



County of San Mateo

Inter-Departmental Correspondence

Department: HUMAN SERVICES AGENCY

File #: 18-293

Board Meeting Date: 4/10/2018

Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors
From: Nicole Pollack, Human Services Agency Director
Subject: Agreement with Northwoods Consulting Partners, Inc. for Support and Maintenance of Onbase and Compass Pilot

RECOMMENDATION:

Adopt a resolution authorizing an agreement with Northwoods Consulting Partners, Inc., for the maintenance of Onbase and Compass Pilot systems, for a term of March 1, 2018 through June 30, 2019, and a total amount not to exceed \$515,200.

BACKGROUND:

In 2008, the Human Services Agency ("HSA") implemented a reliable and scalable document management infrastructure integrating with the County's Medi-Cal client case management system for retrieval of imaged case files using Northwoods Consulting Partners, Inc.'s ("Northwoods") Onbase system. In 2012, the County expanded its client case management system using the Pilot module of Northwood's Compass system. Pilot automated workflows specifically configured to improve case file management for the Medi-Cal program staff to include benefit analyst's interactions with the client population. The system has since been rolled out to other programs including CalWORKs, CalFRESH and other public aid programs administered by HSA.

The client case management system has been configured specifically for the County of San Mateo by Northwoods. Northwoods is the only provider of high-level maintenance, support and licenses for these proprietary systems and therefore should be considered a sole source provider.

These systems require annual maintenance and support for the essential functions of Onbase and Compass Pilot.

DISCUSSION:

The client case management system is a critical component of managing determinations and eligibility for Med-Cal and public aid benefits. This Agreement will provide the necessary ongoing support and maintenance of Onbase and Compass Pilot. In addition, this Agreement will support any necessary small scale updates and customizations that are needed in addition to any incremental

license expansion for additional HSA staff, or partner use.

HSA is requesting that the Board of Supervisors waive the Request for Proposal process as it is in the best interest of the County to continue to contract with Northwoods for use of their proprietary systems. To redevelop such a system would be extremely expensive.

The resolution contains the County's standard provisions allowing an amendment of the County's fiscal obligations by a maximum of \$25,000 (in aggregate).

County Counsel has reviewed and approved the resolution and the agreement as to form. Information Services Department has reviewed the Agreement and agrees that HSA should continue to contract with Northwoods for support and maintenance.

Approval of this agreement contributes to the Shared Vision 2025 outcome of a Prosperous Community by enabling staff to continue to reduce the number of client related documents that need to be copied at the Regional Offices and enhance the system by adding the ability for field collection of client information by selective use of the Pilot module. It is anticipated that the number of copies will be reduced by 90% for FY 2017-19.

PERFORMANCE MEASURE:

Measure	FY 2017-18 Actual	FY 2018-19 Target
Reduction in the number of case related files being copied at Regional Offices	85%	90%
Percentage of time the Document Imaging infrastructure operates without a system incident*	93%	95%

*An incident is any unplanned interruption to an IT service or reduction in the quality of an IT service

FISCAL IMPACT:

The term of the agreement is March 1, 2018 to June 30, 2019. This Agreement is for a total obligation of \$515,200. Funding for this Agreement is estimated to be 82% from State and Federal CalWORKS, Medi-Cal, and CalFRESH program revenue in the amount of \$422,464 and 18% Net County Cost of \$92,736. Appropriations are included in the Fiscal Year 2017-18 Adopted Budget and the Fiscal Year 2018-19 Recommended Budget.