



COUNTY OF ERIE

CHRIS COLLINS

COUNTY EXECUTIVE

February 1, 2011

The Honorable
Erie County Legislature
92 Franklin Street – Fourth Floor
Buffalo, New York 14202

RE: Contract Authorization for Microsoft Rules Engine and Intake Software

Honorable Members:

This resolution authorizes the utilization of existing capital project funds for the development, purchase and implementation of an automated eligibility and client case management software application. Burgeoning Food Stamps and Medicaid caseloads coupled with current high volume increases in Temporary Assistance applications for traditional welfare benefits bring a special urgency to this request as we anticipate these caseload trend increases will continue. This software will result in faster processing, reduced wait time and better customer service and will help the Department to meet established State deadlines for case determinations.

The Department issued a Request for Proposals (RFP) for this purpose and has selected a Microsoft application based on a comprehensive proposal presentation and review. The system will include a front end rules engine component to automate and standardize benefits applications as well as a downstream process to perform task assignment, scheduling and referral. The amount of this capital purchase will be \$1,300,000, and is eligible for Federal and State reimbursement, making the local share 31.35% of total project costs. The system will take advantage of previous years multi-million dollar investments related to imaging and desktop hardware architecture currently in place in Department eligibility offices. There is no additional local share to this request and there is no fiscal impact to the Adopted 2011 Budget.

Should your honorable body require further information, I encourage you to contact the Department of Social Services. Thank you for your consideration on this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Chris Collins", is written over a horizontal line.

CHRIS COLLINS
Erie County Executive

MEMORANDUM

To: Honorable Members of the Erie County Legislature
From: Department of Social Services
Re: Contract Authorization for Microsoft Rules Engine and Intake Software
Date: February 1, 2011

SUMMARY

This resolution authorizes the utilization of capital project funds for the development, purchase and implementation of an automated eligibility and client case management software application. The system will include a front end rules engine component to automate and standardize benefits applications as well as a downstream process to perform task assignment, scheduling and referral. This software will result in faster processing, reduced wait time and better customer service and will help the Department to meet established State deadlines for case determinations.

FISCAL IMPLICATIONS

There is no additional local share to this request and there is no fiscal impact to the Adopted 2011 Budget. Capital Project funding will be utilized and the project is eligible for both federal and state reimbursement, thereby, reducing the local share to 31.35% of total project costs.

REASONS FOR RECOMMENDATION

Burgeoning Food Stamps and Medicaid caseloads coupled with current high volume increases in Temporary Assistance applications for traditional welfare benefits bring a special urgency to this request as we anticipate these caseload trend increases will continue. The system will take advantage of previous years multi-million dollar investments related to imaging and desktop hardware architecture currently in place in Department eligibility offices.

BACKGROUND INFORMATION

The Department issued a Request for Proposals (RFP) for this purpose and has selected a Microsoft application based on a comprehensive proposal presentation and review.

CONSEQUENCES OF NEGATIVE ACTION

Caseload trends and application demands could not be addressed.

STEPS FOLLOWING APPROVAL

A contract will be executed and development will commence.

COMPTROLLER'S OFFICE REVIEW

The proposed Legislation has been reviewed by the Comptroller's Office and is related to an authorized capital project for which there are sufficient capital appropriations for the action proposed - SAP Project A.0022³³ Mainframe Application/Data Migration.

Signed Lorne H. Steinhart
Lorne Steinhart, Deputy Comptroller
Comptroller's Office

Date 2/1/2011

① The third "RESOLVED" clause states that in the event that "any inconsistencies in purpose ^(to the 2004 resolution) exist, (then) this resolution hereby amends the description of the original capital project to include the services outlined herein..."

Typically if a bond resolution needs any type of amendment; e.g., amount, PPU, description, it would have to be amended in a new bond resolution, not just or simply a regular communication. - LHS

