

**WASCO COUNTY BOARD OF COMMISSIONERS
SPECIAL SESSION / AGENDA THURSDAY, JUNE 4, 2015
LOCATION: Wasco County Courthouse, Room #302
511 Washington Street, The Dalles, OR 97058**

Public Comment: Individuals wishing to address the Commission on items not already listed on the Agenda may do so throughout the meeting; please wait for the current speaker to conclude and raise your hand to be recognized by the Chair for direction. Speakers are required to give their name and address. Please limit comments to five minutes, unless extended by the Chair.

Departments: Are encouraged to have their issue added to the Agenda in advance. When that is not possible the Commission will attempt to make time to fit you in during the first half-hour or between listed Agenda items.

NOTE: With the exception of Public Hearings, the Agenda is subject to last minute changes; times are approximate – please arrive early. **Meetings are ADA accessible.** For special accommodations please contact the Commission Office in advance, (541) 506-2520. TDD 1-800-735-2900.

1:00 p.m.

CALL TO ORDER

Items without a designated appointment may be rearranged to make the best use of time. Other matters may be discussed as deemed appropriate by the Board.

- Corrections or Additions to the Agenda
- Administrative Officer - Tyler Stone: Comments
- [Discussion Items](#) (Items of general Commission discussion, not otherwise listed on the Agenda)
- [Consent Agenda](#) (Items of a routine nature: minutes, documents, items previously discussed.)

1:00 p.m. [Public Hearing – Property Transactions](#) – Angie Brewer

1:30 p.m. [Assessor Work Session](#) – Jill Amery

**NEW / OLD BUSINESS
ADJOURN**

If necessary, an Executive Session may be held in accordance with: ORS 192.660(2)(a) – Employment of Public Officers, Employees & Agents, ORS 192.660(2)(b) – Discipline of Public Officers & Employees, ORS 192.660(2)(d) – Labor Negotiator Consultations, ORS 192.660(2)(e) – Real Property Transactions, ORS 192.660(2)(f) To consider information or records that are exempt by law from public inspection, ORS 192.660(2)(g) – Trade Negotiations, ORS 192.660(2)(h) - Conferring with Legal Counsel regarding litigation, ORS 192.660(2)(i) – Performance Evaluations of Public Officers & Employees, ORS 192.660(2)(j) – Public Investments, ORS 192.660(2)(m) –Security Programs, ORS 192.660(2)(n) – Labor Negotiations



WASCO COUNTY BOARD OF COMMISSIONERS
SPECIAL SESSION
JUNE 4, 2015

PRESENT: Scott Hege, Commission Chair
Rod Runyon, County Commissioner
Steve Kramer, County Commissioner
STAFF: Tyler Stone, Administrative Officer
Kathy White, Executive Assistant

At 1:00 P.m. Chair Hege opened the Special Session of the Board of Commissioners with the Pledge of Allegiance. Additions to the Discussion List:

Agenda Item – Property Transactions Public Hearing

Chair Hege opened the public hearing and asked Planning Director Angie Brewer to present the staff report.

Ms. Brewer said that errors over time had created two strips of property on Shearer Street that came to the County. She stated that these transactions began in November under former Planning Director John Roberts with the assistance of Realtor Dennis Morgan.

Commissioner Runyon asked what the errors were. County Assessor Jill Amery replied that it can happen in any number of ways. She said that she just saw one where the owner had done something that didn't match the plat. County Surveyor Dan Boldt said that the County gets involved when they send a tax statement to someone who never gets it and the foreclosure process begins.

Ms. Brewer said that the property remnants are not buildable and are liabilities to the County. She said that there are seven properties involved; all but the Harn property rely

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on one of the strips for access. She reviewed the properties on the map (attached). She said that Ridinger is not directly affected by this but through this process another issue was discovered that would have come up later.

Ms. Brewer said that in 2014 the property owners engaged in mediation to determine how to resolve the complicated property issues. In November of 2014, the Board of Commissioners approved orders to sell the land. Since that time work has been ongoing by the County Surveyors, Assessor, Legal and Planning Department. She explained that there is a specific order in which the prepared documents must be executed (see attached presentation).

Mr. Boldt explained that the County strip of land goes out in the Shearer Street; before the County can convey the land, that piece needs to be dedicated to the City. He said that the City is aware of the situation and is ready to accept the street.

Commissioner Runyon asked how the County came to own a piece of the street. Mr. Boldt replied that the street was assembled over time by dedicated pieces – it was done piecemeal and this small piece was never dedicated to the City.

Ms. Brewer said that once that piece is dedicated to the City there will be a quitclaim deed from the County to Roark. She said that there is a garage that is on the strip owned by the County. Mr. Boldt said this was an oversight that occurred through a sale. The Kargle family had owned a piece of property in the 1940s and then bought this adjacent piece; decades later when the family sold – they sold only the larger piece of property and neglected to convey the additional strip which eventually went into foreclosure.

Ms. Brewer went on to say that that the relinquishment of the easement will undo existing easements to allow for the transfer of the property and then there will be a new revised easement agreement which will allow everyone access. This will reflect the current structure configuration.

Chair Hege asked if at the end of these transactions the County would no longer own any part of either strip. Mr. Boldt replied affirmatively saying that everyone will have what they need to live their lives.

Mr. Boldt said that the issue that was discovered while trying to resolve the two strips is that there is a five foot gap between two of the properties; the tax description includes

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the five feet but the deed does not and the other owner has never paid taxes on the gap. He said that the DOR would see the gap and could assign a tax lot number which would bring the strip to the County through foreclosure. He said that the County should try to resolve these kinds of occurrences whenever they come to light.

Ms. Brewer said that once all the documents are approved by the Board they will be made available in the Clerk's office for signature. She said she has talked to most and left messages for the rest; everyone is happy to know that it is moving forward. She said they are aware of the costs and are grateful for the staff time that has been invested in this process.

{{{Commissioner Kramer moved to approve Order #15-055 authorizing the relinquishment of County-owned property to the City of The Dalles Pursuant to ORS 271.330. Chair Hege seconded the motion which passed unanimously.}}}

{{{Commissioner Kramer moved to approve the Deed of Dedication from Wasco County to the City of The Dalles. Commissioner Runyon seconded the motion which passed unanimously.}}}

{{{Commissioner Kramer moved to approve Quitclaim Deed from Wasco County to Jared B. Roark. Commissioner Runyon seconded the motion which passed unanimously.}}}

{{{Commissioner Kramer moved to approve Order #15-052 authorizing relocation of easement over tax foreclosed property to Jared B. Roark and Dortha C. Bayer, Trustee. Chair Hege seconded the motion which passed unanimously.}}}

{{{Commissioner Kramer moved to approve the Relinquishment of Easement Tax Lot 800, Roark; Tax Lots 600 & 801, Wasco County; Tax Lot 900 Bayer. Chair Hege seconded the motion which passed unanimously.}}}

{{{Commissioner Kramer moved to approve the Easement Agreement for valuable mutual consideration, Isaias Hernandez Jacob and Donagil Vidales, husband and wife (Grantors) and Wasco County (Grantor). Commissioner Runyon seconded the motion which passed unanimously.}}}

{{{Commissioner Kramer moved to approve Quitclaim Deed from Wasco

County to Gary and Beth Harn. Commissioner Runyon seconded the motion which passed unanimously.}}}

Ms. Brewer said that the question arises as to whether the County needs to establish a process for these kinds of situations. Mr. Boldt pointed out that staff has spent months working through this process to convey land out of County ownership and appropriately into private ownership; it should have taken only weeks. He said that it involved legal counsel, the Assessor, planning and the surveyor – these efforts need to be coordinated. He pointed out that there are many County-owned properties and at least two derelict homes. He said that there will be more strips of land that come to the County and no one is minding the store to proactively determine what to do with these pieces of land.

