



SUMMARY REPORT

Agenda Date: 9/9/2025

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

Title:

Agreement with Computer Aid, Inc (CAI) for IT project management consulting services to support the implementation of the Public Defender's new case management system.

Recommended Action:

- 1) Authorize the Public Defender to execute an agreement with Computer Aid, Inc (CAI) for a term of 6 months beginning on September 1, 2025 through March 1, 2026 with an option to extend an additional 6-month term, for an amount not to exceed \$133,632 over the entire potential contract term.
- 2) Adopt a resolution authorizing budgetary adjustments for the FY 2025-2026 adopted budget programming \$133,632 from Graton Tribal Mitigation Funds. (4/5th Vote Required)

Executive Summary:

The Public Defender's Office has selected a preferred case management system (CMS) vendor following an extensive evaluation process and is preparing to finalize the CMS agreement and begin implementation planning.

This implementation project requires specialized project management expertise to support final contract negotiations, oversee project governance, plan data migration, and manage change readiness. The Information Systems Department (ISD), while technically capable, is fully engaged in the County's Integrated Justice System (IJS) modernization project and cannot dedicate resources to this work.

To ensure timely and successful completion of the CMS contracting and implementation phases, the Public Defender's Office seeks to contract with Computer Aid, Inc. (CAI) under a competitively awarded cooperative purchasing agreement through Sourcewell (Contract #061324-CAI). ISD has previously partnered with CAI, confirmed their qualifications, and endorsed their familiarity with County systems and protocols.

The cost of the agreement will be funded from the \$1 million in Graton Mitigation Funds previously approved for the Public Defender's CMS replacement during FY 24/25 budget hearings.

Discussion:

The Department's current CMS was originally designed for district attorney offices and subsequently modified for use in public defender offices. Since transitioning to the current CMS in 2014, the Public Defender's Office

has struggled to adapt it to the department's needs. The process of requesting modifications to the CMS is overly burdensome. Simple tasks, such as reporting on basic data points, are not possible. The department has identified a new vendor as a preferred replacement CMS after a competitive evaluation, including vendor demonstrations and a review of cooperative purchasing opportunities.

Before a contract can be executed, the Public Defender's Office must complete final negotiations with the vendor, ensure County Counsel review, and confirm technical integration details with ISD and the Sonoma County Superior Court. CAI's role will be to assist with these pre-contract tasks, then transition into implementation oversight once the contract is in place. The Sonoma County Probation Department has also contracted with CAI for similar services, providing consistency and efficiency in County-wide case management modernization efforts.

CAI will provide a dedicated Project Manager for an initial six-month term at 50% time (approximately 15-20 hours per week), with an option to extend for an additional six months if needed. Their scope of work will include:

- Contract Finalization Support
- Project Governance
- Implementation Planning
- Data Migration Preparation
- Change Management

The hourly rate will be \$139.20, as established in the Sourcewell contract, with invoices issued monthly based on hours worked.

Strategic Plan:

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

Pillar: Resilient Infrastructure

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:

7/8/2025 - CAI agreement for Sonoma County Probation Department

FISCAL SUMMARY

Expenditures	FY25-26 Adopted	FY26-27 Projected	FY27-28 Projected
Budgeted Expenses			
Additional Appropriation Requested	133,632		
Total Expenditures	133,632		
Funding Sources			
General Fund/WA GF			
State/Federal			
Fees/Other			
Use of Fund Balance	133,632		
General Fund Contingencies			
Total Sources	133,632		

Narrative Explanation of Fiscal Impacts:

This agreement will be funded with Graton Tribal Mitigation Funds identified during FY 24-25 budget adoption and approved for use on the Public Defender’s Office case management system replacement. The included budget resolution authorizes the necessary adjustments to program these previously approved funds into FY 2025-2026.

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:

- CAI Services Agreement - Draft
- Budget resolution

Related Items “On File” with the Clerk of the Board:

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