OFFICE OF THE COMPTROLLER REVIEW

DATE: 1/31/11

PROJECT TITLE: A.00253 2004 Mainframe Application/Data Mitigation

1) IS THE REASON FOR THIS CONTRACT CONSISTENT WITH THE PURPOSE
OF THE PROJECT: YES ☒ NO ☐

IF NO, RETURN THIS REQUEST TO THE DEPARTMENT

IF YES, COMPLETE THE FOLLOWING VERIFICATION

2) PROJECT AVAILABLE APPROPRIATION

TOTAL PROJECT REVENUES \$ 3,500,000.00

TOTAL PROJECT APPROPRIATIONS \$ 3,500,000.00

LESS: TOTAL EXPENDITURE TO DATE \$ 496,417.88

TOTAL COMMITMENTS \$ 0

AVAILABLE APPROPRIATIONS AS OF DATE OF REQUEST \$ 3,003,582.12

LESS: CONTRACT AMOUNT: 1,300,000.00

NET AVAILABLE APPROPRIATIONS \$ 1,703,582.12

COMMENTS: There is \$1,253,582.12 in cash in the project. The project budget also includes \$1,750,000 in Federal aid which the County will receive as claims are submitted for reimbursement.®

REQUEST APPROVED: Lone H. Steinhart

REQUEST DENIED: _____

DATE: 2/1/2011

® claims must be submitted in a timely manner.

A RESOLUTION SUBMITTED BY:
DEPARTMENT OF SOCIAL SERVICES

RE: Contract Authorization for
Microsoft Rules Engine and Intake Software

WHEREAS, this resolution authorizes the utilization of capital project funds for the development, purchase and implementation of an automated eligibility and client case management software application; and

WHEREAS, burgeoning Food Stamps and Medicaid caseloads coupled with current high volume increases in Temporary Assistance applications for traditional welfare benefits bring a special urgency to this request, as we anticipate these caseload trend increases will continue; and

WHEREAS, the Department issued a Request for Proposals (RFP) for this purpose and has selected a Microsoft application based on a comprehensive proposal presentation and review; and

WHEREAS, the system will include a front end rules engine component to automate and standardize benefits applications as well as a downstream process to perform task assignment, scheduling and referral. This will result in faster processing, reduced wait time and better customer service and will help the Department to meet established State deadlines for case determinations; and

WHEREAS, the amount of this capital purchase will be \$1,300,000, and this system will take advantage of previous years multi-million dollar investments in imaging and desktop hardware architecture currently in place in Department eligibility offices; and

WHEREAS, existing Capital Project funding is available and will be utilized. This Project is eligible for both federal and state reimbursement, thereby, reducing the local share to 31.35% of total project costs; and

WHEREAS, the request for proposal provision of Section 19.08 of the Erie County Administrative Code was complied with and a summary of the process is included as Attachment A to this resolution; and

WHEREAS, there is no additional local share to this request and there is no fiscal impact to the Adopted 2011 Budget.

NOW, THEREFORE, BE IT

RESOLVED, that the County Executive is hereby authorized to contract with Microsoft in an amount not to exceed \$1,300,000; funding for which is currently available in SAP Project A.00253, 04 Mainframe Application/Data Migration; and be it further

RESOLVED, that the Comptroller's Office is authorized to make payment for all contractual expenses as outlined above from said project; and be it further

RESOLVED, that the original capital project (A.00253 Mainframe Application /Data Migration and Integration) in 2004 did contemplate expenditures of this nature, however, if any inconsistencies in purpose exist this resolution hereby amends the description of the original capital project to include the services outlined herein; and be it further

RESOLVED, that certified copies of this resolution shall be forwarded to the County Executive, the Commissioner of Social Services, DISS – attention Chief Information Officer, the Erie County Comptroller, the County Attorney, and the Director of the Division of Budget and Management.



ERIE COUNTY DEPARTMENT OF SOCIAL SERVICES

CHRIS COLLINS
COUNTY EXECUTIVE

CAROL DANKERT
COMMISSIONER

Rules Engine and Intake Software

Commissioner's Certification

Proposer Name	Evaluation Criteria Total Scores				
	Expertise Experience	Pricing	Other Considerations	Total	Rank
Microsoft/Mid-America	42.00	35.00	42.00	119.00	1
Hudson Center for Health Equity & Quality	37.00	30.00	31.00	98.00	2
VenTek	21.00	25.00	18.00	64.00	3

It is my opinion in recommending Microsoft/Mid-America, the Erie County Department of Social Services (DSS) has complied with all applicable provisions of Section 19.08 of the Erie County Administrative Code. Scoring sheets and other materials related to this matter are available for review at the DSS offices during regular business hours.

Carol Dankert, Commissioner
Erie County Department of Social Services

Jeffrey Hart, Deputy County Executive