



# County of Monterey

## Item No.34

### Board Report

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

**Legistar File Number: A 23-224**

June 13, 2023

**Introduced:** 5/23/2023

**Current Status:** Criminal Justice - Consent

**Version:** 1

**Matter Type:** BoS Agreement

- a. Approve and authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to execute Amendment No. 3 to Agreement No. A-14028 with Homeland Justice Systems, Inc., to provide for maintenance and support for Probation's Service Management System (SMS), to extend the term for up to one year to June 30, 2024, in the amount of \$62,000, for a total contract amount of \$642,531; and
- b. Approve and authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to sign up to two future amendments that do not significantly change the scope of work and where the total does not exceed ten percent 10% (\$47,493) of the original contract amount, not to exceed the maximum of \$690,024.

#### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to execute Amendment No. 3 to Agreement No. A-14028 with Homeland Justice Systems, Inc., to provide for maintenance and support for Probation's Service Management System (SMS), to extend the term for up to one year to June 30, 2024, in the amount of \$62,000, for a total contract amount of \$642,531; and
- b. Approve and authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to sign up to two future amendments that do not significantly change the scope of work and where the total does not exceed ten percent 10% (\$47,493) of the original contract amount, not to exceed the maximum of \$690,024.

#### SUMMARY:

In 2018, Probation entered into a 3-year agreement with Homeland Justice Systems (HJS) to provide maintenance and software development services to Probation's Case Management System (CMS), Smart Probation. Smart Probation is the CMS utilized to manage operations for adult and juvenile clients and victim information, manage data exchanges with other systems, and to fulfill increasing data collection and reporting mandates. The Agreement was amended June 2019 with Amendment No. 1 to expand Smart Probation CMS functionality by integrating the CMS with a new web-based application for contracted AB109 service providers hosted by the vendor; and with Amendment No. 2 in April 2021, to extend the term of the Agreement, add funding for the additional time, and remove the SMS hosting services.

Amendment No. 3 would increase the agreement amount and extend the term an additional year to provide for continuance of Smart Probation CMS pending the migration to the new case management system under Tyler Technologies, Inc. and vendor assistance through the completion of that project.

DISCUSSION:

The current case management system (CMS), Smart Probation, has been utilized since 2011 and has experienced many upgrades to be able to meet changing requirements, demands of department users and legislation changes on the information maintained on the clients served, but has reached its maximum capabilities. Following procurement under the County code and established policies, the Department has contracted with Tyler Technologies, Incorporated for a new case management system that can accommodate data integration with the County court system, as well as accommodating the growing pre-trial and juvenile justice realignment requirements which are critical for the support of daily operations and to maintain adequate data collection and mandated reporting for the department. As the project to transition to the new CMS is in progress, the current CMS provided by Homeland Justice, Inc. must be maintained and is necessary for continuity of operations. Additionally, HJS will also be providing support and assistance during the migration and until the new CMS goes live.

Amendment No. 3 increases the original Agreement amount by \$62,000 for total not to exceed amount of \$642,531 for continuance of the CMS and assistance with the transition to the new case management system.

A copy of Amendment No. 3 is on file with the Clerk of the Board.

OTHER AGENCY INVOLVEMENT:

The Office of the County Counsel-Risk Management has approved the agreement as for legal form, while the Auditor-Controller has approved it for fiscal provisions.

FINANCING:

Required funds have been included in the FY23-24 Recommended Budget for the Probation Department, Probation 2550, Appropriations Unit PRO001. Funds associated with this recommendation are provided by the AB 109 Public Safety Realignment, and are included in the next fiscal year State budget. There is no additional cost to the County General Fund with this recommended action

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

This recommendation supports the Board of Supervisor Strategic Initiatives of: a) Administration, through the continued support of the Department’s Case Management system infrastructure; and b) Public Safety by maintaining features for the tracking of information on offenders and the delivery of rehabilitative services.

- Economic Development
- Administration
- Health & Human Services
- Infrastructure
- Public Safety

Prepared by: Wendi Reed, Management Analyst III, ext. 3985  
Approved by: Todd Keating, Chief Probation Officer, ext. 3913

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*Todd Keating*  
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Attachment:

Board Report

Amendment No. 3 to Agreement A-14028 with Homeland Justice Systems, Inc.

Amendment No. 2 to Agreement A-14028 with Homeland Justice Systems, Inc.

Amendment No. 1 to Agreement A-14028 with Homeland Justice Systems, Inc.

Agreement No. A-14028 with Homeland Justice Systems, Inc.