

Solano County, California

PRICING PROPOSAL FOR AUMENTUM TAX & VALUATION

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AUMENTUM VALUATION

Essential Tools for Fair and Accurate Appraisals

The screenshot displays the Aumentum Valuation software interface. The top navigation bar includes links for Home, Asmt Admin, Valuation, Records, Tax, Appeals, Cashiering, Info Center, Reports & Interfaces, and Configuration. The user is logged in as Christina Jane Smith, and the date is set to 06/24/2013. The main window is titled 'GIS Analysis Page / Site Summary' and shows the following information:

- Site Name:** 925 WINDSOR AVE SW
- Site Address:** 925 WINDSOR AVE SW
- Market Area:** City
- Neighborhood:** LOWER BRANDON
- Last Inspection:** 04/21/2009
- Value Method:**
 - Land: \$40,700
 - Buildings: \$130,500
 - Features: \$12,300
 - Total Market: \$183,500**

The interface also includes several data tables and visual aids:

- Land Table:**

Use	Land Type	Units	Unit Type	Base Rate	Total Adj.	Adj. Rate	Value
Market	Homestead	15246	SQ FT.	\$2.67	100%	\$2.67	\$40,700
- Buildings Table:**

Building Name	Building Type	Effective Year	Actual Area	Features	Value
Irsn 736 R01 DWELL	Dwelling	1953	2,300	7	\$130,500
- Features Table:**

Feature Name	Feature Description	Quality	Cond.	Year	Value
CONCP	Concrete Patio	Avg	Cond.	2006	\$510
CNPY/	Upper Conventional Canopy	Avg		2007	\$100
CNPY/	Upper Conventional Canopy			2006	\$544
MSTP	Masonry Stoop			2011	\$360
- Visual Aids:**
 - Photos:** A photograph of the property (Photo 3 of 5).
 - Sketches:** A floor plan sketch (Sketch 1 of 3).
 - Pictometry:** An aerial photograph of the property.

The bottom of the interface shows a pagination bar indicating 'Page: 1 of 10' and a copyright notice: '© 2013 Thomson Reuters. All Rights Reserved.'

As governments struggle with economic malaise on a global scale, local governments are feeling the pressure to encourage and sustain economic growth at home. To do that effectively, they must establish a fair and equitable basis for property taxation through fair and accurate valuations. Designed by valuation professionals and supporting international best practices, Aumentum Valuation is the realization of decades of knowledge and experience.

Sophisticated Tools

Easy-to-use and configure, our browser-based Aumentum Valuation system gives you a complete range of appraisal tools using the latest advancements in GIS, sketching and workflow that can be delivered through multiple deployment options including SaaS, on-site and hosted.

Works for You

Aumentum's robust functionality gives you crucial point-in time appraisal capabilities and multiple methods of valuation within each of the main valuation approaches, while also providing much sought-after appraisal and spatial analysis capabilities.

Improve Customer Service

Aumentum was designed for intuitive visual-efficiency so your staff can easily and confidently navigate the application with immediate access to information and an intuitive user interface. This provides your staff the ability to provide a higher level of taxpayer service.

Ready When You Are

Aumentum has been designed to address the challenges you face every day. Adapt quickly to legislative changes, keep you insulated from technology infrastructure updates, and integrate and share data with other government offices. These all provide your staff with crucial time-saving capabilities and peace of mind.

Aumentum Valuation Features

Manage Your Data

Quickly access what you need when you need it

Your most vital asset in the valuation of property is accurate data characteristics which must be managed independently of valuation methods. That is why we developed a customizable configuration for versioned data within Aumentum Valuation. Its well-organized structure allows you and your staff to see what the property looked like at any point in time. To ensure accuracy, the data infrastructure supports the processing of property characteristic changes as well as changes to prior year's data, current data and future assessment data.

Spatial Analysis Capabilities

Make better decisions

The use of Aumentum GeoAnalyst's integration with Esri's ArcGIS® Server increases the consistency of analytical data. All information can be overlaid on maps, allowing you to be informed via the data you maintain through spatial tools. This provides your staff the ability to assess the scale and magnitude of problems, so they can make informed decisions, swiftly and confidently.



