

# Enhancing Agencywide Procurement Consistency: Strategic Applications of San Mateo County's Centralized Model

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## Executive Summary

This paper analyzes the centralized procurement model implemented by the San Mateo County Human Services Agency (HSA) to identify strategic opportunities for the Alameda County Social Services Agency (SSA) to strengthen its contracting operations. The study focuses on the governance, structural alignment, and system integration practices that enable San Mateo's model to support consistent, transparent, and efficient procurement outcomes.

SSA's current operations share several aligned elements with aspects of San Mateo's approach, including centralized functions and the use of modern contract management systems. Building on these similarities, the analysis highlights opportunities to advance standardization, formalize a unified intake structure, expand shared resources and training, and pursue stronger alignment with countywide tools and processes.

Adopting targeted components of San Mateo's centralized model would position SSA to improve internal coordination, reduce process variability, enhance service partner engagement, and strengthen operational reliability across programs. These improvements can support SSA's broader organizational goals of delivering timely, equitable, and accountable services to the community.

# Introduction

San Mateo County Human Services Agency (HSA) and Alameda County Social Services Agency (SSA) share many operational similarities as large public agencies responsible for administering a broad range of safety-net programs that serve diverse and high-need populations. Both agencies oversee major state and federally funded programs such as Adult and Aging Services, In-Home Supportive Services (IHSS), Medi-Cal, CalFresh, CalWORKs, and community-based supportive services while relying heavily on contracted community-based organizations (CBOs) to deliver essential services. San Mateo County HSA manages approximately 250 contracts, and Alameda County SSA manages roughly 236 contracts across its programs, reflecting a comparable scale and reliance on external partners.

Structurally, both agencies operate within comparable frameworks that include program administration divisions, fiscal and procurement units, contract development teams, and compliance and monitoring functions. Each is guided by state entities such as the California Department of Social Services and the California Department on Aging, as well as federal regulations and county procurement policies. Given the breadth of their contracted provider networks, including services such as nutrition programs, senior supports, housing stability, family strengthening, and behavioral health, both counties encounter similar challenges related to timely procurement, contract execution, monitoring, performance measurement, and communication with providers and internal stakeholders.

San Mateo County centralizes its contracting functions by integrating procurement, contract development, monitoring, and provider support into a unified, streamlined workflow. This model promotes consistency, transparency, and coordinated communication across program areas.

Alameda County Social Services Agency (SSA) similarly operates a centralized Contracts and Finance Department that supports programs agency-wide. Through a review of San Mateo County's centralized system, elements of the model may inform future enhancements within SSA, with particular emphasis on opportunities to streamline workflows, strengthen communication channels, and reinforce alignment across programs. By examining the components that contribute to efficiency, standardization, and provider coordination in San Mateo, there is potential to identify complementary practices that can further support SSA's ongoing efforts to improve contracting operations.

This paper examines San Mateo County HSA's centralized contracting system and identifies strategies and practices that Alameda County SSA can adapt to enhance its own contracting processes. Through a comparative lens, the analysis explores opportunities for workflow

standardization, process transparency, staff training, improved document management, and stronger cross-functional coordination, ultimately supporting more efficient operations, strengthened provider relationships, and improved service outcomes.

## Strategic Insights and Best Practices from San Mateo County's Centralized Procurement Model

San Mateo County Human Services Agency (HSA) demonstrates a well-designed and coordinated centralized procurement and contracting structure that supports clarity, efficiency, and strong cross-department communication. According to M. Treanor (personal communication, April 2026), "HSA implementation of their centralized procurement improved their communication with the internal programs [and] their office supports and streamlined their processes." Several key features contribute to the strength of their model:

- **Centralized Intake Form:** San Mateo uses a single, standardized intake form that programs submit when requesting contracting or procurement support. This tool provides a clear, consistent communication pathway that ensures requests are accurately captured, routed, and tracked from the outset.
- **Centralized Contract Management System (OpenGov):** All HSA departments use OpenGov to initiate, process, and track procurement activities for both goods and services. This unified system enhances workflow visibility, reduces duplication, supports consistency in documentation, and enables staff to monitor contract progress in real time.
- **Comprehensive Use of Microsoft Suite Applications:** To address communication or workflow needs not fully covered by OpenGov, HSA leverages tools such as MS Approvals and SharePoint. These tools support document routing, version control, shared resource libraries, and timely task coordination across units.
- **Established SharePoint Site:** San Mateo maintains a robust SharePoint site that houses workflow documents, templates, and guidance materials. A dedicated "How To" tab provides easy access to resources and instructional videos on various procurement processes, along with direct links to their equivalents of GSA and other relevant County departments.
- **Ongoing Training and Capacity-Building:** HSA provides regular training to support both program staff and contract staff in understanding fiscal requirements, procurement processes, and contract development workflows. These sessions build internal capacity and help maintain consistent practice across teams.

