an alleged breach pursuant to this section, County may, in extreme circumstances, immediately suspend performance of services and payment under this Agreement pending the resolution of the process described in this paragraph. County has sole discretion to determine what constitutes an extreme circumstance for purposes of this paragraph, and County shall use reasonable judgment in making that determination.

6. Contract Materials

At the end of this Agreement, or in the event of termination, all finished or unfinished documents, data, studies, maps, photographs, reports, and other written materials (collectively referred to as "contract materials") prepared by Contractor under this Agreement shall become the property of County and shall be promptly delivered to County. Upon termination, Contractor may make and retain a copy of such contract materials if permitted by law.

7. Relationship to Parties

Contractor agrees and understands that the work/services performed under this Agreement are performed as an independent contractor and not as an employee of County and that neither Contractor nor its employees acquire any of the rights, privileges, powers, or advantages of County employees.

8. Hold Harmless

a. General Hold Harmless

Contractor shall indemnify and save harmless County and its officers, agents, employees, and servants from all claims, suits, or actions of every name, kind, and description resulting from this Agreement, the performance of any work or services required of Contractor under this Agreement, or payments made pursuant to this Agreement brought for, or on account of, any of the following:

(A) injuries to or death of any person, including Contractor or its employees/officers/agents;

(B) damage to any property of any kind whatsoever and to whomsoever belonging;

(C) any sanctions, penalties, or claims of damages resulting from Contractor's failure to comply, if applicable, with the requirements set forth in the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and all Federal regulations promulgated thereunder, as amended; or

(D) any other loss or cost, including but not limited to that caused by the concurrent active or passive negligence of County and/or its officers, agents, employees, or servants. However, Contractor's duty to indemnify and save harmless under this Section shall not apply to injuries or damage for which County has been found in a court of competent jurisdiction to be solely liable by reason of its own negligence or willful misconduct.

The duty of Contractor to indemnify and save harmless as set forth by this Section shall include the duty to defend as set forth in Section 2778 of the California Civil Code.

9. Assignability and Subcontracting

Contractor shall not assign this Agreement or any portion of it to a third party or subcontract with a third party to provide services required by Contractor under this Agreement without the prior written consent of County. Any such assignment or subcontract without County's prior written consent shall give County the right to automatically and immediately terminate this Agreement without penalty or advance notice.

10. Insurance

10.1. General Requirements

Contractor shall not commence work or be required to commence work under this Agreement unless and until all insurance required under this Section has been obtained and such insurance has been approved by County's Risk Management, and Contractor shall use diligence to obtain such insurance and to obtain such approval. Contractor shall furnish County with certificates of insurance evidencing the required coverage, and there shall be a specific contractual liability endorsement extending Contractor's coverage to include the contractual liability assumed by Contractor pursuant to this Agreement. These certificates shall specify or be endorsed to provide that thirty (30) days' notice must be given, in writing, to County of any pending change in the limits of liability or of any cancellation or modification of the policy.

10.2. Workers' Compensation and Employer's Liability Insurance

Contractor shall have in effect during the entire term of this Agreement workers' compensation and employer's liability insurance providing full statutory coverage. In signing this Agreement, Contractor certifies, as required by Section 1861 of the California Labor Code, that (a) it is aware of the provisions of Section 3700 of the California Labor Code, which require every employer to be insured against liability for workers' compensation or to undertake self-insurance in accordance with the provisions of the Labor Code, and (b) it will comply with such provisions before commencing the performance of work under this Agreement.

10.3. Liability Insurance

Contractor shall take out and maintain during the term of this Agreement such bodily injury liability and property damage liability insurance as shall protect Contractor and all of its employees/officers/agents while performing work covered by this Agreement from any and all claims for damages for bodily injury, including accidental death, as well as any and all claims for property damage which may arise from Contractor’s operations under this Agreement, whether such operations be by Contractor, any subcontractor, anyone directly or indirectly employed by either of them, or an agent of either of them. Such insurance shall be combined single limit bodily injury and property damage for each occurrence and shall not be less than the amounts specified below:

(a) Comprehensive General Liability..... \$1,000,000

(b) Motor Vehicle Liability Insurance..... \$1,000,000

County and its officers, agents, employees, and servants shall be named as additional insured on any such policies of insurance, which shall also contain a provision that (a) the insurance afforded thereby to County and its officers, agents, employees, and servants shall be primary insurance to the full limits of liability of the policy and (b) if the County or its officers, agents, employees, and servants have other insurance against the loss covered by such a policy, such other insurance shall be excess insurance only.