Streamline Business through Automation

Shorten turnaround times and reduce costs

Through a single-database, system-wide integration, Aumentum allows taxpayer data to be collected once, and automatically populated into other integrated systems including: billing & collection, records management and eGovernment. This increases productivity and accuracy, while eliminating redundant entries and duplication errors.

Picture This

Measure from your desktop

Aumentum's integration with Pictometry Online allows your staff to easily and quickly access oblique and orthogonal images to measure area, perimeter and height of any structure or property without ever having to leave the office. By providing an alternative to field visits to properties, these desktop- valuations offer significant cost savings. They can help you uncover substantial volume of new taxable properties and improvements which in the past might have been virtually impossible to see because of inaccessibility or obstructions.

Sketch Smarter, Not Harder

Increase productivity and accuracy

Aumentum's Smart Sketch provides the perfect pairing of valuation and sketch technology. With the proven capabilities of APEX technology as its foundation, our sketch tool is exclusive and customized to include Aumentum Real Property-specific functionality in a browser environment.

Take the Office with You

Record properties in the field

Your staff can easily capture and update property characteristics from field locations using the same configurable business rules as those run in the office. Aumentum's field data collection tools also provide all electronic copies of relevant documents, photos, sketches and maps available at desktop level.



Make Better Decisions

Gain power through information

Provide decision support for the building of valuation models as well as the statistical validation of prior years' valuations. Regression analysis, neighborhood analysis, depreciation analysis and spatial analysis tools are included to ensure uniform and equitable values are applied across your entire jurisdiction. These tools are a mechanism for verification of the accuracy and equality of proposed valuations prior to placing the values on your assessment roll.

Aumentum Valuation Modules

Aumentum Records

Provides a single data entry source delivering time savings and increased data accuracy to your jurisdiction. It is the core component of every Aumentum installation. It provides a complete inventory of the parcels, filings, business revenue or motor vehicles along with a list of the legal parties who have an interest in the inventory.

Real Property

Provides a configurable valuation engine that supports multiple methods of valuation for real property within each of the main valuation approaches. Each calculation engine is independently built and subscribes to the appropriate attributes from a standardized attribute set.

Aumentum Assessment Administration

Designed to handle the most complex property assessment rules—it correctly maintains the property inventory and valuation data used to determine assessed values for the assessment roll. These functions include a calculation engine and triggering of automatic correction events.

Personal Property

Value personal property through Aumentum's complete import and discovery preview tool. Match, preview and then merge data from external sources. In addition, integration with reporting services provides customized standard system reports, filings and extracts using system-provided templates.

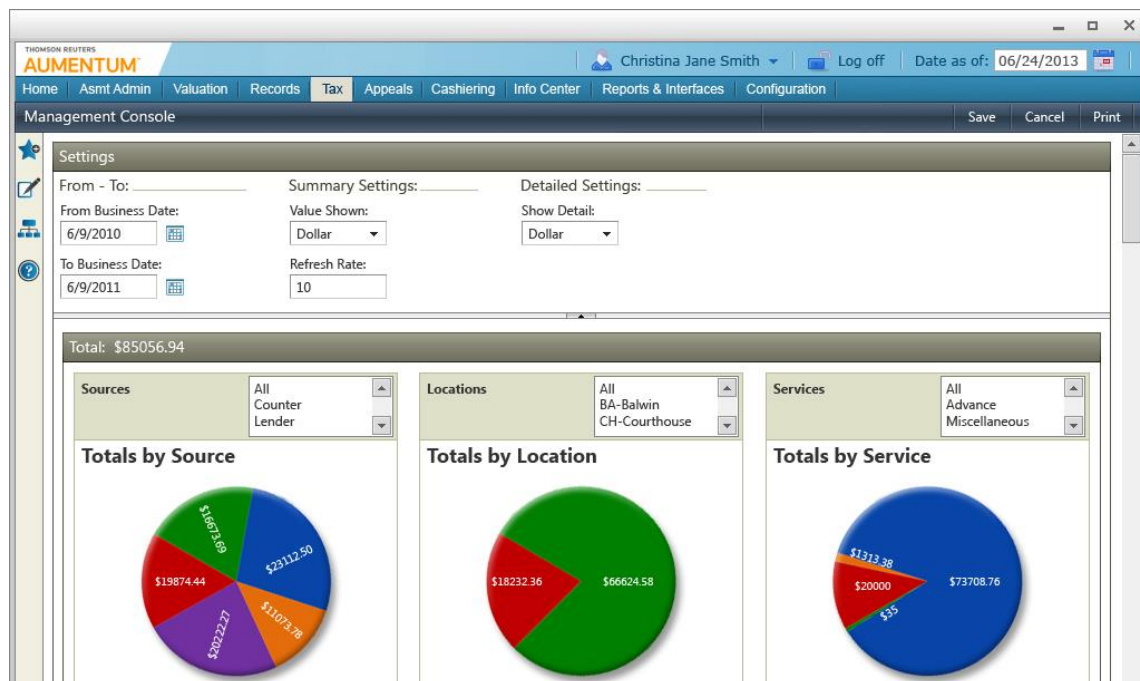
Case Management (included)

