COUNTY OF SONOMA

SUMMARY REPORT

Agenda Date: 3/24/2026

To: Sonoma County Board of Supervisors
Department or Agency Name(s): Public Defender's Office
Staff Name and Phone Number: Brian Morris, 565-3876
Vote Requirement: 4/5th
Supervisorial District(s): All

Title:
Public Defender Case Management System

Recommended Action:
   A)   Authorize the Public Defender or their designee to execute a software services agreement with Kodify, LLC for the implementation of a case management system ("ZLS") through 2031, including any future amendments subject to County Counsel approval. ☐
   B) Adopt a resolution authorizing budgetary adjustments for the fiscal year 2025-2026 adopted budget in the amount of $179,000 from the Graton Tribal Mitigation Fund. (4/5th Vote Required).

Executive Summary:
 The Public Defender's Office requests Board approval to enter into a contract with Kodify, LLC for a new case management system (CMS) tailored specifically for public defender operations. The proposed CMS will enhance client representation, streamline internal workflows, and improve data reporting. During FY 24-25 budget adoption, resources from the Graton Tribal Mitigation Fund were allocated to this work. The department has coordinated with County Counsel, ISD, and the Sonoma County Superior Court to ensure compatibility and compliance.

Discussion:

Background
The Public Defender's Office currently uses DefenderbyKarpel (DbK), a case management system originally developed for district attorney offices and later modified for public defender use. Despite efforts to adapt the system since its implementation in 2014, DbK has consistently failed to meet the operational needs of the department. The system's architecture is not well-suited to the workflows and priorities of public defense, resulting in inefficiencies and data reliability/reporting issues.

Proposed Solution
Kodify, LLC offers ZLS, a case management system, specifically designed by and for public defender offices. This purpose-built system introduces features that align with the department's mission to provide high-quality legal representation to indigent clients.

Key benefits of the ZLS CMS include:

- **Customizability**: The system is designed to evolve with the department's changing business needs. Modifications can be implemented more efficiently, reducing reliance on external developers and long turnaround times.
- **Data Storage**: Unlimited digital evidence storage is provided via Amazon Web Services (AWS), ensuring secure and scalable access to case materials.
- **Reporting Tools**: The CMS includes intuitive, user-friendly reporting capabilities that will allow the department to generate accurate, real-time data on caseloads, attorney performance, and departmental trends. This will enhance transparency and support strategic planning.
- **Financial Application/Client information:** A new system for determining a client's financial eligibility and obtaining client information was created by ISD using Simply.gov. This information (including client address, phone, email, etc.) will be electronically transferred from Simply.gov into ZLS. This will create accurate information and reduce staff time as that data currently has to be manually entered into Karpel.

Client Service Enhancements

The ZLS CMS will significantly improve client communication and engagement. One notable feature is the ability to send automated text message reminders for upcoming court dates. This functionality is expected to reduce the number of missed court appearances, which often result in unnecessary incarceration and additional legal complications for clients. By improving communication and access to case information, the department anticipates a measurable increase in client satisfaction and outcomes.

Cost Savings

The ZLS CMS includes built-in transcription capabilities for body-worn camera footage and other discovery materials. Currently, the department pays approximately $15,000 annually for transcription services for 25 users. Kodify's system will extend this functionality to all 70 department employees at no additional cost, representing a substantial savings and operational efficiency.

Technology Integration and Procurement

The department collaborated with the County Procurement Office to leverage a competitive Request for Proposal (RFP) issued by the Tom Green County Public Defender's Office in Texas. Kodify, LLC was the selected vendor through that process, allowing Sonoma County to piggyback on the procurement and expedite implementation.

In parallel, the department has worked closely with the Sonoma County Information Systems Department (ISD) and the Sonoma County Superior Court to ensure compatibility with the county's new Integrated Justice System (IJS) Hub and the Court's forthcoming case management system. This coordination will assist with the transition and integration across platforms.

Legal Review and Risk Considerations

County Counsel and Risk Management have reviewed the proposed software services agreement. While the contract includes standard protections, the supplier has capped its indemnification and defense obligations at the level of its insurance coverage, $1 million or $2 million per claim, depending on the nature of the claim. The County's standard contract language requires unlimited indemnification. Due to this requested deviation from the standard template, Board approval is required to proceed.

Racial Equity:

Was this item identified as an opportunity to apply the Racial Equity Toolkit?
No

INSTRUCTIONS: If 'Yes' to the above, or if equity analysis was conducted, include requisite information in this section staff's discussion, findings, and recommendations as it directly relates to this item's requested action(s).

Prior Board Actions:
N/A

FISCAL SUMMARY

Expenditures	FY 25-26 Adopted	FY26-27 Projected	FY27-28 Projected
Budgeted Expenses		$162,000	$115,000
Additional Appropriation Requested	$179,000		
Total Expenditures	**$179,000**	**$162,000**	**$115,000**
Funding Sources			
General Fund/WA GF			
State/Federal			
Fees/Other			
Use of Fund Balance	$179,000	$162,000	$115,000
General Fund Contingencies			
Total Sources	**$179,000**	**$162,000**	**$115,000**

Narrative Explanation of Fiscal Impacts:
Funding for this case management system is proposed to come from the Public Defender's previously approved allocation from the Graton Tribal Mitigation Fund. During FY 24-25 budget adoption, $1 million of Graton funds were allocated to the Public Defender for case management system implementation.

Staffing Impacts:			
Position Title (Payroll Classification)	Monthly Salary Range (A-I Step)	Additions (Number)	Deletions (Number)

Narrative Explanation of Staffing Impacts (If Required):
N/A

Attachments:

Attachment 1 - Kodify Service Agreement
Attachment 2 - PDO Budget Resolution

Related Items "On File" with the Clerk of the Board:
None.