



# County of Monterey

**Item No.**

## Board Report

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

**Legistar File Number: A 23-131**

**May 02, 2023**

**Introduced:** 4/12/2023

**Current Status:** Agenda Ready

**Version:** 1

**Matter Type:** BoS Agreement

- a. Approve and Authorize the Director of Health or the Assistant Director of Health to execute an Amendment No. 1 to an Agreement No. A-14688 between the County of Monterey and Panoramic Software Inc., for the provision of web based software subscription, database hosting, technical support/maintenance of the PG-ProWeb solution utilized by the Monterey County Health Department's Public Guardian Bureau, extending the contract term by three (3) years to June 30, 2026, adding \$169,500 for a total contract amount of \$339,000; and
- b. Approve and Authorize the Health Director to approve up to three (3) future amendments that do not exceed 10% (\$16,950) of the original Agreement amount and do not significantly alter the scope of services.

### RECOMMENDATION:

It is recommended that the County of Monterey Board of Supervisors:

- a. Approve and Authorize the Director of Health or the Assistant Director of Health to execute an Amendment No. 1 to an Agreement No. A-14688 between the County of Monterey and Panoramic Software Inc., for the provision of web based software subscription, database hosting, technical support/maintenance of the PG-ProWeb solution utilized by the Monterey County Health Department's Public Guardian Bureau, extending the contract term by three (3) years to June 30, 2026, adding \$169,500 for a total contract amount of \$339,000; and
- b. Approve and Authorize the Health Director to approve up to three (3) future amendments that do not exceed 10% (\$16,950) of the original Agreement amount and do not significantly alter the scope of services.

### SUMMARY/DISCUSSION:

The County of Monterey, Health Department's Public Guardian/Administrator/Conservator Bureau (Public Guardian) operates under the authority and direction according to the California Probate Code and as appointed by the courts in the provision of the following services that include but are not exclusive to: individual assessments, fiscal management, location of housing, establishment/eligibility of government and private benefits, coordination of care, targeted case management visitations, and overall individual client support.

To track the fiduciary and case management services provided, Public Guardian staff utilize the PG-ProWeb solution developed by Panoramic Software, Inc. The approval of this recommended action will enable continuity of tracking the services provided and meet reporting requirements to the Superior Court.

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While this work is not directly in support of a Health Department strategic goal, it is in support of one or more of the ten essential public health services, specifically: 1. Monitor health status to identify and solve community health problems and 7. Link people to needed personal health services and assure the provision of health care when otherwise unavailable.

OTHER AGENCY INVOLVEMENT:

The Offices of County Counsel and the Auditor-Controller have reviewed and approved this Agreement as to legal form and fiscal provisions, respectively.

FINANCING:

Funding for this agreement is included in the Health Department's Public Guardian Bureau (4000-HEA008-8118) FY 2023-24 Requested Budget. Provision for subsequent renewals to the software subscription will be made in the Department's Requested Budget for the years out as needed.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

Check the related Board of Supervisors Strategic Initiatives:

Economic Development:

- Through collaboration, strengthen economic development to ensure a diversified and healthy economy.

Administration:

- Promote an organization that practices efficient and effective resource management and is recognized for responsiveness, strong customer orientation, accountability and transparency.

Health & Human Services:

- Improve health and quality of life through County supported policies, programs, and services; promoting access to equitable opportunities for healthy choices and healthy environments in collaboration with communities.

Infrastructure:

- Plan and develop a sustainable, physical infrastructure that improves the quality of life for County residents and supports economic development results.

Public Safety:

- Create a safe environment for people to achieve their potential, leading businesses and communities to thrive and grow by reducing violent crimes as well as crimes in general.

Prepared by: Sarah Solano, Operations Manager, 883-7502

Approved by:

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Date: 4/20/2023 | 10:30 AM PDT

Elsa Mendoza Jimenez, Director of Health, 755-4526

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Attachments:

Board Report

Amendment No. 1

Board Order

Agreement