



County of Monterey

Item No.

Board Report

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

Legistar File Number: 26-409

May 12, 2026

Introduced: 4/27/2026

Current Status: Agenda Ready

Version: 1

Matter Type: General Agenda Item

- a. Approve and ratify Amendment No. 4 to Agreement No. A-13724 with i-Sight to continue to provide Case Management Software Services, and extend the expiration date for three (3) additional years, for a revised term from December 31, 2026, to December 31, 2029, and increase the not to exceed amount by \$32,604, for a revised total amount not to exceed \$137,504; and
- b. Authorize the Civil Rights Officer, or designee, to execute future amendments to the Agreement, where the amendments do not significantly alter the scope of work and do not exceed 10% (\$13,750) of the total contract amount, subject to approval by County Counsel.

RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and ratify Amendment No. 4 to Agreement No. A-13724 with i-Sight to continue to provide Case Management Software Services, and extend the expiration date for three (3) additional years, for a revised term from December 31, 2026, to December 31, 2029, and increase the not-to-exceed amount by \$32,604, for a revised total amount not to exceed \$137,504; and
- b. Authorize the Civil Rights Officer or designee, to execute and future amendments to the Agreement, where the amendments do not significantly alter the scope of work and do not exceed 10% (\$13,750) of the total contract amount, subject to approval by County Counsel.

SUMMARY/DISCUSSION:

On September 12, 2017, the Board of Supervisors (BOS) approved and authorized the Equal Opportunity Officer, now the Civil Rights Officer, to execute the Agreement No. A-13724 with i-Sight to provide Case Management Software services in the amount of \$22,500, for the period of August 31, 2017, to August 31, 2020. On July 2, 2019, the BOS approved Amendment No. 1 to the Agreement to extend the expiration date by an additional 3 years to August 31, 2023, and to increase the contract amount by \$25,000, for a total not to exceed \$47,500, to provide case management software services. On May 25, 2021, the BOS approved Amendment No. 2 to the Agreement to extend the expiration date for an additional five (5) years to May 30, 2026, and increase the amount of the contract by \$57,400, for a total amount not to exceed \$104,900 to provide case management software services. On June 24, 2022, the parties executed Amendment No. 3 to the Agreement to extend the term ending date for seven (7) months from May 30, 2026, to December 31, 2026, at no additional cost, to allow the contractor to continue to provide services identified in the Agreement as amended by Amendments No. 1 and No. 2.

The Civil Rights Office (CRO) requests the ratification of Amendment No. 4 to the Agreement to extend the expiration date for three additional years, from December 31, 2026, to December 31,

2029, and to increase the not to exceed amount by \$32,604, for a revised total amount not to exceed \$137,504 to continue to allow contractor to continue to provide services identified in the Agreement as amended by this Amendment No. 4. The CRO executed Amendment No. 4 on April 2, 2026, in order to pay the vendor for services. Contracts & Purchasing advised the CRO of the need for Board approval of the increase in funds in the Amendment, based on the previous Board Order in Amendment No. 2 of the original Agreement, signed on May 25, 2021. The CRO seeks ratification and approval of Amendment No. 4 as executed on April 2, 2026.

The CRO continues to use i-Sight Case Management Software as an organizational tool to track complaints, manage investigations more efficiently, and collect and analyze investigative data to manage risk and identify opportunities for improvement. i-Sight Case Management Software allows the CRO to more efficiently manage its caseload by monitoring case progress, enforcing a consistent investigative process, providing early notice for cases that are off track, closing cases faster by creating investigation reports, understand the root cause of misconduct, reduce risk and forecast trends, and save time and money. In addition, i-Sight allows the CRO to obtain statistical information for Managing for Performance, if needed in the future.

Although i-Sight agreed to use the County's standard Agreement, the underlying Agreement required BOS approval due to non-standard provisions, as is common for software providers. i-Sight requested modifications to the warranties and indemnification clauses, and the underlying approved Agreement contains non-standard insurance provisions, as i-Sight is not performing any physical work in the State of California.

OTHER AGENCY INVOLVEMENT:

The Office of the County Counsel-Risk Management and Auditor-Controller's Office have reviewed and approved Amendment No. 4 as to form and legality, and fiscal provisions, respectively.

FINANCING:

The total increase for Amendment No. 4 is \$32,604. Funding for future FYs of the Agreement will be included in those budgets, as appropriate.

BOARD OF SUPERVISORS STRATEGIC GOALS:

- Well-Being and Quality of Life
- Sustainable Infrastructure for the Present and Future
- Safe and Resilient Communities
- Diverse and Thriving Economy
- Dynamic Organization and Employer of Choice
- Administrative
The use of case management software, Case-IQ, supports the CRO's work by centralizing

case management in a single system, enhancing organization and oversight. It streamlines workflows and tasks by standardizing processes and improving department efficiency.

Prepared by: Daniel Gonzalez, Senior Equal Opportunity Analyst, (831) 759-6625

Approved by: Juan P. Rodriguez, Civil Rights Officer, (831) 759-6614

Attachments:

Attachment A - Amendment No. 4 to Agreement

Attachment B - Amendment No. 3 to Agreement

Attachment C - Amendment No. 2 to Agreement

Attachment D - Amendment No. 1 to Agreement

Attachment E - Agreement No. A-13724

(Attachments on file with the Clerk of the Board)