Configurable workflows to meet your needs regardless of the size the jurisdiction or degree of complexity of your processes. Supports any number of appeal levels, each following different rule sets configured by you.



AUMENTUM TAX

All You'll Ever Need for Total Revenue Management



As governments across the globe face unprecedented demand to boost efficiency and maximize budgets, property taxes become an increasingly vital revenue source. We understand that to succeed, you need accurate, real-time information delivered by a comprehensive, seamlessly integrated solution. That's why we assembled a team of experts with more than 4,000 years of collective tax software development experience to develop Aumentum Tax.

PRICING FOR AUMENTUM TAX & VALUATION

Sophisticated Tools

Easy-to-use and configure, our browser-based Aumentum Tax system gives you a complete range of tax tools including levy management, billing, collection cashing, and special assessments.

Informed Decisions

You need to make quick decisions based on accurate and up-to-date information. Aumentum Tax has the analysis capabilities and forecasting tools so you can make informed decisions and long-range plans and positively impact your jurisdiction.

Improve Customer Service

Aumentum Tax maintains unlimited tax years and also automates settlements, balances and roll-overs. And with immediate access to information and an intuitive user interface, your staff will be able to provide a higher level of taxpayer service.

Ready When You Are

Aumentum Tax has been designed to address the challenges you face every day. Adapt quickly to legislative changes, keep you insulated from technology infrastructure updates, and integrate and share data with other government offices. These all provide your staff with crucial time-saving capabilities and peace of mind.

Aumentum Tax Features

The Information You Need at Your Fingertips

Quickly access what you need when you need it

Information Center's general query interface is the perfect tool for today's "information worker." It displays revenue objects, tax bills and data of legal parties. In addition to providing your office extensive information regarding property tax and tax billing data, it provides your staff the ability to search based on many different attributes including: situs and mailing addresses, phone numbers, email addresses, PIN, owner and tax bill.

Streamline Business through Automation

Shorten turnaround times and reduce costs

Through a single-database, system-wide integration, Aumentum Tax allows taxpayer data to be collected once, and automatically populated into other integrated systems including: property valuation, records management and eGovernment. This increases productivity and accuracy, while eliminating redundant entries and duplication errors.

Catch Every Event, Every Time

Quickly provide information & service to taxpayers

Through an unlimited event log and transaction history which chronicles every transaction and event associated with a specific property, Aumentum Tax provides your office the ability to provide fast, accurate and superior customer service. Search filters provide quick access to the needed information which includes notes with key words to augment clarity of records.



Collect and Record Revenue Efficiently

Increase productivity and accuracy

High speed processing of batch remittance files from lenders, individuals and other institutions increases productivity and accuracy, as well as the interest accrued from faster reconciling and deposits of revenues. Reports can be pre-scheduled to run in an unattended setting—no longer tying up workstations—and to provide e-mail notification and delivery when files are complete.

