



Legislation Text

File #: 23-0600, **Version:** 1

Probation Department recommending the Board:

- 1) Make findings in accordance with El Dorado County Ordinance Code, Chapter 3.13.030 (B) that specialty skills and qualifications are not expressly identified in County classifications are involved in the performance of the work;
- 2) Find that Agreement for Services 7883 is exempt from competitive bidding in accordance with Procurement Policy C-17, Section 3.5 Specific Exemptions and Written Findings of Fact;
- 3) Approve and authorize the Chair to sign retroactive Agreement 7883 with Catalis Courts & Land Records, LLC, in the amount of \$231,085.20, with a term of July 24, 2023, through July 23, 2024, with the option to extend for two (2) additional one-year terms with written notice by the Chief Probation Officer, for the maintenance and support of the Probation Department's case management software; and
- 4) Authorize the Purchasing Agent, or designee, to execute further documents relating to Agreement for Services 7883, including amendments which do not increase the maximum dollar amount or term of the Agreement, contingent upon approval by County Counsel and Risk Management.

FUNDING: General Fund 100%.

DISCUSSION / BACKGROUND

Since June of 2006, the Probation Department (Probation) has been contracting with Catalis Courts & Land Records, LLC (Catalis), for a proprietary case management system called Caseload Explorer, which includes modules for adult supervision, juvenile supervision, juvenile detention facilities, and fiscal; licensing; installation; maintenance; training; customization; and system upgrades.

Since the initial contract with Catalis, Probation has added services to include product subscription and service of Catalis's Ce Connect Licensed Software Products and Modules, and quarterly data extract services. These product systems allow for managing drug testing, providing flexible client reporting, and managing all phases of pretrial.

County Procurement Policy C-17, Section 3.5 describes exceptions that may be made to the competitive bidding process. Agreement 7883 falls under Exemption "Software (Proprietary)," Finding of Fact "Proprietary Software is software that is licensed, copyrighted, or patented that only one vendor provides." Catalis provides maintenance, support services, and product subscription service for Caseload Explorer Connect Licensed Software Products and Modules as part of Catalis' proprietary probation, pretrial, and parole case management software. County Procurement and Contracts has affirmed that services with Catalis may be exempted from competitive bidding.

Agreement 4889 with Catalis expired on July 23, 2023. Probation began preparing the new agreement with Catalis on March 1, 2023. At that time the vendor was going through a corporate name change and the County requested new vendor forms and insurance documents. Draft agreement reviews were completed by Probation on May 10, 2023, and Catalis on June 29, 2023. This retroactive item was processed to be brought before the Board as soon as practicable after that date. Agreement 7883 has a not-to-exceed amount of \$231,085.20 and a term of July 24, 2023,

through July 23, 2024 and may be extended for two additional one-year terms if written notice is given by the Chief Probation Officer.

ALTERNATIVES

The Board could not approve the Agreement and provide direction to Probation to find alternatives for new case management software.

PRIOR BOARD ACTION

07/14/2020 Legistar Item 20-0583

07/18/2017 Legistar Item 17-0663

06/23/2015 Legistar Item 15-0682

10/01/2013 Legistar Item 06-1020

OTHER DEPARTMENT / AGENCY INVOLVEMENT

Information Technologies, County Counsel, Procurement & Contracts

CAO RECOMMENDATION

Approve as recommended.

FINANCIAL IMPACT

No fiscal impact or change to Net County Cost as these anticipated services, maintenance, support fees, and subscriptions are included in Probation's FY 2023-24 budget and will be included in future budgets.

CLERK OF THE BOARD FOLLOW UP ACTIONS

1. Clerk of the Board to obtain the Chair's signature on two (2) originals of Agreement 7883.
2. Clerk of the Board to forward one (1) fully executed Agreement to Probation for distribution to vendor.

STRATEGIC PLAN COMPONENT

Public Safety

CONTACT

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