



Board Agenda Item 35

DATE: April 21, 2026

TO: Board of Supervisors

SUBMITTED BY: John Zaroni, Sheriff-Coroner-Public Administrator

SUBJECT: Agreement with Panoramic Software Corporation

RECOMMENDED ACTION:

- 1. Under Administrative Policy No. 34 for competitive bids or requests for proposals (AP 34) determine that an exception to the competitive bidding requirement under AP 34 is satisfied and a suspension of competition is warranted for software and maintenance due to the unusual or extraordinary circumstances, as PPro, a web-based application, was designed and developed by Panoramic Software Corporation for Public Administrator Offices, and is exclusively provided by this vendor;**
- 2. Approve and authorize the Chairman to execute Agreement with Panoramic Software Corporation for PPro web application for use by the Public Administrator's Office to track and report on deceased cases, effective April 21, 2026, not to exceed five consecutive years, which includes a three-year base contract and two optional one-year extensions, total not to exceed \$300,000.**

There is no increase in Net County Cost associated with the recommended actions. Approval of the first recommended action will determine that an exception to the competitive bidding process is warranted to enable the Sheriff's Office to utilize Panoramic Software Corporation for its unique modern case management system to administer estates, manage trust and court accounts, and inventory real and personal property of persons who have died intestate. In addition, the recommended actions would allow the Sheriff's Office to enhance user accountability by tracking individual contributions and updates within each case.

This item is countywide.

ALTERNATIVE ACTION(S):

Your Board could choose not to approve the recommended actions and could require the Sheriff's Office to issue Requests for Proposal (RFP) for software. If your Board chooses not to approve the recommended Agreement, the Sheriff's Office will continue to use outdated software and will not improve its processes immediately, requiring extensive staff time and expense to locate alternative methods for administering the estates of persons who die intestate. The Sheriff's Office previous case management Agreement No. A-20-012 went to the Board on January 7, 2020, and expired June 30, 2024.

SUSPENSION OF COMPETITION/SOLE SOURCE CONTRACT:

It is requested that the Board determine under Administrative Policy No. 34 that an exception to the competitive bidding requirement is satisfied, and a suspension of competition is warranted due to unusual or extraordinary circumstances for the Sheriff's Office to acquire PPro, a web-based application developed by Panoramic Software, designed specifically for Public Administrator offices. Unlike traditional server-based systems, PPro's cloud hosted platform allows users to access the system whether they are working remotely or on-site at a

property. This flexibility is especially beneficial for fieldwork and supports greater file storage capacity. One of PAPro standout features is its inventory tracking capacity. Public Administrator staff can log and photograph estate assets directly on-site, while also tracking location of each item through the case. The system automatically records user activity, including who is logged in and what changes are made, complete with timestamps. This creates a built-in audit log that enhances supervisory oversight and accountability. The platform also introduces functionality that was previously unavailable, such as the ability to upload photos and documents directly into specific sections of a case. This ensures that all case-related materials are stored in one centralized system, making them easier to locate and manage. Additionally, PAPro includes an internal messaging feature that allows users to assign tasks or requests to one another, helping to streamline workflow and improve communication. This software upgrade will significantly streamline departmental workflows. Following comparative vendor demonstrations, Panoramic's PAPro was selected for its modern feature set, high user satisfaction ratings, and widespread market adoption. Based on this, a letter of interest was not necessary. The General Services Department - Purchasing concurs with the Department's assessment that this satisfies the exception to the competitive bidding process required by AP 34.

FISCAL IMPACT:

There is no increase in Net County Cost associated with the recommended actions. The first year of the Agreement will be \$145,000 (\$65,000 one-time implementation, \$50,000 data conversion, and \$30,000 support services). Compensation for hosting, support and maintenance for years two and three shall be \$30,000 and optional years four and five shall be \$31,500 each year due annually at the start of each period. The recommended Agreement provides the Sheriff's Office \$32,000 for optional custom development at an as needed rate of \$175.00 per hour. The maximum contract cost associated with the Panoramic Software Agreement shall be \$237,000 for the initial three-year term, including the addition of \$32,000 optional custom development. The maximum contract compensation through the five (5) year term is \$300,000. Sufficient appropriations have been included in the Sheriff-Coroner-Public Administrator's Org 3111 FY 2025-26 Adopted Budget and will be included in future budget requests for the term of the agreement.

DISCUSSION:

The County has an ongoing need for a modern case management system to administer estates, manage trust and court accounts, and inventory real and personal property of persons who have died intestate. Panoramic Software offers PAPro, a web-based application specifically developed for Public Administrator's Offices. Hosted by Panoramic Software, PAPro provides a comprehensive system for case management, asset tracking, and estate accounting for persons who have died interstate. It enables the Fresno County Public Administrator's Office to efficiently generate a variety of accounting reports, monitor appraised values for all case-related assets, and maintain detail case notes. The system also enhances user accountability by tracking individual contributions and updates within each case.

PAPro represents a significant upgrade from the current system in use. It replaces outdated processes, such as dot matrix check printing, with more efficient laser printed checks. The interface is also more user friendly and intuitive, making it easier for staff to navigate and perform their tasks. Panoramic Software is one of only two vendors offering software tailored to Public Administrator offices. Over 90% of California counties have adopted PAPro.

The County participated in demonstrations by the two vendors for evaluation and concluded that the PAPro satisfies the County's need for a modern case management system that fulfills regulatory requirements and uses modern development technologies to meet the County's future needs. Due to its modern features, strong user satisfaction and widespread adoption, PAPro is the Sheriff's Office choice to modernize the Fresno County Public Administrator's Office.

Moreover, if sufficient funds are not allocated by the County, the recommended Agreement allows for termination at any time upon thirty (30) days advance written notice is given to the Contractor.

If approved by your Board, the recommended Agreement will be effective April 21, 2026.

REFERENCE MATERIAL:

BAI #18, January 7, 2020

ATTACHMENTS INCLUDED AND/OR ON FILE:

Suspension of Competition Acquisition Request
On file with Clerk - Agreement with Panoramic Software Corporation

CAO ANALYST:

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