

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

May 7, 2024

FROM

CHRIS WILHITE, Assessor-Recorder-County Clerk

SUBJECT

Amendment to Contract with The Software Revolution, Inc. for Engineering Support Services

RECOMMENDATION(S)

Approve **Amendment No. 2 to Contract No. 23-1006** with The Software Revolution, Inc., revising the scope of work to include additional engineering support services for the Property Information Management System Upgrade Project and increasing the contract amount by \$250,000, from \$1,000,000 to \$1,250,000, with no change to the 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 additional Discretionary General Funding (Net County Cost). The total contract amount is increasing by \$250,000, from \$1,000,000 to \$1,250,000, and is funded with an existing allocation received by the Assessor-Recorder-County Clerk Department (ARC) from the New PIMS Replacement System General Fund Reserve. The projected annual expenditures would change as a result of the proposed scope of work revision. The annual expenditure in 2022-23 was \$185,928. The recommended amendment will adjust projected annual expenditures from \$697,000 to \$874,000 in 2023-24 and from \$117,000 to \$190,000 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 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 January 23, 2023, as a result of a non-competitive procurement, the Purchasing Department approved Contract No. 4400021608 with The Software Revolution, Inc. (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.

On September 12, 2023 (Item No.13), the Board of Supervisors (Board) approved Amendment No.1 to Contract No. 23-1006 (formerly Contract No. 4400021608) with TSRI, revising the scope of work to include additional engineering support services for the AIMS 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.

TSRI's role in modernizing PIMS is to transform the existing legacy code into modern code in five phases. TSRI offers unique software documentation, transformation, refactoring, and modernization services. Modernization of PIMS will maintain the consistency and protection of data throughout Assessor systems.

Phases one through three of TSRI's services were completed under the initial approval of this contract. The intent of Amendment No. 1 was to complete phases four and five of this project, however, the original converted component code was not fully compatible with the new environment. This required significant testing and recoding efforts to address system performance issues.

Amendment No. 2 to the contract with TSRI will allow the ARC to continue the modernization of PIMS, completing phases four and five of this project.

PROCUREMENT

Not applicable.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Kenneth Brown, Deputy County Counsel, 387-5455) on April 10, 2024; Purchasing (Alberto Cazares, Lead Buyer, 387-3376) on April 11, 2024; Innovation and Technology (Lynn Fyhrlund, Chief Information Officer, 388-5501) on April 16, 2024; Finance (Penelope Chang, Administrative Analyst, 387-4886) on April 19, 2024; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on April 22, 2024.

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

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: May 7, 2024



cc: ARC - Wilhite w/agree
Contractor - c/o ARC w/agree
File - w/agree
CCM 05/9/2024