

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
OF SAN BERNARDINO COUNTY
AND RECORD OF ACTION**

June 25, 2024

FROM

TRACY REECE, Chief Probation Officer, Probation Department

SUBJECT

Contract with Catalis Courts & Land Records, LLC for Case Management System Software Maintenance and Support

RECOMMENDATION(S)

Approve **Contract No. 24-615** with Catalis, Courts & Land Records, LLC for an annual subscription fee, to continue software maintenance and support and enhancements/programming specific to Probation Department's Caseload Explorer case management system, in the total amount of \$505,114, for the period of July 1, 2024 through June 30, 2025.

(Presenter: Tracy Reece, Chief Probation Officer, 387-5692)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

Improve County Government Operations.

Provide for the Safety, Health and Social Service Needs of County Residents.

FINANCIAL IMPACT

Approval of this item will not result in the use of additional Discretionary General Funding (Net Count Cost). The cost of the contract over the term from July 1, 2024 through June 30, 2025 will be funded by the Probation Department's (Department) 2024-25 Adopted Budget and future recommended budgets.

BACKGROUND INFORMATION

The Department's case management system is Caseload Explorer (CE). It is the primary database which maintains detailed information on client services and actions of active cases, both in adult and juvenile community corrections and in juvenile detention.

Since its implementation, AutoMon has maintained CE for the Department and continues to respond to evolving law enforcement data requirements. It is anticipated that CE will continue to be utilized as the Department's primary system for the foreseeable future.

On December 20, 2022, AutoMon merged into Pioneer Technology Group, LLC (Pioneer). On December 27, 2022, Pioneer amended its legal name to Catalis Courts & Land Records, LLC (Catalis). Consequently, Catalis secured the proprietary right to maintain and support the software and provide enhancements/programming to CE.

Approval of this contract will ensure that the Department continues to receive technical support and the latest software upgrades for CE for the period of July 1, 2024 through June 30, 2025.

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PROCUREMENT

Through the merger of AutoMon into Pioneer, now known as Catalis, Catalis has the proprietary right to continue the maintenance and support of the software as well as provide enhancements and programming. The Purchasing Department concurs that a non-competitive justification of proprietary software maintenance and support exists with Catalis.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Bonnie Uphold, Supervising Deputy County Counsel, 387-5455) on May 24, 2024; Purchasing (Ariel Gill, Supervising Buyer, 387-2070) on May 28, 2024; Finance (Jevin Kaye, Principal Administrative Analyst, 387-3078) on May 31, 2024; and County Finance and Administration (Robert Saldana, Deputy Executive Officer, 387-5423) on May 31, 2024.

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Record of Action of the Board of Supervisors
San Bernardino County

APPROVED (CONSENT CALENDAR)

Moved: Curt Hagman Seconded: Joe Baca, Jr.
Ayes: Col. Paul Cook (Ret.), Jesse Armendarez, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY  _____
DATED: June 25, 2024



cc: Probation - Harps w/ agree
 Contractor c/o Probation w/ agree
 File w/ agree
JLL 07/12/2024