



# County of Monterey

**Item No.**

## Board Report

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

**Legistar File Number: A 23-548**

**December 05, 2023**

**Introduced:** 11/16/2023

**Current Status:** Agenda Ready

**Version:** 1

**Matter Type:** BoS Agreement

- a. Approve and authorize the Director of Health Services or designee to execute an Agreement with LexisNexis Risk Solutions Bureau LLC and LexisNexis Risk Solutions FL Inc. ("LexisNexis") incorporating by reference the terms set forth in the Master Service Agreement No. 5-23-70-40-01 between RELX Inc. and the State of California, Department of General Services to give the Monterey County Public Guardian Office access to the Accurint public records database for term January 1, 2024 through December 31, 2027, for a total Agreement amount of \$15,520;
- b. Approve recommendation of Director of Health Services to accept non-standard risk terms (disclaimer of warranties, limitation of liability, indemnification); and
- c. Approve and authorize the Director of Health Services or designee to sign two (2) future amendments to this Agreement where the total amendments does not exceed 10% (\$1,552) of the original Agreement amount and does not significantly change the scope of work and does not exceed the maximum amount of \$17,072.

### RECOMMENDATION:

It is recommended that the County of Monterey Board of Supervisors:

- a. Approve and authorize the Director of Health Services or designee to execute an Agreement with LexisNexis Risk Solutions Bureau LLC and LexisNexis Risk Solutions FL Inc. ("LexisNexis") incorporating by reference the terms set forth in the Master Service Agreement No. 5-23-70-40-01 between RELX Inc. and the State of California, Department of General Services to give the Monterey County Public Guardian Office access to the Accurint public records database for term January 1, 2024 through December 31, 2027, for a total Agreement amount of \$15,520;
- b. Approve recommendation of Director of Health Services to accept non-standard risk terms (disclaimer of warranties, limitation of liability, indemnification); and
- c. Approve and authorize the Director of Health Services or designee to sign two (2) future amendments to this Agreement where the total amendments does not exceed 10% (\$1,552) of the original Agreement amount and does not significantly change the scope of work and does not exceed the maximum amount of \$17,072.

### SUMMARY/DISCUSSION:

The County of Monterey Health Department's Public Guardian/Administrator/Conservator's Bureau (Public Guardian) is mandated by law to take property and probate the estates of county residents who have passed away. Public Guardian is also the court appointed Probate Conservator for individuals who are unable to manage personal or financial affairs or resist fraud or undue influence, when there is no family or a qualified third party to act pursuant to Probate Code. The Public Guardian also serves as Public Representative Payee pursuant to Board Resolution 81-43 for residents deemed

incapable of managing their own entitlement benefits.

By law, the Public Guardian must give notice to all family members to the second degree for all persons that it seeks to file a conservatorship. The Public Administrator also has a legal duty to notify all heirs at law in all probate actions filed to administer a decedent's estate. The Public Guardian's office has had difficulty locating persons entitled to legal notice in some cases which has resulted in some cases being delayed and repeated court appearances necessary by County Counsel. Some of these additional appearances could have been avoided had the Public Guardian's office had a more sophisticated database to research current address and contact information for family members of clients. Additionally, the Public Guardian's office does not have an efficient tool for searching for contact information for relatives, resulting in time spent on google searching for information and making a lot of fruitless phone calls and emails to possible relatives. All this time could be saved by having a more robust and accurate search tool.

The Public Guardian and administrator also has a duty to make a diligent search for and protect real and personal property of conservatees and decedents whose estates are under the control of the Public Guardian's Office, and locating out of county properties can be very difficult without a robust research tool to identify real and personal property.

To assist with these mandates, the Public Guardian's office is seeking to extend for an additional 4-year period an agreement with LexisNexis that will continue to provide access to their electronic information database services with proprietary public record databases throughout the United States which will allow the Public Guardian to locate relatives, heirs, properties and assets of Public Guardian clients and related individuals who are entitled to receive notice of legal actions filed by the Public Guardian's office.

On January 1, 2023, LexisNexis entered into a five-year Master Service Agreement with the State of California's Department of General Services ("CA DGS"). The CA DGS gives the State the right to extend the MSA for two (2) optional two-year periods. The Public Guardian's office will use this Agreement as the base for the Schedule A Agreement, which incorporates the Master Service Agreement in its totality.

While this work is not directly in support of a Health Department strategic initiative, it is in support of one or more of the ten essential public health services, specifically: 1. Monitor health status to identify and solve community health problems, 6. Enforce Laws and Regulations that Protect Health and Ensure Safety and, 7. Link people to needed personal health services and assure the provision of health care when otherwise unavailable.

OTHER AGENCY INVOLVEMENT:

The Office of County Counsel and the Auditor-Controller have reviewed and approved this Agreement as to form and fiscal provisions, respectively.

FINANCING:

There are sufficient appropriations in the Health Department FY 2023-24 Adopted Budget for Public Guardian (HEA008-8118), and provisions will be made in the Department's Requested Budget for

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the years out.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

Check the related Board of Supervisors Strategic Initiatives:

Economic Development:

- Through collaboration, strengthen economic development to ensure a diversified and healthy economy.

Administration:

- Promote an organization that practices efficient and effective resource management and is recognized for responsiveness, strong customer orientation, accountability and transparency.

Health & Human Services:

- Improve health and quality of life through County supported policies, programs, and services; promoting access to equitable opportunities for healthy choices and healthy environments in collaboration with communities.

Infrastructure:

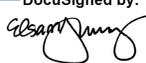
- Plan and develop a sustainable, physical infrastructure that improves the quality of life for County residents and supports economic development results.

Public Safety:

- Create a safe environment for people to achieve their potential, leading businesses and communities to thrive and grow by reducing violent crimes as well as crimes in general.

Prepared by: Juanita Sanders, Management Analyst II, 755-5494

Approved by:

DocuSigned by:  
  
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11/17/2023 | 3:58 PM PST

Elsa Mendoza Jimenez, Director of Health Services, 755-4526

Attachments:

Board Report

Schedule A - LexisNexis Agreement

State Contract, CA DGS and RELX Inc.

RELX Master Services Agreement - Exhibit A & B

RELX Master Services Agreement - Exhibit C

RELX Master Services Agreement - Exhibit D

RELX Master Services Agreement - Exhibit E