

**MEMORANDUM  
COUNTY OF PLACER  
ADMINISTRATIVE SERVICES DEPARTMENT  
PROCUREMENT SERVICES DIVISION**

TO: Honorable Board of Supervisors  
FROM: Brett Wood, Purchasing Manager *BW*  
DATE: March 25, 2014  
SUBJECT: Software Maintenance and Support – AutoMon LLC

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**ACTION REQUESTED**

1. Approve the renewal of a sole-source blanket purchase order with AutoMon LLC of Scottsdale, AZ for software license fees, support and related services for the Probation Caseload Explorer case management system in the maximum amount of \$137,000, for the period of April 1, 2014 to March 31, 2015, funded by the department's FY 2013-14 budget and proposed budget for FY 2014-15 with no additional net County cost, and authorize the Purchasing Manager to sign the resulting blanket purchase order.

**BACKGROUND**

On February 6, 2007, your Board approved the award of a competitively bid contract to AutoMon LLC for the purchase of Caseload Explorer case management software for the Probation Department. AutoMon is the sole licensor of the software and software license fees and support must be paid to AutoMon each year for maintenance, use, and support of the system. On June 4, 2013 your Board approved the award of a Blanket Purchase Order (BPO) to AutoMon for the period April 1, 2013 through March 31, 2014. Probation has an ongoing need for these support services and submitted a request to renew the BPO with AutoMon. The County has negotiated pricing for the next year of support at a rate which is within the guidelines of the original contract.

Probation also budgets a modest amount of funding each year to accommodate occasional programming changes that improve functionality of Caseload Explorer which is unique to Placer County. These custom programming changes are not covered by the standard support agreement and allow the department to request changes to the system that are only editable by the vendor. While unknown at this time what changes, if any, will be needed, the department requires the flexibility to request these changes to allow it to react to law changes, as well as insure the department is able to refresh its ad-hoc reporting model at least twice a year to capture modifications the department makes to the data collected by the system.

Section 1.3(i) of the Purchasing Policy Manual exempts software maintenance from competitive bidding. Additionally, maintenance and updates for the Caseload Explorer system are not available from other vendors.

Your Board's approval is required to proceed with the award of a BPO in the maximum amount of \$137,000 and to authorize the Purchasing Manager to sign the resulting BPO.

**FISCAL IMPACT**

Upon your Board's approval, a BPO will be issued to AutoMon LLC in the maximum amount of \$137,000 for the effective period of April 1, 2014 to March 31, 2015. The department has budgeted appropriately for the annual support fee in the current FY 2013-14 budget. Funding for custom programming will be included in the department's proposed budget for FY 2014-15.

cc: Marshall Hopper, Chief Probation Officer  
Chris Artim, Senior Administrative Services Officer - Probation

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