



COUNTY OF SAN MATEO
Inter-Departmental Correspondence
Information Services



Date: July 5, 2013
Board Meeting Date: August 6, 2013
Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Jon Walton, CIO/Director Information Services Department
John Keene, Chief Probation Officer

Subject: Agreements with Capita Technologies, Inc. and Patricia Highlander

RECOMMENDATION:

Adopt a Resolution:

1. Authorizing an Agreement with Capita Technologies, Inc. for professional services for the configuration, setup, data migration, integration and training of the Probation Case Management System, for the term of August 6, 2013 through August 5, 2016, in an amount not to exceed \$1,653,910.73; and
2. Waiving the Request for Proposals process and authorizing an Agreement with Patricia Highlander for functional analyst professional services, for the term of August 6, 2013 through January 5, 2015, in an amount not to exceed \$121,200.

BACKGROUND:

The information systems used in the Probation Department's Adult and Juvenile Supervision, the Juvenile Institution and Juvenile Traffic units are out of date and are no longer useful to the Probation Department. They do not provide the needed features to manage the "re-alignment population," individuals convicted of non-serious, non-violent, and non-sexual crimes who are redirected from state prison to county jails and from state parole to county probation, and are in need of replacement. The software provided by Capita Technologies will transition Probation to a modern case management system and consolidate the business functions onto a single platform. This upgrade will enable Probation to better manage case loads, be more consistent with evidence-based practices, enhance its ability for information sharing with its justice partners and make it better prepared to provide supervision to the "re-alignment population."

On May 14, 2012, the Information Services Department (ISD), with the assistance of the Probation Department, issued RFP #ISD1820. Ten vendors submitted responses to the

County. After a thorough review, Capita Technology was selected as the recommended vendor.

Patricia Highlander was brought in to assist the Probation Department with the migration to the new case management system. Ms. Highlander has over 20 years of experience with the Merced County Probation Department and was instrumental in their case management system migration projects.

DISCUSSION:

With the Board’s support, Capita Technology will provide software, training and implementation services. Their scope of work includes installing the Capita CASE software, migrating content from the current probation system, building interfaces to other justice and financial systems, and providing staff training.

In keeping with the Agile workforce concept, Ms. Highlander will be employed on a part time basis. She will train Probation’s Departmental Systems Analyst to become the main resource for expertise on the new system. Due to her extensive experience with migrating case management systems and over twenty years of experience in the Merced County Probation Department, Ms. Highlander can provide the County with not only case management program expertise but also systems expertise. For these reasons, we believe it is in the County’s best interest to waive the RFP process as it relates to Ms. Highlander’s position.

The Contractors have assured compliance with the County's Contractor Employee Jury Service Ordinance, as well as all other contract provisions that are required by County ordinance and administrative memoranda, including but not limited to insurance, hold harmless, non-discrimination and equal benefits.

The Probation Department and County Counsel has reviewed and approved the Resolution and Agreements as to form.

ISD also requests that the Board authorize the CIO/Director of Information Services Department or his designee to execute contract amendments, in conjunction with the approval from the Chief Probation Officer, which modify the County’s maximum fiscal obligation by no more than \$25,000 (in aggregate) and/or modify the contract term and/or services so long as the modified term or services is/are within the current or revised fiscal provisions.

Approval of these Agreements contributes to the 2025 Shared Vision of a Collaborative Community by enabling the Probation Department to accurately respond in a timely and systematic manner to inquiries from Criminal Justice partners, and other local and regional Law Enforcement Agencies.

PERFORMANCE MEASURE(S):

| Measure | FY 2012-13 Actual | FY 2014-15 Projected |
|--|------------------------------|---------------------------------|
| To accurately respond in a timely manner to information inquiries from Criminal Justice Partners and other local and regional Law Enforcement Agencies | 45% | 85% |

FISCAL IMPACT:

The total fiscal obligation for the Capita Technologies, Inc. Agreement is not to exceed \$1,653,910.73, with a term of August 6, 2013 through August 5, 2016. The total obligation for the Agreement with Patricia Highlander is not to exceed \$121,200 with a term of August 6, 2013, through January 5, 2015. Funding for these Agreements are included in the Probation Department's IT Budget with the Information Services Department.

Request for Proposals – Matrix

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|----------|---|--|
| 1 | Where was the RFP advertised? | San Mateo Daily Journal County internet sites- Probation, Information Services and Purchasing web pages |
| 2 | In addition to any advertisement, list others to whom the RFP announcement was sent: | Automon, Business & Decision, Capita, Corrections Software, Crowe Horwath LLP, Deltek, Eccentek, enChoice, Inc., InterAct, Integrated Software Specialists, Inc., ISD Corporation, Loryx Systems, New Dawn, Pyramid Alternatives, Ramsell, RS Computer Associates, Softsol Technologies, Inc., Sustain Technologies, Synaptec Software, Inc., AMAX, DSI-ITI, Impac Services, Northpointe, Inc., Solution Spec., Homeland Justice Systems, SunGard, Hamer Enterprises, Judicial Alternatives of Georgia (JAG), Euclid Infotech, Mubai |
| 3 | State the total number of RFP's sent to prospective proposers: | 29 |
| 4 | How many proposals did you receive? | 10 Proposals |
| 5 | List in alphabetical order the names of the proposers (or finalists, if applicable) and the location: | AutoMon- Scottsdale AZ, Capita Technologies- Irvine CA, Corrections Software- Austin TX, EnChoice, Inc.- Tempe AZ, ISD Corporation- Corona CA, Loryx Systems-South San Francisco CA, New Dawn-Logan UT, Ramsell Corporation- Oakland CA, Sustain Technologies, Inc.- Los Angeles CA Synaptec Software- Denver CO |