

WHATCOM COUNTY CONTRACT INFORMATION SHEET

Whatcom County Contract No.

202409008

| | |
|--|--|
| Originating Department: | Assessor |
| Division/Program: (i.e. Dept, Division and Program) | |
| Contract or Grant Administrator: | Rebecca Xczar |
| Contractor's / Agency Name: | Schneider Geospatial |
| Is this a New Contract? Yes <input checked="" type="radio"/> No <input type="radio"/> If not, is this an Amendment or Renewal to an Existing Contract? Yes <input type="radio"/> No <input checked="" type="radio"/> If Amendment or Renewal, (per WCC 3.08.100 (a)) Original Contract #: _____ | |
| Does contract require Council Approval? Yes <input checked="" type="radio"/> No <input type="radio"/> If No, include WCC: _____ Already approved? Council Approved Date: _____ (Exclusions see: Whatcom County Codes 3.06.010, 3.08.090 and 3.08.100) | |
| Is this a grant agreement? Yes <input type="radio"/> No <input checked="" type="radio"/> If yes, grantor agency contract number(s): _____ CFDA#: _____ | |
| Is this contract grant funded? Yes <input type="radio"/> No <input checked="" type="radio"/> If yes, Whatcom County grant contract number(s): _____ | |
| Is this contract the result of a RFP or Bid process? Yes <input type="radio"/> No <input checked="" type="radio"/> If yes, RFP and Bid number(s): _____ Contract _____ Cost Center: 11600 | |
| Is this agreement excluded from E-Verify? No <input type="radio"/> Yes <input checked="" type="radio"/> If no, include Attachment D Contractor Declaration form. | |
| If YES, indicate exclusion(s) below: <input checked="" type="checkbox"/> Professional services agreement for certified/licensed professional. <input type="checkbox"/> Goods and services provided due to an emergency <input type="checkbox"/> Contract work is for less than \$100,000. <input checked="" type="checkbox"/> Contract for Commercial off the shelf items (COTS). <input type="checkbox"/> Contract work is for less than 120 days. <input type="checkbox"/> Work related subcontract less than \$25,000. <input type="checkbox"/> Interlocal Agreement (between Governments). <input type="checkbox"/> Public Works - Local Agency/Federally Funded FHWA. | |
| Contract Amount:(sum of original contract amount and any prior amendments): \$ 209,991 (applicable sales tax included) | Council approval required for; all property leases, contracts or bid awards exceeding \$40,000 , and professional service contract amendments that have an increase greater than \$10,000 or 10% of contract amount, whichever is greater, except when: 1. Exercising an option contained in a contract previously approved by the council. 2. Contract is for design, construction, r-o-w acquisition, prof. services, or other capital costs approved by council in a capital budget appropriation ordinance. 3. Bid or award is for supplies. 4. Equipment is included in Exhibit "B" of the Budget Ordinance. 5. Contract is for manufacturer's technical support and hardware maintenance of electronic systems and/or technical support and software maintenance from the developer of proprietary software currently used by Whatcom County. |
| This Amendment Amount: \$ _____ | |
| Total Amended Amount: \$ _____ | |
| Summary of Scope: | |
| Contract is for a package of 4 online products; Property Portal, Citizen Dashboard, Comper for Citizen, and Comper Pro. Contract amount is for one-time setup cost, annual support, maintenance, hosting, and data updates, through December 31, 2026. Initial funding for one-time setup and prorated 2024 hosting and maintenance (\$37,180) will be from the Assessor Treasurer Maintenance fund/ Treasurer O&M. Ongoing funding to sustain these citizen services has been requested in the biannual budget. | |
| Term of Contract: 2.3 years | Expiration Date: December 31, 2026 |

| | | |
|-------------------|--|-----------------|
| Contract Routing: | 1. Prepared by: Rebecca Xczar | Date: 9/4/2024 |
| | 2. Attorney signoff: <i>[Signature]</i> | Date: 9/05/24 |
| | 3. AS Finance reviewed: <i>[Signature]</i> | Date: 9/5/24 |
| | 4. IT reviewed (if IT related): <i>[Signature]</i> | Date: 9/5/24 |
| | 5. Contractor signed: _____ | Date: 9/11/2024 |
| | 6. Executive contract review: _____ | Date: _____ |
| | 7. Council approved, if necessary: AB2024-604 | Date: 9/10/24 |
| | 8. Executive signed: _____ | Date: 9/11/2024 |
| | 9. Original to Council: _____ | Date: _____ |

