



JEFFREY PRANG
ASSESSOR
COUNTY OF LOS ANGELES
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LOS ANGELES, CALIFORNIA 90012-2770
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(213) 974-3101



December 2, 2025

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, CA 90012

Dear Supervisors:

ADOPTED

BOARD OF SUPERVISORS
COUNTY OF LOS ANGELES

24 December 2, 2025

Edward Yen
EDWARD YEN
EXECUTIVE OFFICER

**AUTHORIZATION FOR THE ASSESSOR TO AMEND SOLE SOURCE
AGREEMENT WITH ORACLE AMERICA, INC. (ORACLE) TO PROVIDE
CONTINUOUS SUPPORT FOR PHASE V OF THE
ASSESSOR MODERNIZATION PROJECT (AMP)
(ALL SUPERVISORIAL DISTRICTS)
(3 VOTES)**

CIO RECOMMENDATION: APPROVE (X)

SUBJECT:

Request to delegate authority to the Assessor, or his designee, to execute Amendment One (1) to Sole Source Agreement with Oracle America, Inc. (Oracle) to (i) add operations and maintenance support services, (ii) include additional scope to address operations and maintenance support services with an increase in Maximum Contract Sum, and (iii) make changes as operationally necessary to provide continuous support for Phase V of the Assessor Modernization Project (AMP).

IT IS RECOMMENDED THAT THE BOARD:

1. Authorize the Assessor, or designee, to execute an Amendment (substantially similar to Enclosure A) to its AMP Phase V Agreement with Oracle, effective upon execution, to: (i) add operations and maintenance support services, (ii) include additional scope to address operations and maintenance support services for Phase V from December 2, 2025 until July 31, 2026 for an additional cost not to exceed \$6,429,880.00, for a new total agreement sum of \$19,629,800.00, and (iii) make changes to the Statement of Work as operationally necessary.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

BACKGROUND

Over the last several years, the Assessor executed modernization efforts aimed at replacing its legacy system environment via the development of an integrated property assessment replacement system known as AMP. AMP is a five (5) phase agile software development project being co-developed with Oracle.

On June 16, 2015, your Board authorized the first Work Order for AMP under the Master Service Agreement with Oracle to develop Phase I, which produced the overall enterprise architecture and foundation for AMP. On November 9, 2016, your Board authorized Phase II of AMP, which built on the groundwork developed in Phase I and provided additional functional components. On May 29, 2018, your Board authorized Phase III of AMP, which continued the development of key processes designed to intake, manage and initiate data and documents to support new AMP business processes, and further laid the architectural and technical foundation for Phase IV. On October 29, 2019, your Board authorized Phase IV of AMP, which involved the development of new business functionalities and system processes to decommission the Assessor's mainframe known as the Property Database. Your Board approved subsequent Amendments to Phase IV extending the development and testing schedule and increasing scope to provide extended operational support and stabilization services for AMP. On August 5, 2024, the Assessor decommissioned its mainframe and cut over to AMP.

In November 2024, the Assessor completed Phase IV of AMP, and your Board approved Phase V, the final phase of AMP which extended operational support and stabilization services for AMP through November 2025. The intended scope of Phase V was to provide software development, knowledge transfer and operational support to stabilize AMP while providing design and architecture to the Assessor team to replace remaining legacy systems.

JUSTIFICATION

During Phase V of AMP, and due to the 2025 California wildfires, significant project scope from both teams was redirected from stabilization services to the development of new AMP functionality resulting in the automation and enrollment of more than 17,000 reductions in assessed value. This saved the Assessor nearly 45,000 hours in roll production, allowing appraisal staff to perform assessments on transfers and new construction that otherwise would have gone unworked.

The sole source Amendment is necessary to reestablish operational stabilization of AMP as initially intended in Phase V. The Amendment will allow for continued knowledge transfer, development and support services to stabilize and improve AMP functionality and performance.

Implementation of Strategic Plan Goals

The recommended action supports the County's Strategic Plan, Goal North Star 3 A. Communication and Public Access by providing increased transparency and accessibility to government services, communication and driving efficient public services and Goal North Star 3 F. Flexible and Efficient Infrastructure by evaluating our current Information Technology (IT) infrastructure and capital projects, and address identified needs to replace or modernize legacy/obsolete infrastructure and to lavage technological advancements that increase visibility, accessibility, and ease of use for residents.

