



Fulton County Board of Commissioners
Agenda Item Summary

14-0867
BOC Meeting Date
10/15/2014

Requesting Agency

Tax Assessor

Commission Districts Affected

All Districts

Requested Action *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*

Request approval to award contract without competition – Tax Assessor, 14SS794646B, Mobile Field Review in the amount of \$248,000 with CourthouseUSA, LLC (d/b/a Data Cloud Solutions, LLC) to instantly collect and record field data. 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 instantly collect and record field data

Courthouse USA is the only vendor with all inclusive capabilities necessary to allow for the instant collection and recording of field data that does not require a county database server or database upgrades. Direct management review allows the supervisors in the office to view on a stroke by stroke basis what the data collector is doing in the field and correct or redirect field personnel in live time.

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:

(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.

Agency Director Approval

Typed Name and Title

Felicia Strong-Whitaker, Interim Director

Phone

(404) 612-5800

Signature

Date

10/10/2014

County Manager's
Approval

POLC

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

Contract & Compliance Information

(Provide Contractor and Subcontractor details.)

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	Courthouse USA									\$248,000.00	100%	\$248,000.00

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)

14-0867

Registration Information	NON-MFBE	MBE	FBE	TOTAL						
No. Bid Notices Sent:										
No. Bids Received:										
<table border="1"> <tr> <td>Total Contract Value</td> <td>.</td> </tr> <tr> <td>Total M/FBE Values</td> <td>.</td> </tr> <tr> <td>Total Prime Value</td> <td>.</td> </tr> </table>					Total Contract Value	.	Total M/FBE Values	.	Total Prime Value	.
Total Contract Value	.									
Total M/FBE Values	.									
Total Prime Value	.									
Fiscal Impact / Funding Source <i>(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)</i> 500-240-2400-1410: Capital, Tax Assessor, Equipment - \$248,000.00										
Exhibits Attached <i>(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)</i> Exhibit 1: Justification and Approval Form Exhibit 2: Contractor Performance Report										
Source of Additional Information <i>(Type Name, Title, Agency and Phone)</i> 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)

Procurement**Contract Attached:**
No**Previous Contracts:**
No**Solicitation Number:**
14SS794646B**Submitting Agency:**
Tax Assessor**Staff Contact:**
David W. Fitzgibbon,
Chief Appraiser**Contact Phone:**
404-612-402**Description:** Mobile Field Review software**FINANCIAL SUMMARY****Total Contract Value:**

Original Approved Amount:

Previous Adjustments:

This Request: \$248,000.00

TOTAL: \$248,000.00

MBE/FBE Participation:

Amount: . %: .

Amount: . %: .

Amount: . %: .

Amount: . %: .

Grant Information Summary:

Amount Requested: .

Match Required: .

Start Date: .

End Date: .

Match Account \$: .

☐

Cash

☐

In-Kind

☐

Approval to Award

☐

Apply & Accept

Funding Line 1:100 240 2401 1160
(pending approval
2015 budget by BOC)**Funding Line 2:**

.

Funding Line 3:

.

Funding Line 4:

.

KEY CONTRACT TERMS**Start Date:****End Date:****Cost Adjustment:****Renewal/Extension Terms:****ROUTING & APPROVALS**

(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: *This is a mobile field review package that allows the direct entry of data from a remote location thereby eliminating paper in the field and making the field collection of data more cost effective.*

Demonstration of Contractor's Unique Qualifications:

Courthouse USA is the only vendor with all inclusive capabilities necessary to allow for the instant collection and recording of field data that does not require a county database server or database upgrades. Direct management review allows the supervisors in the office to view on a stroke by stroke basis what the data collector is doing in the field and correct or redirect field personnel in live time.

(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: *Monday, October 6, 2014*

Date Public Notice closed: *Friday, October 10, 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

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

Date





October 10, 2014

RE: Data Cloud Solution's CAMA Cloud: MobileAssessorSM

A Sole Source Solution

Data Cloud Solutions, LLC (DCS) is the sole owner and provider of technology first detailed under provisional patent 61382775, and protected by copyright laws and international copyright treaties, as well as other intellectual property agreements, laws and treaties. The technology referenced above, and other proprietary business routines and methods owned by DCS, allows for mobile data collection and/or review that greatly reduces or eliminates the need for field documents, routing, data dumps, and ad-hoc reporting. All services and products are licensed, not sold, and currently CourthouseUSA, LLC (CUSA) is the sole authorized reseller of such technology (if not through DCS directly or a CAMA vendor branded solution that can only operate with their respective CAMA product). DCS is the only provider of such technology that can be implemented with any system; not requiring conversion.

