

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

March 28, 2023

FROM

CHRIS WILHITE, Assessor-Recorder-County Clerk

SUBJECT

Amendment to Agreement with CoStar Realty Information, Inc. for Online Appraisal Data Licenses

RECOMMENDATION(S)

Approve **Amendment No. 2 to Agreement No. 21-184** with CoStar Realty Information, Inc., for online appraisal data licenses, increasing the agreement amount by \$109,458, from \$196,120 to \$305,578, and extending the term by one year, for a total agreement term of April 1, 2021 through April 29, 2024, with a one-year option to extend the term of the agreement.
(Presenter: Chris Wilhite, Assessor-Recorder-County Clerk, 382-3208)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

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 cost to extend the term by one year for the period of April 30, 2023 through April 29, 2024, for 36 user licenses is \$109,458. The cost of the licenses will be billed in 2022-23. Adequate appropriation and revenue have been included in the Assessor-Recorder-County Clerk's (ARC) 2022-23 budget (3111001000).

BACKGROUND INFORMATION

The Assessor Division of ARC is responsible for establishing a value for all locally taxable property including residential, commercial, business and personal property, and assessment appeals. The appraisal data provided by CoStar Realty Information, Inc. (Costar) is used by ARC appraisers to prepare appraisals and defend ARC valuations against appeals initiated by property owners.

On March 9, 2021 (Item No. 8), the Board of Supervisors (Board) approved Agreement No. 21-184 with Costar for 32 user licenses to access online appraisal data in an amount not to exceed \$178,720 from April 1, 2021 through March 31, 2023.

On August 10, 2021 (Item No. 10), the Board approved Amendment No. 1 to Agreement No. 21-184 with CoStar, increasing the original agreement amount of \$178,720 by \$17,400 for a total agreement amount of \$196,120, and increasing the original number of user licenses from 32 to 36 licenses to access online appraisal data, with no change to the term of April 1, 2021 through March 31, 2023.

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Since Amendment No. 1 was approved, ARC learned that the actual expiration date of this agreement is April 29, 2023, not March 31, 2023 as indicated in Item Nos. 8 and 10. CoStar representatives explained that this agreement is a 24-month plus prorated agreement with an effective date of April 1, 2021, and an expiration date of April 29, 2023, which effectively makes the original agreement 25 months. By having the new effective date of the recommended amendment as April 30, 2023, CoStar is transitioning the agreement to a true 12-month agreement that will not have the prorated period like the original agreement did.

Approval of this item will extend the agreement's term by one year for the period of April 30, 2023 through April 29, 2024, with one-year option to extend the term through April 29, 2025, for 36 user licenses to access online appraisal data that is necessary for appraisal staff to access vital online appraisal lease data and market data for commercial, industrial, and multi-family properties. Approval of the Recommendation will also increase the agreement amount by \$109,458, from \$196,120 to \$305,578.

PROCUREMENT

As a result of a non-competitive process, on March 9, 2021 (Item No. 8), the Board approved Agreement No. 21-184 with CoStar.

CoStar is a nationally recognized source of data and analytics pertaining to the multi-family and commercial real estate markets. Its online system provides information about sales, listings, rents, lease terms, operating expenses, marketing times, and other data routinely used by appraisers and real estate professionals. CoStar also provides data pertaining to unique property types such as golf courses, hospitals, sports and entertainment venues, and huge regional shopping facilities in real estate markets beyond the Inland Empire region. CoStar is the only vendor that offers this scope of data and analytics.

The County Purchasing Department recognizes the specialized credentials and expertise of CoStar and supports the continued non-competitive procurement of these licenses from CoStar.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Kaleigh Ragon, Deputy County Counsel, 387-5455) on March 2, 2023; Purchasing (Michelle Churchill, Supervising Buyer, 387-2070) on March 3, 2023; Finance (Penelope Chang, Administrative Analyst, 387-4886) on March 3, 2023; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on March 13, 2023.

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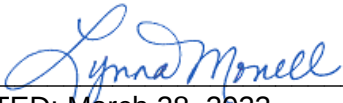
Record of Action of the Board of Supervisors
San Bernardino County

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: March 28, 2023



cc: ARC- Duran w/agree
Contractor- C/O ARC w/agree
File- w/agree
LA 03/31/2023