FISCAL IMPACT/FINANCING

The total maximum amount for AMP Phase V Sole Source Amendment One is \$6,429,880.00. The funding is included in the Assessor's FY 2025-26 Final Adopted Budget.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

In accordance with Board Policy 5.100, Sole Source Contracts, the Assessor provided notification to the Board on August 29, 2025 with a shortened two-week waiting period prior to initiating negotiations for the Sole Source Amendment with Oracle.

County Counsel approves the Sole Source Amendment as to form and all previously negotiated terms and conditions of the existing Sole Source Agreement will remain in full effect.

In compliance with Board Policy 6.020 "Chief Information Office Board Letter," the Office of the Chief Information Officer (OCIO) reviewed the IT components of this request and recommends approval. The OCIO determined that this recommended action does not include any new IT items that would necessitate a formal written CIO Analysis.


IMPACT ON CURRENT SERVICES (OR PROJECTS)

Approval of the recommended actions will have no negative impact on current public services or projects, nor will it affect the Assessor's production of the tax roll. Approval of the recommendation will ensure the Assessor continues to


Honorable Board of Supervisors
December 2, 2025
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develop a modern assessment system to enhance its business operations and improve service delivery.

Respectfully submitted,


JEFFREY PRANG
Assessor

Reviewed by:


PETER LOO
Chief Information Officer

JP:DS:kl:st

Enclosures

c: Chief Executive Office
Chief Information Office
Executive Office, Board of Supervisors
County Counsel
Auditor-Controller
Internal Services Department
Treasurer and Tax Collector
Registrar-Recorder/County Clerk

**AMENDMENT ONE
TO THE
AGREEMENT
BETWEEN
THE COUNTY OF LOS ANGELES
AND
ORACLE AMERICA, INC.
FOR
ASSESSOR MODERNIZATION PROJECT (PHASE V)**

THIS AMENDMENT ONE (hereafter, this “Amendment”) is made and entered into this _____ day of _____ 2025, by and between the COUNTY OF LOS ANGELES (hereafter “County”) and ORACLE AMERICA, INC. (hereafter “Contractor”).

Reference is made to the document entitled “Agreement By and Between County of Los Angeles and Oracle America, Inc. – Assessor Modernization Project (Phase V),” dated November 19, 2024 (the “Agreement”).

WHEREAS, the purpose of this Amendment is to add operations and maintenance support services for AMP Phase V; and

WHEREAS, for the administrative convenience of the parties, the parties desire to include additional scope in Exhibit A (Statement of Work) as described in Attachment I hereto, to address operations and maintenance support services for Phase V from December 2, 2025 until July 31, 2026 for an additional cost not to exceed \$6,429,880.00; and

WHEREAS, any further changes to Exhibit A (Statement of Work) may be incorporated as operationally necessary via a Change Order between the parties; and

WHEREAS, this Amendment is prepared according to the provisions set forth in Paragraph 13.0 Changes to Agreement, Subparagraph 13.1.2 in the Agreement.

NOW THEREFORE, effective upon the signature of all parties hereto, the Agreement is amended as set forth below.

1. Effective Date. This Amendment shall be effective upon full execution.
2. Defined Terms Incorporated. Capitalized terms used but not defined herein shall have the meanings given to them in the Agreement.

3. Amendment. The Agreement is hereby amended as follows:

(i) Amendment to Title. The title of the Agreement is hereby changed to “Agreement By and Between County of Los Angeles and Oracle America, Inc. – Assessor Modernization Project (Phase V) and Operations and Management Support Services.”

(ii) Amendment to Sub-Paragraph 2.30, Solution, of the Agreement. Sub-Paragraph 2.30 of the Agreement is hereby amended and restated in its entirety to read as follows:

2.30 Solution

The aggregate Deliverables and Services provided and/or rendered by Contractor as set forth in Sections III through VI of Exhibit A (Statement of Work) of this Agreement, and as evidenced by Final Acceptance by the County. To be clear, as such term is used in this Agreement, Solution is limited to Phase V of AMP and excludes the Operations and Maintenance Services described in Section VIII of Exhibit A, Statement of Work.

