

**SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**

542



**FROM:** Assessor-County Clerk-Recorder

**SUBMITTAL DATE:**  
December 21, 2007

**SUBJECT:** Approval of Assessment Evaluation Services (AES) as a sole source provider for a valuation application designed to predict value for comparison analysis for the processing of Proposition 8 declines in value throughout Riverside County.

**RECOMMENDED MOTION:** That the Board of Supervisors authorize a County Purchasing Agent to purchase the Proposition 8 Valuation application from the AES (Assessment Evaluation Services), at a cost, not to exceed \$100,000.

**BACKGROUND:** The Assessor-Clerk-Recorder must assess property at the lesser of factored base year value or market value. In a rapidly declining market, as is occurring now, the market value of recently purchased properties is often less than their factored base year values. The Assessor-Clerk-Recorder needs a modern, effective software program to compare sales information with assessed values to determine which properties' assessments should be reduced. This software must be purchased, installed, tested and run by early 2008 for incorporation into the 2008 assessment roll.

Departmental Concurrence

*Larry W. Ward by Cathy Colt*

Larry W. Ward, Assessor-County Clerk-Recorder  
By Cathy Colt,  
Asst.: Assessor-County Clerk-Recorder

Purchasing: *Mark Seiler*  
Mark Seiler, Assistant Director

<b>FINANCIAL DATA</b>	Current F.Y. Total Cost:	\$ 96,000	In Current Year Budget:	Yes
	Current F.Y. Net County Cost:	\$ 0	Budget Adjustment:	No
	Annual Net County Cost:	\$ 0	For Fiscal Year:	2007/08

<b>SOURCE OF FUNDS:</b> Assessor Property Tax Administration Program Funds	Positions To Be Deleted Per A-30	<input type="checkbox"/>
	Requires 4/5 Vote	<input type="checkbox"/>

**C.E.O. RECOMMENDATION:** APPROVE  
BY: *Rob Rockwell*  
Rob Rockwell

**County Executive Office Signature**

Dep't Recomm.:  Consent  Policy   
Per Exec. Ofc.:  Consent  Policy

Prev. Agn. Ref.: | District: | Agenda Number:

3.2

Date: December 18, 2009  
From: Frit Swain Department/Agency: Assessor/Clerk/Recorder  
To: Board of Supervisors  
Via: Purchasing Agent  
Subject: Sole Source Procurement; Request for Software to Process Large  
Volume of Value Reviews for Proposition 8

The information below is provided in support of my Department requesting approval for a sole source. Outside of a duly declared emergency, the time to develop a statement of work or specifications is not in itself justification for sole source.

**Supply/Service being requested:** A valuation application designed to predict value for comparison analysis for the processing of Proposition 8 declines in value throughout Riverside County.

**Supplier being requested:** AES (Assessment Evaluation Services)

**Alternative suppliers that can or might be able to provide supply/service:** During a recent RFP for a CAMA system several companies were evaluated but none other than AES has a ready product that can be utilized specifically for declines in value. Manatron and Software Techniques were both contacted for this product. Neither have a developed product for this specific application.

**Extent of market search conducted:** Follow-up from CAMA RFP.

**Unique features of the supply/service being requested from this supplier, which no alternative supplier can provide:** This product, in use by Orange County, Ventura County, Contra Costa County, San Luis Obispo County and San Bernardino County offers a systems application to aid in declines in value processing. AES has a proven product that can be installed to aid Riverside County in timely processing of Proposition 8 declines for the 2008 assessment year. The application analyzes comparable properties to produce a reliable predicted value for market comparisons in the Proposition 8 process. It produces comparable listings supporting the analysis to facilitate better public service when addressing property owners.

**Reasons why my department requires these unique features and what benefit will accrue to the county:** The Assessor's Office anticipates a dramatic increase in requests for assessment reduction due to the recent residential market decline. The current application, developed in-house in the 1990's, will be ineffectual for this anticipated workload. The Assessor desires to be proactive in reducing those properties that should justifiably be lowered and retaining the values of those for which a reduction is not justified.

**Price Reasonableness:** The proposed contract recommends a purchase price of \$96,000 and an annual maintenance fee of \$30,000 beginning the second year. The maintenance fee includes annual adjustments for trending and weighting and annual training with assistance on start-up each year. This price, for the benefit to the county, appears to be reasonable.

Does moving forward on this product or service further obligate the county to future similar contractual arrangements? This is a stand-alone program designed to assist with Proposition 8 analysis on an annual basis. No additional contractual obligations are involved.

Samy W Ward by Cathy Coer 12-21-07  
Department Head Signature Date

Purchasing Department Comments:

Approve      Approve with Condition/s      Disapprove  
W. [Signature] 12-26-07  
Purchasing Agent Date