



SUMMARY REPORT

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**Agenda Date:** 8/13/2024

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**To:** Sonoma County Board of Supervisors

**Department or Agency Name(s):** Department of Health Services, Human Services Department, Community Development Commission, Probation Department, Child Support Services Department, Office of the District Attorney, Sheriff's Office, and Public Defender

**Staff Name and Phone Number:** Tina Rivera 707-565-4774; Angela Struckmann; Michelle Whitman; Vanessa Fuchs; Janeene de Martinez; Carla Rodriguez; Eddie Engram; Brian Morris

**Vote Requirement:** Majority

**Supervisorial District(s):** Countywide

**Title:**

ACCESS Sonoma Safety Net Initiative - IBM Agreement

**Recommended Action:**

Authorize the Director of Health Services, or designee, to execute Addendum 7 to the Statement of Work with International Business Machines Corporation's contract for Microsoft cloud hosting services and software licensing of the IBM-Care Management software platform on which ACCESS Sonoma operates, in an amount not-to-exceed \$1,995,578, for the three-year term July 1, 2024 through June 30, 2027.

**Executive Summary:**

On behalf of the Safety Net Collaborative, the Department of Health Services (hereinafter, "DHS" or "the Department") requests the Board authorize the Director of DHS, or designee, to execute Addendum 7 to the Statement of Work with International Business Machines (IBM) Corporation's contract for cloud maintenance and licensing of the Watson-Care Management software platform on which ACCESS Sonoma operates, in an amount not-to-exceed \$1,995,578 for a three-year term July 1, 2024 through June 30, 2027.

The IBM Watson-Care platform has been used for the last three years to administer the ACCESS (Accessing Coordinated Care & Empowering Self-Sufficiency) joint program between numerous County departments known as the "Safety Net Departments," which include the Sheriff's Office, Department of Probation, Office of the District Attorney, the Public Defender's Office, the Human Services Department (HSD), the Department of Child Support Services, the Community Development Commission (CDC), and the Department of Health Services (DHS) with the support of the Information Systems Department (ISD). The IBM platform will continue to play a critical role in upcoming years in supporting the County's administration of the new state-mandated CARE Court program, in which Safety Net departments will partner with the County's criminal justice system to ensure that justice-involved clients receive appropriate case management and behavioral health services.

To date the total cost of implementing Accessing Coordinated Care and Empowering Self-Sufficiency (ACCESS) Sonoma Data Hub Project (ACCESS Sonoma) is \$11,370,084. The investment to date has been financed through a mixture of grant funding, including \$1.2 million from one-time PG&E funds, \$1 million from the Hewlett Foundation, and \$1.6 million from the U.S. Department of Health & Human Services, and departmental funding streams. Additional costs of \$1,955,578 are estimated for this addendum. The budget allocation/expenditure authority request will be brought with the Fiscal Year 2024-2025 1<sup>st</sup> Quarter

Consolidated Budget Adjustments.

**Discussion:**

On March 23, 2018, Sonoma County entered into an agreement with International Business Machines Corporation (IBM) to provide software and implementation of the Accessing Coordinated Care and Empowering Self-Sufficiency (ACCESS) Sonoma Data Hub Project (ACCESS Sonoma) which integrates all the County's rapid response safety net services. The ACCESS Sonoma Data Hub Project provides a global view of clients that accounts for their multiple needs - allowing for coordinated front-end referrals and service delivery across the Safety Net Departments. This allows for continuous analysis of each client's needs, collaborative case management, and evaluation of outcomes to support more proactive and prevention-focused efforts aimed at addressing critical client needs.

Sonoma County Safety Net Departments participating in the project include Health Services, Human Services, Community Development Commission, Probation, Child Support Services, District Attorney, Sheriff, and Public Defender. Collectively, this group is known as the Safety Net Collaborative. Though DHS is bringing this item forward to the Board for review and approval, ownership of this agreement and its deliverables belongs to the greater Safety Net Collaborative.

The development of the ACCESS Sonoma system has been executed in multiple phases with each phase delivering added functionality to the system. The Safety Net Departments have completed Phases 1 through 6 of the ACCESS project which included:

1. Phase 1 Rapid Prototype delivered the core database (Data Hub) with an initial view of basic client information and was completed both on time and within budget.
2. Phase 2 added homeless services information to the database, added client care planning and goal tracking, and incorporated roles-based security for future expansion.
3. Phase 3 configured criminal justice data, expanded system security roles, electronic authorization forms, and system infrastructure related to subsequent implementation phase of the project.
4. Phase 4 efforts included setting up an environment in the data center for testing and ACCESS Sonoma development, piloting improvements to client consent management, and adding an alert function for important care team notices. In addition, a COVID-19 cohort with two new assessments was developed in response to the COVID-19 pandemic.
5. Phase 5 efforts included implementation of a mental health diversion cohort care plan, addition of Sheriff data to the data hub, implementation of a client portal for self-progress tracking, expanded security by creating custom client lookup for Sheriff and Probation extracts, implementation of a provider portal for clinics/hospitals/homeless shelters, and provision for development of the technology component necessary to facilitate relocation of the system data component to the cloud at a future time.
6. Phase 6 augmented the ACCESS Sonoma Project by the current Mental Health Diversion Cohort (MHDC) program underwent a conversion of largely manual procedures into cloud-based automation in the IBM and Merative Integrative Care Solution, integration of the 2-1-1 community provider directory data into the ACCESS Sonoma hub and development of a new cohort for Transitional Age Youth (aged 18-25, also known as TAY) from adult foster youth and adult probation who need assistance with accessing services including supportive housing, behavioral health and substance abuse

treatment programs, food security, and medical insurance.