**WHATCOM COUNTY
ASSESSOR'S OFFICE**



REBECCA M. XCZAR
COUNTY ASSESSOR

MEMORANDUM

To: Satpal Sidhu, County Executive
From: Rebecca Xczar, Whatcom County Assessor
RE: Schneider Geospatial Contract
Date: September 4, 2024

Attached, please find for your review and signature a contract between Schneider Geospatial and Whatcom County, for Spatialest Property Portal, Community Dashboard, Comper Pro, and Comper for Citizen.

Background and Purpose

This contract/ purchase includes 4 parts of a package, 3 of which are new and improved public access to property information; a new property portal, a sales mapping and comparison tool for the public which will greatly assist in appeals, and a community data section that will package more data for the public. The 4th part is an internal comp tool for the Assessor's office to use for answering appeals to the Board of Equalization quicker and more efficiently. This is a benefit to citizens, the Assessor's Office, and the Council Office.

One of the main complaints we hear from the public is the lack of good public data in easy to use formats. These tools are essential for the public and for staff time as the more that is publicly available, the less time staff spend answering individual questions.

The appeal load this year has been a huge challenge as we are understaffed for the work load; we will not be able to provide responses to many appeals this year due to staffing and the need to complete statutorily required work first. If the public uses the comper for citizen tool, it will save us time, and with appraisers using the comper pro, it will save additional time. Assessed value appeals also impact the Council Office, as the BOE and funding falls on that department. These tools will increase efficiencies, save time and money, which will benefit both offices.

This online tool package is cheaper than adding additional staff and will make our staff time much more efficient. This is a huge need and a good price for the package of online products. Price includes annual support, maintenance, hosting, and data updates.

Several Washington Counties are currently using Spatialest products/tools, and have highly recommended them.

Funding Amount and Source

Initial funding for one-time setup and prorated 2024 hosting and maintenance (\$37,180) will be from the Assessor Treasurer Maintenance fund/ Treasurer O&M. Ongoing funding to sustain these citizen services has been requested in the biannual budget.

Please contact Rebecca Xczar at extension 5055, if you have any questions or concerns regarding the terms of this agreement.

Encl.



PROFESSIONAL SERVICES AGREEMENT



This Agreement is made and entered into by and between **Schneider Geospatial, LLC**, a Delaware Limited Liability Company, whose place of business is 8901 Otis Avenue, Suite 300, Indianapolis, IN 46216 ("PROFESSIONAL") and **Whatcom County, WA**, whose place of business is: Whatcom County Assessor's Office, 311 Grand Ave, Suite 106, Bellingham, WA 98225 ("CLIENT").

1 Services.

PROFESSIONAL shall provide CLIENT with the following services ("Services"):

A. Property Portal

Property Portal consolidates your entire parcel and property details in a single place offering 'one stop shop' access for staff and citizens alike. Any data can be included to provide one source of reliable information. Deeds, Permits, Sales, Ownership and more all in one place.

a. Online Property Search

- i. **Open Access** – user access is obtained through a web browser using a public url that is shared by CLIENT with their citizens. There is no login required.
- ii. **Subject Property Search** – properties are quickly searchable via a dynamic search that can search across multiple identification categories including, but not limited to Owner Name, Street Address, Parcel No. or Account No. etc.
- iii. **Filter** – customizable filters can be activated, deactivated, or adjusted to allow the user to refine the list of results, making it easy to find specific groups of properties.
- iv. **Map View** – results can be displayed on an interactive map where other spatial data and map layers can viewed, giving context to property searches.
- v. **Attribute Data** – land, building, sales and assessment data is displayed in organized sections for easy reference.
- vi. **Images & Sketches** – display multiple property images, improvement sketches or oblique aerial imagery.
- vii. **Documents** – important documents such as Tax or Assessment Notices can be viewed and downloaded.
- viii. **Data Change Requests** – users can report any discrepancies or incorrect property data via an easy and simple form submission.
- ix. **Links** – easy access to other Spatialist integrated solutions like Comper, Appeals, Community or other county applications such as tax payments or permit applications.
- x. **Property Record Card** – ability to print individual property records for offline use.