In the event of the breach of any provision of this Section, or in the event any notice is received which indicates any required insurance coverage will be diminished or canceled, County, at its option, may, notwithstanding any other provision of this Agreement to the contrary, immediately declare a material breach of this Agreement and suspend all further work and payment pursuant to this Agreement.

11. Compliance With Laws

All services to be performed by Contractor pursuant to this Agreement shall be performed in accordance with all applicable Federal, State, County, and municipal laws, ordinances, regulations, and executive orders, including but not limited to the Health Insurance Portability and Accountability Act of 1996 (HIPAA) and the Federal Regulations promulgated thereunder, as amended (if applicable), the Business Associate requirements set forth in Attachment H (if attached), the Americans with Disabilities Act of 1990, as amended, and Section 504 of the Rehabilitation Act of 1973, which prohibits discrimination on the basis of disability in programs and activities receiving any Federal or County financial assistance, as well as any required economic or other sanctions imposed by the United States government or under state law in effect during the term of the Agreement. Such services shall also be performed in accordance with all applicable ordinances and regulations, including but not limited to appropriate licensure, certification regulations, provisions pertaining to confidentiality of records, and applicable quality assurance regulations. In the event of a conflict between the terms of this Agreement and any applicable State, Federal, County, or municipal law, regulation, or executive order, the requirements of the applicable law, regulation, or executive order will take precedence over the requirements set forth in this Agreement.

Contractor will timely and accurately complete, sign, and submit all necessary documentation of compliance.

12. Levine Act Compliance

The Contractor certifies and warrants that Contractor has fully complied, and will remain in full compliance, with all applicable requirements of the Levine Act in connection with this Agreement, including making any required disclosures of campaign contributions to County Officers, which includes but may not be limited to elected County Officers. Elected County Officers include members of the San Mateo County Board of Supervisors, as well as the Assessor-County Clerk-Recorder, Controller, Coroner, District Attorney, Sheriff, and Tax Collector-Treasurer. Any campaign contribution required to be disclosed under the Levine Act in connection with this Agreement shall be disclosed on the disclosure form provided by the County of San Mateo Levine Act Disclosure Form, a copy of which is available from the County upon request.

13. Non-Discrimination and Other Requirements

13.1. General Non-discrimination

No person shall be denied any services provided pursuant to this Agreement (except as limited by the scope of services) on the grounds of race, color, national origin, ancestry, age, disability (physical or mental), sex, sexual orientation, gender identity, marital or domestic partner status, religion, political beliefs or affiliation, familial or parental status (including pregnancy), medical condition (cancer-related), military service, or genetic information.

13.2. Equal Employment Opportunity

Contractor shall ensure equal employment opportunity based on objective standards of recruitment, classification, selection, promotion, compensation, performance evaluation, and management relations for all employees under this Agreement. Contractor's equal employment policies shall be made available to County upon request.

13.3. Section 504 of the Rehabilitation Act of 1973

Contractor shall comply with Section 504 of the Rehabilitation Act of 1973, as amended, which provides that no otherwise qualified individual with a disability shall, solely by reason of a disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination in the performance of any services this Agreement. This Section applies only to contractors who are providing services to members of the public under this Agreement.

13.4. Compliance with County's Equal Benefits Ordinance

Contractor shall comply with all laws relating to the provision of benefits to its employees and their spouses or domestic partners, including, but not limited to, such laws prohibiting discrimination in the provision of such benefits on the basis that the spouse or domestic partner of the Contractor's employee is of the same or opposite sex as the employee.

13.5. Discrimination Against Individuals with Disabilities

The nondiscrimination requirements of 41 C.F.R. 60-741.5(a) are incorporated into this Agreement as if fully set forth here, and Contractor and any subcontractor shall abide by the requirements of 41 C.F.R. 60-741.5(a). This regulation prohibits discrimination against qualified individuals on the basis of disability and requires affirmative action by covered prime contractors and subcontractors to employ and advance in employment qualified individuals with disabilities.