- **Regular Interdepartmental Coordination Meetings:** HSA holds routine meetings among contracts, procurement, fiscal, and program divisions to review request status, discuss workflow needs, identify technical support issues, and address time-sensitive updates such as Board submission deadlines. This meeting structure promotes alignment and problem-solving across organizational units.

Together, these components form a cohesive and user-friendly centralized procurement system that supports operational efficiency, improves communication, and strengthens accountability. They also offer valuable insight into practices that could help inform future infrastructure enhancements within Alameda County SSA.

## Opportunities for Strengthening SSA's Contracting Infrastructure

Alameda County Social Services Agency (SSA) has established several key components of a centralized contracting environment. The agency's centralized Contracts and Finance Unit provide coordinated guidance across programs, and SSA's use of Agiloft as its primary contract management system supports consistent tracking and documentation. Alameda County's General Services Agency (GSA) also utilizes OpenGov, creating potential for future alignment should SSA pursue deeper system integration.

San Mateo County HSA's experience suggests that a centralized procurement model can support greater process standardization, transparency, and interdepartmental communication. Their previous use of Agiloft and subsequent transition to OpenGov, completed as part of a broader countywide consolidation effort, indicates that system selection is most effective when aligned with organizational needs rather than driven by platform preference. While the move to a unified system improved workflow visibility and shared access to information, the broader value appears to stem from the centralization approach itself, rather than from any specific technology.

Building on these insights, the following opportunities may support continued enhancements to SSA's contracting infrastructure:

- **Centralize intake and request submission:** A unified, agencywide intake form and submission process would promote consistency in how requests are communicated and tracked, reducing gaps between programs, fiscal, contracts, and administrative partners.
- **Strengthen alignment with countywide tools:** Given GSA's use of OpenGov, SSA may wish to explore selective integration points or shared functionalities that could improve workflow visibility and cross-departmental access to information, while recognizing that

transitioning CMS platforms is optional and may require a longer implementation timeframe.

- **Expand shared digital resources:** A comprehensive SharePoint site could serve as a central hub for workflow guidance, templates, FAQs, and onboarding materials, supporting standardization and reducing reliance on informal communication channels.
- **Enhance structured communication:** Regular coordination meetings across program, fiscal, and contracts staff would improve transparency, surface bottlenecks earlier, and ensure alignment on key deadlines, including Board-related timelines.
- **Increase training and cross-training opportunities:** Ongoing training on procurement requirements, contract development, fiscal processes, and system navigation would build internal capacity and support continuity, particularly during peak contracting periods.
- **Leverage existing centralized structures for continued growth:** SSA's Contracts and Finance Unit and its use of Agiloft provide a strong operational foundation. Incremental improvements—rather than system overhauls—can build on this base to enhance efficiency, consistency, and staff support.

## Implementation Timelines and Considerations

The following timeline outlines a phased approach for advancing improvements to SSA's contracting infrastructure based on insights gained from San Mateo County's centralized procurement model. These phases are designed to build on existing SSA structures, strengthen coordination, and support a more consistent and efficient procurement environment. There is also an acknowledgement that a transition to a new or expanded Contract Management System is a larger discussion and may require a longer, separate timeline.

### Phase 1: Planning and Assessment (Months 1–3)

1. Define goals for improving intake, workflows, and communication.
2. Assess current contracting processes and identify standardization needs.
3. Review alignment possibilities between Agiloft and countywide systems such as OpenGov.
4. Begin gathering content for shared templates, guidance, and training materials.

## **Phase 2: Development and Standardization (Months 4–6)**

1. Create a unified agencywide intake form and submission process.
2. Develop standardized workflow documents, templates, and “How To” resources.
3. Build or enhance a centralized SharePoint site for contracting tools and guidance.
4. Establish structured interdepartmental communication protocols.

## **Phase 3: Integration and Pilot (Months 7–9)**

1. Pilot the new intake process and workflows with select programs.
2. Explore optional CMS enhancements or integration points with county systems.
3. Incorporate staff feedback and refine materials and processes.
4. Finalize training modules for broader rollout.

## **Phase 4: Agencywide Implementation (Months 10–12)**

1. Launch the unified intake process and standardized workflows across SSA.
2. Deploy the centralized SharePoint resource hub.
3. Begin ongoing interdepartmental coordination meetings.
4. Deliver training for program, fiscal, and contract staff.

## **Phase 5: Evaluation and Continuous Improvement (Month 12+)**

1. Review process outcomes, efficiencies, and user experience.
2. Adjust workflows and training based on staff and provider feedback.
3. Maintain routine cross-departmental communication to support continuous improvement.
4. Consider long-term planning for optional CMS transition if aligned with agency priorities and resources.

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Alameda County deserves recognition for its ongoing efforts to build and maintain a centralized contracting structure within a large and complex agency. The recommendations in this paper are intended to complement and expand upon those existing efforts—drawing on San Mateo County's experience to highlight tools, processes, and structural elements that could further strengthen SSA's contracting infrastructure.

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