



BOARD OF SUPERVISORS  
AGENDA LETTER

Agenda Number:

Clerk of the Board of Supervisors  
105 E. Anapamu Street, Suite 407  
Santa Barbara, CA 93101  
(805) 568-2240

Department Name: Clerk-Recorder-  
Assessor  
Department No.: 062  
For Agenda Of: March 1, 2011  
Placement: Administrative  
Estimated Tme:  
Continued Item: No  
If Yes, date from:  
Vote Required: Majority

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TO:

FROM: Department Joseph E. Holland  
Clerk-Recorder-Assessor  
805 568-2558  
Contact Info: Brian M. Richard  
CRA Info. Systems Manager  
805 568-3371

SUBJECT: **Approve and authorize the Chair to execute the First Amendment to the contract with Colorado CustomWare Inc.**

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**County Counsel Concurrence**

As to form: Yes

**Auditor-Controller Concurrence**

As to form: Yes

**Other Concurrence:**

As to form: Yes

**Recommended Actions:**

That the Board of Supervisors:

- 1) Approve and authorize the Chair to execute the First Amendment to the Master License, Services and Support Agreement with Colorado CustomWare Inc. (not a local vendor) for the amount of \$93,000 for additional software, implementation, one year of maintenance, and training of Matix, a visualization and valuation tool to be used in conjunction with the original contract application of Realware, plus optional ongoing maintenance for four additional years not to exceed \$20,260 annually.
- 2) Determine that approval of the First Amendment to the Master License, Services and Support Agreement with Colorado CustomWare Inc. is not a project under California Environmental Quality Act (CEQA) pursuant to section 15060(c)(3) and 15378(b)(5) of the CEQA Guidelines, because it will not result in a direct or reasonably foreseeable indirect physical change in the environment.

**Summary Text:**

The current property tax assessment and appraisal system maintains and tracks approximately 152,000 secured and unsecured properties valued at \$63 billion and is used to bill \$675 million in property taxes annually for the County, school districts and special districts. The life-cycle of the current system, functional inadequacies, technological advancement and the ever increasing workload has driven the need for a replacement system. Purchasing a vendor developed integrated administration and valuation property assessment system versus in-house development has been determined to be the best solution.

**Background:**

On May 25, 2010 (File Ref No. 10-00408) your Board approved and authorized the Chair to execute a contract with Colorado CustomWare for the development and implementation of an integrated property assessment administration and valuation system (RealWare). Two additive modules were identified within this contract for purchase at a later date. These two modules are Matix (formerly known as EncompassGIS) and Fieldware.

The Assessor has determined that it would be most efficient to add the Matix module at this time, concurrent with the design and implementation of the (Prop 13) computer assisted mass appraisal (CAMA) component of RealWare.

The Matix module serves as an enhanced GIS (geographic information system) data visualization and valuation tool to be used in conjunction with the CAMA function in RealWare. Users will be presented with a map view, and property sales data view, that will significantly assist with the annual valuation of properties assessed under Revenue & Taxation Code Section 51. The map view provides state-of-the art multi-layer map rendering, navigation and polygon selection. Within this view, the user can easily generate task-specific visualizations using choropleths, bubble charts, and icon and text label overlays. The data view contains a powerful and flexible data grid where associated sales and assessment data for selected neighborhoods (polygons) can be viewed and analyzed.

The FieldWare module is data-collection software that allows users to take RealWare functionality into the field to improve the overall efficiency of the assessment process. The decision whether to add this module will be made at a later date, probably after full implementation of RealWare.

Implementation services will include: installation, connection to existing ArcGIS Map Services, integration configuration with existing legacy system, configuration for custom modeling, training, and on-going support. The estimated timeline is approximately one (1) to two (2) month of installation, configuration, and training to commence after board approval. Additional costs are outlined in the amendment.

**Performance Measure:**

**Fiscal and Facilities Impacts:**

Budgeted: No

**Fiscal Analysis:**

<u>Current FY Cost:</u>	<u>Annualized On-going Cost:</u>	<u>Total One-Time Project Cost</u>
\$ 93,000.00	\$ 20,000.00	\$ 93,000.00
\$ 93,000.00	\$ 20,000.00	\$ 93,000.00

**Narrative:**

The estimated cost of the Matix module includes one-time costs of \$93,000 and on-going support costs of roughly \$20,000 a year commencing with year two.

The initial payment plan for Matix requires the full one-time expenditures of \$93,000 in the current fiscal year to be funded with funds available in the Assessor Property Tax Administration Designation (LIA 9767 – Designated Assessor AB818.) or through any year-end departmental savings. Due to deferment of other capital purchases in the department, sufficient appropriations are available for this acquisition as well as sufficient funding source in the existing budget. The on-going annual support costs of roughly \$20,000, commencing in year two, will be fully absorbed within the Assessor’s budget through use of current resources.

There is also the potential for the Recorder Division to share in the cost of the Colorado CustomWare Property Assessment and Valuation System and the on-going maintenance costs if it is determined that there is functionality in the system that benefits the Recorder, and a reasonable methodology for cost benefit can be determined. If a methodology can be determined, the Recorder Division will use designated sources to reimburse the Assessor designation for the cost.

**Staffing Impacts:**

**Legal Positions:**

**FTEs:**

**Special Instructions:**

Send fully executed copy of the minute order to Rose Rodarte – Assessor’s Office (2<sup>nd</sup> flr Admin Bld).

**Attachments:**

First Amendment for Matix, with Attachment 1

Amendment to Exhibit A

Contract Summary **Authored by:**

Brian Richard/Rose Rodarte

**cc:**