



# County of San Mateo

## Inter-Departmental Correspondence

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**Department:** HEALTH

**File #:** 19-023

Board Meeting Date: 1/8/2019

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**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors

**From:** Louise F. Rogers, Chief, San Mateo County Health  
Lisa Mancini, Director, Aging and Adult Services

**Subject:** Executing an Agreement with Panoramic Software for Public Guardian and Public Administrator programs

**RECOMMENDATION:**

Adopt a resolution authorizing an agreement with Panoramic Software Inc. for the use and maintenance of software applications that serve the statutorily mandated accounting and case management requirements of both the Public Guardian and Public Administrator programs for the term January 1, 2019 to December 31, 2021, in an amount not to exceed \$200,000.

**BACKGROUND:**

The Aging and Adult Services (AAS) Public Guardian (PG) program serves frail, elderly, and physically and mentally disabled residents who are substantially unable to provide for their own personal needs and/or are unable to manage their finances. The PG, acting under the authority and direction of the Superior Court, may be appointed conservator of the person, estate, or both for these residents. The general duties of a conservator include arranging for the conservatee's care and protection. The general duties of the conservator of the estate include managing the conservatee's finances, marshalling and protecting assets, collecting all income due to the conservatee, paying the conservatee's debts, making investments as appropriate, preparing and filing taxes, and representing or arranging representation for all legal matters.

The Public Administrator (PA) program serves the public by investigating and administering the estates of persons who die without a will or without an appropriate person willing to act as estate administrator. The PA's primary duties are to protect the decedent's property from waste, loss, or theft; make appropriate burial arrangements; conduct thorough investigations to discover all assets; liquidate assets at public sale or distribute assets to heirs; pay the decedent's bills and taxes; and locate persons entitled to inherit from the estate and ensure that they receive the inheritance. The PA also acts under the authority and direction of the Superior Court.

**DISCUSSION:**

The County has used Panoramic Software Inc. (Pano) to provide a web-based trust accounting and

case management system to both the PG and PA since 2012 through a request for proposal (RFP) process. In July 2015, AAS initiated an RFP for a new AAS case management system. There were nine respondents to that 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 case management system being utilized in AAS. The Pano system has been configured specifically for the County of San Mateo by Pano. Pano is the only provider of enhancements, maintenance, support, and licenses for these proprietary systems and therefore should be considered a sole source provider.

On September 25, 2018, your Board accepted the report and guidance regarding the FY 2019-21 budget planning of San Mateo County Health, highlighting budget challenges that the department faces. To address those challenges, some contracts and agreements are being evaluated to find opportunities to reduce costs. The proposed agreement continues the monthly maintenance and support cost of Pano at the current service level until December 31, 2021, at an 11% discount compared to the current rate. The agreement allows for \$56,000 in additional enhancements at the discretion of the County, including improvements or customizations to the system during the contract period.

The agreement and Resolution have been reviewed and approved by County Counsel as to form.

The contractor’s services have been approved by the information technology group of San Mateo County Health, Health IT, and by the County’s Information Services Department, ISD. Insurance requirements and other contract provisions that are required by County ordinance and administrative memoranda are met by the contractor.

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

Approval of this agreement contributes to the Shared Vision 2025 outcome of a Healthy Community by allowing the PG and PA programs to have software for statutorily compliant accounting and case management.

**PERFORMANCE MEASURE:**

<b>Measure</b>	<b>FY 2018-19 Estimated</b>	<b>FY 2019-20 Projected</b>
Percentage of conservatees and decedents provided accounting and case management services by PG and PA programs	100%	100%
	(726 conservatees and decedents)	(750 conservatees and decedents)

**FISCAL IMPACT:**

The term of the agreement is January 1, 2019 through December 31, 2020. The amount of the agreement is not to exceed \$200,000 for the three-year term. Funds for these services are included in the AAS FY 2018-19 Adopted Budget and will be included in future budgets.