The ACCESS Sonoma project has received two awards since implementation:

- The National Association of Counties awarded Sonoma County with the 2024 Achievement Award for its program titled “SoCo Access Mobile App”
- The National Association of Counties awarded Sonoma County with the 2024 Achievement Award for its program titled “Transition Age Youth at Risk”

Some highlighted successes of the ACCESS Sonoma project are detailed in Attachment #2 which is a summary of data shared at the 2024 National Association of Counties (NACo) Legislative conference:

- 58% of Transition Age Youth ACCESS participants were placed into permanent housing.
- 32% of Transition Age Youth ACCESS participants were connected to employment.
- 30% of Transition Age Youth ACCESS participants accessed appropriate medical care.
- 30% of Transition Age Youth ACCESS participants were connected to mental health services.
- There have been more than 4,000 outreach and engagement episodes.
- There were 1,157 referrals received for 875 participants as part of the Local Indigent Care Needs Program, serving unhoused adults with complex health or behavioral health issues, exiting the county jail, hospitals, or other healthcare settings.
- There were 769 referrals made for 554 unique clients for services including but not limited to reconnection to prior services, housing/shelters, whole person care, social service benefits, and skilled nursing facilities.

Addendum 7 to the IBM Statement of Work supports the ACCESS Sonoma Project through renewal of the underpinning software, hardware, cloud hosting and 24/7 security services that enable the ACCESS collaborative care initiative to operate. These tools collectively form a solution enabling the County of Sonoma to provide wholistic care to its highest needs population. This addendum will extend the software license subscriptions from July 1, 2024 through June 30, 2027. As in previously Board approved Addendum 5.5, this contract is for a three-year renewal contract with IBM for both the software licensing, Cloud hosting migration and the 24/7 security monitoring services. These two similar addendums are specifically for the software, system, hosting and security of the ACCESS collaborative case management system. When additional funding is available to the Safety Net Collaborative departments through state or federal grants, additional cohorts with their own care plans, assessments, goals, metrics and dashboards can be built and added to the software solution. This process is how the TAY cohort and App were created. Each cohort is running on a system which is licensed and maintained for hardware, software, and security by IBM in the Sonoma County Cloud tenant.

The ACCESS initiative has had enormous success in providing a collaborative case management system for a cross departmental approach to dealing with the high need, high utilizing shared clients of the Safety Net departments. The efficacy of the solution has been demonstrated through each cohort serviced including High Needs Homeless, Mental Health Diversion, Homeless 65+ at Risk for COVID, Jail and Emergency room discharge (LICN), Transition Age Youth at Risk, and other county selected or state mandated cohorts requiring a multi-departmental, collaborative care model. Prior to the end of this three-year contract, the efficacy of the ACCESS approach and the enabling technology / hosting solution will be evaluated to determine if it is still the best solution for a collaborative care model to address the needs of the high needs, high utilizer populations.

The objective of this Addendum 7 is to provide renewed licensing, fees and terms and conditions for the following:

<b>Addendum 7 Element Description</b>	<b>Price (\$)</b>
IBM Health and Human Services Connect360	\$101,568.00
IBM Care Manager	\$240,000.00
IBM InfoSphere Master Data Management	\$311,045.27
IBM Db2	\$339,331.80
MS Azure resources and cloud managed services	\$690,000.00
Ad hoc maintenance and support services	\$313,632.00
<b>Total Software Price</b>	<b>\$1,995,577.07</b>

Note that costs for renewed subscription fees have stayed relatively flat. The previous Addendum #5 renewed software licensing fees and terms and conditions totaled \$1,945,634 for an equivalent period of three years.

Finally, the IBM platform will serve Sonoma County in two capacities: (1) the cumulative phases that increased the functionality and capacity for Watson-Care over the past three years will be utilized to administer CARE (Community Assistance, Recovery & Empowerment) Court; and (2) provide a “proof of concept” for other counties on a national level that collaboration between county Safety Net departments can be executed using IBM’s Watson-Care platform. The ACCESS-Sonoma project on the Watson-Care platform received a Federal earmark in the prior FY 23-24 of \$1.6 million and is already being considered for future Federal matching grants in FY 24-25.

IBM’S Watson-Care platform will again play a very critical role in upcoming years since it will facilitate the County’s administration of the new state-mandated CARE Court program where the Safety Net departments will partner with the County’s criminal justice system to ensure that justice-involved clients receive appropriate case management and behavioral health services. CARE Court will connect a person in crisis with a court-ordered CARE Plan for up to 12 months, with the possibility to extend for an additional 12 months. The framework provides individuals with a clinically appropriate, community-based set of services and supports that are culturally and linguistically competent. This program will be administered in Sonoma County using IBM’s Watson-Care management system.