Make Better Decisions

Empowering managers through information

Using Aumentum's Management Console, your supervisors can review accurate and continually refreshed visual data of office and staff activities – via one central location. This includes collections in real-time by location, source, service, and tender details by session for a selected location or till. This allows supervisors to make immediate decisions such as leveling workloads between departments or offices.

Spatial Analysis Capabilities

Analyze trends for revenue improved forecasting

The use of Aumentum GeoAnalyst's integration with Esri's ArcGIS® Server increases the consistency of analytical data. All information can be overlaid on maps, allowing you to spot trends by geographic areas, such as delinquencies and foreclosures. Additionally, this tool can integrate with outside sources such as census data to create maps that may aid in making important decisions such as revenue forecasting.

Know Your History

Keep record of all transactions

Through Aumentum's unlimited history, provide your office with a historical view of all transactional data, including a year-to-year comparison of collected revenue. This is critical for spotting various trends and the development of projections, future planning and providing robust customer service to constituents who need historical tax information.



Aumentum Tax Modules

Aumentum Records

Provides a single data entry source delivering time savings and increased data accuracy to your jurisdiction. It is the core component of every Aumentum installation. It provides a complete inventory of the parcels, filings, business revenue or motor vehicles along with a list of the legal parties who have an interest in the inventory.

Aumentum Assessment Administration

Designed to handle the most complex property assessment rules—it correctly maintains the property inventory and valuation data used to determine assessed values for the assessment roll. These functions include a calculation engine and triggering of automatic correction events.

Special Assessments

Creates, maintains and calculates amounts for special assessment districts and projects. Various methods are utilized to accommodate different requirements for the jurisdictions, including amortization of entire projects over many years.

Levy Management

Provides the calculation engine to compute payment terms, rate management, tax, charges and revenue forecasting from taxable values.

Billing Engine

Formats and produces property tax bills, business licenses, motor vehicle documents, assessment notices and other bills. This includes flexibility to sort and group bills, include messaging on the bills based on user-defined flags, plus user-directed mapping to determine how charges and descriptions will appear on the bills.

Cashiering

Provides user and batch processes to calculate appropriate interest, penalties and fees and to collect and record payments in real time; over the counter or through remote cashiering devices. Cashiering is fully integrated with other Aumentum modules, and can be configured to collect many different types of revenue.

Accounts Receivable

The repository for all charges, payments and credits. It calculates late payment interest, penalties and fees. It also provides methods of managing changes and correcting payments, as well as the ability to process surplus monies.

Distribution

Calculates the tax revenue due to the taxing authorities for a given time period based on amounts levied and monies collected. This includes the ability to calculate withholding commissions from disbursements to agencies and producing disbursement records.



Delinquents

Determines what bills are delinquent, automatically calculates additional interest, penalties and fees and facilitates the creation of notices. Includes write-off functionality, payment plans and has a bankruptcy program that allows for creation of the filing.

Tax Sale (included)

Facilitates all the activities leading up to and including the auction of liens or the auction of the property itself due to severe delinquency. Includes maintaining of buyer information and details, supports local or internet tax sales, redemption of properties and redemption payouts via ACH, along with e-mail notification to lienholders or certificate holders and full support of 1099 processing.

Business Revenue (included)

A comprehensive, automated Business Tax solution fully integrated with the Aumentum suite. This includes Business Tax as well as Trust Tax or self-reporting taxes. It has a complete import and discovery/preview tool for accepting data from external sources. It also integrates with reporting services, and supports customization of standard system reports, filings, and extracts utilizing Aumentum-provided system templates.