(iii) Amendment to Sub-Paragraph 7.3 of the Agreement. Sub-Paragraph 7.3 of this Agreement is hereby amended and restated in its entirety to read as follows:

7.3 The Maximum Agreement Sum under this Agreement will be the total monetary amount payable by County to Contractor for supplying all the tasks, subtasks, Deliverables, Services under and during the term of this Agreement (the “Maximum Agreement Sum”). Until County has Accepted the provision of Services (including by deemed Acceptance in accordance with Sub-paragraph 5.1 (Acceptance Criteria)), no payment will be due Contractor for such Services. The Maximum Agreement Sum, including all applicable taxes and Pool Dollars for Optional Work, authorized by County hereunder will not exceed Nineteen Million Six Hundred and Twenty-Nine Thousand Eight Hundred Dollars (\$19,629,800.00) as further detailed in Exhibit A (Statement of Work), unless such Maximum Agreement Sum is modified pursuant to a duly approved amendment to this Agreement by County’s and Contractor’s authorized representative(s) pursuant to Paragraph 13.0 (Changes to Agreement). The Maximum Agreement Sum under this Agreement will cover the authorized payments for the Services, Deliverables, and any Optional Work. Unless otherwise agreed in writing, the Maximum Agreement Sum will not be adjusted for any costs or expenses whatsoever of Contractor. Contractor will maintain a system of record keeping that will allow Contractor to determine when it has incurred seventy-five percent (75%) of the applicable Maximum Agreement Sum under this Agreement available for non-Fixed Price options described in Exhibit A (Statement of Work). Upon occurrence of this event, Contractor will promptly send written notification to County’s Project Director at the address herein provided in Exhibit C (County’s Administration).

(iv) Amendment to Sub-Paragraph 8.3 of the Agreement. The second sentence of Sub-Paragraph 8.3 of this Agreement is hereby amended and restated in its entirety to read as follows:

For the purposes of this Sub-Paragraph 8.3, the warranty period for any Deliverables provided, and Services performed, by Contractor pursuant to this Agreement (the "Warranty Period") will be thirty (30) days from the provision of such Deliverable or performance of such Service for the Operations and Maintenance Services described in Section VIII of Exhibit A, Statement of Work, and one hundred eighty days from the provision of such Deliverable or performance of such Service for all other Services.

(v) Amendment to Exhibit A (Statement of Work). Exhibit A (Statement of Work) is amended to include additional operations and maintenance support services as set forth in Attachment I hereto, which attachment is incorporated herein.

EXCEPT AS SET FORTH HEREIN, ALL TERMS AND CONDITIONS OF THE AGREEMENT REMAIN IN FULL FORCE AND EFFECT. NOTWITHSTANDING ANY OTHER PROVISION OF THE AGREEMENT, THE TERMS OF THIS AMENDMENT CONTROL AS ITS SPECIFIC CONTENT.

IN WITNESS WHEREOF, the parties hereto have executed this Amendment:

COUNTY OF LOS ANGELES

By: _____

Jeffrey Prang
Assessor

CONTRACTOR
ORACLE AMERICA, INC.

By: _____

Signature

Printed Name

Title

APPROVED AS TO FORM:
DAWYN HARRISON
County Counsel

By: _____

Michael Owens
Senior Deputy County Counsel

Attachment I

Amendments to Exhibit A, Statement of Work

A. Section I (Statement of Work (SOW) – Management Summary and Business Objective) of the Statement of Work is amended by deleting the following text:

“Exhibit A includes the following sections:

- Definitions;
- AMP **Phase V** Fixed Price Overview;
- AMP **Phase V** Activities;
- Your Responsibilities;
- **Phase V** Assumptions, Change Order Process and Acceptance Criteria; and
- Fees, Expenses, and Taxes.”

And replacing with:

“Exhibit A includes the following sections:

- Definitions;
- AMP **Phase V** Fixed Price Overview;
- AMP **Phase V** Activities;
- Your Responsibilities;
- **Phase V** Assumptions, Change Order Process and Acceptance Criteria;
- Fees, Expenses, and Taxes; and
- O&M Services

B. Section II (Definitions) of the Statement of Work is amended by inserting the following at the end of subsection A:

“13. “O&M Services” means the services described in Section VIII.A of the Statement of Work.”