In addition, the presentation of the ACCESS-Sonoma on IBM’s Watson-Care platform at the annual NACO (National Association of Counties) counties has attracted positive attention at the Federal level for considering of further Federal earmarks.

This contract includes mutual indemnification provisions, whereby both parties agree to indemnify and hold each other harmless from any claims, liabilities, or expenses as specified in the indemnification clause.

**Strategic Plan:**

This item directly supports the County’s Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

**Pillar:** Healthy and Safe Communities

**Goal:** Goal 1: Expand integrated system of care to address gaps in services to the County’s most vulnerable.

**Objective:** Objective 3: Create a “no wrong door” approach where clients who need services across

multiple departments and programs are able to access the array of services needed regardless of where they enter the system.

**Racial Equity:**

**Was this item identified as an opportunity to apply the Racial Equity Toolkit?**

No

**Prior Board Actions:**

4/4/2023: Authorized the Director of Health Services, or designee, to execute Addendum 6 to the Statement of Work with International Business Machines (IBM) Corporation’s contract for both (1) the software automation of the current Mental Health Diversion cohort program; (2) 2-1-1 Data Extract; and (3) the development of a Transitional Age Youth (TAY) cohort program within the ACCESS Sonoma Data Hub Project, in an amount not-to-exceed \$1,600,000 through June 30, 2023.

5/25/2021: the Board approved Addendum 5 to the Statement of Work with IBM for the annual renewal of software subscriptions, and Project Change Request 1 for cloud migration and cloud hosting of the ACCESS Sonoma Data Hub Project, in an amount not-to-exceed \$1,945,634 through June 30, 2024.

9/1/2020: the Board approved Addendum 4 to the Statement of Work with IBM for implementation of Phase 5 of the ACCESS Sonoma Data Hub Project, and any amendments that do not substantially change the scope of work or increase funding, in an amount not-to-exceed \$1,500,000 through December 31, 2020.

7/23/2019: the Board approved Addendum 3 to the Statement of Work with IBM for implementation of Phase 4 of the ACCESS Sonoma Data Hub Project, increasing the contract amount by \$1,500,000 resulting in a new total not-to-exceed amount of \$6,297,000, and any amendments that do not substantially change the scope of work or increase funding.

12/11/2018: the Board approved Addendum 2 to the Statement of Work with IBM for implementation of Phase 3 of the ACCESS Sonoma Data Hub Project, increasing the contract amount by \$1,800,000 resulting in a new total not-to-exceed amount of \$4,797,000.

8/7/2018: the Board approved Addendum 1 to the Statement of Work with IBM for implementation of Phase 2 of the ACCESS Sonoma Data Hub Project, increasing the contract amount by \$1,799,918 resulting in a new total not-to-exceed amount of \$2,997,000.

3/20/2018: the Board approved a Statement of Work and Cloud Services Agreement with IBM to provide software in support of the rapid deployment of an integrated data hub and frontend user application for the ACCESS Sonoma County Initiative, in an amount of \$1,197,082.

12/5/2017: the Board (1) received a report on the activities underway to address the Board priority to Secure the Safety Net and (2) adopted a resolution approving the County Safety Net Departments and Community Development Commission to strengthen coordinate, client-centered care delivery strategies and develop an information hub to facilitate successful implementation of disaster rapid response efforts, ACCESS Sonoma County, and Whole Person Care projects.

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY24-25 Adopted</b>	<b>FY25-26 Projected</b>	<b>FY26-27 Projected</b>

**Agenda Date:** 8/13/2024

Budgeted Expenses		\$666,667	<b>\$666,667</b>
Additional Appropriation Requested	\$666,667		
<b>Total Expenditures</b>	<b>\$666,667</b>	<b>\$666,667</b>	<b>\$666,667</b>
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal		\$666,667	\$666,667
Fees/Other			
Use of Fund Balance	\$666,667		
General Fund Contingencies			
<b>Total Sources</b>	<b>\$666,667</b>	<b>\$666,667</b>	<b>\$666,667</b>

**Narrative Explanation of Fiscal Impacts:**

Departmental fund balance from Safety Net departments will be utilized to support the first year of this contract for \$666,667. Allocations for the first-year expenditure will come to the Board for approval in the FY 24-25 Q1 CBAs. Allocations for the 2<sup>nd</sup> and 3<sup>rd</sup> year of the contract will take place through the annual budgeting process and are contingent on securing future stated/federal funds.

<b>Staffing Impacts:</b>			
<b>Position Title (Payroll Classification)</b>	<b>Monthly Salary Range (A-I Step)</b>	<b>Additions (Number)</b>	<b>Deletions (Number)</b>

**Narrative Explanation of Staffing Impacts (If Required):**

N/A

**Attachments:**

Attachment 1 - Addendum 7 to the Statement of Work with International Business Machines Corporation

Attachment 2 - NACo Presentation

**Related Items "On File" with the Clerk of the Board:**

None.