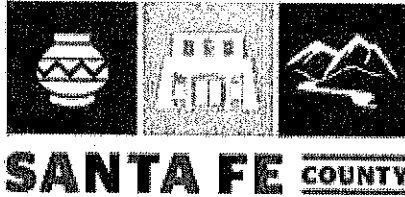


Henry Roybal
Commissioner, District 1

Anna Hansen
Commissioner, District 2

Rudy N. Garcia
Commissioner, District 3



Anna T. Hamilton
Commissioner, District 4

Hank Hughes
Commissioner, District 5

Katherine Miller
County Manager

MEMORANDUM

DATE: October 7, 2021

TO: File

FROM: Bill Taylor, Procurement Manager *BT*

RE: **Sole Source Determination for the Purchase of Software to Provide Deed Ownership Management System for the County Assessor's Office, Pursuant to NMSA 1978, 13-1-126. Sole Source Procurement**

BACKGROUND & ISSUE:

Santa Fe County Assessor's Office manages the change of deed ownerships for County residents. Currently, the Office is transferring deeds manually, on average, 10,000 yearly. This process is time consuming and cumbersome. Implementing an automated software that would allow the Office to move resources from everyday deed entry to other data entry priorities for the Office and gives the Office the ability to meet statutory requirements as well as position the office to be prepared, utilizing technology, should another pandemic occur.

As the County grows and the parcel count increases yearly and in the future, the amount of deeds needing to be processed will continue to increase. Having this software in place will allow the Assessor to provide quality customer service as well as ensure deeds are transferred properly to an estimated 98% accuracy rate. The Office currently have a return Notice of Values (NOV) and returned tax bill mail count of 4,000. Utilizing a software system that has the ability to reduce the amount of returned mail, and also ensure that property owners receive their tax bills, is crucial.

The process involves multiple steps, including changing property owner information, changing addresses, reviewing and/or changing the statutory 3% cap status on properties, changing or removing exemptions statuses that apply (these include: Head of Family, Senior Freeze, Agricultural, Veterans or 100% disabled veteran), sending transfer questionnaire letters to non-residential property owners.

Just Appraised does everything that we do in an automated form, streamlining all processes. For this process, there are two full-time staff members to complete four hours each or eight hours per day. This process would be reduced to one hour per day with this software. Having this software in place bring sustainability in the data appraisal section. As staff leave or retire, the system would allow the Office to operate efficiently with changes due to attrition.

The Just Appraised software system provides the following work flow services:

- Workflow management set up
- Match transfer documents
- Extract sale & transfer information into the Assessor's CAMA database

DETERMINATION

After significant due diligence and good faith effort by the County, it has determined that there are no other software systems that can offer a cloud based software with the following capabilities relating to ownership deeds, specifically:

- Workflow management set up related to change of ownership deeds
- Match secondary transfer documents to their corresponding transfer documents
- Extract sale and transfer information into data fields required to update the ownership to the CAMA database

The Assessor's Office contacted multiple deed software companies to request if their systems capabilities would match the above capabilities desired by the Assessor, specifically:

- Omni Partners
- Konica Minolta
- Tyler Technologies
- Informatik, Inc.
- Sandy Knoll Software
- Greenbriar
- Trimin Systems

Four of the seven listed vendors confirmed that their software does not have the capability to provide the workflow management of ownership deeds.

The Office and Purchasing Division also searched vendors on existing Cooperative Agreements for these services, but was unsuccessful.

It is therefore the determination of the Procurement Manager, CPO for the County that the scope of services provided by Just Appraised is unique and is substantially related to the intended purpose of the contract for the Assessor's Office, and meets the requirements of a sole source procurement, NMSA 1978, 13-1-126.

Contract Information:

Vendor: Just Appraised
2261 Market Street No. 4074
San Francisco, CA 94114

Services:

Provide a Pilot program for the first year for the Assessor's Office.

Scope of Services (see attachment) \$20,000.00

Statement of Work

This Statement of Work ("Statement of Work" or "SOW") is made as of 11/1/21 (the "SOW Effective Date"), by and between Santa Fe County Assessor ("Customer") and Just Appraised Inc. ("Company") pursuant to the terms and conditions of the SaaS Services Agreement dated 11/1/21 as amended from time to time (the "Agreement"). This SOW shall be subject to the terms and conditions of the Agreement and is hereby incorporated by reference into the Agreement. Capitalized terms used but not defined in this SOW have the same meanings as provided in the Agreement. Customer and Company are sometimes referred to herein each individually as a "Party" and collectively as the "Parties."