PROPOSED COSTS FOR IMPLEMENTATION OF AUMENTUM SYSTEM

Description	Pricing
Professional Services	\$1,580,800
Software License	\$1,867,022
Total	\$3,447,822

Description	Annual Support
Annual Maintenance*	*3 Year Contract Term
Year 1	\$373,404
Year 2	\$384,607
Year 3	\$396,145

Pricing Considerations & Break out for Business Revenue (BR), Case Mgmt & Public Access

- Case Management Total Cost \$ 164,208 (included in total above)
- Business Revenue Total Cost \$ 237,920 (included in total above)
 - Option to exclude these will lower Annual Support Cost by \$51,826
- Public Access: \$65,000 is included in Professional Services cost above
 - Base Public Access services; does not include eForms/correspondence or PPA filings – further discussion & review with County required to price this out
 - Public Access is a hosted service; pricing for set up & annual recurring costs are shown below
- Travel Costs not included above; estimated at \$105,000; to be billed as incurred
- Cannabis configuration costs TBD after Mendocino work effort (April/May 2017); not included in BR Module
- Annual support pricing based on 3 year contract, with 3 % escalators (same for Public Access Hosting/Support fees)
- Mobile/Field functionality not currently included in pricing, can be added/priced at later date

Professional Services-Setup/Configuration

The professional services pricing includes data mapping, workflow setup, implementation, configuration and training.

- Interface & reporting capped at 208 hours
 - Consulting on our standard API's and File I/O
 - Consulting on our Data Model and/or changes to existing CA market reports
- Includes 30 days UAT
- Standard 3 Conversions + 1 Go Live Conversion
- Standard California reporting is included. The SDK (software development tools) are included for your own IT staff to utilize.

Software License

The software license includes an unlimited number of users on the full Aumentum Tax & Valuation solution, utilized by the Treasurer/Tax Collector, Auditor and Assessor.

- | | |
|-----------------------------|-----------------------------|
| • Records | • Tax Billing & Collections |
| • Valuation | • Tax Sale |
| • Personal Property | • Business Revenue |
| • Assessment Administration | • Case Management |
| • Levy Management | |

Annual Maintenance

The annual maintenance will provide you with everyday access to our help desk via telephone or e-mail, as well as a regular, active schedule of new product releases. As part of your support agreement, Thomson Reuters commits to providing changes that are required to maintain our solution's compliance with the applicable laws for your state (all legislative changes are included with the support contract). Also included as part of our regular release schedule are user-requested enhancements, workflow efficiency changes, bug fixes and technology-driven improvements made to our products on an on-going basis, over their lifespan.

Maintenance: Annual Maintenance fees start upon Go-Live.

Public Access Information & Pricing:

Property & Tax Inquiry delivers fast and easy searches of Records data—parcels and owners—as well as vital records, CAMA, Personal Property and Tax information. The service can be configured to display associated images such as photos and sketches, and map views if deployed with Internet GIS.

E-Forms manages commonly used documents with the public or other entities and processes them through Aumentum workflow. Documents can be pre populated to reduce errors and minimize the time it takes to fill out a form.

Tax Payment delivers the public with a highly secure “shopping cart” experience. Reach-in technology ensures confidence that only correct, up-to-date tax amounts are displayed and paid. Customers maintain existing banking relationships. To facilitate prompt deposits, customers select a payment processor of choice for credit and debit cards payments as well as e-checks.

Internet GIS serves up map views associated with specific property and tax information. Highly-configurable using map layers that already exist within a jurisdiction. Runs on current ESRI technology.

E-Billing supports enrollment and multiple forms of verification and notifies subscribers when bills are ready for viewing, giving immediate access to on-line bill payment. Tracks e-mail notifications and logs when a bill has been viewed and sends automatic reminder notices if the bill has not been paid.

Cost Proposal for Aumentum Public Access

COST CATEGORY	SOFTWARE LICENSE	HOSTING SET UP/CONFIG	YEAR 1: HOSTING/SUPPORT
Property & Tax Inquiry	\$0	\$14,500	\$14,500
Tax Payment	\$0	\$14,500	\$14,500
E-Forms	\$0	\$14,500	\$14,500
Internet GIS	\$0	\$14,400	\$9,250
Total	\$0	\$57,900	\$52,750

Pricing Notes:

Interfaces

Thomson Reuters estimates \$5,600 (28 hours) for interface design, engineering, QA and documentation to support development of an interface for payment processor. Note that Thomson Reuters currently has interfaces and standards for many of the top payment processors, and if Solano County uses one of those, then those costs do not apply.