B. Community

Community is a dashboard of information designed to Share, Engage, Empower, Analyze & Visualize information. Patterns and trends are apparent, helping and supporting decision making processes. Typical information includes Sales, Permits, Assessments, Tax Calculator, Assessments and individual Property Information. Community makes data from individual sources available in an easy to access location, creates accessibility and transparency and this gains public trust.

a. Interactive Map-based Dashboard

- i. **User Access** – users can access Community using an open, public url with no login required.
- ii. **Search** – Community provides the ability to:
 - i. **Search by Category** – searching by sub-strata categories such as Commissioner Districts, School Districts or Zip codes allows the user to quickly view analytics for these areas.
 - ii. **Search by Property** – individual properties are quickly found via a dynamic search that can search across multiple identification categories including but not limited to Street Address, Parcel No. or Account No. etc.
 - iii. **Search by Custom Defined Areas** – users can define their own area on the map using selection tools to view insights into specific areas.
- iii. **Area Overview** – customizable landing page provides client with the ability to highlight the most important or relevant insights as the first thing a user sees.

HEADQUARTERS
Historic Fort Harrison
8901 Otis Avenue, Suite 300
Indianapolis, IN 46216

Ankeny, Iowa
1450 Southwest Vintage Parkway
Suite 260
Ankeny, IA 50023

- iv. **Assessment Data** – display current market and assessed values for the entire jurisdiction, including historical trends and distribution of values among property types.
- v. **Census Data** – provide stakeholders with demographic information to assist decision making surrounding service delivery, investment, and town planning.
- vi. **Sales Data** – display historic market trends such as sales growth and median property prices. View neighborhood sales on the map and export sales reports for further analysis.
- vii. **Permit Data** – view active and historic permits for any area and any property type to identify areas of growth and support strategies surrounding service delivery and infrastructure planning and development.
- viii. **Tax Estimation** – empower citizens to estimate their upcoming taxes using a built-in tax calculator.
- ix. **Street/Satellite imagery** – the map-based solution provides spatial context using either street or satellite imagery. Map extent dynamically updates as the search parameters are adjusted.
- x. **Map Layers** – multiple map layers can be added. The user can enable or disable the layers or adjust their opacity depending on their analysis.
- xi. **Links** – provide quick links to other county and third-party applications or sites.

C. Comper Pro

Comper Pro is a revolutionary online Comparable Sales selector. Comper Pro helps validate or present assessment information, assists with appeal management and improves accessing or disseminating property information. The associated Comp Grid allows the appraisers to make adjustments to the comps and generate a value. It provides the ability for appraisers to generate their own URAR form/Fee Appraiser style report. Product functionality shall include the following:

a. Comparable Sales Selector

- i. **Ratio Analysis** – this study allows the user to assess overall model performance and reviews the relationships between the actual sale prices and the model predicted values using the recommended IAAO statistics.
- ii. **User protected Login** – user access is controlled via login credentials. Two user profiles exist. One for Administrators and one for standard Users, providing different permissions.
- iii. **Subject Property Search** – the Subject Property is quickly searchable via a dynamic search that can search across multiple identification categories including but not limited to Street Address, Parcel No. or Account No. etc.
- iv. **Filters** – customizable filters can be activated, deactivated, or adjusted to allow the user to refine the list of potential comparable sales.
- v. **Attribute Information** – Subject and Comp info displays are customized to allow easy comparison and review of the most relevant data for decision-making. There is also a link for quick access to the full source data.
- vi. **Comp Selection** – the comp selection tool allows the user to quickly and easily add or remove properties from the comparable sales list.
- vii. **Comp History** – a history of the saved comps is recorded, including information about the User, Date and Time they were saved. (Optional – clients with AppraisalEst™ have the ability for the Comps generated via the Comp Model to also be saved to the comp history.)
- viii. **Street/Satellite imagery** – the map-based solution provides spatial context of the Subject Property and Comparable Sales using either street or satellite imagery. Map extent dynamically updates as the filters and selected comparable sales are adjusted.
- ix. **Comparable Sales Print Report** – a customizable pdf comp report can be generated that displays a side-by-side comparison of the Subject Property and selected Comparable Sales.

b. Comparable Sales Adjustment Grid (Comp Grid)

The Comp Grid is a professional side-by-side analysis table that makes line-item adjustments of the comparable sales attributes to be 'like' the Subject based on a defined set of criteria, thus reflecting an indicated Market Value.

