



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Human Services Agency



Date: November 19, 2014
Board Meeting Date: December 9, 2014
Special Notice / Hearing: None
Vote Required: 4/5ths

To: Honorable Board of Supervisors

From: Iliana Rodriguez, Director, Human Services Agency

Subject: Amendments to Bitfocus and AgreeYa Agreements and Appropriation Transfer Request for Changes the Clarity Human Services System for the Core Service Agencies

RECOMMENDATION:

Approve the following actions:

- A) Adopt a Resolution authorizing the Human Services Agency Director to execute amendments: (1) to the Bitfocus, Inc. Agreement for the purpose of developing revised enrollment and assessment screens and to develop a custom performance measurement report, in the amount of \$23,000 and to change the current approval of authorization of the Human Services Agency Director to sign amendments up to \$171,844 for licenses, maintenance, data and cleaning to include all technology services necessary to fulfill the goals of the Agreement and the term remaining April 8, 2014 through July 30, 2016; and (2) to the AgreeYa Agreement for the purpose of implementing a revised master program and services list in the amount \$89,000 and up to \$100,000 for future unanticipated services necessary to fulfill the goals of the Agreement with the authorization to extend the term to July 30, 2016 at the Human Services Agency's discretion to match the term of the Bitfocus Agreement.
- C) Approve an Appropriation Transfer Request in the amount of \$112,000 from the Measure A Trust Fund to the Human Services Agency to implement system changes to the Clarity System used by the Core Services Agencies of which \$23,000 is to be applied to the Bitfocus amendment and \$89,000 to the AgreeYa amendment.

BACKGROUND:

The Board adopted \$325,000 in Measure A Half-Cent Sales Tax funds in the FY 2013-15 County budget for a coordinated case management and performance reporting

system for the eight Core Service Agencies that could provide information and referral services for basic needs, such as food, emergency shelter, clothing, housing and utilities assistance, for low-income county residents.

On April 8, 2014, the Board approved an Agreement with Bitfocus by Resolution 073095 and a subsequent amendment on August 5, 2014 by Resolution 073331 which included authorizing the Clarity Human Services System to enable the Core Service Agencies to have a coordinated case management system, adding additional users, and to replace the existing Homeless Management Information System (HMIS) which was no longer Housing and Urban Development (HUD) compliant. Additionally, Resolution 073331 authorized the Human Services Agency Director to execute Amendments up to \$171,844 for the purpose of purchasing additional licenses, maintenance, data import and cleaning, but did not include systems changes and other information technology services.

On August 1, 2014, the Human Services Agency Director executed Agreement 75100-15-D002 with AgreeYa, in the amount of \$100,000, for start-up costs to provide administration of the Clarity Human Services system and the development of a HUD compliant reporting tool for 4 months. On August 25, 2014, the Board approved an Amendment to AgreeYa by Resolution 073385 for \$163,000 to fund a full year of systems administration.

The Clarity Human Services System went live successfully on July 1, 2014. All eight Core Agencies have been actively using the system in serving their clients since implementation and have identified system changes that would result in more efficient workflow and accurate reporting of performance and community requests and needs for services.

There are currently a total of 172 users of the Clarity Human Services system from both Core Service Agencies and homeless service providers. This system facilitates a higher level of service to County residents by increasing the ability to share data for safety net services provided.

DISCUSSION:

Since the implementation of the Clarity System in July 2014, the Core Service Agencies have identified essential changes for the system which will improve their ability to assess and enroll clients in services, and to collect and report on specific information on client needs, services received, and program results. The Core Services Agencies now have the ability to access information on clients who may also be accessing services from another agency to better coordinate services and to make referrals within the system. This project created a secure client centric network connecting eight Core Agencies.

With your Board's approval of the ATR and authorization to the HSA Director to execute amendments to Bitfocus and AgreeYa, the Human Services Agency will be able to

optimize and enhance the Clarity System to further address the daily business needs of the eight Core Agencies.

This change will contain three major deliverables with the total cost of \$112,000:

1. A revised master program and services, 966.4 hours and cost of \$89,000.
2. A new performance measurement report, 141 hours and cost of \$19,000.
3. Modifications for profile, assessment and program enrollment screens, 29.5 hours and cost of \$4,000.

The technological requirements for each of the above items have been created, reviewed and approved by all eight Core Services Agencies. The County Manager's Office and the Human Services Agency served as project sponsors have been actively engaged in this process. The estimated completion date for these change requests is March 2015.

Your Board's authorization of the Human Services Agency Director to execute Amendments to Bitfocus and AgreeYa will allow the Human Services Agency to implement current changes once the Amendments have been finalized and quickly execute future amendments through FY 2015-16 should unanticipated costs occur such as system modifications, maintenance, administration, expansion needs and other information technology services.

County Counsel has approved this Board Memo and Resolution as to form.

Approval of this ATR and authorization to amend the Bitfocus and AgreeYa agreements contributes to the Shared Vision 2025 outcome of a collaborative and prosperous community as this will result in better data collection and information sharing and reporting among Core Service Agency providers and the County. It will also allow for more informed decision making regarding allocation of resources and increased community partnerships to address basic needs such as food and shelter throughout the County. The customer satisfaction rating from Core Service Agencies, Human Services Agency and the County Manager's Office is anticipated to be 90%.

PERFORMANCE MEASURE(S):

Measure	FY 2014-15 Projected	FY 2015-16 Projected
Customer satisfaction rating from Core Service Agencies, Human Services Agency and the County Manager's Office.	90%	90%

FISCAL IMPACT:

Approval of this Appropriation Transfer Request will result in the one-time transfer of funds in the amount of \$112,000 to the Human Services Agency of which \$23,000 will

be included in the Amendment of Bitfocus and \$89,000 will be included in the Amendment of AgreeYa. This Appropriation Transfer will provide funding to implement the changes to the Clarity Human Services System. Funding for this appropriation is through Measure A.

If there are additional system needs identified, HSA will include funding for the amendments to the Bitfocus and AgreeYa agreements in the FY 15-17 Recommended Budget.