13.6. History of Discrimination

Contractor certifies that no finding of discrimination has been issued in the past 365 days against Contractor by the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or any other investigative entity. If any finding(s) of discrimination have been issued against Contractor within the past 365 days by the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or other investigative entity, Contractor shall provide County with a written explanation of the outcome(s) or remedy for the discrimination prior to execution of this Agreement. Failure to comply with this Section shall constitute a material breach of this Agreement and subjects the Agreement to immediate termination at the sole option of the County.

13.7. Reporting: Violation of Non-discrimination Provisions

Contractor shall report to the County Executive Officer the filing in any court or with any administrative agency of any complaint or allegation of discrimination on any of the bases prohibited by this Section of the Agreement or the Section titled "Compliance with Laws". Such duty shall include reporting of the filing of any and all charges with the Equal Employment Opportunity Commission, the California Department of Fair Employment and Housing, or any other entity charged with the investigation or adjudication of allegations covered by this subsection within 30 days of such filing, provided that within such 30 days such entity has not notified Contractor that such charges are dismissed or otherwise unfounded. Such notification shall include a general description of the circumstances involved and a general description of the kind of discrimination alleged (for example, gender-, sexual orientation-, religion-, or race-based discrimination).

Violation of the non-discrimination provisions of this Agreement shall be considered a breach of this Agreement and subject the Contractor to penalties, to be determined by the County Executive Officer, including but not limited to the following:

- i. termination of this Agreement;
- ii. disqualification of the Contractor from being considered for or being awarded a County contract for a period of up to 3 years;
- iii. liquidated damages of \$2,500 per violation; and/or
- iv. imposition of other appropriate contractual and civil remedies and sanctions, as determined by the County Executive Officer.

To effectuate the provisions of this Section, the County Executive Officer shall have the authority to offset all or any portion of the amount described in this Section against amounts due to Contractor under this Agreement or any other agreement between Contractor and County.

13.8. Compliance with Living Wage Ordinance

As required by Chapter 2.88 of the San Mateo County Ordinance Code, Contractor certifies all contractor(s) and subcontractor(s) obligated under this contract shall fully comply with the provisions of the County of San Mateo Living Wage Ordinance, including, but not limited to, paying all Covered Employees the current Living Wage and providing notice to all Covered Employees and Subcontractors as required under the Ordinance.

14. Compliance with County Employee Jury Service Ordinance

Contractor shall comply with Chapter 2.85 of the County's Ordinance Code, which states that Contractor shall have and adhere to a written policy providing that its employees, to the extent they are full-time employees and live in San Mateo County, shall receive from the Contractor, on an annual basis, no fewer than five days of regular pay for jury service in San Mateo County, with jury pay being provided only for each day of actual jury service. The policy may provide that such employees deposit any fees received for such jury service with Contractor or that the Contractor may deduct from an employee's regular pay the fees received for jury service in San Mateo County. By signing this Agreement, Contractor certifies that it has and adheres to a policy consistent with Chapter 2.85. For purposes of this Section, if Contractor has no employees in San Mateo County, it is sufficient for Contractor to provide the following written statement to County: "For purposes of San Mateo County's jury service ordinance, Contractor certifies that it has no full-time employees who live in San Mateo County. To the extent that it hires any such employees during the term of its Agreement with San Mateo County, Contractor shall adopt a policy that complies with Chapter 2.85 of the County's Ordinance Code." The requirements of Chapter 2.85 do not apply unless this Agreement's total value listed in the Section titled "Payments", exceeds two-hundred thousand dollars (\$200,000); Contractor acknowledges that Chapter 2.85's requirements will apply if this Agreement is amended such that its total value exceeds that threshold amount.

15. Retention of Records; Right to Monitor and Audit

(a) Contractor shall maintain all required records relating to services provided under this Agreement for three (3) years after County makes final payment and all other pending matters are closed, and Contractor shall be subject to the examination and/or audit by County, a Federal grantor agency, and the State of California.

(b) Contractor shall comply with all program and fiscal reporting requirements set forth by applicable Federal, State, and local agencies and as required by County.

(c) Contractor agrees upon reasonable notice to provide to County, to any Federal or State department having monitoring or review authority, to County's authorized representative, and/or to any of their respective audit agencies access to and the right to examine all records and documents necessary to determine compliance with relevant Federal, State, and local statutes, rules, and regulations, to determine compliance with this Agreement, and to evaluate the quality, appropriateness, and timeliness of services performed.