C. Section III (AMP Phase V Fixed Price Overview) of the Statement of Work is amended by deleting the first sentence of such section and replacing it with the following:

“This section describes the fixed price services and deliverables (other than the O&M Services and associated deliverables, which are described in Section VIII) to be provided by Oracle in support of AMP Phase V. For the avoidance of doubt, nothing contained in this Section III, including the descriptions of project overviews, timelines, and program organization and approach, reflects or applies to the provision of the O&M Services.”

D. Section IV (AMP Phase V Activities) is amended by deleting the first sentence and replacing it with the following:

“This section sets out Phase V activities and the supporting tasks that will be executed by Oracle (other than the O&M Services). For the avoidance of doubt, nothing contained in this Section III, including the descriptions of project overviews, timelines, and program organization and approach, reflects or applies to the provision of the O&M Services.”

E. Section V (Your Responsibilities) is amended by deleting the sentence fragment immediately above Section V.A.1 and replace with the following:

“You acknowledge that Oracle’s ability to perform the services (other than the O&M Services, which are subject to the assumptions listed in Section VIII) depends upon Your reasonable fulfillment of the following responsibilities and the following project assumptions:”

F. Section VI (Phase V Assumptions, Change Order Process and Statement of Work Acceptance Procedure) is amended by deleting the introductory sentence and replacing it with the following:

“The following project assumptions, change order process and a Statement of Work Acceptance procedure will be used by both LACA and Oracle in the execution of AMP **Phase V** (other than the execution of the O&M Services, which will be subject instead to the provisions for such O&M Services set forth in Section VIII).

G. Section VII is amended by inserting the following new subsection header above the existing text of Section VII:

“A. Fees, Expenses and Taxes for Phase V Services (other than O&M Services)”

And by inserting the following as a new subsection B of Section VII:

B. Fees, Expenses and Taxes for O&M Services

You agree to pay Oracle a fee of Six Million Four Hundred and Twenty-Nine Thousand Eight Hundred and Eighty dollars (\$6,429,880.00) for Services and Deliverables described in Section VIII of this SOW. This fee includes travel and out of pocket expenses. This fee does not include taxes. The provisions of Section 7.5, Holdbacks, of the Agreement shall not apply to the O&M Services. Upon completion of a Deliverable, the corresponding Deliverable fee specified below becomes due and payable and Oracle shall thereafter invoice, and You shall pay, such Deliverable fee; this payment obligation shall become non-cancelable and the sum paid nonrefundable on Your acceptance date.

As of the Effective Date of Amendment 1 to the Agreement, the below delivery dates are estimated dates and are intended for planning purposes only. As such Oracle does not guarantee that these dates will be met and failure to meet such estimated dates shall not, in

and of itself, constitute a breach of contract. Oracle will, however, use commercially reasonable efforts to meet the estimated dates.

Table 19: O&M Deliverables Fee Table

| # | Deliverable Name | Deliverable Description | Expected Delivery Month | Deliverable value |
|-----|----------------------------|---|-------------------------|-------------------|
| OM1 | O&M Summary Report Month 1 | The report covers O&M activities provided in that month | Month 1 | \$803,735.00 |
| OM2 | O&M Summary Report Month 2 | The report covers O&M activities provided in that month | Month 2 | \$803,735.00 |
| OM3 | O&M Summary Report Month 3 | The report covers O&M activities provided in that month | Month 3 | \$803,735.00 |
| OM4 | O&M Summary Report Month 4 | The report covers O&M activities provided in that month | Month 4 | \$803,735.00 |
| OM5 | O&M Summary Report Month 5 | The report covers O&M activities provided in that month | Month 5 | \$803,735.00 |
| OM6 | O&M Summary Report Month 6 | The report covers O&M activities provided in that month | Month 6 | \$803,735.00 |
| OM7 | O&M Summary Report Month 7 | The report covers O&M activities provided in that month | Month 7 | \$803,735.00 |
| OM8 | O&M Summary Report Month 8 | The report covers O&M activities provided in that month | Month 8 | \$803,735.00 |

H. **Insert a new Section VIII of the Statement of Work as follows:**

I. **OPERATIONS AND MAINTENANCE (“O&M”)**

Oracle’s scope of services under this Statement of Work will also include the Services and deliverables described in this Section VII.

A. Oracle Delivery Scope

Oracle will provide up to four thousand eight hundred and twenty (4,820) Person Days to assist with providing support for AMP. Support may include project management, architecture, security upgrades, OPA replacement, development, database management, issue remediation and testing, as mutually agreed by You and Oracle.