Said another way, nothing other than DCS's CAMA Cloud: MobileAssessorSM exists that allows for remote/mobile, automatic routing and selection of subject sites, and real-time processing and project reporting of all data elements; for which, CUSA is the sole reseller of said product. Some key capabilities are highlighted below:

1. DCS is the only company offering CAMA Cloud: MobileAssessorSM, and all capabilities related thereto, as an all-in-one solution; providing all required mobile devices/hardware, and a SaaS hosted solution that doesn't necessitate a county server or database upgrade.
 - 1.1. CUSA is the only authorized reseller of such technology and services.
2. DCS is the only company offering DynamicRouteSM, which can automatically route parcel visitation order based upon current geological location and active directional bearing.
 - 2.1. CUSA is the only authorized reseller of such technology and services.
3. DCS is the only company with a mobile, all-in-one, mass data collection solution that is **CAMA system neutral**. CAMA Cloud: MobileAssessorSM can import and export data in any known format and is not relegated to any one system; and, can support the synchronization of numerous other files, resources, and data elements separate from CAMA data.
 - 3.1. CUSA is the only authorized reseller of such technology and services.
4. DCS is the only company offering Instant PhotoBaseSM, which is a feature that automatically uploads, synchronizes, watermarks parcel and timestamp information, and associates new photography with the parcel, in real time.
 - 4.1. CUSA is the only authorized reseller of such technology and services.
5. DCS is the only company with an integrated Quality Control solution, and product that allows for **live quality control of data changes** as they are happening in the field. The QC module also manages and records date/time/location information for every action taken in the field. This unique real-time workflow product also contains an administrative alert system for field personnel communication and rerouting.
 - 5.1. CUSA is the only authorized reseller of such technology and services.

CourthouseUSA, LLC | marlene@courthouseusa.com, laura@courthouseusa.com | 816.529.9169
Data Cloud Solutions, LLC | PO Box 2194, Springfield, OH 45501 | 888.586.6914



CourthouseUSA™
The Authoritative Source for Property Information

Key Field Data Collection System Features

1. A minimum of six hours of continuous field use of the data collection software on a single fully charged battery.
2. HTML5 technology compatible with iOS, Windows, and/or Android touch-screen mobile devices.
 - 2.1. Includes touch screen sketching.
3. Internally integrated camera, GPS, Wi-Fi, and cellular hardware (3G/4G/LTE).
4. Dynamic, uninterrupted online/offline ("cellular dead zone") data collection capabilities.
5. Ability to make on-the-fly bulk parcel assignments (new and revised) to multiple users from a central location - without requiring field personnel or their mobile device to be present.
6. Automatic routing of assigned parcels based upon the field user's login credentials, current location, and direction of travel.
7. Interactive GPS and GIS mapping showing at least the subject parcel and the user's location.
8. Portrait and Landscape modes (with optimized layouts) activated by the mobile device's orientation.
9. Field changes can be reviewed at the office by managers (controlled by user ID Role type/access privileges) within minutes* of the changes being made.
 - 9.1. Includes uploading, parcel association and synchronization of new property photo's.
10. Comprehensive audit trail of all field data changes including a minimum of: what was changed, by who, at what time, and the location of the mobile device at the time of the field changes.
11. Management/office dashboard that reports a minimum of: individual data collector's productivity counts, all data collectors' productivity counts, parcel assignments completion status per user, and map representation of route history and parcel completion per user - all in "real-time".
12. An "alert" system that allows certain parcels to be flagged as needing a priority visit - overriding the initial route order of other "non-alert" parcel assignments.

**If the mobile device is within at least a 3G Internet area; otherwise if "offline", the changes will automatically continue uploading once the device has a strong Internet signal.*

Please let us know if anything further clarification is needed in this regard.

Thank you.

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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

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 packagers 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.