

**MEMORANDUM
ADMINISTRATIVE SERVICES DEPARTMENT
COUNTY OF PLACER**

TO: Honorable Board of Supervisors

FROM: Clark Moots, Director of Administrative Services
Stephen G. Pecor, Chief Probation Officer

DATE: February 6, 2007

SUBJECT: **Approve the award of Request for Proposals (RFP) Number 9523 to Automon Corporation for the purchase of Probation Case Management Software; And authorize the Purchasing Manager to execute related agreements in the maximum amount of \$536,949.**

ACTION REQUESTED

Approve the award of Request for Proposals (RFP) Number 9523 to Automon Corporation for the purchase of Probation Case Management Software; And authorize the Purchasing Manager to execute related agreements in the maximum amount of \$536,949.

BACKGROUND

Placer County implemented the current Probation Case Management System in 1996. The current application was designed primarily for use by the Sheriff's Office as an event-based system. Probation selected this system so that data could be shared with the Sheriff's Department, who was already using the application. Today's technology lessens the need for agencies to share a common system, allowing for efficient integration between disparate systems.

The current application (as used by Probation) consists of two modules. One module is used by both Sheriff's correctional staff and Probation's institutional staff. This Jail/Institutions module is tailored to meet the Sheriff's needs, while Probation staff use manual processes when needed to achieve their needs. The other module is specific to Probation; however, only three municipalities nationwide (including Placer) use this module. This module was designed for use in Travis County, Texas, and fails to address a myriad of California-specific probation needs.

The Probation Department considered different options for replacing the inefficient, outdated system. One option was to retain and customize the current software. However, it was determined that the necessary customizations would be very costly. In addition, a custom software package would be much more costly to maintain than the use of a probation specific commercial-off-the-shelf (COTS) product. Therefore, it was decided that a new system was the better option.

The Probation Department's defined requirements for this new system included, one that has been written specifically for a probation office, an application that has been installed at a California site and operating for at least one year, an application that has interfaced and shared data with other law enforcement agencies, and a vendor that continues to receive positive reviews from customers regarding their service and support.

The Probation Department compiled an extensive list of functional requirements and then worked with the Administrative Services Department (Procurement and IT Divisions) to release an RFP in January of 2006. A buyer from Procurement coordinated a team of eight Probation employees and one IT employee in evaluating the five vendor proposals received. Two vendors were eliminated because they do not have probation systems in use in California. After an exhaustive review of the remaining three vendors and their applications, including product reviews, product demonstrations, and site visits, the Probation Department determined that Automon Corporation's product, Caseload Explorer Case Management System, was clearly the one that best satisfied Probation's functional and technical requirements.

By transitioning to Caseload Explorer, the Probation Department will not only gain current technologies, they will be allowed new efficiencies in their office. Today, Probation staff manually enters and verifies data. With the new system, data can be obtained automatically from the County's Public Safety System, thereby reducing the time required to run reports, perform data entry, reduce data entry errors, and increase the amount of time officers are able to spend in the field supervising offenders.

Automon's Caseload Explorer Case Management System would run on the County's enterprise-wide, high-speed data network. It will be accessible by all Probation staff as well as other law enforcement agencies within the County. Additionally it includes security features to ensure that only authorized individuals enter or view specific information.

We respectfully request your Board's approval to purchase Automon's Caseload Explorer Case Management System.

FISCAL IMPACT

There will be a one-time cost of \$536,949 and annual on-going costs averaging \$87,000 per year, for each of the five years following acceptance of the system. Funds for the acquisition of the Caseload Explorer case management system are available within the Probation Department's FY06/07 budget.

Respectfully submitted,



Clark Moots
Director of Administrative Services



Stephen G. Pecor
Chief Probation Officer

Cc: Richard E. Colwell, Chief Assistant County Executive Officer
Michael Cholerton, Assistant Chief Probation Officer
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Mark Giacomini, Senior Management Analyst
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