

AGENDA MATERIAL

DATE 9/6/22 ITEM NO. CC 17



MEMORANDUM

Date: August 31, 2022

To: The Honorable Chair and Members
Pima County Board of Supervisors

From: Jan Leshner 
County Administrator

Re: **Additional Information for the September 6 Board of Supervisors Meeting – Consent Item No. 17, Hasler Enterprise Solutions, LLC dba Abelian – Case Management System**

Item number 17 on the September 6 Board of Supervisors Consent Calendar is a contract with Hasler Enterprise Solutions, LLC dba Abelian, to provide a new electronic Case Management System (CMS) for the Community & Workforce Development department (CWD). As described in the attached memorandum from Director Dan Sullivan, the CMS will replace four existing systems that serve different CWD programs, and will for the first time provide a "single digital doorway" into all service.

The system will allow any community member to complete a simple electronic intake form. Then, through a combination of automated and human navigation, be routed to available services based on the person's specific needs. Navigators using a mobile application will be able to bring the system out into the community and also assist community members at CWD's one-stops, ensuring that users with barriers to using technology are not hindered in accessing CWD's services.

The Board will recall that CWD was created in 2020 as the result of a merger between what had been Community Services, Employment & Training (CSET) and Community Development & Neighborhood Conservation (CDNC). The merger has allowed the Department to integrate services and better serve members. However, disparate legacy systems and lack of a digital application portals have meant that CWD staff often rely on paper forms and internal referrals to ensure that community members are provided access to the full array of services.

The Department has spent over a year working with Information Technology and Procurement to document all of its various business processes and complete a competitive process to select a vendor based on company background, system features and support, cost, and demonstrations. Abelian was selected as the highest scoring vendor. In parallel, CWD has acquired grant funding from various sources that will cover the implementation cost and the first two years of operation. The cost of the system is significant, but a necessity if we are to continue develop more efficient client-centered approaches to serve our community.

JKL/dym

Attachment

c: Francisco García, MD, MPH, Deputy County Administrator and Chief Medical Officer
Carmine DeBonis, Jr., Deputy County Administrator
Steve Holmes, Deputy County Administrator
Dan Sullivan, Director, Community Workforce & Development
Andrew Flagg, Deputy Director, Community Workforce & Development

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PIMA COUNTY

COMMUNITY & WORKFORCE
DEVELOPMENT

MEMORANDUM

Date: August 29, 2022

To: Jan Leshner
County Administrator

From: Dan Sullivan *DS*
Community & Workforce Development
Director

Re: **Community & Workforce Development Case Management System**

A key component of strategic planning in Community & Workforce Development (CWD) has been the acquisition of a new electronic Case Management System (CMS). Acquisition of a CMS will allow CWD to replace four separate systems used by different divisions of the department: the Emergency Services Network, Participant Tracking System, Home Repair and Weatherization, and Emergency Eviction Legal Services. More important, a new CMS will allow CWD to fully implement a "digital one-stop"—an online portal that will allow members of the community a **single online entry point** in to the full array of CWD services.

Over a year ago, CWD collaborated with Information Technology (ITD) to begin the detailed process of mapping out the business processes for each of its myriad programs and developing a list of requirements and desired features that a CMS could provide. CWD then worked with Procurement to complete a lengthy competitive Request for Proposals process, in which an evaluation panel consisting of representatives from CWD and IT scored proposals received based on a variety of criteria, including company background, system features and support, cost, and demonstrations. Subsequently, CWD worked with Procurement to negotiate a proposed contract with the highest-scoring vendor, **Hasler Enterprise Solutions, LLC dba Abelian**.

If approved by the Board and following an implementation period, the CMS will allow CWD to consolidate its disparate systems, to open a single digital doorway into all of its services to any member of the community, and to provide robust data analysis and reporting to the public. Among other things, the CMS will:

- Be entirely cloud- and browser-based, and its design is responsive to multiple devices, including computers, tablets, and smartphones;
- Use a common-intake form, allowing any member of the community to easily apply for any CWD service;
- Be accessible in both English and Spanish;
- Automatically determine client eligibility for various CWD programs based on information submitted on the common intake form;
- Allow clients to upload, store, electronically sign, and access documents, and to check their application status online;
- Provide clients with email and text-message reminders about application status and upcoming appointments;
- Allow CWD staff to use a mobile application to assist clients in applying for services in the field, particularly in rural communities;
- Protect personally identifying client information by encrypting data at rest and in transit;
- Produce both standard and custom reports related to any data in the CMS, including dashboard reports for high-level overviews;
- Provide the ability for CWD staff to adjust configuration after implementation.

CWD, in partnership with Grants Management & Innovation, has secured significant grant funding to cover the implementation cost and the cost of the first two years of operation via the Department of Labor's CAREER Grant

Jan Leshner, County Administrator

Re: Community & Workforce Development Case Management System

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and American Rescue Plan Act funding. Thereafter, CWD will seek funding from various sources, including formula grants and the General Fund, to continue to fund the annual cost of the system.

The contract with Abelian is anticipated to come before the Board of Supervisors for approval on September 6, 2022. CWD recommends that the item be approved.