Pursuant to the terms and conditions of the Agreement, and for good and valuable consideration, the adequacy and receipt of which are acknowledged by the Parties, the Parties agree as follows:

1. GENERAL TERMS AND DEFINITIONS

1.1 Contact Information

Company: Just Appraised Inc. 2261 Market Street #4074, San Francisco CA, 94114

Customer: Santa Fe County Assessor, 100 Catron St., Santa Fe, NM 87501

1.2 Service Location Information. Company will perform the Professional Services at the following location(s):

Santa Fe County Assessor, 100 Catron St., Santa Fe, NM 87501

2. SCOPE OF SERVICES

2.1 Timeline and Phases; Scope; Professional Services Description

Company is working with Customer to deploy Company's Transfer of Ownership and Sales Coding application to the Customer's Property Tax Deeds Department. The Company's Platform aggregates various data sources about real estate transactions and creates a workflow that allows staff members to process the transactions more quickly.

Within this Statement of Work, Company will work with Customer to:

- review the current Platform as it exists now and agree upon changes that support the Customer's needs (Phase 1);
- roll out the product to a limited group of users for usability and technical testing (Phase 2);
- and finally, fully deploy the product to all users in Customer's Property Appraisal Office (Phase 3)

2.2 Timeline and Phases

Timeline:

- Phase 1 will begin on the Effective Date
- Phase 1 will end when both parties agree the feature set has been implemented and is stable

Activities:

- Data transfer discussions
 - Just Appraised to provide access to FTP folder for ongoing data transfers
 - Just Appraised to provide specific data fields required for product configuration
 - Customer to provide access to CAMA files for configuration
- Planning conversations to agree upon product configuration required to go live and agree upon features that will be implemented after the Platform is live
 - These conversations will cover:
 - Specific field names to be displayed on Data Confirmation Page, Data Export page
 - Specific CAMA fields to be displayed in Land Records view
 - These conversations will also cover specific document types to be Filtered Out / displayed using “Data Extract” / “No Data Extract” workflows
- Ongoing development work by the Company to implement features and bug fixes
- Usability tests with Customer staff members

Phase 2 – Initial Deed Processing / Coding Roll Out, Limited Data Integration Roll Out

Timeline:

- Phase 2 will begin after the feature set mutually agreed upon in Phase 1 has been developed and tested
- Phase 2 will end when both parties agree the feature set has been implemented and is stable

Feature Set:

- Company delivers deed document extracts in Dashboard and Platform for Customer review and processing.
 - Dashboard filtering
 - Just Appraised to provide user ability to sort documents by Dashboard column headers
 - Just Appraised to provide filtering options by Book, Page, Recorded Date, Document Type
 - Just Appraised to provide Saved Search functionality to save selected filters by user defined label
 - Recommended Parcel Matches
 - Software to provide automated parcel recommendations for most parcels
 - Software to provide manual Parcel Search functionality
 - Workflow Management
 - Software to provide automated tracking of user steps in workflow
 - Software to facilitate assignment of tasks between users
 - Software to provide email notifications when user is assigned task by teammate
 - UI to confirm extracted data
 - Specific extracted fields include:
 - Book
 - Page
 - Instrument number
 - Docstamp amount
 - Grantee Name(s)
 - Grantee Address
 - Recorded Date
 - Sale Date
 - Document Flagging
 - Specific Document Flags include:
 - Needs Review
 - Mapping
 - Trust
 - Joint Tenants with Rights of Survivorship
 - Tenants in Common

- Life Estate
- AKA/FKA/NKA
- Multiparcel
- Copy / Paste Data Export to CAMA
- Company delivers the “No Data Extract” workflow for non-deed documents in Dashboard for Customer Review
- User can open document within Just Appraised Platform
- User can add Team Comments to “No Data Extract” task
- User can route document using Workflow features
- User can mark task “Complete”, “Dismissed”
- Company delivers Basic Sale Coding Recommendations step in the workflow
- Company to work with Customer to define schedule for data retention

Activities:

- 1 representative from Company on site at Customer offices for 2-3 business days for training and support
- Ongoing development work by the Company to implement features and bug fixes
- Usability tests with Customer staff members

Phase 3 - Full Data Integration Roll Out

Timeline:

- Phase 3 will begin after the feature set mutually agreed upon in Phase 2 has been developed and tested
- Phase 3 will continue until the contract ends as specified elsewhere in the Terms

Feature Set

- Data Export via API
- Just Appraised to configure Web Service
- Just Appraised to update Data Export workflow to include “Process (API)” button that triggers JSON payload to Customer API endpoint
- Customer IT to configure queries to update database with sales information from payload

