

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

June 11, 2024

**FROM**

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

**SUBJECT**

Amendment to Terms of Service Agreement with Stonebranch, Inc. for Conversion of Workload Automation Software and Software Licensing Services

**RECOMMENDATION(S)**

Approve **Amendment No. 1 to Agreement No. 23-1093** with Stonebranch, Inc. for automation software and software licensing services, revising the statement of work to extend the Go-Live (End) date from March 31, 2024 to August 30, 2024, and increasing the agreement amount by \$23,250, from \$146,500 to \$169,750, with no change to the term of October 15, 2023 through October 14, 2026.

(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 agreement amount is increasing by \$23,250, from \$146,500 to \$169,750. The cost to add additional training to the statement of work (SOW) is \$4,500. The cost to add additional support hours is \$18,750. Adequate appropriation and revenue are included in the Assessor's Property Information Management System (PIMS) Upgrade Project 2023-24 budget (3119992756) and has been included in the 2024-25 Recommended Budget.

**BACKGROUND INFORMATION**

The Assessor-Recorder-County Clerk Department (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).

Stonebranch, Inc. (Stonebranch) is integral in the conversion of this data from the existing workload automation software to Stonebranch's workload automation software. This conversion will provide for scheduling and administering AIMS related overnight and backend processes across IT environments.

On October 3, 2023 (Item No. 11), the Board of Supervisors approved Agreement No 23-1093, including non-standard terms, with Stonebranch for conversion of workload automation

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software, in an amount not-to-exceed \$146,500, for the term of October 15, 2023 through October 14, 2026. Stonebranch has been providing services according to the SOW in the Agreement, which was scheduled to be completed by March 31, 2024. However, additional support is required due to resource constraints. The SOW is now scheduled to be completed on August 30, 2024. Additional training is required on the conversion and functioning of the product for the operations and infrastructure team. The additional support hours are required for further integration, validation, and testing with the batch system as well as user interface. The Agreement term will continue through October 14, 2026, for software licensing services.

Approval of Amendment No. 1 to Agreement No. 23-1093 with Stonebranch will allow the ARC to continue the modernization of PIMS to AIMS, completing the full batch job scheduling, batch job integration, and printer processing. The recommended action will allow the ARC to improve County government operations and operate in a fiscally-responsible and business-like manner.

**PROCUREMENT**

N/A

**REVIEW BY OTHERS**

This item has been reviewed by County Counsel (Kenneth Brown, Deputy County Counsel, 387-5455) on May 17, 2024; Purchasing (Ariel Gill, Supervising Buyer, 387-2070) on May 17, 2024; Innovation and Technology (Lynn Fyhrlund, Chief Information Officer, 388-5501) on May 17, 2024; Risk Management (Greg Ustaszewski, Staff Analyst II, 396-9008) on May 17, 2024; Finance (Penelope Chang, Administrative Analyst, 387-4886) on May 21, 2024; and County Finance and Administration (Paloma Hernandez-Barker, Deputy Executive Officer, 387-5423) on May 24, 2024.

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Record of Action of the Board of Supervisors  
San Bernardino County

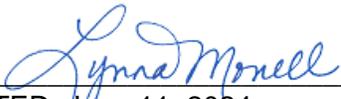
**APPROVED (CONSENT CALENDAR)**

Moved: Joe Baca, Jr. Seconded: Curt Hagman

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

Lynna Monell, CLERK OF THE BOARD

BY

  
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DATED: June 11, 2024



cc: ARC - Willhite w/ agree  
Contractor c/o ARC w/ agree  
File w/ agree

JLL 06/20/2024