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TO: Rep. Mary Hooper, Chair, House Appropriations Committee

FROM: Matthew Valerio, Defender General
Mary Deaett, Human Resources & Program Manager

DATE: February 24, 2021

RE: Case Management System

Thank you very much for your interest in the department's case management needs and our search for a new system. We listened to your committee today regarding the Attorney General's Office (AGO), State's Attorneys (SA) and Defender General (ODG) systems. We would like to clarify a few things.

The ODG and SA have been in a case management contract with the company now known as Journal Technologies Inc. (JTI) since the spring of 2014. Both departments use software called JustWare, which as you may know, is no longer being continued after June 30, 2021. We received notice of this on February 24, 2020. While we planned to move ahead on finding replacement software as soon as possible, COVID occurred and we were delayed. We did finally issue a Request for Information (RFI) last summer and then an RFP for new software in October 2020.

In terms of Tyler Technologies, they were not one of the nine companies that responded to our RFP. Prior to issuing the RFP, Mary Deaett was invited to and attended a demonstration by Tyler to the State's Attorney's Office. That demonstration informed us that Tyler's legal software is missing one crucial element for our department. The ODG relies heavily on Microsoft Outlook for calendaring events, meetings, tasks, etc. JustWare currently provides that integration for us. We think reliance on Microsoft products makes sense given the State's (ADS) reliance on the Microsoft Office suite. Tyler's software has no compatibility nor integration with Outlook.

In addition, Tyler's software is much more expensive than JTI's. Although the cost has not been finalized at this point, JTI's proposal was for an implementation cost of \$150,000 plus yearly licensing (eDefender is a leased software), support, maintenance, hosting and storage costs starting in Year 1 of about \$178,000. First year costs would also include VT-ADS fees. ODG's need in Year 1 (FY 2022) is for an additional \$138,452 over the current budget line item (\$117,000). Over five years the additional need above the current budgeted line item is \$477,788.

After extensive research across the United States with other public defender offices, the clear favorite case management system is JTI's eDefender software. Due to compatibility and cost, the ODG selected to negotiate with JTI. We are in contract negotiations at this time, and we are hoping for a successful implementation of eDefender on July 1, 2022.

The needs of the AGO, SA and DG in relation to the Judiciary's software are different. The Judiciary did reach out to both the SA and DG about integration with Odyssey. We can only speak about our department in saying that there is, in fact, limited need for integration between the ODG's system and Odyssey. The situation is different for the SAs, and we are unsure of the needs of the AGO. Throughout the crafting of the RFP, however, Mary was in close contact with Sarah London at the AGO regarding their current system and need for a new one. Mary was also in close contact with the Public Utility Commission which currently uses the court version of JTI's software called eCourt. JTI has an ongoing relationship with Vermont in this regard.

The Agency of Digital Services has been extremely helpful along the ODG's path towards a new system. We do not know why the ODG was not included in the one-time funding as proposed by ADS, but it could be that ODG costs were not known at the time ADS prepared the one-time funding proposal for other systems, or it could be that the ODG cost is minimal compared to the other systems.

If you have any questions, we would be happy to provide additional information.