Mr. Boldt went on to say that he was part of the process when the County had a problem with County-owned vehicles; when there were budget issues the easiest answer was to cut a Sheriff's vehicle – soon the County had dozens of vehicles that needed to be replaced at the same time. He said that a committee was formed and the found a way to have a process to rotate Sheriff's vehicles out of that department into other departments as they aged. Now the County buys a predetermined number of Sheriff's vehicles each year. He stated that the County got the right people in the room on a regular basis to make those decisions. He recommended that the County establish a Lands Committee that will look to take care of the lands the County currently owns and sell them in such a manner that the County can maximize the value of the land.

Mr. Stone reported that the County currently owns between 150 and 200 of these properties and it has been an issue as long as he has been with the County and probably long before.

County Assessor Jill Amery said that she and County Counsel Kristen Campbell have worked on this and seen how complex it is. She said that Tax and Assessment wants to have a process to get rid of these properties as they are acquired by the County. She said that she supports the forming of this committee rather than just having the Tax and Assessment Office make the decisions alone. She said that she foresees the Board having to set some policies as the committee works through the process.

Mr. Stone observed that one of the challenges in selling a property is that the money has to be distributed.

Commissioner Runyon pointed out that involving legal counsel is expensive. Ms. Amery acknowledged that saying that they want to do as much of the work in-house as possible. Mr. Stone said that County costs were not recovered on this transaction – it was a learning curve. Mr. Boldt pointed out that the County now has good document templates to use going forward.

*****The Board was in consensus to form a Lands Committee to work on the disposal of current and future County-owned lands.*****

Commissioner Kramer said that he would be happy to sit on that committee as the Board representative to help in whatever way he can.

Chair Hege said that this circumstance cannot be unique to Wasco County; other counties must have a process. Ms. Amery said that they do and she has already been exploring that. She reported that Clackamas County has an annual sale and she would like to see Wasco County get there.

Commissioner Kramer said that he has a constituent who has property next to him that is designated as a park. He is willing to buy property and then trade as a creative solution to the issue. Mr. Boldt said that a lot of those parks exist; under previous LUDO, developers had to dedicate land for a park and it would always be the worst parcel of land in the development.

Agenda Item – Assessor's Work Session

Ms. Amery said that the documents included in the Board Packet is what she had to work with regarding the new software that was converting when she came on board. She said that she wants transparency and to forge a clear path that everyone understands. She noted that someone had suggested the County sue Thompson Reuters and throw out the system. She said she cannot say how we got here but she can say where we are – the data is getting converted. She reported that other counties use the same software and it works. She said the fiscally responsible choice is to finish the conversion and stay with the software. She said a fix is in place for the Treasurer's system to work with the Assessor's system; it has been tested and she believes it is ready to go live.

Ms. Amery said that when she came into her position in 2014 there was no plan, no notes for the new system. They converted in 2011 to Proval and only one-third of the

data was converted. In 2013/2014 there were some glitches. She said they have made a lot of headway; reconciliations are happening and it is working well. She said she recommends staying with the current system and moving forward. Mr. Stone said that he supports Ms. Amery in this.

*****The Board was in consensus to support the Assessor's decision to retain the current tax software system.*****

Chair Hege said that the problem he sees is that even if the County were to go to the expense of switching to a different system, data would still need to be converted. He noted that this may not be the best system out there but it is adequate and the County does not need to incur the expense of another implementation and training.

Ms. Amery said that the purchase was about \$317,000 to date; it may not be what she would have chosen but it is workable. She said that the transition would have gone more smoothly had there been a plan in place but much of the data would still have had to be entered by hand. She noted that the Proval side is the most complicated piece – other counties are using it, but each in their own way. She said staff will still need more training, but she believes the system will work and she wants to get it done.

Chair Hege said that after all the data is entered, the County may determine they want a change but it will be easier because the data will have been converted. Ms. Amery agreed and said that at that point what the County may consider is to upgrade to a newer, better version of what the current provider has.

Commissioner Runyon said that he would be reluctant to go forward with the current company for an upgrade.

Ms. Amery said that the current company has been very good to work with. She said that she believes the errors were on both sides – the County should have had a better plan and it was difficult to get information from the Treasurer. She said that the company has been on site and has been great.

Chair Hege said that there has been a negative view of the company but it may not have always been their error. Ms. Amery concurred and pointed out that what the County purchased was the basic product. She said she came to the Board today just to make sure everyone is on the same page.

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Chair Hege adjourned the session at 2:04 p.m.

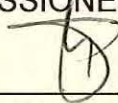
Motions Passed

- To approve Order #15-055 authorizing the relinquishment of County-owned property to the City of The Dalles Pursuant to ORS 271.330.
- To approve the Deed of Dedication from Wasco County to the City of The Dalles.
- To approve Quitclaim Deed from Wasco County to Jared B. Roark.
- To approve Order #15-052 authorizing relocation of easement over tax foreclosed property to Jared B. Roark and Dortehea C. Bayer, Trustee.
- To approve the Relinquishment of Easement Tax Lot 800, Roark; Tax Lots 600 & 801, Wasco County; Tax Lot 900 Bayer.
- To approve the Easement Agreement for valuable mutual consideration, Isaias Hernandez Jacob and Donagil Vidales, husband and wife (Grantors) and Wasco County (Grantor).
- To approve Quitclaim Deed from Wasco County to Gary and Beth Harn.

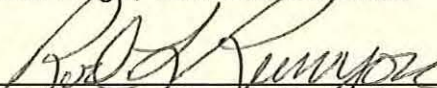
Consensus

- To form a Lands Committee to work on the disposal of current and future County-owned lands.
- To support the Assessor's decision to retain the current tax software system.

