



County of Monterey

Item No.

Board Report

Board of Supervisors
Chambers
168 W. Alisal St., 1st Floor
Salinas, CA 93901

Legistar File Number: A 24-374

August 13, 2024

Introduced: 7/24/2024

Current Status: Agenda Ready

Version: 1

Matter Type: BoS Agreement

- a. Approve and authorize the County of Monterey, on behalf of the County Assessor, to sign a Shared Systems Memorandum of Understanding (MOU) with the California Assessors' Association, and the California Board of Equalization to participate in a Statewide Network Group for information technology services, systems support, and maintenance services to support assessment functions at amounts not to exceed \$10,000 per year, or \$20,000 for a retroactive 2-year term of July 1, 2024 through June 30, 2026.
- b. Approve and authorize the Assessor or their designee to execute amendments that do not adversely affect the County liability and/or extend the term of the MOU beyond June 30, 2026.

RECOMMENDATION:

- a. Approve and authorize the County of Monterey, on behalf of the County Assessor, to sign a Shared Systems Memorandum of Understanding (MOU) with the California Assessors' Association, and the California Board of Equalization to participate in a Statewide Network Group for information technology services, systems support, and maintenance services to support assessment functions at amounts not to exceed \$10,000 per year, or \$20,000 for a retroactive 2-year term of July 1, 2024 through June 30, 2026.
- b. Approve and authorize the Assessor or their designee to execute amendments that do not adversely affect the County liability and/or extend the term of the MOU beyond June 30, 2026.

SUMMARY/DISCUSSION:

In 2004, the Board authorized the Monterey County Assessor to enter into a Joint Powers Agreement (JPA-SDR) for the creation of Standard Data Records for the filing of annual Business Property Statements.

In 2013, the Board authorized the Monterey County Assessor to enter into a second Joint Powers Agreement (JPA-e-Forms) to create, collect, store, and maintain electronic forms and data with the County and the State Board of Equalization necessary to the assessment function. These two JPAs are now combining into a single Shared Systems Memorandum of Understanding (MOU) administered by the California Assessors' Association, a non-profit organization comprised of all state Assessors, who manage the program as the coordinating entity.

The services provided under these JPAs were and continue to be positive and productive activities for the County resulting in greater efficiencies and cost savings. The JPAs facilitate the development and ownership of storing and maintaining electronic forms and data necessary to for the assessment forms and process. They also result in the distribution of the associated costs and liabilities directly related to

this purpose proportionate to each participating County's share of statewide taxes generated. All participating counties share in the costs so that the services and benefits provided by the system are available to all California taxpayers and County entities statewide. Participation by the County may be terminated early if the cost exceeds the benefits.

At this time, the Assessor asks the Board to authorize them to continue participating in the JPAs for e-Forms and SDR services (now the combined MOU) and to make Monterey County's share of annual payments for the MOU in an amount not to exceed \$10,000 per year for a combined total of \$20,000, for a 2-year term retroactive to July 1, 2024 until June 30, 2026, and, further, to execute all appropriate amendments and extensions of the MOU through June 30, 2026 that do not increase the dollar amount or substantially change the terms and liabilities of the County's participation in the MOU. The County has and will continue to benefit from the services performed pursuant to this MOU, a greater cost savings than would be possible if the County would have to obtain these services, either in-house or by outsourcing the work as a stand-alone County activity.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed and approved the memorandum of understanding and has approved it as to form.

FINANCING:

Each County is sharing only a portion of the costs, proportionate to that County's share of the statewide receipt of tax revenue. There is no additional cost to the County General Fund, as there are sufficient appropriations in the Assessor's FY 2024-2025 Adopted Budget (1180-ACR001-8003) for the current recommended action. The estimated future annual maintenance costs are less than \$10,000 for MOU per year through June 30, 2026 (combined total of \$20,000 through that date). At any time, if funding is not approved, the County can withdraw from the MOU pursuant to the terms of the MOU agreement.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

The services rendered in this agreement provide the Assessor's Office 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 Marie Tabata, Management Analyst, x6607

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Approved by: Xochitl Marina Camacho, Assessor-Clerk/Recorder, x5803

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Attachments:

Shared Systems Memorandum of Understanding (MOU)

Attachment A. Scope of Work-Vendor Contract

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Attachment B. 2023 Annual Usage Report