- i. **Adjustment Rates** – Comp Grid rates are configured to make a variety of adjustment types that include dollar/unit, % adjustment, dollar for dollar, qualitative factoring as well as Min/Max adjustments.
- ii. **Grid Estimate** – the estimate of value is determined based on the net adjusted sale prices of the comparable sales and can be calculated using mean, median or moving average.
- iii. **Editing Adjustments** – users are able to manually change any adjustments as well as add additional line items that may be appropriate.
- iv. **Add Notes** – users can make notes against individual line-item adjustments as well as analysis or summary notes regarding the full report.
- v. **Grid Report** – a highly detailed pdf comp report provides a side-by-side comparison of the Subject Property and selected Comparable Sales with the adjustments, notes and estimate of value.

D. Comper for Citizen

Comper for Citizen is an interactive map-based application that allows the taxpayer to view their property in comparison to similar, nearby properties that have recently sold. Simple, easy to use filters allow the citizen to select the sales evidence they feel best represents their property. Product functionality shall include the following:

- a. **User Access** – Public user profiles can access Comper using an open public url with no login required. (Internal user profiles have secure password protected access).
- b. **Subject Property Search** – the Subject Property is quickly searchable via a dynamic search that can search across multiple identification categories including but not limited to Street Address, Parcel No. or Account No. etc.
- c. **Filters** – customizable filters can be activated, deactivated, or adjusted to allow the user to refine the list of potential comparable sales.
- d. **Attribute Information** – Subject and Comp info displays are customized to allow easy comparison and review of the most relevant data for decision-making. There is also a link for quick access to the full source data.
- e. **Comp Selection** – the comp selection tool allows the user to quickly and easily add or remove properties from the comparable sales list.
- f. **Comp History** – a history of the saved comps is recorded for internal management, including information about the User, Date and Time they were saved.
- g. **Street/Satellite imagery** – the map-based solution provides spatial context of the Subject Property and Comparable Sales using either street or satellite imagery. Map extent dynamically updates as the filters and selected comparable sales are adjusted.
- h. **Comparable Sales Print Report** – a customizable pdf comp report can be generated that displays a side-by-side comparison of the Subject Property and selected Comparable Sales

Other Fixed Fee phases of this project may be developed during the course of this agreement. Once the estimates are accepted, an Authorization to Proceed will have to be signed and submitted before work will begin.

2 Payment for Services.

CLIENT shall compensate PROFESSIONAL for the Services as follows:

A. Product/Service

| | | |
|----|---------------------------------|-------------------|
| a. | One-time Setup Cost: | \$11,900 |
| | Setup items: | |
| | Property Portal Setup | Included |
| | Community Setup | Included |
| | Comper Pro Setup | Included |
| | <u>Comper for Citizen Setup</u> | <u>Included</u> |
| | Subtotal | \$34,000 |
| | <u>Discount</u> | <u>(\$22,100)</u> |
| | Total | \$11,900 |
| b. | Annual Hosting: | \$75,840 |
| | Hosting items: | |
| | Property Portal | Included |
| | Community | Included |
| | Comper Pro | Included |
| | Comper for Citizen | Included |

B. Payment Schedule

| | | |
|--------|---|-----------------|
| Year 1 | September 1, 2024 – December 31, 2024: | \$37,180 |
| | (Setup: \$11,900, Hosting: \$25,280) | |
| Year 2 | January 1, 2025 – December 31, 2025: | \$75,840 |
| Year 3 | January 1, 2026 – December 31, 2026: | \$79,632 |

Invoicing will be done on an annual basis at the beginning of the term unless otherwise specified.

