



Fulton County Board of Commissioners  
**Agenda Item Summary**

**# 14-0868**  
**BOC Meeting Date**  
 10/15/2014

<b>Requesting Agency</b> Tax Assessor	<b>Commission Districts Affected</b> All Districts
------------------------------------------	-------------------------------------------------------

**Requested Action** *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*  
 Request approval to award contract without competition - Tax Assessor, 14SS56893B, Desktop Review Program with ESRI Canada, (Vancouver, British Columbia) in the amount \$171,000 to provide desktop review and analysis software and interface. Effective upon BOC approval.

**Requirement for Board Action** *(Cite specific Board policy, statute or code requirement)*  
 In accordance with Purchasing Code Section 102-384, after conducting a good faith review, and the Purchasing Department has determined that there is only one source available for the required supply, service, or construction item, the request shall be forwarded to the Board of Commissioners for approval.

**Is this Item Goal Related?** *(If yes, describe how this action meets the specific Board Focus Area or Goal)*  
 Yes            Increase revenue for general fund.

**Is this a purchasing item?**  
 Yes

**Summary & Background**            *(First sentence includes Agency recommendation. Provide an executive summary of the action that gives an overview of the relevant details for the item.)*

The Tax Assessor requests approval to award a contract without competition to provide desktop review and analysis software.

ESRI is the only vendor with all inclusive desktop review and analysis package. This will enable the staff to conduct as much as 90% of the necessary review of property from the office environment thereby making the field verification much more productive and cost effective. The desktop review process which will add revenue to the general fund through discovery of unassessed property.

ESRI is the sole exclusive provider of Assessment Analyst 2D. Staff will be able to review the appraisal valuations produced by CAMA, detect errors in source data in conjunction with remotely sensed information including satellite imagery, oblique air photography, bulk collected street front photography, and geo-referenced building sketches.

Impact will be positive if procured and used for the 2015 Tax Digest. The negative impact will be the lack of the ability to compare changes from the previous year's photography and the lack of a visual tool for the appraisal staff to defend the values.

Pursuant to Purchasing Code Section 102-384, this request meets the following category permitted as basis for conditions allowing the award of a contract without competition:

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker, Interim Director	Phone (404) 612-5800	
Signature 	Date 10/10/2014	

Revised 03/12/09 (Previous versions are obsolete)

(3) The existence of limited rights in data, patent rights, copyrights, or secret processes; or similar circumstances, make the supplies and services available from only one source.

<b>Contract &amp; Compliance Information</b>	<i>(Provide Contractor and Subcontractor details.)</i>
----------------------------------------------	--------------------------------------------------------

Not Applicable

Contractor Type	Contractor Status	Contractor Name	Address	City	State	Zip Code	Contact Name	Contact Phone	Contact Email	Upon Approval	Amount	Percentage	Prime/Contract Value
Prime	Non-MFBE	ESRI Canada										100%	\$171,000.00

Agency Director Approval		County Manager's Approval
<b>Typed Name and Title</b> Felicia Strong-Whitaker, Interim Director	<b>Phone</b> (404) 612-5800	
<b>Signature</b>	<b>Date</b>	

Revised 03/12/09 (Previous versions are obsolete)

# # 14-0868

Information	NON-MFBE	MBE	FBE	TOTAL
No. Bid Notices Sent:				
No. Bids Received:				

<b>Total Contract Value</b>	.
<b>Total M/FBE Values</b>	.
<b>Total Prime Value</b>	.

**Fiscal Impact / Funding Source** *(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)*  
 Funds will be provided in the 2015 budget subject to approval of the Board of Commissioners.

