



# County of Monterey

**Item No.53**

## Board Report

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

**Legistar File Number: A 24-530**

**December 03, 2024**

**Introduced:** 11/5/2024

**Current Status:** Criminal Justice - Consent

**Version:** 1

**Matter Type:** BoS Agreement

- a. Approve and authorize the Contracts/Purchasing Officer or their designee to sign Amendment No. 4 to Agreement No. A-15534 with Orbis Partners, LLC, to provide annual software licenses, hosting, and support fees, additional e-training accounts, increase the Agreement's amount by \$98,632 for a revised total agreement amount of \$213,578 and extend the term of the Agreement for two years, ten months to align with the term of the software licensing to November 23, 2027, for a revised full agreement term of September 20, 2021 through November 23, 2027; and
- b. Authorize the Contracts/ Purchasing Officer or their designee to sign future amendments to the Agreement, where any increased costs do not exceed ten percent (10%) of the original contract amount (\$6,922) for a not to exceed maximum amount of \$220,500 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 their designee to sign Amendment No. 4 to Agreement No. A-15534 with Orbis Partners, LLC, to provide annual software licenses, hosting, and support fees, additional e-training accounts, increase the Agreement's amount by \$98,632 for a revised total agreement amount of \$213,578 and extend the term of the Agreement for two years, ten months to align with the term of the software licensing to November 23, 2027, for a revised full agreement term of September 20, 2021 through November 23, 2027; and
- b. Authorize the Contracts/ Purchasing Officer or their designee to sign future amendments to the Agreement, where any increased costs do not exceed ten percent (10%) of the original contract amount (\$6,922) for a not to exceed maximum amount of \$220,500 and do not significantly change the scope of work.

### SUMMARY:

The Probation Department recommends the approval of Amendment No. 4 to Agreement No. A-15534 with Orbis Partners, LLC, in the amount of \$98,632 for a revised total agreement amount of \$213,578 and to extend the term of the Agreement for two years, ten months to align with the term of the software licensing to November 23, 2027, for a revised full agreement term of September 20, 2021 through November 23, 2027 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 need for the CaseWorks-YASI software is 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.

On September 20, 2021, following Board approval, the Probation Department entered into an 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. The agreement provided for software licensing, hosting, and support for fifty (50) users, with an e-training component. Amendment No. 1 to increase the Agreement amount by \$24,000 was executed on January 24, 2022 as future departmental needs indicated that additional training support was needed in the form of a coaching component and increased eTraining accounts, as well as read-only licenses for account holders needing access to Case-Works software. Amendment No. 2 added forty (40) additional e-training accounts and increased the Agreement's amount by \$6,922 on February 1, 2023. Amendment No. 3 to provide virtual training and coach refresher training was executed April 15, 2024.

Amendment No. 4 increases the original Agreement amount by \$98,632 for total not to exceed amount of \$213,578 for continuance of the YASI assessment software licensing and training of staff due to new hires and transfers in FY24-25 and forward. The Probation Department recommends approval of Amendment No. 4 as it will allow staff to continue using the YASI software which is an essential tool for assessment and ability to meet the specific needs of the realigned youth population.

OTHER AGENCY INVOLVEMENT:

Amendment No. 4 to Agreement No. A-15534 has been reviewed by the Office of County Counsel and approved as to form. The Office of the Auditor-Controller has reviewed and approved as to fiscal provisions.

FINANCING:

Funding for Amendment No. 4 is provided by the SB823 State Juvenile Justice Realignment Block Grant. The expenditure of \$45,680 will be made within the existing appropriation limits during FY 24-25. The remaining balance of \$52,952 will be included in the budgets for FY25-26 and 26-27 (\$26,214 and \$26,738 respectively). There is no 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: Jose Ramirez, Assistant Chief Probation Officer, ext. 3913

Attachments:

Amendment No. 4 to Agreement with Orbis Partners, LLC

Amendment No. 3 to Agreement with Orbis Partners, LLC

Amendment No. 2 to Agreement with Orbis Partners, LLC

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