



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Human Services Agency



Date: June 18, 2014
Board Meeting Date: August 5, 2014
Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Iliana Rodriguez, Director, Human Services Agency

Subject: Agreement with Exemplar Human Services, LLC

RECOMMENDATION:

Adopt a Resolution authorizing an agreement with Exemplar Human Services, LLC, to provide analytic subscription services to enable staff to access and utilize key performance management outcome data, for the term of August 5, 2014 through June 30, 2016, in the amount of \$265,000.

BACKGROUND:

Currently, case management reports for the CalWORKs Employment Services staff are generated using a combination of CalWIN extracts on a monthly basis. The data contained in the reports is always a month behind such that case managers are not seeing “real time” case management data and instead are looking at the status of their caseloads from the previous month. Additionally, once the report is generated, a manual process occurs in which a staff member must sort through each report for each worker and manually color-code statuses and conduct counts for each different status.

The report is then manually distributed via email to each case manager and supervisor. Case managers need an adequate case management reporting tool that can, on a real-time basis, provide them with an accurate overview of the status of their Welfare-to-Work (WTW) cases. Exemplar has the functionality to distribute case management reports, via email, on a daily basis. The reports will highlight any cases in their caseload that have alerts on them which require immediate action. If action is not taken within a specified time frame (as determined by management) the alert status will escalate to the supervisory and management level(s).

DISCUSSION:

Exemplar’s web-based Engagement Matrix Analytic Service is an effective automated service designed by Exemplar to access and utilize key performance management weekly outcome data related to operations. This case management reporting tool will be

utilized by case managers and will also provide high level caseload status information for supervisors and management. Client services may also be positively impacted as the tool will provide a more efficient method for tracking the status of cases/clients and will quickly identify those that are currently unengaged and not receiving the many services that the CalWORKs Employment Services program can offer.

The Contractor has assured compliance with the County Contractor Employee Jury Service Ordinance, as well as all other contract provisions that are required by County ordinance and administrative memoranda including, but not limited to, insurance, hold harmless, non-discrimination, and equal benefits. County Counsel has reviewed and approved the Agreement and Resolution as to form and the Contractor meets the insurance certification requirements. The Human Services Agency requests the Board waive the Request for Proposals (RFP) Process because Exemplar is a social services consulting and analytic services company specializing in performance management business solutions for WTW agencies and other human services programs. Exemplar has been providing performance management services to clients in California and across the nation since 2005, and has been under contract with the California Department of Social Services (CDSS) during most of this time under the California Multiple Award Schedules (CMAS) procurement vehicle. It has helped the state design and implement "CalStat" a process for helping counties share performance management practices, aided in the development of the state's "Pay for Performance" indicators, and helped the state develop Engagement reports that could be a model for future statewide participation reporting. On the basis of their unique experience, Exemplar has been awarded sole source contracts with San Bernardino, Kern, Alameda, and Santa Cruz Counties to provide them with Engagement Matrix.

The Human Services Agency also requests the Board to authorize the Director of the Human Services Agency or the Director's 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/or services so long as the modified term or services is/are within the current or revised fiscal provisions.

Approval of this Agreement contributes to the Shared Vision 2015 outcome of Prosperous Community by increasing the opportunity for CalWORKs Family Engagement by 60% by 2016, through a new case management reporting tool.

PERFORMANCE MEASURE(S):

Measure	FY 2014-15 Projected	FY 2015-16 Projected
Percentage of mandatory Welfare-to-Work individuals participating in approved activities	40%	60%

FISCAL IMPACT:

The term of the Agreement is August 5, 2014 through June 30, 2016. The Agreement is funded 100% by the CalWORKs Single Allocation. Appropriation for the Agreement is

included in the FY 2014-15 Tentatively Adopted Budget and will be included in the FY 2015-16 Budget. There is no Net County Cost.