**Exhibits Attached** *(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)*  
 Exhibit 1: Justification and Approval Form  
 Exhibit 2: Contractor Performance Report

**Source of Additional Information** *(Type Name, Title, Agency and Phone)*  
 David Fitzgibbon, Chief Appraiser, Tax Assessor, (404) 612-6402

Agency Director Approval		County Manager's Approval
Typed Name and Title Felicia Strong-Whitaker, Interim Director	Phone (404) 612-5800	
Signature	Date	

Revised 03/12/09 (Previous versions are obsolete)

<b>Procurement</b>			
<b>Contract Attached:</b> No		<b>Previous Contracts:</b> No	
<b>Solicitation Number:</b> 14SS56893B	<b>Submitting Agency:</b> Tax Assessor	<b>Staff Contact:</b> David W. Fitzgibbon, Chief Appraiser	<b>Contact Phone:</b> 404-612-402
<b>Description:</b> Desktop Review Program			
<b>FINANCIAL SUMMARY</b>			
<b>Total Contract Value:</b>		<b>MBE/FBE Participation:</b>	
Original Approved Amount:		Amount: . %: .	
Previous Adjustments: .		Amount: . %: .	
This Request: \$171,000.00		Amount: . %: .	
TOTAL: \$171,000.00		Amount: . %: .	
<b>Grant Information Summary:</b>			
Amount Requested: .		<input type="checkbox"/> Cash	
Match Required: .		<input type="checkbox"/> In-Kind	
Start Date: .		<input type="checkbox"/> Approval to Award	
End Date: .		<input type="checkbox"/> Apply & Accept	
Match Account \$: .			
<b>Funding Line 1:</b> 100 240 2401 1160 (pending approval 2015 budget by BOC)	<b>Funding Line 2:</b> .	<b>Funding Line 3:</b> .	<b>Funding Line 4:</b> .
<b>KEY CONTRACT TERMS</b>			
<b>Start Date:</b> .		<b>End Date:</b> .	
<b>Cost Adjustment:</b> .		<b>Renewal/Extension Terms:</b> .	
<b>ROUTING &amp; APPROVALS</b> (Do not edit below this line)			
X	Originating Department:	Fitzgibbon, David	Date: 10/6/2014
.	County Attorney:	.	Date:
X	Purchasing/Contract Compliance:	Strong-Whitaker, Felicia	Date: 10/9/2014
X	Finance/Budget Analyst/Grants Admin:	Oshikoya, Hakeem	Date: 10/10/2014
.	Grants Management:	.	Date:
.	County Manager:	.	Date:

**JUSTIFICATION AND APPROVAL FOR ALLOWING AWARD OF CONTRACT  
WITHOUT COMPETITION**

*(Section A must be completed by the User Department and then submitted to the Department of Purchasing & Contract Compliance)*

**SECTION A**

**Department:** *Board of Assessors*

**Department Contact:** *David W. Fitzgibbon*

**Description of Supplies/Services:** *Desktop Review Program, (Software and interface to CAMA)*

**Demonstration of Contractor's Unique Qualifications:**

*This contractor is the only vendor with all inclusive desktop review and analysis package. This enables the staff to conduct as much as 90% of the necessary review of property from the office environment thereby making the field verification much more productive and cost effective.*

*Contractor has installations in Maricopa County, Arizona, British Columbia and Hawaii and have demonstrated significant returns on investment in terms of additional revenue to the taxing jurisdictions*

*This item has not been previously procured.*

*Impact will be positive if procured and used for the 2015 digest, negative impact will be little or no growth for 2015 digest.*

*(Section B must be completed by the Department of Purchasing & Contract Compliance)*

**SECTION B****MARKET SURVEY**

**Results of Market Survey:** *No Responses*

**Date Public Notice posted on website:** *Friday, October 3, 2014*

**Date Public Notice closed:** *Thursday, October 9, 2014*

**REVIEW OF OFFER(S)**

**Were any offers received (Y/N):** *No*

**Number of offers received:** *None*

**Respondents:** *N/A*

**Date Offers submitted to User Department for review:** *N/A*

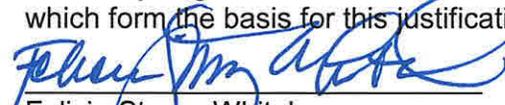
**User Department review and recommendation:** *Recommends proceeding with sole source vendor.*

**Purchasing Agent review and recommendation:** *Purchasing is in agreement with the department's recommendation.*

**CERTIFICATION**

Having conducted a good faith review of source availability regarding the materials, goods and or services stipulated herein, subsequent to consultation with the County Manager and the recommendation of the User Department, it has been determined that there is only one source available for the required work, labor or service to be done or the supplies, materials, or equipment to be furnished, per the Fulton County Code of Ordinances §102-384, Award without competition.

