



SENT VIA EMAIL

AMENDMENT No. 2 to
Grant Agreement for Community Health Assess and Treat (CHAT)
Between
CareOregon, Inc.
and
The City of Portland Grant No. 32002585

This Amendment No. 2 amends Grant No. 32002585 dated January 15, 2022 by and between CareOregon, Inc. (CareOregon) a domestic nonprofit corporation registered in the State of Oregon, and the City of Portland, a municipal corporation of the State of Oregon ("City") by and through their duly authorized representatives. This Amendment may refer to CareOregon and City individually as a "Party" or collectively as the "Parties."

This Amendment is authorized by City Ordinance No. 190578.

The Effective Date of this Amendment is October 1, 2022. The purpose of this Amendment is to extend the termination date, add funds and revise provisions.

The Grant Agreement was previously amended as follows:

Amendment 1, dated October 1, 2021, which extended the duration of the Grant Agreement and added provisions.

The Parties agree to Amend the Grant Agreement as follows:

1. The Term is extended from October 1, 2022 to September 30, 2023, unless terminated sooner under the provisions of the Grant.
2. The Grant Agreement not-to-exceed amount of \$ 2,488,575 is increased by \$2,400,000 to a new total not-to-exceed amount of \$4,888,575.
3. Attachment A-1: Budget, is replaced with the attached Attachment A-1: Budget 2023.
4. Attachment B-1: Quarterly Report Supplement is replaced with the attached Attachment B-1: 2023 Quarterly Report Template.

5. Attachment C: Data Sharing is hereby added in its entirety to this Agreement.
6. Exhibit 1 CareOregon Correspondence is added.
7. The Project Manager is changed from Lisa Reslock to The Community Health Services Director.

All other terms and conditions of the Grant remain unchanged by this Amendment and in full force and effect.

This Amendment 2 to Grant No. 32002585 and Exhibit 1: CareOregon Correspondence, when taken together shall constitute one and the same grant amendment.

The Parties agree that they may execute this Amendment by electronic means, including the use of electronic signatures.

IN WITNESS WHEREOF, the Parties hereby cause this Amendment to be executed.

Contract Number: 32002585

Amendment Number: 2

Contract Title: Community Health Assess and Treat (CHAT)

CITY OF PORTLAND SIGNATURES

By: _____ Date: _____
Portland Fire & Rescue Chief
Ordinance #190578

Approved as to Form:

By: _____ Date: _____
Office of City Attorney

Attachment A-1
Amendment 2 Budget 2023

Personnel Expense Overhead FRCH000001 CHD Admin	Salary	Shift Premium	Benefits	Taxes	Retirement	Total	Positions	Annual w/Benefits	9-months	
Community Health Division Chief 50%	\$176,800		\$28,079	\$3,949	\$0	\$208,828	1	\$208,828	\$78,310.65	
Critical Care RN Manager	\$148,138		\$16,934	\$12,494	\$36,086	\$213,652	1	\$213,652	\$160,238.95	
Admin Specialist II	\$74,000		\$16,934	\$6,241	\$18,026	\$115,201	1	\$115,201	\$86,401.00	
Analyst II 50%	\$74,000		\$16,934	\$6,241	\$18,026	\$115,201	1	\$115,201	\$43,200.50	
									\$368,151.10	\$368,151
Personnel Expense - FRCH000002 CHAT	Salary		Benefits	Taxes	Retirement	Total	Positions	Annual		
Community Health Medic/EMT B (days)	\$48,775		\$16,934	\$4,114	\$11,882	\$81,704	9	\$735,337	\$551,502.86	
Community Health Medic/EMT B (swing)	\$52,582		\$16,934	\$4,435	\$12,809	\$86,760	9	\$780,836	\$585,627.19	
Registered Nurse	\$111,238		\$16,934	\$9,381	\$27,098	\$164,651	4	\$658,604	\$493,953.17	
Community Health Supervisor	\$108,698		\$16,934	\$9,167	\$26,479	\$161,278	4	\$645,111	\$483,833.01	
									\$2,114,916.23	\$2,114,916
Capital Investment - FROD400002 CHAT	Cost						Items	Total		
Fuel	\$5,000						8	\$40,000	\$30,000	
IT annual fees (Phones, Computers, Email Accounts)	\$1,356		computer, data/internet				8	\$10,848	\$10,848	
Lifepak maintenance	\$500						4	\$2,000	\$2,000	
Training	\$1,000						20	\$20,000	\$20,000	
Building Lease & utilities	\$5,000						9	\$45,000	\$45,000	
EMS Equipment/Supplies	\$6,000						4	\$24,000	\$24,000	
									\$131,848.00	\$131,848
Minimum estimated Carryover from past CareOregon funding									\$	2,614,915
CareOregon proposed grant funding									\$	250,000
									\$	2,364,915 Round to \$2.4M

ATTACHMENT B-1
2023 Quarterly Report Template



Submit narrative reports indicated below to communitygivinggrants@careoregon.org, and cc: Sarah Reynolds (reynoldss@careoregon.org) and Shawn DeCarlo (decarlos@careoregon.org), attesting to the utilization of funds, and describing progress within the areas of focus.

