



Legislation Text

File #: 23-1753, **Version:** 1

Health and Human Services Agency (HHSA) recommending the Board:

- 1) Make findings that the provision of proprietary client data management software, identified as Panoramic PG-Pro Web, provided by Contractor is in the public's best interest and that there are specialty skills, qualifications, and equipment not expressly identified in County classifications involved in the performance of the work in accordance with El Dorado County Ordinance Code, Chapter 3.13.030(B);
- 2) Make findings in accordance with Procurement Policy C-17 Section 3.5 exempting the competitive bidding process for proprietary software;
- 3) Approve and authorize the Chair to sign Agreement for Services 8111 with Panoramic Software Corporation (Panosoft), for HHSA's usage and licensing of this Contractor's proprietary Panoramic PG-Pro Web software, in the amount of \$147,540, and for the retroactive term of July 1, 2023, through June 30, 2026, to ensure continuity of services as the prior Agreement 4860 with Panosoft expired June 30, 2023;
- 4) Authorize the Purchasing Agent to execute amendments relating to Agreement 8111, contingent upon approval by County Counsel and Risk Management, which do not increase the maximum dollar amount or term of the Agreement; and
- 5) Authorize the HHSA Director, or Chief Assistant Director, to execute programmatic, administrative, and fiscal documents relating to Agreement 8111.

FUNDING: 100% County General Fund appropriated for HHSA Public Guardian Office and HHSA Self-Sufficiency General Assistance Programs.

DISCUSSION / BACKGROUND:

HHSA's Public Guardian Office ensures the physical and financial safety of persons unable to do so on their own, and when there are no viable alternatives to a public conservatorship. HHSA's Self-Sufficiency General Assistance (GA) Program, established in Chapter 8.84 in the County's Code of Ordinances per Welfare and Institutions Code §17000, provides assistance to eligible low-income residents of El Dorado County who are unemployed or unable to work, to help those individuals become productive members of the community.

Since 2012, HHSA staff assigned to the Public Guardian Office and Self-Sufficiency GA Program have utilized the Panoramic PG-Pro Web case management software provided by Panosoft to create, track, and manage data pertaining to program participation and performance. The Panoramic PG-Pro Web software supports various aspects of the Public Guardian Office's program operations, including documentation for investigations, case management, and tracking payments, receipts, and bank reconciliations for clients. This comprehensive case-management software includes features such as: storage of client's case notes, client addresses, and appointment history; and pre-filled form letters, all of which are utilized by both the Public Guardian Office and GA Program. Additionally, the software allows images to be attached to client files and allows staff to generate court-related documents and agency-wide reports.

This proposed Agreement 8111 with Panosoft is a renewal of Agreement 4860, which was approved

by the Board of Supervisors on June 9, 2020, to provide the case management software licensing to HHSA, for the maximum contractual obligation of \$100,000, for the term of July 1, 2020 through June 30, 2023 (File ID 20-0712). As the responsibility for handling the renewal request of the Agreement with Panosoft for continued software usage was unclear between HHSA Public Guardian Office and HHSA Self Sufficiency GA Program, there was a delay in the renewal request, which resulted in this renewal request being submitted after the prior Agreement expired.

Consequently, HHSA is recommending the Board approve of this Agreement 8111, to be retroactive with a start date of July 1, 2023, to ensure continuity of the proprietary Panoramic PG-Pro Web system usage by HHSA staff. HHSA is actively working to improve communication protocols and reporting systems to prevent such retroactive contracts in the future. This retroactive request will allow for payment of outstanding invoices to this Contractor and will ensure no gaps in software usage.

Since 2012, HHSA's Office of Public Guardian and HHSA Self Sufficiency General Assistance programs has utilized this vendor's software for General Assistance and Public Guardian programs. Over the years, HHSA has researched other vendors and could not identify any alternative vendors that could provide similar software capabilities. HHSA has also provided outreach to other Public Guardian Offices throughout the state to inquire about the program their staff uses, and the vast majority use Panoramic. As the Panoramic software serves as the HHSA Public Guardian and General Assistance data repository and provides a tracking software system for Case Management services, there are internal processes and workflow systems in place which would create additional work to recreate if switching vendors.

Pursuant to Board of Supervisors Policy C-17, 3.5 Specific Exemptions, proprietary software is exempt from competitive bidding. HHSA worked with the County's Information Technologies Department to ensure this software meets County requirements and confirmed that this software is proprietary as the Contractor holds the exclusive rights to this software.

ALTERNATIVES: Should the Board decline to approve this retroactive Agreement 8111, outstanding invoices by Panosoft will not be paid. Further, failure to approve this Agreement will result in the loss of a case management software system which is integral to the operation of HHSA's Public Guardian Office and HHSA's Self-Sufficiency GA Program, and consequently will lead to an inability for these programs to access or maintain case management data.

PRIOR BOARD ACTION:

- 1) 05/22/2012, 12-0576, version 1, HHSA Panoramic Agmt 514-S1211
- 2) 06/10/2014, 12-0576, version 2, HHSA Panoramic Amd I, 514-S1211
- 3) 05/19/2015, 15-0554, HHSA Panoramic Agreement 005-S1611
- 4) 06/09/2020, 20-0712, HHSA Panoramic Agreement 4860

OTHER DEPARTMENT / AGENCY INVOLVEMENT:

Approved by County Counsel, Human Resources, Information Technologies, and Risk Management. The Auditor-Controller has been notified of this Agreement in accordance with Policy B-12.

CAO RECOMMENDATION:

Approve as recommended.

FINANCIAL IMPACT:

The Net County Cost for the license fee is \$36,000 for year one, \$47,880 for year two, and \$63,660 for year three. Sufficient appropriations are included in the Fiscal Year 2023-2024 Budget and will be included in future budgets for the term of the Agreement. As outlined in the Panosoft Agreement, if any additional services or trainings are needed outside of the services included in the agreed upon annual rates (Schedule A of the Agreement), additional fees would incur. HHSA Public Guardian and HHSA General Assistance Programs do not anticipate any type of additional services or trainings, so HHSA did not include any funding for these services to be approved by the Board.

CLERK OF THE BOARD FOLLOW UP ACTIONS

Clerk of the Board to obtain signature of Chair on one (1) original Agreement for Services #8111

STRATEGIC PLAN COMPONENT:

Healthy Communities, Good Governance

CONTACT

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