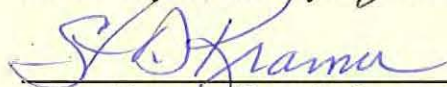
WASCO COUNTY BOARD
OF COMMISSIONERS



Scott Hege, Commission Chair



Rod Runyon, County Commissioner



Steve Kramer, County Commissioner

Agenda Item

Property Transactions

- [Deed of Dedication – Wasco County to City](#)
- [Quitclaim to Roark](#)
- [Relinquishment of Easement](#)
- [Easement and Agreement](#)
- [Order – Easement](#)
- [Order - Dedication](#)
- [Quitclaim to Harn](#)
- [Quitclaim to Ridinger](#)

After recording return to:
City of the Dalles
City Hall
313 Court Street
The Dalles, OR 97058

Consideration: Public Purpose, ORS 271.330

DEED OF DEDICATION

KNOW ALL MEN BY THESE PRESENTS that WASCO COUNTY, herein called Grantor, does hereby dedicate to the CITY OF THE DALLES, a local access road (as defined in ORS 368.001) over and across the following real property:

(A PORTION OF TAX LOT 1N 13E 2CD 600)

A portion of real property granted by the Circuit Court of the State of Oregon Judgment dated September 20, 2001 and recorded September 21, 2001, as Microfilm No. 20013979, Wasco County Deed Records, to Wasco County, more particularly described as follows:

The East 20 feet of the South 9 feet of the North 159 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon,

The true consideration for this conveyance is the value to the public of the land dedicated herein for Shearer Street.

Dated this ____ day of _____, 2015.

Scott Hege, Commissioner

Rod Runyon, Commissioner

Steve Kramer, Commissioner

STATE OF OREGON)

) ss.
County of Wasco)

Personally appeared before me this ____ day of _____, 2015,
the above named Rod Runyon, Commissioner of Wasco County, Oregon, and acknowledged the
foregoing to be his voluntary act and deed.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

Personally appeared before me this ____ day of _____, 2015,
the above named Steve Kramer, Commissioner of Wasco County, Oregon, and acknowledged the
foregoing to be his voluntary act and deed.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

Personally appeared before me this ____ day of _____, 2015,
the above named Scott Hege, Commissioner of Wasco County, Oregon, and acknowledged the
foregoing to be his voluntary act and deed.

Notary Public for Oregon

This dedication is accepted by the City of The Dalles, for the public, pursuant to the
provisions of Resolution No. 15-_____, adopted on _____, 2015.

CITY OF THE DALLES

By: _____
Steve Lawrence, Mayor

ATTEST:

Julie Krueger, MMC, City Clerk

APPROVED AS TO FORM:

Gene Parker, City Attorney

Until a change is requested, all tax
statements shall be sent to:

Jared B. Roark

After recording return to:

Timmons Law PC

PO Box 2350

The Dalles, OR 97058

Consideration: ORS 275.225/\$50.00

QUITCLAIM DEED

Wasco County, Grantor, releases and quitclaims to Jared B. Roark, Grantee, all right, title and interest in and to the following described real property in Wasco County, State of Oregon, as is and with no representations or warranties:

Portion of the land conveyed to Wasco County by Amended Deed recorded November 22, 2002, as Microfilm No. 20026197, Wasco County Deed Records described as follows:

The South 10 feet of the North 134 feet of the West 50 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLEES CITY, Wasco County, State of Oregon.

The true consideration for this deed stated in terms of dollars is none.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424,

OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009,
AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

DATED: _____, 2015.

Scott Hege, Commissioner

Rod Runyon, Commissioner

Steve Kramer, Commissioner

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Scott Hege**, Wasco County Commissioner and
acknowledged the foregoing instrument to be his voluntary act and deed.

Notary Public for Oregon

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Rod Runyon**, Wasco County Commissioner and
acknowledged the foregoing instrument to be his voluntary act and deed.

Notary Public for Oregon

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Steve Kramer**, Wasco County Commissioner and
acknowledged the foregoing instrument to be his voluntary act and deed.

Notary Public for Oregon

RELINQUISHMENT OF EASEMENT

The purpose of this conveyance is to release and relinquish all rights, title, and interest in a certain 9-foot wide easement for road purposes (the “Easement”) described as being the South 9 feet of the North 159 feet of the East 120 feet of Lot 6, Block 6, THOMPSON’S ADDITION TO DALLES CITY, Wasco County, Oregon.

WHEREAS, Wasco County is the owner of the following real property, more particularly described in Exhibit A and as depicted in Exhibit B, encumbered by the Easement:

TAX LOT 600, WASCO COUNTY: Real property granted by the Circuit Court of the State of Oregon Judgment dated September 20, 2001 and recorded September 21, 2001, as Microfilm No. 2001-3979, Wasco County Deed Records, to Wasco County, except the east twenty (20) feet dedicated to the City of The Dalles by Deed of Dedication dated _____..

WHEREAS, the following real properties, more particularly described in Exhibit A, benefit from the Easement:

TAX LOT 800, ROARK: Real property conveyed by Warranty Deed recorded May 18, 2015, as Microfilm No. 2015-001836, Wasco County Deed Records, to Jared B. Roark, successor in interest to Daren W. Whitbeck and Marilyn J. Whitbeck.

TAX LOT 801, WASCO COUNTY: Real property conveyed by Amended Deed recorded November 22, 2002, as Microfilm No. 20026197, Wasco County Deed Records, to Wasco County.

TAX LOT 900, BAYER: Real property conveyed by Warranty Deed recorded February 27, 2009, as Record No. 2009-000753, Wasco County Deed Records, to Dorothea C. Bayer, Trustee, or successor Trustee(s), of the Dorothea C. Bayer Revocable Living Trust.

WHEREAS, the owners of all four properties (the “Parties”) desire to release and relinquish the Easement in lieu of a relocated easement.

WHEREAS, Wasco County, as owner of the above described portion of encumbered TAX LOT 600, pursuant to ORS 275.090, has agreed to convey said relocated easement.

NOW, THEREFORE, in consideration of good will and other valuable considerations Roark, Wasco County, and Bayer hereby agree as follows:

1. Recitations: The foregoing recitations are true and correct and are incorporated herein by this reference.

2. Relinquishment of Easement: All Parties hereby agree to release and relinquish the Easement and all rights title and interest created in their favor in exchange for the relocated easement to be conveyed contemporaneously with this relinquishment.
3. Binding Effect: The covenants in this Relinquishment of Easement are not personal but shall run with the land and shall be binding upon and inure to the benefit of the fee simple title holder of TAX LOT 600, and any respective heirs, personal representatives, transferees, successors, or assigns.
4. This Relinquishment Agreement is hereby ratified and confirmed and shall remain in full force and effect.
5. Counterparts: This Relinquishment of Easement may be executed in one or more counterparts, each of which shall be deemed to be an original but all of which shall constitute one and the same Relinquishment of Easement.
6. Attached hereto and by this reference made a part hereof is a map marked Exhibit B showing the relinquishment.

