



# County of San Mateo

## Inter-Departmental Correspondence

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**Department:** HEALTH

**File #:** 21-1009

Board Meeting Date: 12/14/2021

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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:** Amendment to Agreement with Panoramic Software, Inc.

**RECOMMENDATION:**

Adopt a resolution authorizing an amendment to the agreement with Panoramic Software Inc. for the provision and maintenance of software applications that serve the accounting and case management requirements of the Public Guardian and Public Administrator programs, extending the term through December 31, 2023 and increasing the amount by \$216,000 to a total maximum payable amount not to exceed \$416,000.

**BACKGROUND:**

The Aging and Adult Services (AAS) Public Guardian (PG) program serves elderly and physically and mentally disabled residents who are substantially unable to provide for their own needs and/or are unable to manage their financial resources. The PG, acting under the authority and direction of the Superior Court, may be appointed conservator of the person and/or estate for these clients. A conservator of the person arranges for the conservatee's protection and care. A conservator of the estate manages the conservatee's finances, marshals and protects assets, collects income, pays debts, makes investments as appropriate, and makes sure that tax returns are prepared and filed.

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 an administrator. The PA also acts under the authority and supervision of the Superior Court. 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 heirs and ensure that they receive their inheritance.

The PG and PA have used Panoramic Software Inc.'s (Panoramic) software for web-based trust accounting and electronic case management since 2012. The County issued a Request for

Proposals (RFP) prior to contracting with Panoramic, which was selected as the winning vendor. In January 2019, the Board passed Resolution 076352, which approved an agreement with Panoramic for the term January 1, 2019 to December 31, 2021 in an amount not to exceed \$200,000.

**DISCUSSION:**

Panoramic has been providing satisfactory services to County with no major issues. AAS seeks to extend the term of the contract with Panoramic for two additional years until December 31, 2023 and add \$216,000 to the contract for a total maximum payable under the agreement of \$416,000.

A waiver of the RFP process is requested due to the proprietary nature of the product. Panoramic configured the current system in use specifically for San Mateo County AAS. Panoramic is the only company that can provide system enhancements, maintenance, support, and licenses for these proprietary systems and, as such, is a sole source provider.

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

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

It is anticipated that 100% of PG conservatees and PA decedents' estates will be provided with accounting and case management services using Panoramic's software.

**PERFORMANCE MEASURE:**

Measure	FY 2021-22 Estimated	FY 2022-23 Projected
Percentage of PG conservatees and PA decedents' estates provided with accounting and case management services using Panoramic's software	100%	100%

**FISCAL IMPACT:**

The term of the amended agreement is January 1, 2019 through December 31, 2023. This amendment increases the contract amount by \$216,000 to an amount not to exceed \$416,000 for the four-year term. Funds for these services are included in the AAS FY 2021-22 Adopted Budget and similar arrangements will be made in future budget years.