



**COUNTY OF SAN MATEO**  
Inter-Departmental Correspondence  
Health System



**Date:** November 4, 2016  
**Board Meeting Date:** December 13, 2016  
**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors  
**From:** Louise Rogers, Chief Health System  
Lisa Mancini, Director, Aging and Adult Services  
**Subject:** Agreement with Assurecare, LLC

**RECOMMENDATION:**

Adopt a resolution authorizing an agreement with Assurecare, LLC for ongoing support of the automated case management system and assessment tool, for the term of February 1, 2016 through December 31, 2021, in an amount not to exceed \$745,000.

**BACKGROUND:**

Aging and Adult Services (AAS) selected Charles H. Mack, Inc. to provide the Q Continuum System (Q System) as its primary case management system after a Request for Proposals (RFP) in December 2002. Subsequent contracts and amendments were made to extend the contract period and to allow for modifications and add additional users to the system. In May 2014, Charles H. Mack, Inc. was acquired by Assurecare, LLC (Assurecare).

**DISCUSSION:**

In July 2015, AAS initiated an RFP for a new AAS case management system. There were 9 respondents to the RFP. After an extensive review of the responses, the selection committee determined that there was not a better or more cost-effective alternative to the existing Q System.

The Q System is an automated case management system that allows AAS staff to track and record client-related information to better match clients' needs with services, thereby assisting them to remain in the community in a less restrictive setting for as long as it is safely possible.

The agreement and Resolution have been reviewed and approved by County Counsel as to form. ISD has reviewed and approved the IT component of this agreement. Modifications to the hold harmless clause have been reviewed and approved by County

Counsel and Risk Management. The County Contract Compliance Committee has reviewed and approved the request to contract for a term exceeding three years.

The Health System requests your Board to authorize the Chief of the Health System or designee to execute contract amendments which modify the County's maximum fiscal obligation by no more than \$25,000 (in aggregate) and/or modify the contract term and services so long as the modified term or services is/are within the current or revised fiscal provisions.

This contract is late due to protracted contract negotiations regarding the legal and technical language needed in the new agreement.

This agreement contributes to the Shared Vision 2025 outcome of a Healthy Community by providing an automated case management system to ensure timely, accurate, and client-based data for all AAS programs and services provided through our community providers. It is anticipated that 95% of at-risk individuals can be maintained in a less restrictive setting through effective case management.

**PERFORMANCE MEASURE(S):**

<b>Measure</b>	<b>FY 2015-16 Actual</b>	<b>FY 2016-17 Projected</b>
Percentage of at-risk individuals maintained in a less restrictive setting through effective case management.	95%	95%

**FISCAL IMPACT:**

The term of the agreement is February 1, 2016 through December 31, 2021. The amount of the agreement is not to exceed \$745,000. Funds are included in the AAS FY 2016-17 Adopted Budget. Similar arrangements will be made for future impacted budgets. It is anticipated that \$558,750 (75%) of the total cost will be paid for through State and federal funding, with the remaining \$186,250 to be Net County Cost.

The payment provisions of this agreement differ from the previous agreement due to an 8.3% increase in software license cost per user, to bring the license cost in line with average industry cost, and the addition of 31 new licenses over the contract term.

# Request for Proposals – Matrix

<p><b>1</b></p>	<p>Where was the RFP advertised?</p>	<p>The San Mateo Daily Journal The Health System Home Page Public Purchase</p>
<p><b>2</b></p>	<p>In addition to any advertisement, list others to whom the RFP announcement was sent:</p>	<p>N/A</p>
<p><b>3</b></p>	<p>State the total number of RFP's sent to prospective proposers:</p>	<p>One</p>
<p><b>4</b></p>	<p>How many proposals did you receive?</p>	<p>Nine vendors responded</p>
<p><b>5</b></p>	<p>List in alphabetical order the names of the proposers (or finalists, if applicable) and the location:</p>	<p>Assurecare LLC Athena Software ClientTrack Harmony Jump Technology Services McGladrey LLC MD Systems PeerPlace Networks, LLC</p>