



SUMMARY REPORT

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**Agenda Date:** 4/16/2024

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**To:** Board of Supervisors of Sonoma County  
**Department or Agency Name(s):** Information Systems Department  
**Staff Name and Phone Number:** Steve Lindley 565-8599  
**Vote Requirement:** 4/5th  
**Supervisorial District(s):** Countywide

**Title:**  
Public Request Act (PRA) Process and Technology Assessment

**Recommended Action:**

- A) Authorize the Information Systems Department Director or Designee to execute an agreement for professional services with Deloitte in the amount of \$213,050 through October 31, 2024 to perform a needs assessment of processes, technologies, resources, and costs associated with all aspects of the Public Records Act (PRA) process.
- B) Adopt a Resolution authorizing budgetary adjustments to the fiscal year 2023-2024 adopted budget, programming \$34,442 for associated costs for the fiscal year. (4/5<sup>th</sup> vote required)

**Executive Summary:**

The County lacks a centralized platform to track all Public Records Act (PRA) requests received by County departments. Each department/agency manages, monitors, and tracks their own PRA requests. The lack of a centralized platform often results in reduced efficiency, duplicative requests and responses, and increased time for PRA fulfillment. As a preliminary assessment, starting on 7/1/2022 staff was asked to code the time spent addressing PRAs using time tracking system code SON-000PRA2223. Although data tracking has yet to be done 100% of time, in FY 22/23, 2,499 hours were logged from a wide range of job classifications. Using the median hourly wage of employees that reported their time, the cost is estimated to be \$125,000. □

To standardize and streamline the process of responding to PRAs for all County departments/agencies, the Information Services Department (ISD) recommends contracting with Deloitte, leveraging the State of California Technology, Digital, and Data Consulting Master Service Agreement No. 5-22-70-25-001 through 359, to provide an assessment of the current PRA process.

**Discussion:**

The County of Sonoma consists of over 4,000 employees and over 20 different operational departments. Each department is responsible for responding to California Public Records Act (PRA) requests for information that pertains to their department. Each department tracks and monitors the status of their own PRA requests, but there is no centralized tracking platform that allows visibility into all PRA requests that the County receives. Some PRA requests are simple and can be responded to quickly, while others are more complicated, can require assistance from multiple departments, and in some cases, a large number of documents which must be reviewed and redacted by legal counsel, before they can be released. Some requests can include the need to search for information across multiple platforms, which can be complicated, and although some redaction tools are in place, the current process is time-consuming and inefficient. When a PRA request is completed,

the County provides the information to the requestor, but the County does not currently have a platform to post the information and make it available to others, which can result in multiple PRA requests for the same information. Sometimes the information is still available from a prior PRA request, while other times the information must be gathered again in order to fulfill the new request. PRA requests can be received through different channels, and sometimes the requestor sends the request to the wrong department or person, causing delays in the process.

The County is seeking to conduct a thorough needs assessment with the primary goal of identifying gaps in our current processes and obtaining strategic recommendations for areas of improvement. These areas may include, but are not limited to, more efficient business processes, staff training, consolidation, innovative technologies and tools, increased automation, and enhanced tracking and reporting capabilities. To achieve this goal, ISD released a Request for Offer (RFO) in search of qualified candidates that possess the necessary expertise and experience to perform a thorough, well-rounded assessment that incorporates the needs of all departments across the organization.

Using the State of California Technology, Digital, and Data Consulting Master Service Agreement No. 5-22-70-25-001 through 359, ISD sent the RFO to five eligible contactors. Offers were evaluated based on the vendors technical approach to project management, methodology for performing needs assessments, cost, staff expertise, and relevant experience, specifically with working on California Public Records Act (PRA) or Freedom of Information Act (FOIA) projects and implementing PRA or FOIA related technologies. After reviewing the offers, Deloitte was found to have the most experience and expertise.

The process is expected to take roughly 20 weeks and includes participation from all County of Sonoma departments and agencies, including Sonoma Water, the Human Services Department, Ag & Open Space, Community Development Commission (CDC), and other entities directed by the County of Sonoma Board of Supervisors. As part of this engagement, Deloitte will meet with representatives from each agency to conduct interviews and gather any information and documentation about the processes, technologies, and resources that are in place for responding to PRA requests. Deloitte will also evaluate the PRA process from the public's point of view, including how the public locates and requests information. The assessment will also include a cost analysis of both direct and indirect costs associated with responding to PRAs. Deloitte will deliver a final assessment report detailing the findings, considerations, recommendations, and action plan resulting from the assessment.

The final report will be reviewed with the CAO's Office and next steps resulting from the report will vary, with some improvements being as easy as making process changes, while other improvements may require additional technologies, staffing, or services, which may require additional funding. The contract allows for additional work to be performed for the implementation of certain recommendations that carry greater urgency or lead to immediate business benefits, although the total value of the contract (initial award plus amendment) cannot exceed \$500,000. ISD is funding the \$213,050 for the assessment but will need to partner with the CAO's Office to identify a funding source for any additional work, should the County decide to exercise this amendment.

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**Strategic Plan:**

This item directly supports the County’s Five-year Strategic Plan and is aligned with the following pillar, goal, and objective.

**Pillar:** Organizational Excellence

**Goal:** Goal 2: Increase information sharing and transparency and improve County and community engagement

**Objective:** Objective 5: Develop strategies that improve information and knowledge sharing within and between County departments.

**Racial Equity:**

**Was this item identified as an opportunity to apply the Racial Equity Toolkit?**

No

**Prior Board Actions:**

None

**FISCAL SUMMARY**

<b>Expenditures</b>	<b>FY23-24 Adopted</b>	<b>FY24-25 Projected</b>	<b>FY25-26 Projected</b>
Budgeted Expenses	\$0	\$178,608	\$0
Additional Appropriation Requested	\$34,442	\$0	\$0
<b>Total Expenditures</b>	<b>\$34,442</b>	<b>\$178,608</b>	<b>\$0</b>
<b>Funding Sources</b>			
General Fund/WA GF			
State/Federal			
Fees/Other			
Use of Fund Balance	\$34,442	\$178,608	\$0
General Fund Contingencies			
<b>Total Sources</b>	<b>\$34,442</b>	<b>\$178,608</b>	<b>\$0</b>

**Narrative Explanation of Fiscal Impacts:**

Information Systems will fund this assessment from Replacement A\* fund balance that was set aside as part of FY 23/24 budget adoption for this purpose. Costs for FY2023-24 are projected to be \$34,442 and will be added with the attached budget resolution. Appropriations for FY2024-25 will be included in the recommended budget to be considered by the Board in June. Capacity to finance this \$213,050 consultant assessment is available within the fund without impacting planned future equipment and infrastructure replacement projects.

*\* Fund contains 1) Yearly general fund department contributions for computer and equipment replacements to smooth replacement expense and ensure timely replacement of equipment; 2)*

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*Contributions for infrastructure replacement collected through annual rates and expended per replacement schedule based on useful life of assets; and 3) General Fund project specific funding for ongoing work and retained interest used to supplement funding for strategic technology priorities.*

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

**Narrative Explanation of Staffing Impacts (If Required):**

None

**Attachments:**

County of Sonoma - Statement of Work - PRA

Deloitte PRA Budget-Adjustment-Resolution

Exhibit A - State of California Master Services Agreement PCC § 10298 and § 12100 Master Agreement 5-22-70-25-001 through 359 dated 11.15.22

**Related Items "On File" with the Clerk of the Board:**

None.