I, Felicia Strong-Whitaker, Interim Purchasing Director, certify that the facts and representations under my cognizance which are included in this justification and its supporting documentation which form the basis for this justification are complete and accurate.

  
\_\_\_\_\_  
Felicia Strong-Whitaker  
Interim Purchasing Director

10/10/2014  
Date

I, Patrick O'Connor, County Manager, certify that the facts and representations under my cognizance which are included in this justification and its supporting documentation which form the basis for this justification are complete and accurate.

  
\_\_\_\_\_  
Patrick O'Connor  
County Manager

10/10/14  
Date



October 1<sup>st</sup>, 2014

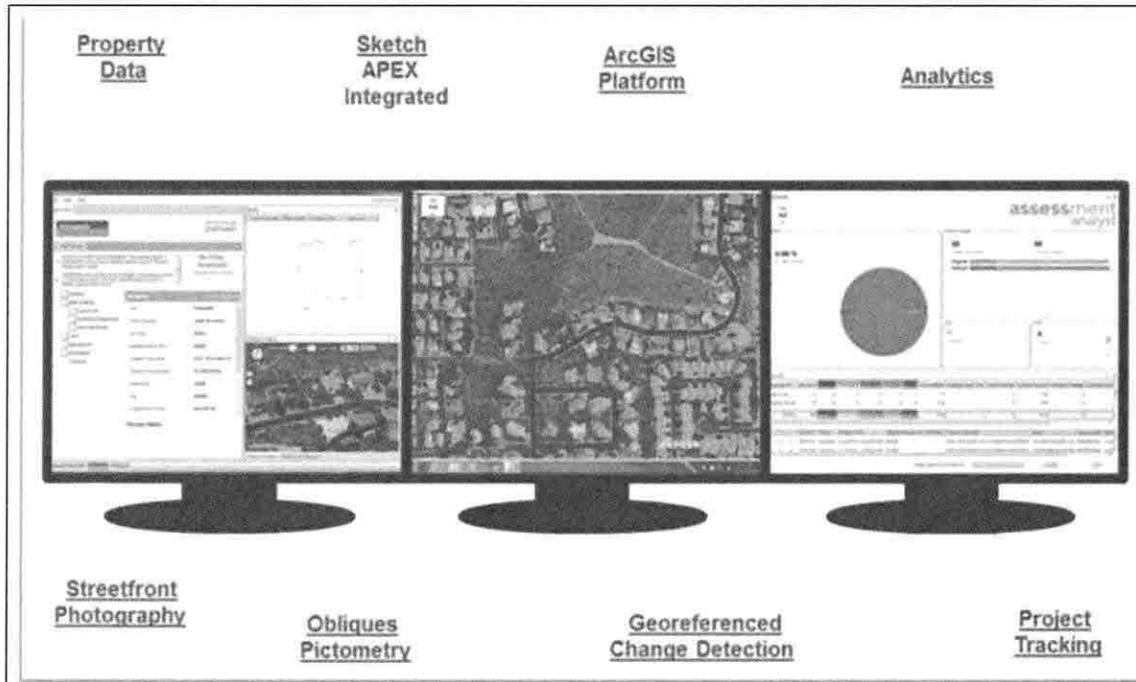
**Re: Sole Source Procurement of Esri Canada's Assessment Analyst 2D**

To Whom It May Concern:

For nearly three decades, Esri Canada has delivered solutions using the leading Geographic Information System (GIS) software products from Esri. Esri Canada has built a highly coordinated team of GIS specialists and domain professionals serving a growing GIS customer base in excess of 10,000 users.

Esri Canada has a unique understanding of how enterprise GIS can provide a powerful foundation for enhanced property assessment. Esri Canada has built GIS applications designed to meet the increasing demand for improved productivity and accuracy for the Assessor. We have worked with a wide variety of large and small assessment jurisdictions across the United States, Canada and internationally. For example, Assessment Analyst <sup>TM</sup> 2D, delivers more precise, uniform and cost-effective property valuations and has been proven in jurisdictions of over one million plus parcels.

