NAPA COUNTY BOARD OF SUPERVISORS
Board Agenda Letter

TO: Board of Supervisors
FROM: JoAnn Melgar for Jennifer Yasumoto - Director
Health & Human Services Administration
REPORT BY: JoAnn Melgar, Staff Services Analyst II - 707-253-4722
SUBJECT: Renewal Agreement with Panoramic Software Incorporated (Public Guardian)

RECOMMENDATION
Director of Health and Human Services requests approval of and authorization for the Chair to sign Renewal Agreement No. 170128B with Panoramic Software Incorporated (Panosoft) for a total contract maximum of $80,000 for the term July 1, 2019 through June 30, 2024 for PG-Pro Web application software and maintenance fees to provide tracking and detailed financial data for Public Guardian clients.

EXECUTIVE SUMMARY
The purpose of today's recommended action is to approve a renewal agreement with Panoramic Software Incorporated (Panoramic) for the PG-Pro Web application software, for the term July 1, 2019 through June 30, 2024. Panoramic has been continuously providing this software and maintenance to Public Guardian staff since May 2013. Panoramic is one of only a handful of vendors offering this type of specialized software and is the primary and preferred Public Guardian software provider for many counties throughout California. Accordingly, the selection of this vendor was done on a sole source basis and no Request for Proposals was issued. The total contract maximum over the 5-year term of this Agreement is $80,000.

Panoramic Software Incorporated is not a local vendor.

FISCAL IMPACT
Is there a Fiscal Impact? Yes
Is it currently budgeted? Yes
Where is it budgeted? Health & Human Services Comprehensive Services for Older Adults
Is it Mandatory or Discretionary? Mandatory
Is the general fund affected? No
Future fiscal impact: Although this agreement terminates June 30, 2020, it contains an automatic renewal for future years. Appropriations will be budgeted accordingly.
Consequences if not approved: If the recommended agreement is not approved, the County will be unable to utilize the contractor's database and software to track client financial records.
Additional Information:

ENVIRONMENTAL IMPACT

ENVIRONMENTAL DETERMINATION: The proposed action is not a project as defined by 14 California Code of Regulations 15378 (State CEQA Guidelines) and therefore CEQA is not applicable.

BACKGROUND AND DISCUSSION

Panoramic Software Incorporated (Panoramic) has been continuously providing this software and maintenance to Public Guardian staff since May 2013. Prior to May 2013, the Public Guardian's Office was using three different systems for data collection and documentation.

This system enables all financial and client data to be combined into one database. The software is also equipped to meet the needs of County Counsel for court documentation saving both Public Guardian and County Counsel staff time. The system tracks client data, court timeframes and generates necessary reports. The accounting process is automated by the software and ready for submitting to the court without any exporting or manufacturing of spreadsheets. This saves both Public Guardian and County Counsel staff time when producing these documents, it alleviates the concern of errors and assures that clients are provided with the best service available.

Panoramic is one of the only vendors used for the Public Administrator/Public Guardian/Public Conservator programs in many other California counties. Legacy and Harmony have been used by other counties, in the past, but they are not updating those systems anymore. Larger counties have created their own systems.

Panoramic is not a local vendor.

SUPPORTING DOCUMENTS

None

CEO Recommendation: Approve
Reviewed By: Ben Guerrieri