

EXHIBIT A

SCOPE OF SERVICES AND BILLING PROVISIONS

A. SCOPE OF SERVICES

- A.1. Overview:** The County of Monterey (“County”) solicited proposals from qualified organizations to provide turnkey Telephone Services, Tablet Program, and Video Visitation System (“Services”) for Incarcerated Individuals (“IP”).

After consideration and evaluation of the CONTRACTOR'S proposal, the County hereby engages CONTRACTOR to provide the Services.

A.1. Contractor Responsibilities:

Contractor shall provide the Services to Monterey County Sheriff Department and Monterey County Probation Department. Monterey County Probation Department will not be charged for their portion of the services pursuant to Senate Bill 1008, which added to Penal Code section 2084.5 and added to Welfare & Institutions Code section 208.1, but CONTRACTOR will receive compensation through the Sheriff Department which shall include consideration for the services provided to the Probation Department. Probation Department services will be a parred down version of voice communications and tablet services. RFP 10881 references the no charge to the Probation Department for the services. CONTRACTOR agrees to perform services and provide staff and otherwise do all things necessary for or incidental to the performance of work that include the following:

A.1.1. *Terms, conditions, provisions, and activities associated with the Scope of Work listed and described in the following:*

- A.1.1.1. Request for Proposal (RFP) #10881 issued by the County dated May 23, 2023, Addendum 1 issued by the County on June 30, 2023, Addendum 2 issued by the County on July 14, 2023, and any other amendments or addenda thereto.
- A.1.1.2. CONTRACTOR’s proposal and response to RFP #10881 dated July 31, 2023.

A.2. Other Contractor Responsibilities:

A.2.1. *Site Administrator/Technician (SAT).* Per section 5.1.5.4. of RFP #10881 and CONTRACTOR’s response page 101, upon Probation approval, a part-time-time (4 hours per week) dedicated onsite SAT will work 1/2-day Wednesday (morning),. SAT shall submit a request for any absence (i.e.. Vacation, medical appointment, training, etc.) at least forty-eight (48) hours prior to ACPO or designated Division Director for approval. SAT shall provide a plan for coverage in their absence. Absence must be approved prior to absence unless absence is due to an emergency.

A.2.2. *Tablets.* CONTRACTOR shall supply a 1 to 1 ratio of tablets for youth), which would currently be 100 tablets (70 for Juvenile Hall and 30 for Youth Center), and 4 Commander tablets (two (2) tablets at each institution). Keep a supply of at least 10% (10 IP tablets and two (2) Commander tablets on site(one at each institution). CONTRACTOR shall replace all damaged tablets within three (3) weeks.

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- A.2.3. *Education Programs.* CONTRACTOR shall work with designated Probation Service Managers (PSM) at the Juvenile Hall and Youth Center to implement additional education programs on Tablets. County will incur any and all costs associated with the implementation of the Probation Department's additional education programs. Once implemented, the educational programs will be at no cost to County.
- A.2.4. *Implementation.* CONTRACTOR shall work with Probation on 45-day implementation plan per CONTRACTOR response to section 8.2.3.2., and comply with Exhibit B.
- A.2.5. *Intake/Booking Kiosks.* CONTRACTOR shall provide one (1) Intake/Booking Kiosk at the Juvenile Hall at a mutually agreed upon date *if requested by the Probation Department.*
- A.2.6. *Investigative Tools.* CONTRACTOR shall implement Investigative Tools that include but not limited to SmartInmate™, SmartLink™, "Best Known Name Address," and Call Transcription with translation and keyword search capability.
- A.2.6.1. Call Transcription tool shall maintain a high level of accuracy, with a minimum of 75% accuracy at all times.
- A.2.7. *Cold Storage Retrievals.* CONTRACTOR shall have no hidden costs for cold storage retrievals of call detail records and recordings that would include the Leave Behind Solution, call recordings, redundant Storage Area Networks (SANs), and other related storage formats, media, and devices.
- A.2.8. *Plug-Ins.* The system's browser shall have no plug-ins.
- A.2.9. *Legacy and Other Data.* CONTRTACTOR shall import and download legacy data that includes known attorney numbers, known Friends and Family numbers, blocked/restricted numbers, Personal Allowed Numbers (PANs), JMS data feed, and other Incarcerated Person Data Feeds identified and pre-determined by the County. Detailed tasks, timelines/due dates, and deliverables will be included in the Project Control Document (PCD) in the Pre-Implementation Phase.
- A.2.10. *Other Services.* CONTRACTOR shall implement other services in Table 1, Section B of this document. CONTRACTOR shall not implement any other services not included in the RFP and Contractor Proposal, without a signed amendment.

B. RATES, COSTS, AND REVENUE SHARE

Rates shall not exceed those identified by California Public Utilities Commission and/or Federal Communications Commission.