IN WITNESS WHEREOF, this Relinquishment of Easement has been executed on this _____ day of _____, 2015.

The following parties have caused this relinquishment to be executed.

STATE OF OREGON)
) ss.
County of Wasco)

Jared B. Roark

This instrument was acknowledged before me on this _____ day of _____, 2015, by **Jared B. Roark**

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

Dorothea C. Bayer, Trustee
Dorothea C. Bayer Revocable Living Trust

This instrument was acknowledged before me on this _____ day of _____, 2015, by **Dorothea C. Bayer**, Trustee, of the Dorothea C. Bayer Revocable Living Trust.

Notary Public for Oregon

Scott Hege, Commissioner

Rod Runyon, Commissioner

Steve Kramer, Commissioner

STATE OF OREGON)
) ss.
County of Wasco)

 This instrument was acknowledged before me on this _____ day of _____, 2015, by **Scott Hege**, Commissioner for Wasco County.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

 This instrument was acknowledged before me on this _____ day of _____, 2015, by **Rod Runyon**, Commissioner for Wasco County.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

 This instrument was acknowledged before me on this _____ day of _____, 2015, by **Steve Kramer**, Commissioner for Wasco County.

Notary Public for Oregon

APPROVED AS TO FORM:

County Counsel

EXHIBIT A

TAX LOT 600 COUNTY 1N 13E 2CD Tax Lot 600 Microfilm No. 20013979

Legal Description: The South 9 feet of the North 159 feet of the East 120 of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon

TAX LOT 800 ROARK 1N 13E 2CD Tax Lot 800 Microfilm No. 951402

Legal Description: The South 100 feet of the West 50 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon.

TAX LOT 801 COUNTY 1N 13E 2CD Tax Lot 801 Microfilm No. 20026197

Legal Description: The South 10 feet of the North 134 feet of the West 50 of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon.

TAX LOT 900 BAYER 1N 13E 2CD Tax Lot 900 Record No. 2009-000753

Legal Description: The North 124 feet of the West 50 of Lot 6, Block 6, THOMPSON'S ADDITION to Dalles City, in the City of The Dalles, County of Wasco and State of Oregon.

After recording return to:
Timmons Law PC
PO Box 2350
The Dalles, OR 97058

EASEMENT AND AGREEMENT

FOR VALUABLE MUTUAL CONSIDERATION, Isaias Hernandez Jacob and Donagil Vidales, husband and wife (Grantors), and Wasco County (Grantor), on this ____ day of _____, 2015, do hereby create this Easement and Agreement, including the easement and restrictions contained herein, as follows:

WITNESSETH:

WHEREAS, Grantors, Isaias Hernandez Jacob and Donagil Vidales, own certain real property located in the City of The Dalles, as described by Statutory Warranty Deed, Wasco County Deed Records No. 2014-00535, recorded February 27, 2014, described as follows:

The West 50 feet of the West 105 feet of the East 120 feet of the North 100 feet, and the West 105 feet of the East 120 feet of the South 50 feet of the North 150 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon.

EXCEPT the East 5 feet of the West 105 feet of the East 120 feet of the South 50 feet of the North 150 feet thereof.

AND, Grantor, Wasco County owns certain real property located in the City of The Dalles as described by Wasco County Trial Court order dated September 20, 2001, recorded September 21, 2001 as Microfilm No. 2001-3979, Wasco County Deed Records, described as follows:

The South 9 feet of the North 159 feet of the East 120 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon.

WHEREAS, Grantors, Isaias Hernandez Jacob and Donagil Vidales, desire to provide an easement along the South boundary of their property, nine (9) feet in width, and Grantor, Wasco

County, pursuant to ORS 275.090, desire to provide an easement along the North boundary of its adjacent property six (6) feet in width, to be an easement fifteen (15) feet in width providing access to the tract conveyed to Jared B. Roark, successor in interest to Daren W. Whitbeck and Marilyn J. Whitbeck, (Grantee), by Warranty Deed recorded May 18, 2015, as Microfilm No. 1025-001836, Wasco County Deed Records along with the ten (10) foot strip conveyed by Quitclaim Deed dated _____ to Jared B. Roark, and also to the tract conveyed to Dorothea C. Bayer, Trustee, or successor Trustee(s), of the Dorothea C. Bayer Revocable Living Trust dated November 11, 2008, (Grantee) by Warranty Deed recorded February 27, 2009, as Document No. 2009-000753, Wasco County Deed Records.

WHEREAS, Grantors intend that the present and future owners of the Grantees' properties referenced herein shall jointly and equally share in the maintenance, snowplowing and repair costs thereof.

NOW, THEREFORE, the following permanent easements and restrictions are hereby imposed upon the lands involved, as also depicted in Exhibit A:

1. A permanent fifteen (15) foot wide private road easement is hereby created for the benefit of the Grantees and is more fully described as follows:

The South 9 feet of the West 100 feet of the East 120 feet of the North 150 feet AND the North 6 feet of the South 9 feet of the North 159 feet of the West 100 feet of the East 120 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon.

2. The Easement shall be used for private road and utility purposes only. The Easement may also be used by firefighting, emergency and other public vehicles and personnel for public services, emergencies, fires and similar events. It is intended that the Easement shall permit year-round access for vehicles and foot traffic to and from the Grantees' properties.
3. The Easement shall be jointly maintained by the Grantees, with each Grantee paying an equal fractional share of the reasonable costs of repairing and maintaining the private road located within the Easement. Each Grantee shall also pay an equal fractional share of the reasonable costs of snowplowing the Easement once three (3) or more inches of snow has fallen. No maintenance, repair, upgrading of the private road or snowplowing work shall be done, however, until a majority of the Grantees

and Grantors agree on the contractor or contractors to do the work, as well as what work will be done.