Oracle will provide a monthly status report regarding activities performed under O&M.

Table 20: Deliverables for O&M Activities

| Deliverable# | Deliverable Name | Deliverable Description | Estimated Month |
|--------------|----------------------------|--|-----------------|
| OM1 - 8 | Monthly O&M Summary Report | Covers O&M activities for the above services | Monthly |

B. Your Responsibilities for O&M Services

You acknowledge that Your timely provision of, and reasonable access to, office accommodations, facilities, equipment, assistance, cooperation, complete and materially accurate information and data from Your officers, agents, and employees, and suitably configured computer products (collectively, "cooperation") are essential to the performance of any services as set forth in this Statement of Work.

Oracle will not be responsible for any deficiency in performing services to the extent such deficiency results from Your failure to provide reasonable cooperation; provided however, that Oracle acknowledges its duty to endeavor reasonably to mitigate the effects of any such failures so as to avoid deficiencies.

You acknowledge that Oracle's ability to perform the O&M Services depends upon Your reasonable fulfillment of the following responsibilities and the following project assumptions:

1. General Responsibilities

- Maintain the properly configured hardware / operating system platform to support the services.
- Obtain licenses, under separate contract, for any necessary Oracle software and hardware programs before the commencement of services.
- Maintain annual technical support for the Oracle software and hardware, under separate contract, throughout the term of the services.
- Obtain Cloud Services, including but not limited to OCI services, under a separate contract prior to the commencement of Services under this exhibit and maintain such Cloud Services for the duration of the Services provided under this exhibit.
- Provide Oracle with full and timely access to relevant functional, technical, and business resources with adequate skills and knowledge to support the performance of services.
- Provide, for all Oracle resources performing services at Your site, a workspace that complies with applicable state and federal standards.
- Provide any notices, and obtain any consents, required for Oracle to perform on-site services.

- h. Limit Oracle's access to any production environments or shared development environments to the extent necessary for Oracle to perform services.
- i. If, while performing services, Oracle requires access to other vendor's products that are part of Your system, You will be responsible at Your expense for acquiring all such products and the appropriate license rights necessary for Oracle to access such products on Your behalf.
- j. You are responsible for acquiring and maintaining any equipment and performing any labor and / or activities necessary to set-up and maintain network connectivity at and to Your Oracle software environment.
- k. You will provide and maintain user accounts for, and access to, a VPN for the Oracle team members, including but not limited to, Oracle's onsite and remote resources for Oracle team member support of Your project. VPN access will be granted to Oracle resources based on mutual agreement.
- l. You will provide 24-hour remote VPN access to all environments, as mutually agreed, associated with the services, with no outage longer than 12 hours during business hours.

2. Project Responsibilities

- a. Identify, schedule, and facilitate the necessary requirements gathering, analysis, acceptance criteria, test cases, test data, design, and implementation planning sessions with Your business user representatives and project team members as necessary for any O&M Services tasks
- b. Provide any necessary and appropriate data (e.g., test data, configuration data, etc.) required by Oracle to support the performance of services.
- c. Be responsible for defining business requirements and identifying a member of Your staff who will serve as the LACA subject matter expert (the "Business Owner"). LACA will be responsible for coordinating the collection of business requirements, prioritizing them, and ensuring the active participation of subject matter experts from Your staff as required for delivery of Services.
- d. Understand the applicable architecture and implementation approach and provide guidance to Oracle when requested.
- e. Be solely responsible for the design and development of any changes or modifications to existing systems, excluding AMP, as required for Services.
- f. Procure, install, setup/configure, and validate all hardware including, but not limited to, storage and servers, network infrastructure and operating system platforms required to support the performance any services.
- g. Be responsible for installing patches or upgrading environment to meet minimum standards.
- h. Be responsible for the legacy touch-points portion of any interface, e.g., the actual extract from and/or feed into the legacy applications.
- i. Database and servers planning, architecting, installation, management and support will be performed by You in all legacy environments.
- j. Provide any required functional environments (including environments for development, integration, user acceptance, staging or production) as needed for performance of the O&M Services.

- k. Provide access to any libraries necessary to perform the services (e.g., code), including merging of the libraries (e.g., code path changes), and migrating of libraries (e.g., code path) between all environments.
- l. Be responsible for maintaining, administering, and supporting the relevant libraries.
- m. Ensure that the system and its environments comply with Your security guidelines, and all applicable governmental regulations.
- n. Be responsible for reconstruction / restoration of any lost or altered files, data, and programs.
- o. Provide a backup of each mutually agreed environment on a schedule agreed to by You and Oracle.
- p. Be responsible for the installation, configuration, maintenance, and management of any and all third-party products.
- q. Provide the following support and response times for infrastructure-related issues:
 - o Normal business hours support with response time within four (4) hours of the time the issue arises.
- r. Provide access to Your production employee Microsoft Active Directory.
- s. Designate a project manager who shall (i) oversee and ensure Your performance of the obligations You are tasked with during the performance of services, and (ii) work directly with the Oracle project manager on a daily basis to support the performance of services.
- t. Provide an escalation process for management of O&M Services tasks
- u. Be responsible for the contractual relationships with third party contractors and for directing such third parties to fully cooperate with Oracle, and the project team, as and when required by Oracle.
- v. Assign an Architect, business rules and subject matter expert to work on any OPA replacement support tasks.

C. O&M Services Assumptions

The following project assumptions will be used by both LACA and Oracle in the execution of the O&M Services.

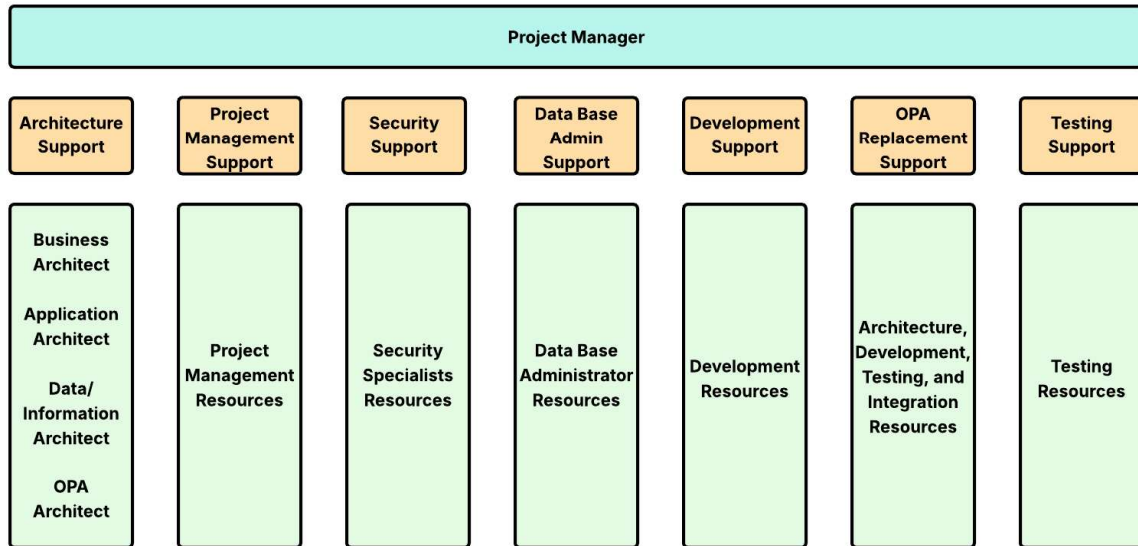
1. Project Assumptions

- a. A Person Day is defined as eight (8) hours.
- b. As part of the monthly deliverable, Oracle will include details on the Person Days worked.
- c. The timing and manner of execution of the services will be based upon:
 - o The location of the Oracle resource(s) performing the service.
 - o The need of the Oracle resource to interact with LACA or offshore resources.
- d. Each assigned Oracle resource will generally perform Services for a total of forty (40) hours per business week (i.e. per 5 business days), generally consisting of one (1) Person Day per business day, unless time off is approved and documented by the Oracle Project Manager.

- e. Oracle offshore resources will not be required to work during standard LACA working hours, unless a pre-planned meeting is agreed to by the PMs.
- f. There is no expectation that either staff will adhere to the holiday schedule of the other party.
- g. The LACA and Oracle Project Manager will define a window for meetings on Monday through Thursday where all the team members, LACA and Oracle, can participate.
- h. The Oracle onshore Project Manager, and architecture, security and database administration support, will be available for up to 4 hours per LACA work day (excluding Oracle local holidays and personal leave days) on a mutually agreed schedule. Deviations will be mutually agreed between PM's.
- i. The expected duration of the O&M Services will be November 19, 2025 to July 31, 2026.
- j. Oracle support services will be performed offsite outside of the LA area and outside of County facilities.
- k. Any functionality will be created using U.S. English only.
- l. All monetary values will use US dollars.
- m. You may record meetings not containing material subject to copyright for internal LA County use only.
- n. You have procured appropriate licenses for and provided Oracle with the following open-source software to use in the performance of this SOW: JIRA, Gitlab, Jenkins, Archiva, and AngularJS.

2. Project Management Assumptions:

- a. Oracle may assign or release a specific project resource, or may assign different resources, at different times, to a task.
- b. If You assign resources to a task with which Oracle assists, those resources will represent You and will be empowered to make decisions on Your behalf.
- c. Your and Oracle's project managers will establish project reviews to monitor the usage of the services.
- d. In the event Oracle is unable to provide the resources necessary to provide the O&M Services the Project Managers shall execute a Change Order adjustment to reconcile the variance in the last invoice period.
- e. Based on the expectations of the parties as of the date of Amendment 1 to the Agreement as to the nature of O&M Services You will request, the anticipated structure of support organization is as follows. Organization for O&M Services delivery is subject to change based on the nature of the O&M Services provided.



3. Documentation Assumptions:

- a. All written documentation and communication will be done in U.S. English.
- b. A document deliverable is a document in Microsoft Office 365 format and consists of one (1) electronic copy.

You acknowledge that any change or alternation of the assumptions in this **Section VIII.C** may alter the approach, resources, staffing levels, schedule for delivery of the O&M Services and shall be subject to the Change Order Process as outlined below.

SOLE SOURCE CHECKLIST

Department Name: OFFICE OF THE ASSESSOR

☐

New Sole Source Contract

☒

Sole Source Amendment to Existing Contract

Date Existing Contract First Approved:

November 6, 2024

| Check (✓) | JUSTIFICATION FOR SOLE SOURCE CONTRACTS Identify applicable justification and provide documentation for each checked item. |
|-------------------------------------|---|
| <input type="checkbox"/> | ➤ Only one bona fide source (monopoly) for the service exists; performance and price competition are not available. A monopoly is an <i>"Exclusive control of the supply of any service in a given market. If more than one source in a given market exists, a monopoly does not exist."</i> |
| <input type="checkbox"/> | ➤ Compliance with applicable statutory and/or regulatory provisions. |
| <input type="checkbox"/> | ➤ Compliance with State and/or federal programmatic requirements. |
| <input type="checkbox"/> | ➤ Services provided by other public or County-related entities. |
| <input checked="" type="checkbox"/> | ➤ Services are needed to address an emergent or related time-sensitive need. |
| <input type="checkbox"/> | ➤ The service provider(s) is required under the provisions of a grant or regulatory requirement. |
| <input checked="" type="checkbox"/> | ➤ Additional services are needed to complete an ongoing task and it would be prohibitively costly in time and money to seek a new service provider. |
| <input type="checkbox"/> | ➤ Services are needed during the time period required to complete a solicitation for replacement services; provided services are needed for no more than 12 months from the expiration of an existing contract which has no available option periods. |
| <input type="checkbox"/> | ➤ Maintenance and support services are needed for an existing solution/system during the time to complete a solicitation for a new replacement solution/ system; provided the services are needed for no more than 24 months from the expiration of an existing maintenance and support contract which has no available option periods. |
| <input type="checkbox"/> | ➤ Maintenance service agreements exist on equipment which must be serviced by the original equipment manufacturer or an authorized service representative. |
| <input type="checkbox"/> | ➤ It is more cost-effective to obtain services by exercising an option under an existing contract. |
| <input type="checkbox"/> | ➤ It is in the best economic interest of the County (e.g., significant costs to replace an existing system or infrastructure, administrative cost savings and excessive learning curve for a new service provider, etc.) In such cases, departments must demonstrate due diligence in qualifying the cost-savings or cost-avoidance associated with the best economic interest of the County. |

René Phillips

Digitally signed by René Phillips
Date: 2025.11.12 16:44:25 -08'00'

Chief Executive Office

Date