16. Merger Clause; Amendments

This Agreement, including the Exhibits and Attachments attached to this Agreement and incorporated by reference, constitutes the sole Agreement of the parties to this Agreement and correctly states the rights, duties, and obligations of each party as of this document's date. In the event that any term, condition, provision, requirement, or specification set forth in the body of this Agreement conflicts with or is inconsistent with any term, condition, provision, requirement, or specification in any Exhibit and/or Attachment to this Agreement, the provisions of the body of the Agreement shall prevail. Any prior agreement, promises, negotiations, or representations between the parties not expressly stated in this document are not binding. All subsequent modifications or amendments shall be in writing and signed by the parties.

17. Controlling Law; Venue

The validity of this Agreement and of its terms, the rights and duties of the parties under this Agreement, the interpretation of this Agreement, the performance of this Agreement, and any other dispute of any nature arising out of this Agreement shall be governed by the laws of the State of California without regard to its choice of law or conflict of law rules. Any dispute arising out of this Agreement shall be venued either in the San Mateo County Superior Court or in the United States District Court for the Northern District of California.

18. Notices

Any notice, request, demand, or other communication required or permitted under this Agreement shall be deemed to be properly given when both: (1) transmitted via email to the email address listed below; and (2) sent to the physical address listed below by either being deposited in the United States mail, postage prepaid, or deposited for overnight delivery, charges prepaid, with an established overnight courier that provides a tracking number showing confirmation of receipt.

In the case of County, to:

Name/Title: Amy Davidson, Director of Center on Homelessness
Address: 500 County Center, 1st Floor, Redwood City, CA 94063
Telephone: 650-877-5444
Email: adavidson@smcgov.org

In the case of Contractor, to:

Name/Title: Megan Kurteff Schatz/President
Address: 440 North Barranca Ave.#1815 Covina, CA 91723
Telephone: 916-436-1836
Email: info@focusstrategies.net

19. Electronic Signature

Both County and Contractor wish to permit this Agreement and future documents relating to this Agreement to be digitally signed in accordance with California law and County's Electronic Signature Administrative Memo. Any party to this Agreement may revoke such agreement to permit electronic signatures at any time in relation to all future documents by providing notice pursuant to this Agreement.

20. Reimbursable Travel Expenses

To the extent that this Agreement authorizes reimbursements to Contractor for travel, lodging, and other related expenses as defined in this section, the Contractor must comply with all the terms of this section in order to be reimbursed for travel.

- a. Estimated travel expenses must be submitted to authorized County personnel for advanced written authorization before such expenses are incurred. Significant differences between estimated and actual travel expenses may be grounds for denial of full reimbursement of actual travel expenses.

- b. Itemized receipts (copies accepted) for all reimbursable travel expenses are required to be provided as supporting documentation with all invoices submitted to the County.
- c. Unless otherwise specified in this section, the County will reimburse Contractor for reimbursable travel expenses for days when services were provided to the County. Contractor must substantiate in writing to the County the actual services rendered and the specific dates. The County will reimburse for travel at 75% of the maximum reimbursement amount for the actual costs of meals and incidental expenses on the day preceding and/or the day following days when services were provided to the County, provided that such reimbursement is reasonable, in light of travel time and other relevant factors, and is approved in writing by authorized County personnel.
- d. Unless otherwise specified within the contract, reimbursable travel expenses shall not include Local Travel. "Local Travel" means travel entirely within a fifty-mile radius of the Contractor's office and travel entirely within a fifty-mile radius of San Mateo County. Any mileage reimbursements for a Contractor's use of a personal car for reimbursable travel shall be reimbursed based on the Federal mileage reimbursement rate.
- e. The maximum reimbursement amount for the actual lodging, meal and incidental expenses is limited to the then-current Continental United States ("CONUS") rate for the location of the work being done (i.e., Redwood City for work done in Redwood City, San Mateo for work done at San Mateo Medical Center) as set forth in the Code of Federal Regulations and as listed by the website of the U.S. General Services Administration (available online at <http://www.gsa.gov/portal/content/104877> or by searching www.gsa.gov for the term 'CONUS'). County policy limits the reimbursement of lodging in designated high cost of living metropolitan areas to a maximum of double the then-current CONUS rate; for work being done outside of a designated high cost of living metropolitan area, the maximum reimbursement amount for lodging is the then-current CONUS rate.
- f. The maximum reimbursement amount for the actual cost of airfare shall be limited to fares for Economy Class or below. Air travel fares will not be reimbursed for first class, business class, "economy-plus," or other such classes. Reimbursable car rental rates are restricted to the mid-level size range or below (i.e. standard size, intermediate, compact, or subcompact); costs for specialty, luxury, premium, SUV, or similar category vehicles are not reimbursable. Reimbursable ride-shares are restricted to standard or basic size vehicles (i.e., non-premium vehicles unless it results in a cost-saving to the County). Exceptions may be allowed under certain circumstances, such as unavailability of the foregoing options, with written approval from authorized County personnel. Other related travel expenses such as taxi fares, ride-shares, parking costs, train or subway costs, etc. shall be reimbursable on an actual-cost basis. Reimbursement of tips for taxi fare, or ride-share are limited to no more than 15% of the fare amount.