4. Notwithstanding anything contained in this Agreement, each Grantee shall maintain, repair and snowplow the private road right-of-way so as to comply with the requirements of all applicable City of The Dalles ordinances and in such a manner as to assure that the private road is safe for travel at all times.
5. A private road sign built to the specifications of the City of The Dalles shall always be maintained at the intersection of the Easement with Shearer Street and the private road shall be given a name. No structures (except utilities), signs, or similar items shall be placed, installed, or maintained within the Easement without the consent of a majority of the Grantors and Grantees.
6. No vehicle shall be parked on or within the Easement, nor shall any impediment be placed, stored or maintained within the Easement. It is the intent of this document that the Easement shall remain free and clear to allow the Grantees (and their invitees) to have full, unimpeded access to their respective properties and the individual driveways which branch off of the Easement.
7. No Person shall in any way prohibit, restrict, limit or in any matter interfere with normal ingress and egress and use of the Easement (or the private road therein) by any of the beneficiaries of the Easement or their invitees. Normal ingress and egress and use shall include not only use by the Grantees, but also by their family, guests, invitees, trades people and others bound for or returning for any of the properties having a right to use the private road.
8. If any part of the Easement, private road or properly placed structures within the Easement are damaged by one of the Grantees (or by his or her family or invitees), then that Grantee shall be fully responsible for repairing the damage and paying for the same.
9. Grantor, their successors, and any and all current and future owners of the Grantees properties referenced herein shall indemnify, save and hold the City of The Dalles, Wasco County and Grantors (as well as its officers, agents, and employees) harmless for, from and against any and all claims, causes of action, costs, or damages for personal injury and/or property damages arising out of or related to the use of the Easement or the private road, or the failure to properly construct, maintain, repair, and/or install any appurtenance thereto. The owners of all properties benefitted by the Easement shall be jointly and severally liable and responsible for maintaining the entire length of the private road in the Easement and to maintain the same in full compliance with all City of The Dalles ordinance requirements and standards. This Agreement shall also be enforceable by the City of The Dalles at its option. If the private road is not maintained to the requirements of all City of The Dalles ordinance requirements, the Grantees and their successors and assigns shall be deemed, by the recording of this Agreement, to have petitioned for the creation of a special assessment district by the City of The Dalles to maintain or upgrade the private road

within the Easement. Alternatively, The City of The Dalles, at its option, can improve and maintain the private road so that it meets the requirements of all City of The Dalles ordinances, and The City of The Dalles can charge the Grantees for the reasonable costs of maintenance or improvement thereof, with all such costs secured by either placing a lien on the benefitted properties or by placing the costs on the tax roll for the Grantees' properties referenced herein.

10. Each of the Grantees' properties shall be used in compliance with the City of The Dalles ordinances.
11. The Easement and restrictions, terms and conditions of this Agreement shall permanently run with the land and shall both bind and benefit Grantors, all current and future owners of the Grantees' properties referenced herein and their heirs, assigns and successors in and to the land.
12. The Easement and restrictions, terms and conditions of this Agreement shall be in addition to any existing deed restrictions binding the Grantees' properties (if any) and shall in no way lessen, negate or alter any existing deed restrictions.
13. The street or road covered by this Agreement is private and is not required to be maintained by the City of The Dalles.

WASCO COUNTY BOARD OF COMMISSIONERS

Scott C. Hege, Commission Chair

Rod L. Runyon, County Commissioner

Steve Kramer, County Commissioner

Approved as to form:

By: Kristen A. Campbell, County Counsel

Isaias Hernandez Jacob, Grantor

Donagil Vidales, Grantor

Jared B. Roark

Dorothea C. Bayer, Trustee, Grantee

STATE OF OREGON)
) ss.
County of Wasco)

This instrument was acknowledged before me on this _____ day of _____, 2015, by **Scott Hege**, Commissioner for Wasco County.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

This instrument was acknowledged before me on this _____ day of _____, 2015, by **Rod Runyon**, Commissioner for Wasco County.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

This instrument was acknowledged before me on this _____ day of _____, 2015, by **Steve Kramer**, Commissioner for Wasco County.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

This instrument was acknowledged before me on this _____ day of _____, 2015, by **Isaias Hernandez Jacob** and **Donagil Vidales**.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

 This instrument was acknowledged before me on this _____ day of _____, 2015, by **Jared B. Roark**.

Notary Public for Oregon

STATE OF OREGON)
) ss.
County of Wasco)

 This instrument was acknowledged before me on this _____ day of _____, 2015, by **Dorothea C. Bayer**, Trustee of the Dorothea C. Bayer Revocable Living Trust.

Notary Public for Oregon

IN THE BOARD OF COMMISSIONERS OF THE STATE OF OREGON
IN AND FOR THE COUNTY OF WASCO

IN THE MATTER OF AUTHORIZING)	
RELOCATION OF EASEMENT OVER)	ORDER
TAX FORECLOSED PROPERTY TO)	#15-052
JARED B. ROARK AND DORTHEA C.)	
BAYER, TRUSTEE)	

WHEREAS, Jared B. Roark and Dortha C. Bayer, Trustee of the Dortha C. Bayer Revocable Trust (“Property Owners”), have requested the relocation of an easement on tax foreclosed real property owned by Wasco County and described as The South 9 feet of the North 159 feet of the East 120 feet of Lot 6, Block 6, THOMPSON’S ADDITION TO DALLES CITY, Wasco County, State of Oregon.

WHEREAS, purpose of the relocated easement (the “Easement”) is to more accurately describe the existing easement and will not adversely impact the use or value of the County’s real property.

WHEREAS, the County has the authority to relocate the Easement pursuant to ORS 275.090(3) and (5).

WHEREAS, the Property Owners entered into mediation in or around July 19, 2014, whereby the Property Owners agreed upon terms, which are beneficial to the County, for using and maintaining the Easement.

WHEREAS, since the Easement is only replacing an existing easement and because the terms of the Easement are beneficial to Wasco County, the Wasco County Board of Commissioners finds that no consideration is required.

IT IS THEREFORE ORDERED that the Wasco County Board of Commissioners is authorized to execute the Relinquishment of Easement, which relinquishes the original easement, attached as Exhibit B.

IT IS FURTHER ORDERED that the Wasco County Board of Commissioners is authorized to execute the Easement and Agreement, which relocates the original easement and incorporates the terms of the subject mediation, attached as Exhibit A.

DATED this _____ day of _____, 2015.

WASCO COUNTY BOARD OF COMMISSIONERS

Scott Hege, Commission Chair

Rod Runyon, County Commissioner

Steve Kramer, County Commissioner

APPROVED AS TO FORM:

Kristen A. Campbell
Wasco County General Counsel

IN THE BOARD OF COMMISSIONERS OF THE STATE OF OREGON
IN AND FOR THE COUNTY OF WASCO

IN THE MATTER OF AUTHORIZING)	
RELINQUISHMENT OF COUNTY-)	ORDER
OWNED PROPERTY TO CITY OF)	#15-055
THE DALLES PURSUANT TO)	
ORS 271.330)	

WHEREAS, Wasco County has requested relinquishment of a 20’ portion of tax foreclosed real property to another governmental body for public purposes.

WHEREAS, ORS 271.330 provides for relinquishment of tax foreclosed real property not needed for public use to other governmental bodies in the State of Oregon;

WHEREAS, property relinquished to another governmental body under ORS 271.330 shall be used and continue to be used, by that governmental body for a public purpose; and

WHEREAS, the subject real property proposed to be relinquished was not acquired with road funds;

WHEREAS, the Wasco County Assessor published notice of this public hearing to consider this proposed transfer in a newspaper of general circulation as provided pursuant to ORS 271.330(5); and

IT IS THEREFORE ORDERED that the real property described in attached EXHIBIT A is not needed for Wasco County purposes.

IT IS FURTHER ORDERED that Wasco County authorize the relinquishment of that county-owned real property, as is and with no representations or warranties, to the City of The Dalles via deed of dedication attached as Exhibit A.

