



County of Monterey

Item No.

Board Report

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

Legistar File Number: A 26-093

April 14, 2026

Introduced: 3/19/2026

Current Status: Agenda Ready

Version: 1

Matter Type: BoS Agreement

- a. Approve and authorize the Director of the Department of Social Services or designee to sign an agreement with Northwoods Consulting Partners, Inc. for the use of Traverse software, a cloud-based case management system for adult and child welfare cases, retroactive to December 10, 2025 for a one-year term ending on December 9, 2026, in the amount of \$423,121 including nonstandard indemnification and liability provisions; and
- b. Authorize the Director of the Department of Social Services or designee to sign three amendments to this Agreement where the total amendments do not exceed 10% (\$42,312) of the amended contract amount, do not significantly change the scope of work, and do not exceed the maximum aggregate amount of \$465,433.

RECOMMENDATION: It is recommended that the Board of Supervisors:

- a. Approve and authorize the Director of the Department of Social Services or designee to sign an agreement with North Woods Consulting Partners, Inc. for the use of Traverse software, a cloud-based case management system for adult and child welfare cases, retroactive to December 10, 2025 for a one-year term ending on December 9, 2026, in the amount of \$423,121 including nonstandard indemnification and liability provisions; and
- b. Authorize the Director of the Department of Social Services or designee to sign up to three amendments to this Agreement where the total amendments do not exceed 10% (\$42,312) of the amended contract amount, do not significantly change the scope of work, and do not exceed the maximum aggregate amount of \$465,433.

SUMMARY:

This retroactive agreement allows for the continuation of the use of Traverse software by the Department of Social Services (DSS), Family & Children's and Adult and Aging Services. The software is a cloud-based case management tool incorporating proprietary coding and artificial intelligence for case discovery, cognitive search and enable social workers to collect, view, and share documentation with clients and community partners.

DISCUSSION:

This retroactive agreement allows for the continuation of the use of North Woods' Traverse software, a proprietary cloud-based case management system built for adult and child welfare programs. The software is a content collection and case discovery solution that integrates with case data providing an easy to use and searchable document management system that assists social workers with collecting and viewing content regarding abuse, neglect, foster care, and adoption cases. Traverse has several unique features that not only save staff time but also provide continuity of key information as cases are reassigned to different social workers over time. One of these features is the ability to cull information from voluminous case files assisting social workers in case discovery and in uncovering correlations throughout all case related documentation in a matter of seconds versus manually combing through volumes of prior case history. The reduction in time spent reviewing case documents will free up staff capacity to work on more complex tasks.

The Department recommends approval of the nonstandard indemnification terms due to the benefits the software provides. While the indemnification terms are nonstandard to the county, they are standard in the software industry.

A retroactive agreement is requested due to delays in obtaining authorization from the California Office of Technology and Solutions Integration to purchase Traverse. Access to Traverse has been provided to the Department as of the retroactive date requested.

OTHER AGENCY INVOLVEMENT/COMMITTEE ACTIONS:

The Office of County Counsel has reviewed and approved the nonstandard agreement as to form. Auditor-Controller's Office reviewed the contract but does not agree to the nonstandard payment provisions.

FINANCING:

This agreement supports Child Welfare services and the In-Home Supportive Services program. The Child Welfare portion is \$231,611.50 and will be funded with realignment funds. The IHSS portion is \$191,509.50 and will be funded 85% Social Services revenues and 15% realignment funds. Sufficient appropriations and estimated revenues for SOC005 are included in the FY 2025-26 Adopted Budget and FY 2026-27 appropriations and revenues will be included in the corresponding budget process.

BOARD OF SUPERVISORS STRATEGIC PLAN GOALS:

This retroactive nonstandard agreement correlates to the Well-Being and Quality of Life Strategic Plan Goal adopted by the Board of Supervisors by providing tools and services to promote safe and healthy family dynamics, as well as provide a mechanism to identify and respond to instances of abuse, neglect, and maltreatment.

Mark a check to the related Board of Supervisors Strategic Plan Goals:

- Well-Being and Quality of Life
- Sustainable Infrastructure for the Present and Future
- Safe and Resilient Communities
- Diverse and Thriving Economy
- Administrative

Prepared by: Prepared by: Alex Soltero, Management Analyst III, x 3584.

Approved by: Roderick W. Franks, Director, x4430.

Attachments: Agreement

The proposed agreement is on file with Clerk of the Board as an attachment to this Board Report.