



County of Monterey

Item No.

Board Report

Board of Supervisors
Chambers

168 W. Alisal St., 1st Floor
Salinas, CA 93901

Legistar File Number: A 22-578

November 22, 2022

Introduced: 11/4/2022

Current Status: Agenda Ready

Version: 1

Matter Type: BoS Agreement

- a. Ratify the execution by the County Assessor of the non-standard Software-as-a-Service (“SaaS”) Services Agreement (A-15410) between the County of Monterey and Just Appraised Inc. to provide software services with a retroactive start date of July 1, 2021 through September 30, 2022, for a revised total agreement amount of \$59,500; and
- b. Approve and authorize the County Assessor to execute Amendment No. 1 to the SaaS Services Agreement (A-15410) with Just Appraised Inc., extending the agreement for an additional nine (9) month period (retroactively from October 1, 2022) for a revised full agreement term of July 1, 2021 through June 30, 2023, and adding \$60,000 for a revised total agreement amount of not to exceed \$119,500; and
- c. Approve nonstandard provisions in the SaaS Services Agreement and Amendment No. 1 as recommended by the County Assessor; and
- d. Approve and Authorize the Assessor, or designee, to sign up to three (3) future one (1) year amendments to this agreement where the amendments do not significantly change the scope of work for a maximum, not to exceed amount of \$330,000 for the full term of the agreement.

RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Ratify the execution by the County Assessor of the non-standard Software-as-a-Service (“SaaS”) Services Agreement (A-15410) between the County of Monterey and Just Appraised Inc. to provide software services with a retroactive start date of July 1, 2021 through September 30, 2022, for a revised total agreement amount of \$59,500; and
- b. Approve and authorize the County Assessor to execute Amendment No. 1 to the SaaS Services Agreement (A-15410) with Just Appraised Inc., extending the agreement for an additional nine (9) month period (retroactively from October 1, 2022) for a revised full agreement term of July 1, 2021 through June 30, 2023, and adding \$60,000 for a revised total agreement amount of not to exceed \$119,500; and
- c. Approve nonstandard provisions in the SaaS Services Agreement and Amendment No. 1 as recommended by the County Assessor; and
- d. Approve and Authorize the Assessor, or designee, to sign up to three (3) future one (1) year amendments to this agreement where the amendments do not significantly change the scope of work for a maximum, not to exceed amount of \$330,000 for the full term of the agreement.

SUMMARY/DISCUSSION:

County Assessor’s Office and Just Appraised Inc. executed a non-standard annual software agreement to deploy a transfer of ownership and sales coding application that aggregates various data sources about real estate transactions and create a work flow that allows staff members to process the transactions more quickly. The services provided by Just Appraised Inc. are necessary to ensure quick processing.

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The Assessor discovered two disparities between the Board action authorizing the initial contract and the agreement ultimately executed by the parties. First, the Board action only authorized an initial term of July 1, 2021 through June 30, 2022 whereas the executed agreement held an initial term of July 1, 2021 through September 30, 2022. Second, the Board action authorized the Assessor to seek amendments extending the duration of the agreement whereas the executed agreement provides for automatic renewals. This amendment shall remove automatic renewals and provide for a fixed term to follow the fiscal year.

Also, the Assessor requests that the Board approve this amendment No 1 due to business necessity. The agreement is for software to ensure the preparation and continuation of a timely and accurate property tax roll as mandated by the State of California. Services continued to be rendered beyond the term approved by the Board and the agreement requires an increase in contract liability in order to continue paying the vendor’s invoices for services rendered following expiration of the Board’s approved term and for the proposed extended fixed term.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed and approved as to legal form, and the Auditor-Controller has reviewed and approved as to fiscal provisions.

FINANCING:

The annual cost to the Monterey County Assessor’s Office for the term July 1, 2021 through June 30, 2022 is \$59,500 and the cost is within the Assessor’s 2021-2022 Adopted Budget (1180-ACR001-8003). The annual cost to the Monterey County Assessor’s Office for the term July 1, 2022 through June 30, 2023 is \$60,000. The agreement cost is within the Assessor’s 2022-2023 Adopted Budget (1180-ACR001-8003). Future annual extensions will be funded through annual budget allocations.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The services rendered in this agreement provide the Assessor with the additional support it needs to provide reliable and high-quality services to the residents of Monterey County.

Economic Development

Administration

Health & Human Services

Infrastructure

Public Safety

Prepared by: Chihiro Tabata, Management Analyst , x6607

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Chihiro Tabata
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Authorized by: Stephen L. Vagnini, Assessor-Clerk/Recorder, x5803

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Stephen Vagnini
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Attachments:

Renewal and Amendment No. 1 to SaaS Services Agreement with Just Appraised Inc.
SaaS Services Agreement