DATED this _____ day of _____, 2015.

WASCO COUNTY BOARD OF COMMISSIONERS

Scott Hege, Commission Chair

Rod Runyon, County Commissioner

Steve Kramer, County Commissioner

APPROVED AS TO FORM:

Kristen A. Campbell
Wasco County General Counsel

Until a change is requested, all tax statements shall be sent to:
Gary W. Harn and Beth Harn
1111 Shearer Street
The Dalles, OR 97058

After recording return to:
Timmons Law PC
PO Box 2350
The Dalles, OR 97058

Consideration: ORS 275.225/\$50.00

QUITCLAIM DEED

Wasco County, **Grantor**, releases and quitclaims to Gary W. Harn and Beth Harn, **Grantees**, all right, title and interest in and to the following described real property in Wasco County, State of Oregon, as is and with no representations or warranties:

Portion of the land conveyed to Wasco County by Deed recorded September 21, 2001 as Microfilm No. 20013979, Wasco County Deed Records described as follows:

The South 9 feet of the North 159 feet of the East 120 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, Wasco County, State of Oregon;

EXCEPTING THEREFROM the East 20 feet.

The true consideration for this deed stated in terms of dollars is none.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS

195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

DATED: _____, 2015.

Scott Hege, Commissioner

Rod Runyon, Commissioner

Steve Kramer, Commissioner

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Scott Hege**, Wasco County Commissioner and acknowledged the foregoing instrument to be his voluntary act and deed.

Notary Public for Oregon

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Rod Runyon**, Wasco County Commissioner and acknowledged the foregoing instrument to be his voluntary act and deed.

Notary Public for Oregon

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Steve Kramer**, Wasco County Commissioner and acknowledged the foregoing instrument to be his voluntary act and deed.

Notary Public for Oregon

Until a change is requested, all tax statements shall be sent to:
Isaias Hernandez Jacob and Donagil Vidales
2122 East 10th Street
The Dalles, OR 97058

After recording return to:
Isaias Hernandez Jacob and Donagil Vidales
2122 East 10th Street
The Dalles, OR 97058

Consideration: \$1.00

QUITCLAIM DEED

Patricia Ridinger, **Grantor**, releases and quitclaims to Isaias Hernandez Jacob and Donagil Vidales, **Grantees**, all right, title and interest in and to the following described real property in Wasco County, State of Oregon:

The East 5 feet of the West 55 feet of the East 120 feet of the North 100 feet of Lot 6, Block 6, THOMPSON'S ADDITION TO DALLES CITY, in the City of The Dalles, Wasco County, State of Oregon.

This conveyance is in recognition of:

1. A recently discovered 5-foot hiatus between the two properties;
2. The discovery that Grantee's deed description differs from Assessor's taxation description;
3. Grantee's predecessor paid taxes on said 5-foot hiatus for decades; and
4. The understanding that this conveyance reflects the continuous historic and existing use and possession of this hiatus.

The true consideration for this deed stated in terms of dollars is none.

BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON TRANSFERRING FEE TITLE SHOULD INQUIRE ABOUT THE PERSON'S RIGHTS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010. THIS INSTRUMENT DOES NOT ALLOW USE OF THE PROPERTY DESCRIBED IN THIS INSTRUMENT IN VIOLATION OF APPLICABLE LAND USE LAWS AND REGULATIONS. BEFORE SIGNING OR ACCEPTING THIS INSTRUMENT, THE PERSON ACQUIRING FEE TITLE TO THE PROPERTY SHOULD CHECK WITH THE APPROPRIATE CITY OR COUNTY PLANNING DEPARTMENT TO VERIFY THAT THE UNIT OF LAND BEING TRANSFERRED IS A LAWFULLY ESTABLISHED LOT OR PARCEL, AS DEFINED IN ORS 92.010 OR 215.010, TO VERIFY THE APPROVED USES

OF THE LOT OR PARCEL, TO DETERMINE ANY LIMITS ON LAWSUITS AGAINST FARMING OR FOREST PRACTICES, AS DEFINED IN ORS 30.930, AND TO INQUIRE ABOUT THE RIGHTS OF NEIGHBORING PROPERTY OWNERS, IF ANY, UNDER ORS 195.300, 195.301 AND 195.305 TO 195.336 AND SECTIONS 5 TO 11, CHAPTER 424, OREGON LAWS 2007, SECTIONS 2 TO 9 AND 17, CHAPTER 855, OREGON LAWS 2009, AND SECTIONS 2 TO 7, CHAPTER 8, OREGON LAWS 2010.

DATED: _____, 2015.

Patricia Ridinger

STATE OF OREGON)
) ss. _____, 2015.
County of Wasco)

Personally appeared the above named **Patricia Ridinger**, and acknowledged the foregoing instrument to be her voluntary act and deed.

Notary Public for Oregon



Wasco County Planning Department

"Service, Sustainability & Solutions"

2705 East Second St. • The Dalles, OR 97058
(541) 506-2560 • wcplanning@co.wasco.or.us
www.co.wasco.or.us/planning

Memorandum

To: Wasco County Board of County Commissioners:
Chairman, Commissioner Scott Hege
Commissioner Steve Kramer
Commissioner Rod Runyon

Copy: Tyler Stone, Wasco County Administrator
Kristen Campbell, Wasco County Legal Counsel
Dan Boldt and Brad Cross, Wasco County Surveyor
Jill Amery, Wasco County Assessor

From: Angie Brewer, Director, Wasco County Planning Department

Date: Prepared for June 4, 2015

Subject: Wasco County Property Transactions

As you are aware, Wasco County is the recipient of foreclosed lands in unincorporated and incorporated portions of the County. Over the last seven months, Wasco County Planning, Surveyor, Assessor, and Legal Counsel have been working with five private landowners resolve an access dispute in an area that includes two small properties acquired by the County through the foreclosure process. The properties in question are located within the City of The Dalles. A resolution was achieved through a mediated process lead by Six Rivers Mediation in October of 2014.

The issue: (1) one small strip of land currently owned by Wasco County is used by multiple private landowners for their primary point of access from Shearer Street; (2) a portion of this strip includes a portion of Shearer Street; and (3) one separate small strip of land owned by Wasco County contains a portion of a private garage. Before County acquisition, the use of these lands had been in conjunction with the adjacent properties. Thus, adjacent properties have historically included them in landscaping, structural development and access.

To resolve this issue, the following actions are requested of the Board:

1. Board approval and signature of an Order authorizing relinquishment to the City of The Dalles and the Deed of Dedication to be accepted by the City (portion of Shearer Street to the City).
2. Board signature of the Quit Claim Deed from the County to Roark (previously Whitbeck).
3. Board approval and signature of an Order authorizing the relocation of easement and relinquish existing easement (driveway areas).
4. Board signature of the Easement and Easement Agreement (repositioning relinquished easement plus mediated agreement).
5. Board signature of the Quit Claim Deed from the County to Harn (driveway area).

