

**ORANGE COUNTY
BOARD OF COMMISSIONERS**

ACTION AGENDA ITEM ABSTRACT

Meeting Date: March 3, 2009

Action Agenda

Item No. 4-d

SUBJECT: Approve Purchase of Additional Licenses and Related Hardware for Existing Electronic Document Management System for Social Services

DEPARTMENT: Purchasing Department, Social Services & IT **PUBLIC HEARING:** (Y/N)

No

ATTACHMENT(S):

INFORMATION CONTACT:

Pam Jones, 245-2652
Nancy Coston, 245-2800
Todd Jones, 245-2285

PURPOSE: To consider authorizing the purchase of the remainder of the licenses needed for full implementation of Social Services' Electronic Document Management System.

BACKGROUND: The Department of Social Services provides crisis assistance and social work services to residents of Orange County. The caseloads in major program areas have increased 60-120% in the last eight years, and have been increasing at a greater rate due to the current economic conditions. During this time relatively few new staff have been added to meet this demand increase. This combination has caused a workload crisis.

Most of the agency programs are mandated by the state or federal government and have very specific rules and regulations attached. Meeting these standards requires a substantial amount of paperwork. Social Services agencies generate thousands of paper documents a week that accumulate in massive file rooms requiring extensive amounts of space. At the Orange County Department of Social Services' two locations, two large file rooms are full. Filing cabinets line all major hallways and most staff members have multiple filing cabinets inside their offices. Additionally, older case files are stored in several facilities off site. Storing and accessing these files is extremely difficult and new case files are created daily.

Staff within Social Services, Information Technology and the County Manager's Office reached the conclusion that an automation solution was paramount to allow the agency to continue a high level of service under these parameters.

In recognition and support of this need, the Board of County Commissioners approved funding for an Electronic Document Management system in the FY2007-08 budget. Social Services worked with the Purchasing Department to plan and release a Request for Proposals beginning in March of 2008. Upon completion of the bidding process, the project was awarded to Northwoods Consulting Partners in June of 2008.

The Department successfully implemented the first phase of the system beginning in August of 2008. Money for the second phase of the project was approved in the FY2008-09 budget using the pricing structure included in the initial bid. The implementation of the system was divided into two phases for training and quality control purposes. The system consists of software applications designed to interface with existing and developing technologies. It includes a dynamic file management system with search and retrieve functions.

This system allows the agency to process, file, and store the majority of client materials into a secure database. The user interface permits workers to efficiently locate client files and share them effectively. This allows staff to quickly realize when another staff member is working on a case so that efforts are not duplicated. Line staff are able to enter information directly into the system while supervisors and management are able to check accuracy, view follow-up of work and run various reports detailing client activity and demographics.

This project supports the requirements of the Department of Social Services to collect, compile, retain and recall client data and programmatic files in a supportable, sustainable electronic format. The application improves the current paper-driven process, replaces outdated legacy systems, and streamlines business practices.

Due to the success of the first phase of implementation, the department is requesting approval to move forward with the implementation of the second phase. This involves the purchase of an additional 80 user licenses to grant access to the system to all departmental staff. This will allow cross-sharing of information among all staff and between all Social Services' buildings. Further, purchase at this time will allow the system implementation to be integrated into the upfit of new office space for Social Services.

The hardware required to run and support this application includes, but is not limited to, servers, scanners, and other related equipment, and will be purchased from existing funds using the State of North Carolina technology contract pricing.

All technologies and applications associated with this contract conform to Orange County Information Technology requirements.

FINANCIAL IMPACT: The total cost of acquiring the additional software licenses, implementation, training and any needed consulting services is not to exceed \$280,000. It is estimated the hardware required will cost \$24,000, and will be purchased using the State of North Carolina technology contract pricing. Funding and state and federal offsetting revenue are allocated in the Department of Social Services FY2008-09 budget for the purchase. No additional County funds are being requested.

RECOMMENDATION(S): The Manager recommends the Board approve the purchase of the licenses, hardware and related services and authorize the Purchasing Director to sign documents necessary to effect the orders.