The rates, revenue share, and schedule for services and applications are shown in Table 1:

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TABLE 1

Service or Application	Non-Recurring / Installation Cost	Cost Per Unit (Minute, Message, Voicemail, etc.)	Minimum Annual Guarantee (MAG)	Revenue Share to Sheriff's Office (per minute or %)
INCARCERATED PERSON TELEPHONE SYSTEM AND ASSOCIATED SERVICES				
1. Telephone System (hardware and software), two Administrative Workstations, Implementation and Project Management	FREE	N/A	N/A	N/A
2. Calls - Interstate, Intrastate, International (Cost to IPs/IPs' family and friends)	N/A	FREE	N/A	N/A
3. Minimum Annual Guarantee (MAG)	N/A	N/A	\$125,000-N/A	N/A
4. MailGuard® and MailGuardLegal® System services	FREE	FREE	N/A	N/A
5. Telephone Services and Optional Features:				
<i>Administration and Control</i> - Call scheduling and control feature set provides automated and manual, granular control over all aspects of telephone availability and access privileges - Multiple call analysis tools providing standard and customizable reports - Global and personal allowable number lists - Secure, web-based design provides full on-site and remote access to all administrative controls and tools based on user permission level	FREE	FREE	N/A	N/A
<i>Security</i> - SmartEvo™ ITS service with voice biometrics, call transcription and other advanced call management/investigative tools - 3-way calling and hook-switch dialing detection and prevention - Positive DTMF call acceptance - 24/7/365 remote network monitoring ensures 99.99% uptime	FREE	FREE	N/A	N/A
<i>Recording Storage and Retrieval (No Hidden Costs)</i> - CDRs, call recordings and systems data stored on encrypted and redundant storage area networks (SAN) at three separate geographic locations - All CDR and call recording data securely stored and accessible to staff for one year or longer after agreement expiration - Download a single file or select a set of call recordings to play back, burn/copy to disk or email in .MP3 file format	FREE	FREE	N/A	N/A
<i>Call Monitoring and Investigative Tools</i> - Unlimited and undetectable live call monitoring - Hot number/call watch list offering text, phone or email	FREE	FREE	N/A	N/A

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<p>alert notifications - Call transcription with translation and keyword search capability - Advanced case management tools to help investigators better track and manage assets for specific incidents or individuals that can be shared securely with external law enforcement agencies - “Best Known Name and Address” feature queries internal client databases to help locate the address associated with telephone numbers - SmartLink™ tools allow investigators to check for any links between IPs and public individuals or other IPs using multi-path and multi-relation analysis</p>				
<p><i>Optional Value-Added Features</i></p> <ul style="list-style-type: none"> - Compatibility/deployment of on-site, visitation telephone hardware - Interoperable with SmartTablet™ and SmartKiosk™ devices to provide tablet/kiosk-based calling - Indigent calling feature to configure free call quantity limits to predesignated numbers, including designated call durations and calling windows - Custom speed dial to agency-defined numbers and/or designated voicemail boxes for IPs to contact PREA, crime tips, public defenders and more - Seamless Video Relay Service (VRS) and Video Remote Interpreting (VRI) interfacing 	FREE	FREE	N/A	N/A
6. Patented MailGuard® and MailGuardLegal® System services	FREE	FREE	N/A	N/A
7. Jail Management System (JMS), Commissary and Related Systems Interfacing with Automated Information Service (AIS)	FREE	FREE	N/A	N/A
8. All hardware with installation and software upgrades	FREE	FREE	N/A	N/A
9. Full-time, On-site Certified Technician (OCT)/ Site Administrator/Technician (SAT)	FREE	FREE	N/A	N/A
10. 24/7/365 live, U.S.-based customer and technical support	FREE	FREE	N/A	N/A
11. Debit Release Card System	FREE	FREE	N/A	N/A
12. SmartEvo™ ITS Inbound Voicemail eXchange (VMX™)				
13. Intake and Lobby Deposit Kiosks (No Cost to County). The booking kiosks will be interfaced with the inmate Trust Fund accounting system. Rates to IPs' family and friends, if applicable, were not provided.	FREE	N/A	N/A	N/A
14. Training (Initial and Ongoing) for staff	FREE	FREE	N/A	N/A
TABLETS AND TABLET PROGRAM				
1. SmartTablet™ devices (1:1 distribution ratio) with Wireless Charging Stations and SmartKiosk™ devices, and earbuds; Implementation and Project	FREE	FREE	N/A	N/A

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Management				
2. Tablet Messages/Apps:				
- Internal Facility/Staff Text Messages	N/A	FREE	N/A	N/A
5. SmartEd™ and SmartReentry™ tablet-based IP educational resources and rehabilitative programs	FREE	FREE	N/A	N/A
6. SmartLaw™ Digital Law Library	FREE	FREE	N/A	N/A
7. SmartEntertainment™ Service Tablet Streaming (Cost to IPs/IPs' family and friends)				
- Standard Content Streaming	N/A	FREE	N/A	N/A
10. Training (Initial and Ongoing) for staff	FREE	FREE	N/A	N/A
VIDEO VISITATION SERVICE				
1. Video System (hardware, software), Implementation and Project Management	FREE	FREE	N/A	N/A
1. Remote VVS service for attorneys and public defenders	FREE	FREE	N/A	N/A
2. Local video sessions (onsite)	N/A	FREE	N/A	N/A
3. Remote video sessions (scheduled and video-on-demand)	N/A	N/A	N/A	50%
4. Training (Initial and Ongoing) for staff	FREE	FREE	N/A	N/A