- g. Travel-related expenses are limited to: airfare, lodging, car rental, taxi/ride-share plus tips, tolls, incidentals (e.g. porters, baggage carriers or hotel staff), breakfast, lunch, dinner, mileage reimbursement based on Federal reimbursement rate. The County will not reimburse for alcohol.
- h. Reimbursement of tips are limited to no more than 15 percent. Non-reimbursement items (i.e., alcohol) shall be excluded when calculating the amount of the tip that is reimbursable.

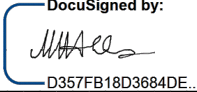
21. Rehabilitation Act of 1973

Refer to the attachment required to be completed by the Contractor.

SIGNATURE PAGE TO FOLLOW

In witness of and in agreement with this Agreement's terms, the parties, by their duly authorized representatives, affix their respective signatures:

For Contractor: Focus Strategies

 D357FB18D3684DE...	3/17/2026	MEGAN KURTEFF-SCHATZ
_____ Contractor Signature	_____ Date	_____ Contractor Name (please print)

COUNTY OF SAN MATEO

By:
President, Board of Supervisors, San Mateo County

Date:

ATTEST:

By:
Clerk of Said Board

Exhibit A

In consideration of the payments set forth in Exhibit B, Contractor shall provide the following services:

- A. Scope of work for facilitation, technical assistance, and consultation services to support the County's Coordinated Entry System (CES) redesign and implementation process. The goal of this effort, referred to as CES 2.0, is to modernize CES by integrating best practices and redesigning the implementation tool. The CES redesign effort will be informed by key themes identified through CES meetings and stakeholder input, including:
 - I. The importance of a transparent process that provides people experiencing homelessness and service providers with clear communication and realistic expectations about referrals to housing programs.
 - II. The importance of matching people seeking housing with an appropriate housing resource in a way that is transparent for system stakeholders and prioritizes limited housing resources consistently with community priorities.
 - III. Opportunities to use health and other system data to strengthen prioritization and matching.
 - IV. The value of an updated CES assessment that effectively reflects community priorities, promotes equity, and effectively identifies households with the highest barriers to housing.

1. Phase I: Development and Design (April 2026 – November 2026)

Identification of a project working group that includes staff from Focus Strategies, Center on Homelessness (COH), and Kate Bristol Consulting. The project working group will meet bi-weekly to prepare for stakeholder meetings, review data and information, and make decisions about how best to move the redesign process forward.

a) Facilitation of Stakeholder Meetings

- i. Support the County's CES 2.0 Working Group to design the new structure and policies.
- ii. Develop a new prioritization approach.
- iii. Update the CES assessment.
- iv. Monthly meetings, agenda setting, note taking, and meeting facilitation to synthesize into a final system design.
- v. Facilitation of stakeholder engagement such as the Lived Experience Advisory Group (LEAG), Homeless System Impact Committee (HSIC), and other committees.
- vi. Provide input or help make decisions about the design and policies.
- vii. Assist in presenting the final design to the Continuum of Care Board (CoC) for adoption, if needed.
- viii. Kate Bristol Consult will provide content expertise and support Focus Strategies with the synthesis of stakeholder information and the development of the final CES design recommendations for the CES 2.0 Working Group.
- ix. Facilitation of virtual or in-person sessions to build rapport, strengthen relationships, and ensuring broad community buy-in.

