

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS  
OF SAN BERNARDINO COUNTY  
AND RECORD OF ACTION**

September 12, 2023

**FROM**

**CHRIS WILHITE, Assessor-Recorder-County Clerk**

**SUBJECT**

Amendment to Agreement with The Software Revolution, Inc. to provide Engineering Support Services for the Assessor's Property Information Management System Upgrade Project

**RECOMMENDATION(S)**

Approve **Amendment No. 1 to Contract No. 23-1006** (4400021608) with The Software Revolution, Inc., revising the scope of work to include additional engineering support services for the Assessor's Property Information Management System Upgrade Project, adding a milestone payment schedule, with no change to the contract amount of \$1,000,000, and shortening the term from five years to two years, for a total term of January 23, 2023 through January 22, 2025.

(Presenter: Chris Wilhite, Assessor-Recorder-County Clerk, 382-3208)

**COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES**

**Improve County Government Operations.**

**Operate in a Fiscally-Responsible and Business-Like Manner.**

**FINANCIAL IMPACT**

Approval of this item will not result in the use of Discretionary General Funding (Net County Cost). The total agreement amount of \$1,000,000 remains unchanged. The Purchasing Department approved a five-year agreement with projected annual expenditures not to exceed \$200,000. The annual expenditure in 2022-23 was \$185,928. The projected annual expenditures would change as a result of the proposed scope of work revision. While the total contract amount remains unchanged, the recommended amendment will adjust projected annual expenditures to \$697,000 in 2023-24 and \$117,000 in 2024-25. Adequate appropriation and revenue have been included in the Assessor's Property Information Management System (PIMS) Upgrade Project 2023-24 budget (3119992756) and will be included in the 2024-25 recommended budget.

**BACKGROUND INFORMATION**

The Assessor Division of the Assessor-Recorder-County Clerk Department (ARC) is responsible for locating, describing, and identifying ownership of property within the County; establishing a taxable value for properties subject to taxation; applying applicable legal exemptions; and publishing annual and supplemental assessment rolls. The ARC is the main data source for many internal and external public agencies, property owners, and business entities for public records. PIMS, the current Information Technology (IT) system that houses this data, is being modernized to a supportable IT platform that uses current and industry standard programming languages. The new modernized system will be called the Assessor's Information Management System (AIMS).

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On September 15, 2020 (Item No.17), the Board of Supervisors (Board) approved Agreement No. 20-876 with Array Information Technology, Inc. (Array) to provide system integration services for the Assessor's PIMS Upgrade Project from September 15, 2020 through June 30, 2025.

On November 16, 2021 (Item No.19), the Board approved an assignment and assumption Agreement No. 21-836 with Array and CGI Technologies and Solutions Inc. (CGI T&S) for the assignment of Agreement No. 20-876 from Array to CGI T&S, effective November 16, 2021. The Software Revolution, Inc. (TSRI) has been engaged with the PIMS Upgrade Project since 2020, first as a subcontractor under the original software integrator (Array), then by CGI T&S, and now as a direct San Bernardino County contractor.

On January 23, 2023, the Purchasing Department approved Contract No. 4400021608 (Agreement) with TSRI for engineering support services in the total amount of \$1,000,000 for the five-year term of January 23, 2023 through January 22, 2028, to assist with the modernization of PIMS.

Amendment No. 1 to the Agreement with TSRI will allow ARC to continue the modernization of PIMS, completing Phases four and five of this project. TSRI's role in the project is to transform the existing legacy code into modern code, which requires testing, integration, refactoring, and final iteration of this project. Phases one through three included pre-project, assessment, and transformation to compile integration-ready code and have been completed.

The benefits of modernizing a legacy application system is overall reduced costs, improved flexibility, and increased collaboration between internal and external agencies and other data users. TSRI offers unique software documentation, transformation, refactoring, and modernization service. Further importance of modernization is to maintain the consistency and protection of data throughout ARC systems. The recommended action will allow the ARC to improve County government operations and operate in a fiscally-responsible and business-like manner.

**PROCUREMENT**

Purchasing supports this non-competitive amendment to the Agreement with TSRI. Under the original software integrator (Array), TSRI worked as a subcontractor and is now working as a direct County contractor. TSRI has specific knowledge of the PIMS Upgrade Project and the transformed code for AIMS that no other company can offer. The selection of a different company to complete Phases four and five would disrupt the project's progress. In addition, TSRI has established a proprietary framework that portions off the modern code that future builds rely upon.

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Kaleigh Ragon, Deputy County Counsel, 387-5455) on August 9, 2023; Purchasing (Jessica Barajas, Supervising Buyer, 387-2065) on August 15, 2023; Innovation and Technology (Jake Cordova, Assistant Chief Information Officer, 388-5501) on August 16, 2023; Finance (Penelope Chang, Administrative Analyst, 387-4886) on August 17, 2023; and County Finance and Administration (Paloma Hernandez-Baker, Deputy Executive Officer, 387-5423) on August 25, 2023.

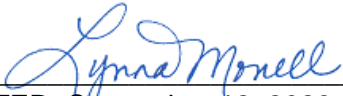
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Record of Action of the Board of Supervisors  
San Bernardino County

**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Curt Hagman  
Ayes: Col. Paul Cook (Ret.), Jesse Armendarez, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY   
DATED: September 12, 2023



cc: ARC - Gaeta w/agree  
Contractor - c/o ARC w/agree  
File - w/agree  
CCM 09/15/2023