



# County of Monterey

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

## Legislation Details (With Board Report)

<b>File #:</b>	A 21-596	<b>Name:</b>	A1 to Agreement A-15534-Orbis Partners, LLC - Caseworks-YASI Software
<b>Type:</b>	BoS Agreement	<b>Status:</b>	Criminal Justice - Consent
<b>File created:</b>	12/8/2021	<b>In control:</b>	Board of Supervisors
<b>On agenda:</b>	1/11/2022	<b>Final action:</b>	
<b>Title:</b>	a. Approve and authorize the Contracts/Purchasing Officer or Contracts/ Purchasing Supervisor to sign Amendment No. 1 to Agreement No. A-15534 with Orbis Partners, LLC, to provide read-only licenses, training for six coaches, and additional e-training accounts for Case-Works-YASI Software in the amount of \$24,000, for a revised total agreement amount of \$93,223, and extend the agreement an additional four (4) months (September 20, 2024 through January 31, 2025) for a revised full agreement term of September 20, 2021 through January 31, 2025; b. Authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to sign future amendments to the Agreement, where any increased costs do not exceed ten percent (10%) of the original contract amount (\$6,922) and do not significantly change the scope of work.		

### Sponsors:

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### Code sections:

**Attachments:** 1. Board Report, 2. Amend No. 1-Orbis Partners - YASI FY21-24, 3. Executed Agreement - Orbis Partners LLC - YASI FY2021-2024 - Copy, 4. Completed Board Order Item No. 52

Date	Ver.	Action By	Action	Result
1/11/2022	1	Board of Supervisors		

- a. Approve and authorize the Contracts/Purchasing Officer or Contracts/ Purchasing Supervisor to sign Amendment No. 1 to Agreement No. A-15534 with Orbis Partners, LLC, to provide read-only licenses, training for six coaches, and additional e-training accounts for Case-Works-YASI Software in the amount of \$24,000, for a revised total agreement amount of \$93,223, and extend the agreement an additional four (4) months (September 20, 2024 through January 31, 2025) for a revised full agreement term of September 20, 2021 through January 31, 2025;
- b. Authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to sign future amendments to the Agreement, where any increased costs do not exceed ten percent (10%) of the original contract amount (\$6,922) and do not significantly change the scope of work.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and authorize the Contracts/Purchasing Officer or Contracts/ Purchasing Supervisor to sign Amendment No. 1 to Agreement No. A-15534 with Orbis Partners, LLC, to provide read-only licenses, training for six coaches, and additional e-training accounts for Case-Works-YASI Software in the amount of \$24,000, for a revised total agreement amount of \$93,223, and extend the agreement an additional four (4) months (September 20, 2024 through January 31, 2025) for a revised full agreement term of September 20, 2021 through January 31, 2025;
- b. Authorize the Contracts/ Purchasing Officer or Contracts/Purchasing Supervisor to sign future amendments to the Agreement, where any increased costs do not exceed ten percent (10%) of the original contract amount (\$6,922) and do not significantly change the scope of work.

### SUMMARY:

The Probation Department recommends the approval of Amendment No. 1 to Agreement No. A-15534 with Orbis Partners, LLC, in the amount of \$24,000, for a revised contract total amount of \$93,223 and includes a term extension of four (4) months for a revised term of September 20, 2021 through January 31, 2025, to allow for additional training support and program continuity for future staff training and utilization of Case-Works-YASI software in the Probation Department.

**DISCUSSION:**

The Agreement with Orbis Partners, LLC, in an amount not to exceed \$69,223, for the term of September 20, 2021 through September 19, 2024 to utilize Case-Works-YASI software in the Probation Department was approved and authorized by the Board of Supervisors on September 14, 2021.

The agreement provides for software licensing, hosting, and support for fifty (50) users, with an e-training component. Later in-depth analysis of future departmental needs indicate that additional training support is needed in the form of a coaching component and increased eTraining accounts, as well as the necessity for read-only licenses for account holders needing access to Case-Works software.

The need for the CaseWorks-YASI software was due to Senate Bill 823 (SB), signed in to law in September 2020 by Governor Newsom, which realigned the Department of Juvenile Justice (DJJ) population from the State of California to Counties, beginning July 1, 2021. The bill established the jurisdiction of the Juvenile Court up to the age of 25 for certain offenses and transferred the responsibility of care, custody, and supervision of youth to the county of commitment. This population of realigned youth are high-risk and have greater needs for specific individualized case plans with services and programs that address mental health needs, sex offender treatment or related behavioral or trauma-based needs, healthy adolescent development programs, family engagement, reentry, and continuing education.

Case-Works-YASI software is used to assess risk, needs and protective factors for the youth being released from the State and for assessment standardization for all youth populations in juvenile institutions, and under community supervision. This software not only provides integrated scoring with case planning for the specialized population, but also supports additional data collection requirements, as outlined and mandated in the Juvenile Justice Realignment legislation.

The Amendment amount of \$24,000, includes the annual cost of \$4,000 per year over the term of the Agreement to provide twenty (20) read-only licenses for Probation; a one-time cost of \$8,500 for training six (6) coaches, to include a total of 10 hours of training over 5 scheduled sessions with additional support as needed from coach trainers; and a one-time cost of \$3,500 for twenty (20) additional e-training accounts to be used as needed for training new staff at any point in the implementation and utilization of the software assessment. As the access and software licenses were not released until November 24, 2021 and are effective three years from that date, also included in this Amendment is a term extension of four (4) months through January 31, 2025 to provide for full usage of services in the Agreement and the amended additional e-training accounts.

**OTHER AGENCY INVOLVEMENT:**

Amendment No. 1 to Agreement No. A-15534 has been reviewed by the Office of County Counsel-Risk Management and approved as to form and risk provisions. The Office of the Auditor-Controller has reviewed and approved as to fiscal provisions.

**FINANCING:**

Funding for Amendment No. 1 is provided by the Youth Program and Facilities Grant. The additional expenditure of \$16,000 will be made within the existing appropriation limits during FY 21-22. The remaining

balance of \$8,000 will be included in the budgets for FY22-23 and 23-24. There is no additional cost to the County General Fund with the recommended action.

**BOARD OF SUPERVISORS STRATEGIC INITIATIVES:**

This recommendation supports key objectives of: 1) Health and Human Services by providing care and treatment for the specific needs of each youth with County and community services to improve their quality of life and support rehabilitation; and 2) Public Safety by providing services and programs to youth for successful reintegration into the community and aid in crime prevention.

- ☐ 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

**Attachments:**

Amendment No. 1 to Agreement with Orbis Partners, LLC

Agreement No. A-15534 - Orbis Partners, LLC for FY 2021-22, FY2022-23, and FY 2023-24