



Suspension of Competition Acquisition Request

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1. Fully describe the product(s) and/or service(s) being requested.
The Sheriff-Coroner-Public Administrator is requesting to (re) purchase CompuTrust Case Management System (CTI) which is a system used for the management of estates of who died intestate, managing Trust and Court accounts, and inventorying real and personal property.
2. Identify the selected vendor and contact person; include the address, phone number and e-mail address for each.
Vendor: Compu Trust Software Corporation
Contact: Paula Lomanto, Sales Marketing
Address: 135 E. Main Ave Suite# 150, Morgan Hill, CA 95037
Phone: 1 (800) 222-7947
E-Mail: paula@compustrustcorp.com
3. What is the total cost of the acquisition? If an agreement, state the total cost of the initial term and the amounts for potential renewal terms.
Total Contract Cost (5yr term): \$214,346.00
One Time Conversion Cost to web-based System: \$37,800.00
One Time Universe Costs (First year only through full Internet Conversion): \$2,520.00
Initial Term (2 yrs, 11.5 months): \$81,694.00 (July 15, 2019 through June 30, 2022)
Customer Support and technical Assistance: \$7,000.00
Optional hosted service costs: \$25,547.00
Renewal Terms (2yrs) \$59,785.00 (July 1, 2022 through June 30, 2024; FY 2019-20 through FY 2023-24)
4. Identify the unique qualities and/or capabilities of the service(s) and/or product(s) that qualify this as a Suspension of Competition acquisition.
CompuTrust is the software developer and only provider of the current system currently utilized by the County.
CompuTrust is the only provider who can maintain and support the system; and the only provider than can provide an upgrade of the existing system.
5. Identify from Administrative Policy #34 what circumstances constitute a Suspension of Competition.
☐ In an emergency when goods or services are immediately necessary for the preservation of the public health, welfare, or safety, or for the protection of County property.
☐ When the contract is with a federal, state, or local governmental agency.
☐ When the department head, with the concurrence of the Purchasing Agent, finds that the cost of preparing and administering a competitive bidding process in a particular case will equal or exceed the estimated contract amount or \$2,500 whichever is more.
☐ When a contract provides only for payment of per diem and travel expenses and there is to be no payment for services rendered.
☐ When obtaining the services of expert witnesses for litigation or special counsel to assist the County.
☐ When in unusual or extraordinary circumstances, the Board of Supervisors or the Purchasing Agent/Purchasing Manager determines that the best interests of the County would be served by not securing competitive bids or issuing a request for proposal.
6. Explain why the unique qualities and/or capabilities described above are essential to your department.
The County's Sheriff-Public Administrator currently utilizes CompuTrust System for operational services. CompuTrust is specifically designed to support Public Administrator Office administer the estates of persons who died intestate (without a will), manage trust and court records, and inventory real and personal property. The proposed Agreement includes an upgrade of the CTI software to a web-based version (CTI-V3). The web-based version of CTI includes all of the functionality of the current CTI system as well as additional functions, such as new case management, assets log and check register pages. The web-based system will allow staff access in the field and in court. This system is widely used by many counties within California and allows the County the ability to customize the system to suit the County's specific needs.
7. Provide a comprehensive explanation of the research done to verify that the recommended vendor is the only vendor with the unique qualities and/or capabilities stated above. Include a list of all other vendors contacted, what they were asked, and their responses.
The Public Administrator has used CompuTrust Software since the 1990s. The system is specifically customized to the service needs with detail financial and accounting. Staff has researched other vendors and options and determined that other software companies would require unnecessary costly expenditures due to the countless hours to personnalize their system to meet the Public Administrator's needs. Panosoft Panoramic Software was evaluated as an alternative option to CompuTrust. However, in conference with Panoramic-utilizing companies, Panosoft was slow to respond to DOS system updates, and other modifications to the system interface. Additionally, CompuTrust was more amenable to working with existing printer equipment required to maintain

the continuity of County business processes. There appeared to be no cost-benefit savings in switching to Panoramic, notwithstanding the cost of transition. In addition, County staff will require significant re-training for a new system. Acquiring a new system would also cause for a disruption in current program system functionality. The continued use of CompuTrust Software is necessary for the Public Administrator's Office to perform its mandated services.

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Requested By:

Staff Analyst

Title

[\[✕ Sign\]](#) Double click!

I approve this request to suspend competition for the service(s) and/or product(s) identified herein.

thomas.trester 12/3/2019 3:41:05 PM

Department Head Signature

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gcornuelle 12/4/2019 6:44:24 AM

Purchasing Manager Signature

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