



## Board Report

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**File #:** A 21-346, **Version:** 1

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- a. Approve and authorize the County, by and through the County Assessor, to enter into an agreement with Just Appraised Inc., to deploy transfer of ownership and sales coding application that aggregates various data sources about real estate transactions and creates a work flow that allows staff members to process the transactions more quickly in an amount not to exceed \$64,500 for July 1, 2021 through June 30, 2022; and
- b. Accept non-standard terms and conditions requested by vendor as recommended by the Assessor; and
- c. Authorize the Assessor to sign four future annual renewals to the agreement under same or similar terms that do not materially change the scope of work or increase the annual payments in excess of 10% per year over the FY 2021-22 amount.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

- a. Approve and authorize the County, by and through the County Assessor, to enter into an agreement with Just Appraised Inc., to deploy transfer of ownership and sales coding application that aggregates various data sources about real estate transactions and creates a work flow that allows staff members to process the transactions more quickly in an amount not to exceed \$64,500 for July 1, 2021 through June 30, 2022; and
- b. Accept non-standard terms and conditions requested by vendor as recommended by the Assessor; and
- c. Authorize the Assessor to sign four future annual renewals to the agreement under same or similar terms that do not materially change the scope of work or increase the annual payments in excess of 10% per year over the FY 2021-22 amount.

### SUMMARY/DISCUSSION:

The proposed agreement contains non-standard indemnification and liability provisions; however, Just Appraised Inc. will provide software that will allow the Assessor to deploy transfer of ownership which includes a sales coding application that aggregates various data sources about real estate transactions and creates a work flow that allows staff members to process the transactions more quickly. These non-standard provisions are an industry-wide accepted standard although not County standard. The services provided by Just Appraised Inc. are necessary for a quicker process of the transactions.

The Assessor requests that the Board approve an agreement effective July 1, 2021 through June 30, 2022, including non-standard provisions, between Just Appraised Inc. and the Monterey County Assessor's office 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. Therefore, the Assessor requests the Board of Supervisors approval of this recommendation.

County Counsel has reviewed the Agreement and has not approved it because it perpetuates the non-standard provisions/conditions including, but not limited to, the following: as-is/limited/no liability/warranty performance, no intellectual property liability. County Risk reviewed the Agreement and did not approve due to non-standard insurance and indemnity provisions.

**FINANCING:**

The annual cost to the Monterey County Assessor's Office for the term July 1, 2021 through June 30, 2022 is \$64,500 per year. The agreement cost is within the Assessor's 2021-2022 Recommended 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

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

Attachments: Just Appraised Inc. Non-Standard Maintenance and Support Agreement