



COUNTY OF SAN DIEGO

AGENDA ITEM

BOARD OF SUPERVISORS

NORA VARGAS
First District

JOEL ANDERSON
Second District

TERRA LAWSON-REMER
Third District

MONICA MONTGOMERY STEPPE
Fourth District

JIM DESMOND
Fifth District

DATE: July 16, 2024

04

TO: Board of Supervisors

SUBJECT

SINGLE SOURCE AUTHORITY TO RENEW CONTRACT WITH AXIALLON SOFTWARE, INC. FOR PROBATION CASE MANAGEMENT SYSTEM MAINTENANCE AND SUPPORT SERVICES (DISTRICTS: ALL)

OVERVIEW

The County of San Diego Probation Department (Probation) manages electronic criminal justice case files using the Probation Case Management System (PCMS). Probation officers use PCMS to monitor client case plan progress, initiate and review referrals to services, and to make operational decisions regarding the supervision of adults and youth supervised by Probation.

On June 20, 2000 (16), the Board of Supervisors approved a negotiated procurement of the Probation Case Management System (PCMS), and in June 2003, Probation contracted with Clear Wave Software (CWS) (now Axiallon Software, Inc) for the development and implementation of, and system support for, PCMS. On May 6, 2014 (3), the Board extended the term of Probation's contract with CWS to June 30, 2019. On May 21, 2019 (4), the Board approved the extension of Probation's contract with Axiallon Software, Inc. (Axiallon) through June 30, 2022. Probation is seeking approval to continue the contract with Axiallon for an additional term of one (1) year and four (4) option years to facilitate continued system availability without disruption, allowing Probation to maintain its juvenile justice approach and adult supervision model to foster positive outcomes for Probation clients.

This request is to authorize the Director, Department of Purchasing and Contracting, to approve and authorize a renewal contract with Axiallon Software Inc. for one (1) additional year and four (4) option years, through June 30, 2030. Probation is requesting Board approval for a Single Source Exception to Policy A-87, Competitive Procurement, and allow for continued enhancements and support of the PCMS with Axiallon Software, Inc.

RECOMMENDATION(S)
CHIEF ADMINISTRATIVE OFFICER

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MANAGEMENT SYSTEM MAINTENANCE AND SUPPORT SERVICES
(DISTRICTS: ALL)

In accordance with Board Policy A-87, Competitive Procurement, approve and authorize the Director, Department of Purchasing and Contracting, to renew the existing contract and enter into negotiations with Axiallon Software Inc. and subject to successful negotiations and a determination of a fair and reasonable price, award a contract for one (1) additional year with four (4) option years and up to an additional six (6) months if needed, and to amend the contract as needed to reflect changes to requirements and funding, subject to the approval of the Chief Probation Officer.

EQUITY IMPACT STATEMENT

Probation Case Management System (PCMS) is a software program used by authorized Probation staff and stakeholders to access youth and adult client data. The software is instrumental in tracking client needs and services, with the goal of reducing recidivism and rehabilitating clients. PCMS is used to analyze client data on an individual and aggregate basis. PCMS provides data to allow for more thorough case management choices and referral services for clients. Participation and outcome data is collected and analyzed by sub-populations to ensure equitable case management and outcomes for all individuals regardless of race, gender, ethnicity, or geography.

SUSTAINABILITY IMPACT STATEMENT

Today's proposed actions contribute to the County of San Diego's Sustainability Goals of providing equitable access to economic opportunity and reducing outcomes of poverty like homelessness. These services will strengthen individual resiliency, promote client self-sufficiency, and improve client health and well-being. These actions will serve to strengthen the County's efforts to maximize environmental and sustainability practices and have a long-term, positive impact in the lives of justice-involved clients and the community.

FISCAL IMPACT

Funds for this request are included in the Fiscal Year 2024-25 Operational Plan for the Probation Department. If approved, this request will result in estimated costs and revenue ranging from \$0.9 to \$1.27 million in Fiscal Year 2024-25. The funding source is existing General Purpose Revenue. After evaluating the proposals submitted, Probation will return to the Board, if needed, with any recommendations for additional appropriations prior to contract award. There will be no change in net General Fund costs and no additional staff years.

BUSINESS IMPACT STATEMENT

N/A

ADVISORY BOARD STATEMENT

N/A

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BACKGROUND

The Probation Case Management System (PCMS) is a Criminal Justice Information System that contains electronic case files and involves multiple interfaces. It is Probation's integrated solution to carefully manage client cases and to provide quick and easy access to vital information to authorized sworn and non-sworn staff, contracted stakeholders, and clinicians.

On June 17, 2003 (13), the Board of Supervisors (Board) authorized Clear Wave Software (now Axiallon Software, Inc.) to develop, implement, and support the PCMS application. On May 1, 2020, the Director of Purchasing and Contracting executed the current contract with Axiallon. Today's requested action would provide ongoing maintenance of system operations, system upgrades, interfaces, and future enhancements to PCMS utilizing the latest technology platforms. Future enhancements will be developed in support of County initiatives and/or statewide legislative changes.

System enhancements in PCMS over the years, such as developing a mobile application and adding a youth risk and needs assessment tool and tracking console, have helped ensure needs-based support for clients. The system also includes a directory that is accessible by certain community service providers who have a need to communicate vital information about Probation Department (Probation) clients receiving their services. The two-way communication channel available through PCMS optimizes office and community provider time and offers better support for Probation clients.

In September 2023, Probation conducted a market scan to compare its current provider with other vendors and evaluate its currently used product, PCMS, with similar systems available. Axiallon Software was compared to nine other vendors that offer similar products that also track and record client data. The PCMS system and all its ancillary pieces are owned by Probation, and all vendors were evaluated on their capabilities for software maintenance. Through these findings, Probation has determined a categorical exemption from the Competitive Procurement Policy, more specifically an exemption for Operating and Maintenance Services for Software and Hosting Services, and found Axiallon Software, Inc. as the only service provider who can provide the required services. To ensure Probation best serves its clients, a renewal of the PCMS contract with Axiallon Software, Inc. is necessary due to the vendor's unique knowledge, skill, and ability; standardization of its interfacing systems to ensure maintenance, repair, and interoperability; and continuity to ensure retention of its operational efficiency and unique critical knowledge.

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Today's action requests the Board to authorize the Department of Purchasing and Contracting to approve and authorize a renewal contract with Axiallon Software, Inc. for one (1) additional year with up to four (4) one-year options and an additional six (6) months if needed, for continued enhancements and support of PCMS through Categorical Exemption F, Operating and Maintenance Services, under A-87, Section 2, Categorical Exemptions from Competitive Procurement Policy, where the renewal of operating and maintenance services for existing software with the current provider qualifies as a Single Source.

LINKAGE TO THE COUNTY OF SAN DIEGO STRATEGIC PLAN

Today's proposed actions support the Equity, Empower, Community, and Justice Initiatives of the County of San Diego's 2024-2029 Strategic Plan by providing opportunities for equitable and supportive housing and health services, investing in resources to allow County employees to continue operational excellence, supporting services to assist justice-involved individuals transitioning back into the community, improving their quality of life, and reducing the risks of criminal recidivism.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'Andrew Strong', with a long horizontal line extending to the right.

Andrew Strong for

EBONY N. SHELTON
Chief Administrative Officer

ATTACHMENT(S)

N/A