Attached to this cover memorandum, please find the documents referenced above as well as a copy of the PowerPoint presentation that will be provided by staff at the June 4, 2015 meeting.

Wasco County Property Transactions

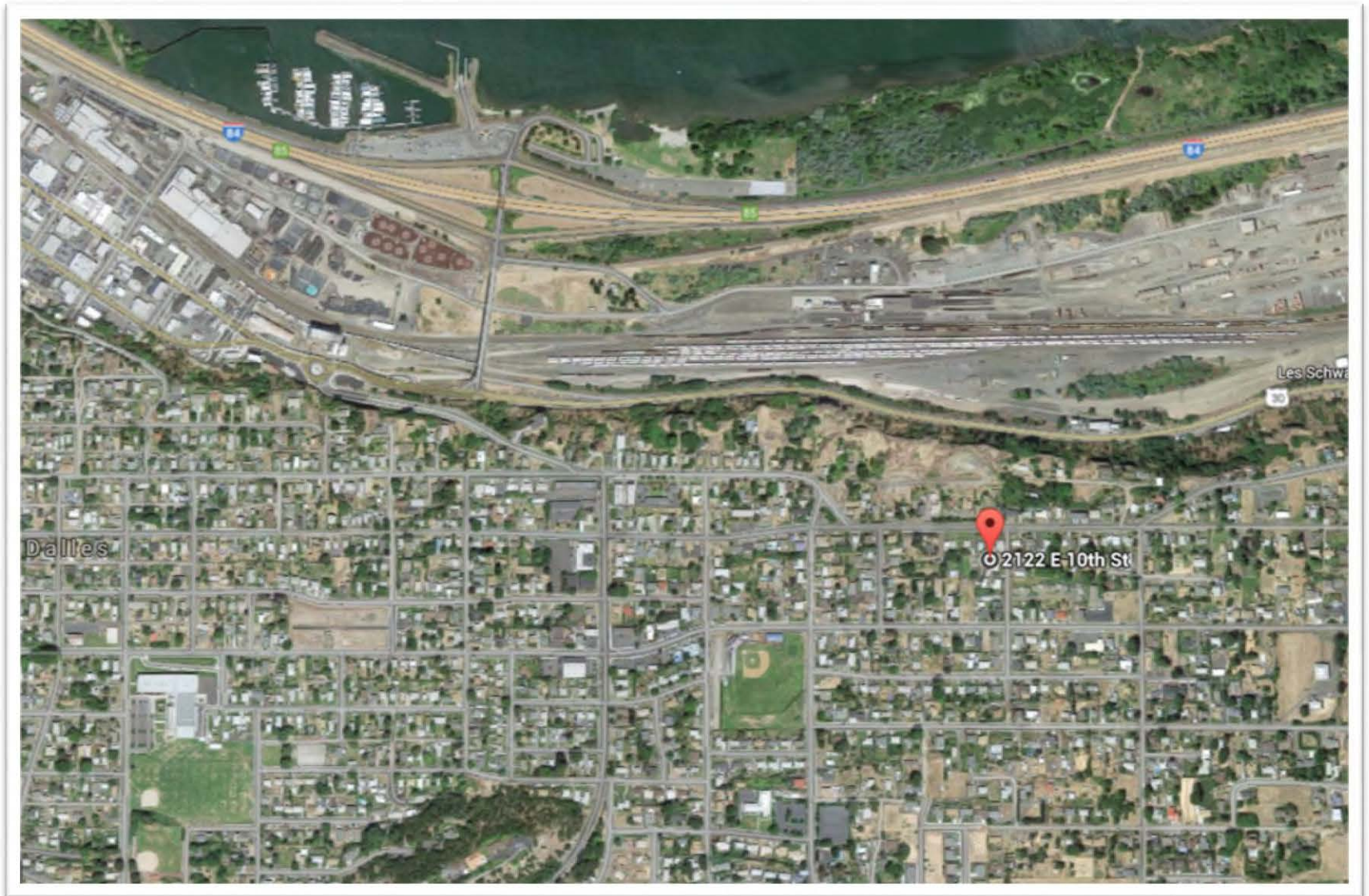
June 4, 2014 Presentation

Angie Brewer

Summary

- Two “strips” of land owned by Wasco County within the City of The Dalles
- County ownership is a common result of deed gaps or owner’s mistakes, then Department of Revenue relotting leading to the foreclosure process.
- This instance creates an access issue that impacts four separate properties within the City.

General Location



General Location of Subject Properties



- Seven Properties:
 - Two County Properties
 - Vidalis-Jacob Property
 - Harn Property
 - Bayer Property
 - Roark Property
(previously Whitbeck)
 - Ridinger Property

