



County of San Mateo

Inter-Departmental Correspondence

Department: HEALTH

File #: 22-555

Board Meeting Date: 7/12/2022

Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Louise F. Rogers, Chief, San Mateo County Health
Heather Forshey, Director, Environmental Health Services

Subject: Agreement with Incapsulate, LLC to Provide a Records Management System for the Environmental Health Services Division

RECOMMENDATION:

Adopt a resolution authorizing an agreement with Incapsulate, LLC to provide a records management system for Environmental Health Services Division of San Mateo County Health, for the term of July 12, 2022, through June 30, 2027, in an amount not to exceed \$1,300,000.

BACKGROUND:

Since 1994, Environmental Health Services (EHS) has used an integrated records management system designed for daily time and activity tracking, billing, inventory management, inspection, and violation tracking, and complaint management. The records management system has maintained detailed program information and data exports to the County Open Data portal and facilitated uploads of mandatory data, as required by various state agencies. Additionally, EHS has maintained a public portal to allow regulated businesses to electronically submit hazardous materials business plan information pursuant to AB2286. In 2015, EHS implemented a system to capture inspection information electronically and generate and distribute various reports while in the field.

In September 2021, EHS released a Request for Proposals for a new records management system that would support the current and future needs of EHS and businesses in the community. Incapsulate, LLC (Incapsulate), using Salesforce's Public Sector Solutions, was selected in part because of its ease of customization, cloud platform architecture, enhanced technology solutions for use by field staff, integration of industry-proven data management approaches, robust accounting solution, and data visualization components, overall cost, and its innovative approach to meeting EHS' needs.

DISCUSSION:

The proposed agreement between EHS and Incapsulate will provide EHS with a records

management system to maintain detailed program information and data exports to the County Open Data portal and facilitate uploads of mandatory data, as required by various State agencies' regulatory requirements. Incapsulate's records management system design will reinvent the way EHS engages with constituents, including businesses, by providing a unified, comprehensive view of all licensing, permitting, inspection, and enforcement interactions. From a regulated business's initial permit application through issuance and renewals, information is readily available to the business, and EHS can leverage real-time collaboration tools to connect with its constituents in a new way to resolve issues and reduce the time it takes to issue permits.

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

The County Attorney has reviewed and approved the resolution and agreement as to form.

The Information Services Department has reviewed and approved the IT component of this agreement.

The County's Contract Compliance Committee has approved a waiver request for a five-year term of this agreement.

It is anticipated that the new records management system will improve EHS' online user interface, with a portal for 14,000 businesses to manage accounts with EHS remotely. One outcome of the new business/user interface is to improve access to online payments. Better online access will yield efficiencies for both EHS and businesses. It is anticipated that 2,254 payment transactions will be received online using EHS Public Portal during FY 2022-23, and 9,000 payment transactions will be received in FY 2023-24.

PERFORMANCE MEASURE:

Measure	FY 2022-23 Estimated	FY 2023-24 Projected
Number of payment transactions that are received online using EHS Public Portal	2,254 payment transactions	9,000 payment transactions

FISCAL IMPACT:

The term of the agreement is July 12, 2022, through June 30, 2027. The amount of the agreement is not to exceed \$1,300,000 for the five-year term. Funds in the amounts of \$635,000 and \$31,050 will be included in the EHS FY 2022-23 and FY 2023-24 Recommended Budget, respectively. Similar arrangements to FY2023-24 will be made for future budget years. One hundred percent of the cost associated with this agreement is funded through EHS revenues. There is no Net County Cost associated with this agreement.

ATTACHMENT:

RFP Matrix