



# Monterey County

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## Board Report

Legistar File Number: A 15-305

August 25, 2015

**Introduced:** 8/14/2015

**Version:** 1

**Current Status:** Consent Agenda

**Matter Type:** BoS Agreement

- a. Approve and authorize the Director of the Department of Social Services, or his designee, to sign an agreement with InTelegy Corporation for \$140,000 for the period September 1, 2015 through June 30, 2016 to perform an assessment for the replacement of a workload development tool and provide consulting services related to the lobby/intake redesign; and
- b. Authorize the Director of the Department of Social Services, or his designee, to sign up to three amendments to this agreement where the total amendment amounts, cumulatively, do not exceed 10% of the original contract (\$14,000 maximum additional amount) and do not significantly change the scope of work.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and authorize the Director of the Department of Social Services, or his designee, to sign an agreement with InTelegy Corporation for \$140,000 for the period September 1, 2015 through June 30, 2016 to perform an assessment for the replacement of a workload development tool and provide consulting services related to the lobby/intake redesign; and
- b. Authorize the Director of the Department of Social Services, or his designee, to sign up to three amendments to this agreement where the total amendment amounts, cumulatively, do not exceed 10% of the original contract (\$14,000 maximum additional amount) and do not significantly change the scope of work.

### SUMMARY/DISCUSSION:

In February 2015, Intelegy provided a summary report of issues and recommendations related to an assessment of current operations in the Community Benefits Branch that support the delivery of services to customers for the three large entitlement programs (Medi-Cal, CalFresh and CalWORKs) administered by the department. While many of the recommendations have been implemented, this contract would provide project management and support related to overall business process workflows and lobby management re-design, and an assessment of a new workload assignment management tool that is critically needed to replace the existing in-house tool developed during the implementation efforts with Call Center operations in 2013. The intent of the lobby management re-design is to develop updated business process requirements for customers seeking our services including the use of self-help and assisted-help technologies, as well as streamlining general operational flows so that the customer experience is improved.

After collaboration with the stakeholders and a detailed lobby workflow /business processes strategy and plan is developed, DSS will return to your Board for further discussion and authorization to implement the next phase of this project.

OTHER AGENCY INVOLVEMENT:

The Auditor Controller and Purchasing have reviewed and approved this agreement, Contracts Purchasing approved the sole source documentation, and County Counsel has approved the agreement as to form.

FINANCING:

This agreement is fully funded with Social Services Federal and State revenues and Realignment funds. Sufficient appropriations and estimated revenues for SOC005 are included in the FY 2015-16 Adopted Budget and anticipated available for the life of the Agreement. Approval of this action will not have an impact on the General Fund Contribution.

Prepared by: Wendy Russell, Deputy Director, x4431

Approved by: Elliott Robinson, Director, x4434

Attachments: InTelegy contract

Proposed agreement is on file with Clerk of the Board as an attachment to this Board Report