b) Prioritization Tool Update

- i. Complete follow-up analysis, as needed, to inform changes to questions and domains, prioritization factors and weighing criteria.
 1. Assessing specific questions or factors from the current CES tool.
 2. Reviewing HMIS data not currently incorporated into prioritization.
 3. Identifying approach to measure clients' needs such as severity in mental and physical health conditions and support with Activities to Daily Living (ADLs).
 4. Exploring the use of relevant non-HMIS data sources such as physical and mental, health, substance use, and justice system data.
- ii. Focus Strategies and Kate Bristol Consulting will conduct a review of best and emerging practices, examining prioritization tools and CES designs used in communities comparable in size and resources to San Mateo County.
- iii. Findings from the literature review and data analysis will be presented to the CES 2.0 Working Group to inform and support decision-making.
- iv. Focus Strategies will draft and iteratively update a new prioritization tool to be approved by the County based on recommendations from the CES 2.0 working group, COH, CEO, and Kate Bristol Consulting.
- v. Develop a tool or tools that is trauma-informed, data driven and as streamlined as possible while providing the information needed to prioritize and make successful matches to the existing and anticipated inventory.

c) Implementation Planning

- i. Develop a pilot and evaluation process to test the new tool and system design, allowing for adjustments prior to full implementation. Testing includes determining question wording, answer choices, weighting, and flow, as well as ensuring that the tool creates an appropriate distribution and fits the system's needs for matching.
- ii. Work with COH to program and test the tool in HMIS. HMIS testing is different from pilot testing and includes ensuring that answer choices are correct and clear and that scoring and any conditional programming function correctly.
- iii. Review and update CES policies and procedures to align with the redesigned system.
- iv. Support the transition of existing CES participants to the new process, including establishing a transition plan for replacing or aligning scores between the current and revised tools to minimize disruptions and ensure that people who have already been prioritized continue to receive support.
- v. Develop a communication and training plan to prepare stakeholders and CES staff for the transition.

2. Phase II: Implementation Completion (December 2026 – May 2027)

Focus Strategies and Kate Bristol Consulting will support COH in piloting and refining the CES 2.0 system, updating processes and written policy, and updating or developing communication and training materials. The scope for this phase will be refined in collaboration with COH closer to the end of the design phase to ensure it reflects the priority needs of COH based on the final CES design.

a) Piloting

- i. Begin with piloting the CES 2.0 tool and process with one or two providers and gathering feedback on the new process and tool from providers and participants who were assessed.
- ii. Focus Strategies, with guidance from Kate Bristol Consulting, will use the findings from this pilot to make recommendations for any adjustments or refinements to the tool and process.

b) Rollout

- i. Finalize documentation changes to the CES policies and procedures to align with the new process and develop training and communication materials to roll out CES 2.0.
- ii. Focus Strategies and Kate Bristol Consulting will provide technical assistance and thought partnership throughout the rollout of the new CES.

Exhibit B

In consideration of the services provided by Contractor described in Exhibit A and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms.

- A. Contractor will invoice County for actual costs incurred, upon completion of services shown in Exhibit A, based on the project components and rates shown below. Invoices will be submitted electronically to Lesly Randolph (LRandolph@smcgov.org), or designee, by the 20th of each month for the previous month’s service. Invoices must be itemized and include:
1. Total amount hours charged per activity, to include a breakdown of the number of hours worked by each position.
 2. Report indicating progress towards established milestones from the previous month. Milestones and target delivery dates will be developed by the Contractor, with approval from HSA.
 3. Incentives documentation (for gift cards) must include the receipt of purchase, recipient name and signature, denomination of card, and card number.
 4. See Paragraph **20. Reimbursable Travel Expenses** of this Agreement for additional invoicing requirements related to travel expenses.

B1. Roles

Party	Project Role
Focus Strategies	<ol style="list-style-type: none"> 1. Project management, including scheduling, tracking of project progress and timeline 2. Co-facilitation of stakeholder meetings, including coordination of meetings, agenda setting, note taking 3. Data analysis and score testing 4. Best practices research
Kate Bristol Consulting (sub-contractor)	<ol style="list-style-type: none"> 1. Co-facilitation of stakeholder meetings 2. Thought partner on system design recommendations, data analysis approach, and best practices research findings 3. Provide content knowledge expertise and guide the direction of design recommendations 4. Serve as a liaison to CEO throughout to project, meeting with them as needed 5. Support in-person engagements, as needed
COH	<ol style="list-style-type: none"> 1. Support the coordination and facilitation of stakeholder meetings, including introductions to stakeholders 2. Support the coordination of any in-person engagements, including identifying space and logistics

	<ol style="list-style-type: none"> 3. Build out the new tool in HMIS 4. Provide HMIS data for analysis and tool and design testing 5. Communicate with providers and community stakeholder on the redesign process and roll out
CEO	<ol style="list-style-type: none"> 1. Provide oversight and guidance on design and policy decisions 2. Support the coordination and facilitation of stakeholder meetings, including introductions to stakeholders 3. Support in communicating County priorities and direction to CES 2.0 Working Group and other stakeholders

B. Positions shown in table below are subject to change. Contractor must obtain written approval by County prior to making changes to the below table. The written request will be submitted in the form of a memo and shall include a description of the request (to remove, add, or edit a position title), the name, title, position/job description, and if applicable, the hourly rates for the term of the Agreement.

B2. Hourly Rate per Position

Position Table	Hourly Rate FY2025-26	Hourly Rate FY2026-27
President	\$285	\$290
Director	\$275	\$280
Principal Associate	\$275	\$280
Associate Director	\$270	\$275
Manager/Team Lead	\$260	\$265
Senior Consultant	\$240	\$245
Senior Analytics Consultant	\$240	\$245
Consultant	\$230	\$235
Analytics Consultant	\$230	\$235
Project Manager	\$230	\$235
Administrative Manager	\$190	\$195
Administrative Analyst	\$170	\$175
Subcontractor – Katharine Gale	\$275	\$280
Subcontractor – Kate Bristol	\$275	\$280
Stipends for participation by people with lived experience	\$2,000	\$2,000

B3. Phase 1 Timeline and Budget

Activities	Timeline	Estimated Cost
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Facilitate eight stakeholder meetings for initial design and prioritization tool discussions, including engaging subcommittee on findings from emerging best practice review, CES and Diversion Evaluation, and additional analysis. <i>Note: Cost estimate includes up to two in-person engagements</i>	April 2026 – August 2026	\$175,000
Conduct emerging best practices review.	April - May 2026	
Conduct data analysis and exploration, as needed.	May 2026 – August 2026	
Finalize CES design and update prioritization tool.	August – September 2026	
Begin Implementation Planning, including pilot process, updating CES policies and procedures, developing communication and training plan.	September 2026 – November 2026	

B4. Phase 2 Timeline and Budget

C. County will:

Activities	Timeline	Estimated Cost
Launch or complete pilot CES 2.0 tool and processes	December 2026	\$140,000
Refinement of CES 2.0 based on pilot findings	February 2027	
Full implementation of CES 2.0	March – May 2027	

1. Have the option to adjust funding across activities, line items, and fiscal years shown in the Project Component Table as agreed upon by both parties in writing, as long as it doesn't exceed the total Agreement obligation amount.

ATTACHMENT I

Assurance of Compliance with Section 504 of the Rehabilitation Act of 1973, as Amended

The undersigned (hereinafter called "Contractor(s)") hereby agrees that it will comply with Section 504 of the Rehabilitation Act of 1973, as amended, all requirements imposed by the applicable DHHS regulation, and all guidelines and interpretations issued pursuant thereto.

The Contractor(s) gives/give this assurance in consideration of for the purpose of obtaining contracts after the date of this assurance. The Contractor(s) recognizes/recognize and agrees/agree that contracts will be extended in reliance on the representations and agreements made in this assurance. This assurance is binding on the Contractor(s), its successors, transferees, and assignees, and the person or persons whose signatures appear below are authorized to sign this assurance on behalf of the Contractor(s).

The Contractor(s): (Check a or b)

- a. Employs fewer than 15 persons.
- b. Employs 15 or more persons and, pursuant to section 84.7 (a) of the regulation (45 C.F.R. 84.7 (a), has designated the following person(s) to coordinate its efforts to comply with the DHHS regulation.

Name of 504 Person:


Name of Contractor(s):

Street Address or P.O. Box:

City, State, Zip Code:

I certify that the above information is complete and correct to the best of my knowledge

Signature:

<small>DocuSigned by:</small>  <small>D357FB18D3684DE...</small>
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Title of Authorized Official:

President

Date:

3/17/2026

*Exception: DHHS regulations state that: "If a recipient with fewer than 15 employees finds that, after consultation with a disabled person seeking its services, there is no method of complying with (the facility accessibility regulations) other than making a significant alteration in its existing facilities, the recipient may, as an alternative, refer the handicapped person to other providers of those services that are accessible."