Organization	City of Portland Fire & Rescue CHAT Program
Date Report Submitted	
Reporting Period	Reports are due no later than: <ul style="list-style-type: none">• April 30, 2023, for the reporting period January 1, 2023 – March 31, 2023• July 31, 2023, for the reporting period April 1, 2023 – June 30, 2023• October 31, 2023, for the reporting period July 1, 2023 – September 30, 2023
Submitted by (name, email)	

1. Please describe how CHAT interventions and workflows have impacted patient outcomes in the following areas:
 - a. Reduction in ED utilization
 - b. Patient Satisfaction
 - c. Increased patient engagement with primary care providers

2. During this quarter, please describe successes and process improvements in the following areas:
 - a. Engaging and supporting members on getting their medical and SDOH needs met
 - b. Building partnerships and relationships with clinical providers and community-based organizations to connect members to necessary resources
 - c. Long term program sustainability planning and implementation

**ATTACHMENT B
AMENDMENT 2
2023 Quarterly Report Template**



3. Please describe any systems barriers and/or gaps that CHAT teams are experiencing in their work with our members, providers, and community partners.

4. Please outline what activities CHAT teams perform to improve health disparities, which include:
 - a. How CHAT teams are improving their ability to track and address race, ethnicity, and language differences in services provided
 - b. Providing outreach, education, and connections to primary and/or behavioral health care providers.
 - c. Care coordination focused on addressing and mitigating the SDOH.

5. Please summarize the Follow Up teams' activities, services provided, and the results/outcomes of the services they are providing to members.

**ATTACHMENT B
AMENDMENT 2
2023 Quarterly Report Template**



Complete the quantifiable result of the following metrics and include in the summary above:

CHAT On Scene	Q1 2023	Q2 2023	Q3 2023
Total Calls Received			
% of total calls for the top 8 primary provider impressions			
% of total calls for the top 8 secondary provider impressions			
Total referral actions taken for additional care or services			
% of ED Visits diverted			
% of ambulance transports diverted			
% of members who received follow up support			
# services provided in each category to be identified by Portland Fire & Rescue			
CHAT Follow Up			
Total follow up outreach and engagement activities			
Total in person follow ups encounters			
Total telephonic follow up encounters			
# Services provided in each category identified by Portland Fire & Rescue			
Average number of referrals made			
Average number of visits per member			
% of members in top 5 outcome of services that were met/provided			

ATTACHMENT C
DATA SHARING AND REPORTING

Data Sharing

- *One time* data pull to be given to CareOregon by the end of January 2023, of the entire population served November 2021 through December 31, 2022. Data points needed will be mutually agreed upon. All reports to be delivered via secure email to Ashley Green (greena@careoregon.org), Ash Pine (pinea@careoregon.org) and cc: Sarah Reynolds (reynoldss@careoregon.org).
- *Ongoing through September 2023*: PFR will continue to send monthly (by the 5th) data extract that includes all CHAT responses and interventions. See below for the *minimum* information required for both CHAT On Scene and the Follow Up team. *Final report due 10/5/2023.*
 - o **CHAT On Scene**
 - i. Name, Date of Birth, Address (please document if houseless), and Phone Number
 - ii. Date of Service
 - iii. Place of Service
 - iv. Reason for visit and provider primary impression
 - v. Services delivered
 - vi. Outcome of services
 - a. including specific documentation of transportation to any secondary place of service (e.g., emergency department, urgent care, crisis center, primary care provider, community-based organization)
 - vii. Results of any positive screenings related to social determinants of health
 - o **CHAT Follow Up**
 - i. Member Name, Date of Birth, Address (please document if houseless), and Phone Number
 - ii. Date of service
 - iii. Reason for visit and provider primary impression
 - iv. Services delivered
 - v. How services were delivered (in person or on phone)
 - vi. Outcome of services provided (example: appointment with primary care provider scheduled, housing secured, established care with BH provider/ Medical provider, enrolled in health insurance, etc)

Quarterly Reporting

Provider shall submit written quarterly reports inclusive of narrative explanation of program successes, improvements and barriers, as well as quantitative summaries of metrics using the provided quarterly reporting template. CareOregon requests that any program changes or changes to the submitted and approved proposal be communicated prior to implementation.

See attached template for quarterly reporting.

From: [Shawn DeCarlo](#)
To: [Johnson, Kristin](#)
Cc: [Schultz, Trisha](#)
Subject: RE: CareOregon community giving grant request - CHAT program
Date: Thursday, January 5, 2023 9:25:33 AM



The City's email systems have identified this email as potentially suspicious. Please click responsibly and be cautious if asked to provide sensitive information.

Hi Kristin, thanks for your email. In the past CareOregon treated our funds as a contract and amendments were included to extend the length of our original agreement.

For 2023 CareOregon is treating the PFR CHAT funding as a community giving grant and our process is to send award emails and a grant award letter with funds.

So there is no need for any formal agreement, contract or amendments on our end. Let me know if this answers your question. Thanks,

Shawn DeCarlo

Director, Community Benefit Program
CareOregon
315 SW 5th Ave, Portland, Oregon 97204
P: 503-416-3913
decarlos@careoregon.org

From: Johnson, Kristin <Kristin.Johnson@portlandoregon.gov>
Sent: Thursday, January 5, 2023 8:12 AM
To: Shawn DeCarlo <DeCarloS@careoregon.org>
Cc: Schultz, Trisha <Trisha.Schultz@portlandoregon.gov>
Subject: FW: CareOregon community giving grant request - CHAT program

Hello Shawn,

Chief Matthews forwarded to me the good news about CareOregon's authorization of an additional \$2.4M for the CHAT program. Thank you so much!

I am reaching out to see if there will be an amendment we can process through Council in order to accept the funds. Is there anything you need from us to make that happen?

Thanks and Happy New Year!

KRISTIN JOHNSON | Financial Analyst II (she/her)
PORTLAND FIRE & RESCUE
55 SW Ash St., Portland, OR 97204
Cell: 503.314.0418
Email: kristin.johnson@portlandoregon.gov
www.portlandoregon.gov/fire

I have a flex schedule that results in a regular day off every other Friday (12/9, 12/23, 1/6, 1/20)

From: Matthews, Tim <Tim.Matthews@portlandoregon.gov>
Sent: Thursday, December 29, 2022 11:17 AM
To: Johnson, Kristin <Kristin.Johnson@portlandoregon.gov>
Subject: Fwd: CareOregon community giving grant request - CHAT program

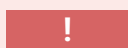
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From: Matthews, Tim <Tim.Matthews@portlandoregon.gov>
Sent: Thursday, December 29, 2022 11:08 AM
To: Aaby, Chan <Channing.Aaby@portlandoregon.gov>; Wanner, Kezia <Kezia.Wanner@portlandoregon.gov>; Schultz, Trisha <Trisha.Schultz@portlandoregon.gov>; Boone, Sara <Sara.Boone@portlandoregon.gov>
Subject: Fwd: CareOregon community giving grant request - CHAT program

FYI

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From: Shawn DeCarlo <DeCarloS@careoregon.org>
Sent: Thursday, December 29, 2022 10:46 AM
To: Matthews, Tim <Tim.Matthews@portlandoregon.gov>; LaVina, Michelle <Michelle.Lavina@portlandoregon.gov>
Cc: Jeremiah Rigsby <rigsbyj@careoregon.org>; Jennifer Hawkins <hawkinsj@careoregon.org>; Sarah Reynolds <reynoldss@careoregon.org>
Subject: CareOregon community giving grant request - CHAT program



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Hi Tim and Michelle, I'm happy to let you know that your attached request to CareOregon's community giving grant program for support of Portland Fire and Rescue's Community Health Assess and Treat (CHAT) program has been approved in the amount of \$2.4M (\$2,400,000). This represents slightly less than the \$2,675,809 requested in the attached proposal. The attached budget clarifies our grant funded program assumptions for the period 1/1/23 – 9/30/23. Please be prepared to communicate in advance to CareOregon any substantive changes to the staffing and program assumptions detailed in the proposal and budget.

Reporting requirements are detailed in the data sharing and reporting outline document, and a quarterly reporting template is also included. Any questions on reporting can be addressed to Sarah Reynolds at reynoldss@careoregon.org.

I will submit a check request based on the attachments. Our intention is to send funds in full all at once. If anything changes I'll let you know. Please allow approximately 2-3 weeks for funds to arrive.

Any questions, please feel free to reach out to me. Thanks, and congratulations! Cheers,

Shawn DeCarlo | Director, Community Benefit Program | www.careoregon.org | direct: 503-416-3913 | (he/his/him)



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