Esri Canada is the sole exclusive provider of Assessment Analyst <sup>TM</sup> 2D. Assessment Analyst <sup>TM</sup> 2D enables an assessor or trained technician to review the appraisal valuations produced by CAMA and detect errors in source data by examining the CAMA data in conjunction with remotely sensed information including satellite imagery, oblique air photography, bulk collected street front photography, and geo-referenced building sketches. The many benefits of Assessment Analyst <sup>TM</sup> 2D include the creation of a seamless work environment while simultaneously providing the Analyst with the ability to add additional undiscovered revenue to the tax roll.



1130 West Pender Street, Suite 610  
Vancouver, British Columbia V6E 4A4

T 604 682 4652  
F 604 682 5692

esri.ca



Assessment Analyst™ 2D ultimately allows the Assessor to-

- Optimize property tax revenues by revealing hidden omissions or inaccuracies in your assessment data, and then correcting the data from your desktop
- Ensure uniformity and equity in your data maintenance protocol
- Produce more accurate assessments through improved data quality
- Implement a successful, cyclical reassessment/re-inventory program with less manual work
- Ensure compliance with reassessment and re-inventory standards set by the International Association of Assessing Officers (IAAO)
- Reduce costs through increased productivity, less adhoc data maintenance and fewer onsite inspections

Esri Canada's professional services team provides a timely and complete Assessment Analyst™ 2D solution: implementation, configuration, integration, training and support.

To the best of our knowledge there is no competitor or products available in our industry that can currently match the scope of functions, analytic features and integrated capabilities for improved workflow and property valuation that Assessment Analyst™ 2D can offer Fulton County.

Should you need any additional information, please do not hesitate to contact your account manager, Josh Ledgerwood at 210-464-7751 or [jlledgerwood@esri.ca](mailto:jlledgerwood@esri.ca)

Sincerely,

A handwritten signature in black ink, appearing to read "ML", with a horizontal line extending to the left and a vertical line extending downwards.

Michael Lomax  
Director, Assessment

**INTEROFFICE MEMORANDUM**

**TO:** Fulton County Board of Commissioners  
**THRU:** Patrick O'Connor, Interim County Manager  
**FROM:** David W Fitzgibbon, Chief Appraiser, Board of Assessors  
**DATE:** October 10, 2014  
**SUBJECT:** Sole Source Memo

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I have thoroughly reviewed the proposals for the following projects and have also reviewed the projects in comparison with any other sources providing similar type services or software packages. While several other vendors offer some of the functions of the projects, I have found none that offer these packages with the complete set of requirements for our use. I am satisfied that these vendors offer unique and unmatched products and that the following should be considered sole source providers for the individual services proposed.

Pictometry aerial photography and oblique imagery

This product provides a 360° view of all property within Fulton County. This product is utilized by the staff to view properties from all angles in the review of improvements and defense of these values. The imagery allows us to compare improvements on the images to our CAMA records to help identify unreturned and unassessed property. We previously had this product but did not receive funding for 2014. Our staff used this product to add over \$700,000 in revenue to the general fund in tax year 2012. Without it, we have not been able to compare year to year changes without a door-to-door review, which is very labor intensive and time consuming. This tool is vital to the use of the following products.

ESRI Canada, Assessment Analysis Desk Top Review

This product is a unique program that allows us to compare our CAMA record to the aerial photography and programmatically identifies those properties where the building footprint differs from the CAMA sketch and record. This product will allow us to eliminate 80% of the "Boots on the ground" approach to discovery. The package identifies those properties; color codes the most important changes and allows for the data entry of any changes directly into our CAMA database; tracks any value changes and generates a work flow record for supervisors. The cost of this product is more than justified based on historical returns from other jurisdictions where it has been utilized. Fulton County should recognize an even greater return than historical due to the very long interval between the last door-to-door reviews.

Courthouse USA Mobile field application

This product allows for field review in real time through the use of tablet computers and software that allows real time changes and supervisor review. Through the use of this product in conjunction with the ESRI Canada product we feel our production time will be shortened significantly and thereby add more value to the tax digest in a more cost effective and efficient manner.

The approval of the above products will allow us to more effectively and efficiently identify and value improvements that are on site but not in our assessment records. *All of which will be new growth and not subject to the milage rollback provisions of Georgia law.*