Activities

- Ongoing development work by the Company to implement features and bug fixes
- Make changes as they occur in compliance with New Mexico Dept of Revenue/legislation updates that affect change of ownership workflow
- Usability tests with Customer staff members
- Technical tests with Customer system administrators

4. ROLES AND RESPONSIBILITIES

4.1 Company Roles and Responsibilities.

<u>Individual</u>	<u>Responsibility</u>
Company Project Manager Inran Khoja	<ul style="list-style-type: none"> ● Oversee project progress through all stages ● Analyze Platform launch requirements (functionality, security, privacy, etc.) ● Conduct user research for new feature sets ● Work with Customer regarding Platform maintenance and changes ● Assess and prioritize features, bug fixes, and technical changes for product throughout all stages ● Identify new potential feature sets and areas of collaboration between Customer and Company

	<ul style="list-style-type: none"> Act as primary points of contact for Company
Company Inc. Technical Lead / Developer Ihsan Ecemis, Ph. D.	<ul style="list-style-type: none"> Lead development effort Manage development of technical documentation Coordinate Company environments and development code movement through environments Work to execute and lead each production deployment

4.2 Customer Roles and Responsibilities.

<u>Individual</u>	<u>Responsibility</u>
Customer Project Sponsors	<ul style="list-style-type: none"> Secure project funding Monitor project progress Provide guidance and strategic direction Ensure business and IT resources are available Resolve escalated issues Approve on-going operational support Approve project expenditures Approve all business deliverables
Customer System Administrators / Technical Team	<ul style="list-style-type: none"> Regularly send property data (CAMA exports) to Company on an agreed upon schedule Advise on changes to data schema Build web service for mass update capability and facilitate Just Appraised integration
Customer Staff	<ul style="list-style-type: none"> Participate in user research for product improvements Report bugs and assist Company team to resolve bugs Provide feedback on product and submit feature requests

5. TECHNICAL & DATA SPECIFICATIONS

5.1 Data Exchange

Access to specific pieces of data from Customer is essential to the Platform's functionality. However, the Platform will not directly connect to Customer's databases. This access to data by Company includes: exports of all data fields and information from Customer's CAMA database that include, but are not limited to, the following information: ownership, full cash value, and various property characteristics for all parcels, exports of deed images for new property sales.

Company and Customer will agree in writing upon a regular schedule throughout the Term on which the above data will be transferred from Customer to Company to be imported into the Platform. The above data is referred to in the Agreement as the "Customer Data."

Given that the Platform will not directly connect to Customer's databases, consistency of data format and data structure is essential to continued operations of the Platform. Should the format or data structure of any of the Customer Data

change, Customer will notify Company as soon as they become aware of the change, and will work with Company to resolve any technical difficulties that may arise.

Likewise, results from the Platform will be transferred from the Platform into Customer's database. Should the format or data structure required to import the data into Customer's database change, Customer will notify Company and work with them to resolve any technical difficulties that arise.

5.2 Tools

Required connections for the Platform also include tools to: provide client-side analytics (i.e. user bounce rate, etc.), monitor Platform performance (i.e. slow page loads, etc.), monitor errors (i.e. identifying specific information about bugs automatically, etc.), and manage logs (i.e. compliance with log requirements, etc.). These tools may include externally hosted industry standard services.

6. **FEES AND PAYMENT.**

As consideration for the Professional Services provided by Company under this SOW, Customer shall pay Company the Professional Services Fees specified in the Order Form. Such fees shall be invoiced and paid in accordance with Section 4 of the Agreement. This price reflects an early-adopter price for Customer in exchange for being a reference to any new potential clients. Customer will share their experience working with Company via written emails, phone calls. Customer will allow Company to use Customer name in Case Study highlighting impact of the Platform on Customer. All training and onboarding services have been discounted their full value and are included in the scope of this initial term payment scheme.

7. **SOW TERM**

The term of this SOW begins on the SOW Effective Date and shall continue to 6/30/23.

[Signatures Appear on Following Page.]

By signing below, the Parties acknowledge and agree to all of the terms and conditions of this SOW, including the scope and timeframe of the work identified herein.

IN WITNESS WHEREOF, authorized persons representing each Party have executed this Statement of Work as of the SOW Effective Date.

JUST APPRAISED INC.

CUSTOMER: SANTA FE COUNTY ASSESSOR

By: _____
Name:
Title:
Date:

By: _____
Name:
Title:
Date: