



Monterey County

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

Board Report

Legistar File Number: BC 19-129

November 22, 2019

Introduced: 11/8/2019

Current Status: Agenda Ready

Version: 1

Matter Type: Budget Committee

- a. Support approval and authorization for the Department of Social Services Director to sign an agreement for \$1,222,950.00 with Northwoods for a Traverse subscription and implementation project effective December 10, 2019 through December 9, 2022;
- b. Support Authorizing the Director of the Department of Social Services to sign up to three (3) amendments to the Agreement, where the amendments do not significantly change the scope of work;
- c. Support approval for an increase in both appropriations and estimated revenues of \$455,950 for the Social Services Budget Unit 001-5010-SOC005-8262 FY 2019-20 Adopted Budget (4/5ths vote required); and
- d. Support authorizing the Auditor-Controller to amend the FY 2019-20 Adopted Budget by increasing appropriations and estimated revenues by \$455,950 in Social Services Budget Unit 001-5010-SOC005-8262 (4/5ths vote required).

RECOMMENDATION:

It is recommended that the Budget Committee:

- a. Support approval and authorization for the Department of Social Services Director to sign an agreement for \$1,222,950.00 with Northwoods for a Traverse subscription and implementation project effective December 10, 2019 through December 9, 2022;
- b. Support Authorizing the Director of the Department of Social Services to sign up to three (3) amendments to the Agreement, where the amendments do not significantly change the scope of work;
- c. Support approval for an increase in both appropriations and estimated revenues of \$455,950 for the Social Services Budget Unit 001-5010-SOC005-8262 FY 2019-20 Adopted Budget (4/5ths vote required); and
- d. Support authorizing the Auditor-Controller to amend the FY 2019-20 Adopted Budget by increasing appropriations and estimated revenues by \$455,950 in Social Services Budget Unit 001-5010-SOC005-8262 (4/5ths vote required).

SUMMARY/DISCUSSION:

Social Services has identified a need to transition from a physical file management system to an electronic file system for storage and retrieval of records and documents for Family and Children Services and Aging and Adult Services. The social workers spend more of their time in the field than at their desks, and they often must quickly make decisions and do not have the luxury of time to go back to the office to gather information.

Northwoods is a technology company that is focused on providing customized software to human service organizations that have social workers and case workers. The Traverse software is a content collection and case discovery solution that integrates with case data providing an easy to use and searchable document management system that will assist social workers to collect, and view content regarding abuse, neglect, foster care, and adoption cases more effectively and informatively.

The software has several unique features that will not only save staff time, but it will also provide continuity of key information as cases are reassigned to different social workers over time. One of these features is the ability to cull information from voluminous case files assisting social workers in case discovery and in uncovering correlations throughout all case related documentation and data in a matter of seconds versus manually combing through volumes of prior case history. The software will improve our service delivery, maximize productivity, and will assist the Department in making informed decisions to achieve better outcomes.

The agreement covers implementation and three years of Traverse subscription. The Department is recommending approval of the Northwoods agreement and increasing the Department's appropriations and revenues.

OTHER AGENCY INVOLVEMENT:

The County Administrator's Office - Budget Office concurs with these actions. Risk Management has approved the agreement as to liability provisions. County Counsel have approved the Agreement as to legal form. The Information Technology Department, the Auditor-Controller and Contracts/Purchasing have reviewed and approved the Agreement.

FINANCING:

This agreement will be funded 85% of Social Services revenues and 15% with realignment funds. The Department is recommending an increase of appropriations and estimated revenues of \$455,950 for Social Services Budget Unit 001-5010-SOC005-8262 in the FY 2019-20 Adopted Budget. Future annual subscription costs will be incorporated during budget development. There is no change to the existing General Fund Contributions in this budget unit.

Prepared by: Becky Cromer, Interim Finance Director, x4404

Approved by: Lori A. Medina, Director, x4430

Attachments: Traverse Quote