If the CLIENT cancels the agreement before end of initial multi-year term, any waived discounts and promotional fees will be included in the final invoice.

Balances due thirty (30) days after the due date for non-government clients and sixty (60) days after the due date for government clients shall be assessed an interest rate of 1½% per month (18% per year). CLIENT agrees to pay for any and all costs of collection including, but not limited to interest, lien costs, court costs, expert fees, attorney's fees and other fees or costs involved in or arising out of collecting any unpaid or past due balances, including late fees or penalties. If payment is not received within thirty (30) days of the due date, PROFESSIONAL reserves the right, after giving seven (7) days written notice to CLIENT, to suspend services to CLIENT or to terminate this Agreement.

3 Terms of Service. Each party's rights and responsibilities under this Agreement are conditioned upon and subject to the Terms of Service which can be found at <http://schneiderGIS.com/termsofservice>. By executing this Agreement, CLIENT acknowledges that it has read the above-described Terms of Service and agrees that such Terms of Service are incorporated herein and made a part of this Agreement. PROFESSIONAL reserves the right to update or modify the Terms of Service upon ten (10) days prior notice to CLIENT. Such notice may be provided by PROFESSIONAL to CLIENT by e-mail.

4 Term, Termination and Renewal. The initial term of this Agreement shall be defined in the Scope of Services or Payment Schedule above. If the services provided are for an annual rate and extend for multiple years, PROFESSIONAL will prorate the first year of the agreement to match the fiscal year for the CLIENT, followed by consecutive, twelve (12) month periods. This Agreement shall automatically renew for successive terms which consist of a twelve (12) month period, subject to earlier termination as set forth in this Agreement or upon written notification by either party thirty (30) days prior to the end of a term. If, for any reason, this Agreement is terminated prior to the end of a term, any waived or discounted fees or specified promotional items provided by PROFESSIONAL shall be invoiced by PROFESSIONAL and paid by CLIENT. PROFESSIONAL reserves the right to update the pricing applicable to this Agreement after the initial term for any renewal terms and/or any subsequent terms occurring after the initial term of the Agreement; PROFESSIONAL shall provide prior written notice to CLIENT of any pricing adjustments applicable to any such renewal and/or subsequent terms.

5 Additional Data Hosting. PROFESSIONAL's website hosting services allow for storage of up to ten (10) Gigabytes of data and files to include as content for CLIENT's website hosted in PROFESSIONAL's web data server environment. Additional storage and transfer requirements may be negotiated, at PROFESSIONAL's discretion, if CLIENT decides to add additional content to the website – such as orthophotos, scanned documents, etc.

6 Assignment. PROFESSIONAL has the right to assign or transfer any rights under or interest in this Agreement upon fifteen (15) days' written or electronic notice to CLIENT. Nothing in this Paragraph shall prevent PROFESSIONAL from employing consultants or subcontractors to assist in the performance of the Services.

7 Rights and Benefits. Nothing in this Agreement shall be construed to give any rights or benefits in this Agreement to anyone other than CLIENT and PROFESSIONAL. CLIENT and PROFESSIONAL expressly state there are no third-party beneficiaries to this Agreement.

8 Successors. This Agreement is binding on the partners, successors, executors, administrators and assigns of both parties.

9 Applicable Law. The terms and conditions of this Agreement are subject to the laws of the State of Washington.

IN WITNESS WHEREOF, the Parties have executed this Agreement by affixing their signatures below.

Pricing is valid through September 16, 2024.

PROFESSIONAL:
Schneider Geospatial, LLC
By: Jeff Corns
D39413E0C71F43A...
Print: Jeff Corns, GISP
Title: President
Date: 9/11/2024

CLIENT:
Whatcom County Assessor's Office
By: _____
Print: _____
Title: _____
Date: _____

WHATCOM COUNTY:

Recommended for Approval:

Rebecca Ann 9/5/24
County Assessor Date

R. J. R. 9/5/24
IT Manager Date

Approved as to form:

[Signature] 9/05/24
Prosecuting Attorney Date

Approved:

Accepted for Whatcom County:

DocuSigned by:
By: Satpal Singh Sidhu 9/11/2024
1192C7C18B664E3
Satpal Singh Sidhu Date
Whatcom County Executive