

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

October 5, 2021

FROM

JASON ANDERSON, District Attorney

SUBJECT

Contract with Xpertdoc Technologies, Inc. for Automated Document Management Services

RECOMMENDATION(S)

1. Approve **Contract No. 21-716** with Xpertdoc Technologies, Inc. in the amount of \$250,000 to provide document design, creation, and automated document management services from June 12, 2021 through June 11, 2026.
2. Authorize the Purchasing Agent to approve amendments for future cost increases provided the total annual contract amount remains within the Purchasing Agent's contract authority of \$200,000 annually, as delegated by County Policy 11-04.A.ii., and non-financial/non-material changes to the Agreement, subject to County Counsel review and approval.
3. Direct the District Attorney to transmit all documents in relation to the contract to the Clerk of the Board of Supervisors within 30 days of execution.

(Presenter: Michael Fermin, Assistant District Attorney, 382-3662)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

Operate in a Fiscally-Responsible and Business-Like Manner.

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 County Cost). The total contract cost will be \$250,000 for the five-year term. Appropriation of \$36,800 plus an additional \$13,200 for ongoing mentoring/guidance, as needed, is included in the District Attorney's (Department) 2021-22 adopted budget. The ongoing annual cost of \$36,800 and an amount not to exceed \$13,200 for ongoing mentoring/guidance will be included in the Department's future recommended budgets. The Department is requesting authorization for Purchasing to approve any future amendments for price increases up to their contract authority of \$200,000 per year.

BACKGROUND INFORMATION

The Department is the public prosecutor and has the mandated responsibility to prosecute crimes committed within San Bernardino County pursuant to Government Code 26500. As part of the duties and obligations of the Department, information is shared with other law enforcement agencies, including providing case information and filing documents with the Superior Court. The Department uses over 100 different templates to generate complaints, arrest warrants, subpoenas, motions and other forms needed throughout the course of a case.

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The Department's existing case management system, STAR, is being replaced by a new case management system designed and configured using Microsoft Dynamics 365 as its platform. Dynamics 365 does not offer document generation functionality that is robust enough to address the complexity of templates used by the District Attorney's Office.

The functionality provided by Xpertdoc Technologies allowed the Department to further automate its templates and store them on a platform for efficient use and document management. Xpertdoc Technologies offers a cloud-based document generation solution that integrates with Microsoft Dynamics 365. This means that once programed, it can automatically populate the forms with case information and allows the user to print or save to case files. It also allows the efficient creation and population of new templates with case information. These services will reduce the amount of workload required from staff to create, revise, and manage existing and future templates.

In March 2018, a Request for Proposals was released to solicit proposals from interested and qualified vendors to provide automated document management services that integrated with Microsoft CRM. As a result of this competitive procurement process, on June 12, 2018 (Item No. 45), the Board of Supervisors (Board) approved a contract with Xpertdoc Technologies, Inc., in the amount of \$143,400, to provide document design, creation, and automated document management services from June 12, 2018 through June 11, 2021, with two additional one-year options to extend the agreement, and authorized the Purchasing Agent to execute amendments to the contract up to a total of \$10,000 for unanticipated changes in the project scope and any non-financial changes to the contract, subject to review by County Counsel. The services provided have become an integral part of helping staff manage over 100 templates with key integration with the Department's case management system and a five-year contract is recommended to continue providing those services.

The Department inadvertently waited too long to execute the extension of the contract and the contract expired. It was then determined that the best method to avoid interruption in service was to obtain approval for a new contract with retroactive authorization to pay pending invoices. The vendor agreed to the new contract with the same pricing as the previous contract. The Department requests the contract to be retroactive to June 12, 2021, as Xpertdoc has continued to provide services while awaiting the new contract.

PROCUREMENT

This is a non-competitive procurement. The reason it is not competitive is due to the functionality of the software and integration with the Department's new case management system. In 2018, the Department conducted a Request for Proposal to solicit proposals from interested and qualified vendors to provide automated document management services that integrated with Microsoft CRM. The Department obtained Board approval to contract with Xpertdoc Technologies, Inc. on June 12, 2018 (Item No. 45).

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Katherine Hardy, Deputy County Counsel, 387-5455) on September 13, 2021; Purchasing (Leo Gomez, Purchasing Manager, 387-2063) on September 10, 2021; Finance (Carl Lofton, Finance Analyst, 387-5404) on September 20, 2021; and County Finance and Administration (Valerie Clay, Deputy Executive Officer, 387-5423) on September 20, 2021.

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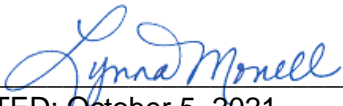
Record of Action of the Board of Supervisors
San Bernardino County

APPROVED (CONSENT CALENDAR)

Moved: Joe Baca, Jr. Seconded: Col. Paul Cook (Ret.)

Ayes: Col. Paul Cook (Ret.), Janice Rutherford, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: October 5, 2021



cc: DA- Chapman w/agree
Contractor- C/O DA w/agree
File- w/agree
LA 10/5/2021