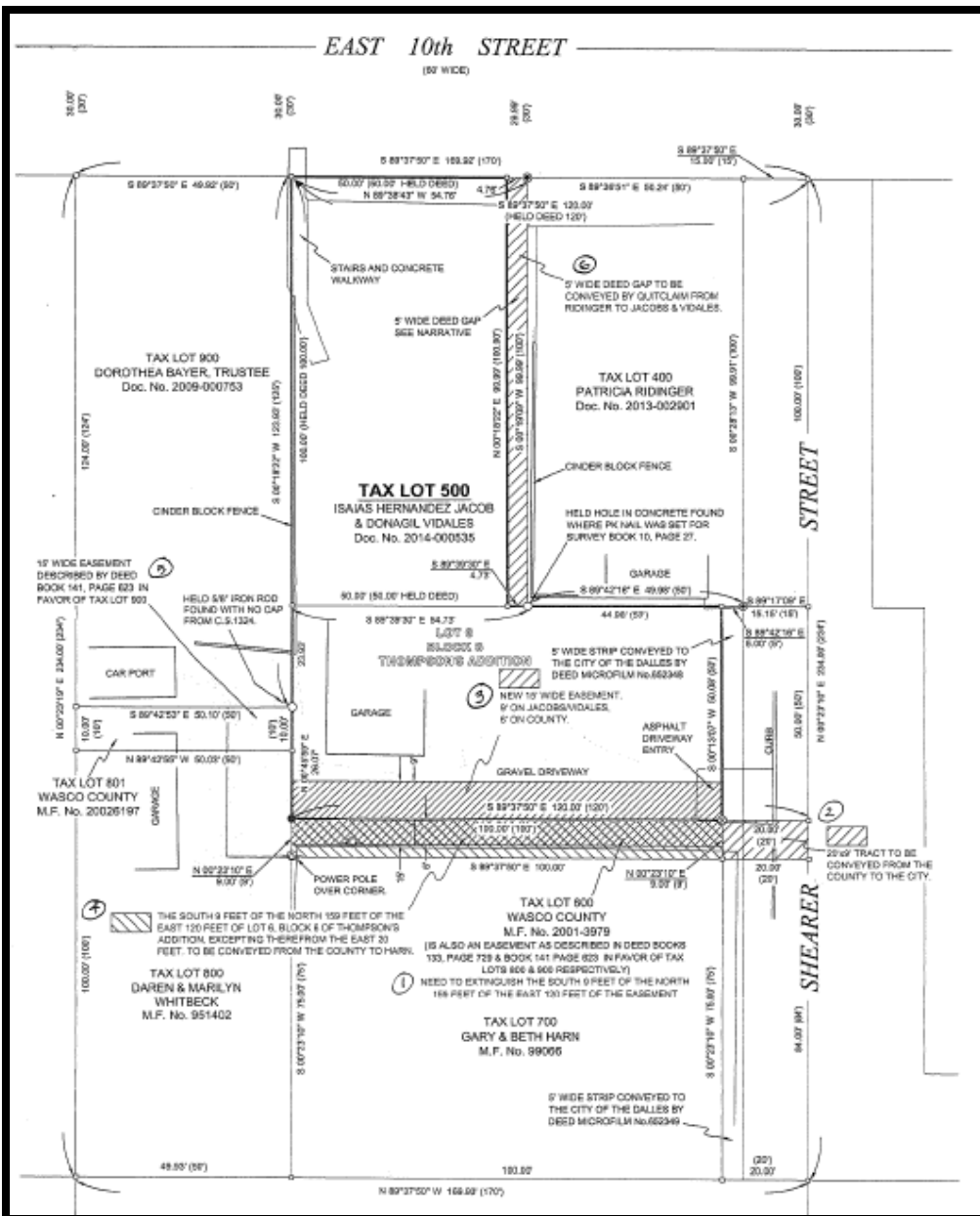


Image of Survey Work:

Significant investment of time on behalf of Wasco County Surveyors, Assessor's Office, Planning Department and County Counsel.

This survey has been prepared in addition to several easement agreements and quit claim deeds. These documents are included in your packet and require approval before they can be recorded.

Abbreviated Timeline

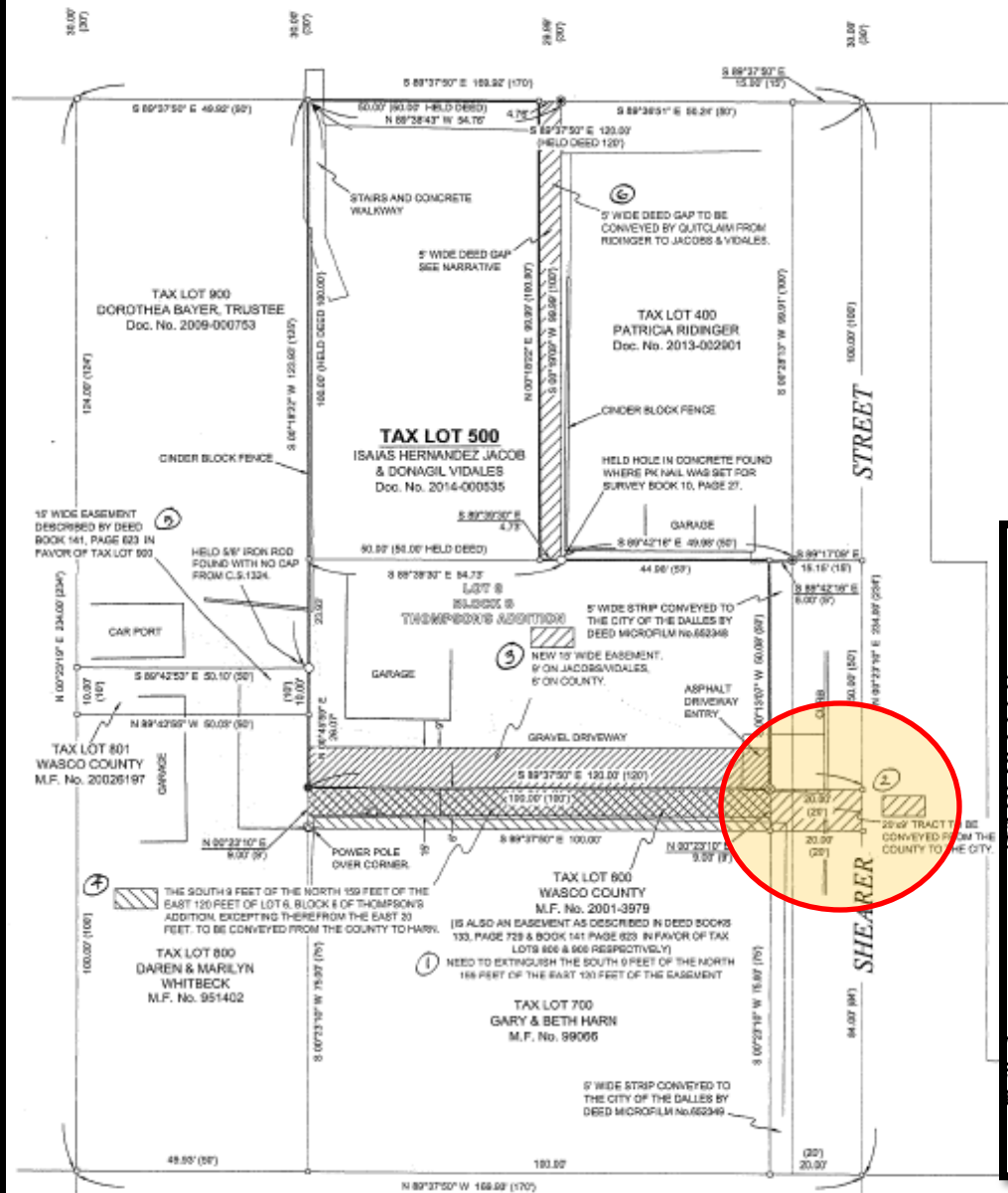
- Fall of 2014:
 - Access concerns raised with Wasco County
 - Mediation process led by Six River Mediation to identify a path to resolve the concerns
- November 5, 2014:
 - Board Hearing to authorize the sale of subject properties
- November 2014 – Present:
 - Ongoing work by Surveyors, Assessor, Legal and Planning

Actions Requested:

1. **Order** authorizing relinquishment to City and **Deed of Dedication** (portion of Shearer Street to the City)
 - Both require signature; City must accept dedication.
2. **Quit Claim Deed Wasco County to Roark** (Whitbeck)
 - Signature of Board and Roark required
3. **Order** authorizing relocation of easement and **Relinquish existing easement**
 - Both require signature of Board and private landowners
4. **Easement and Easement Agreement** (repositioning relinquished easement plus mediated agreement)
 - Both require signature of Board and private landowners
5. **Quit Claim Deed Wasco County to Harn**
 - Signature of Board and Harn required

EAST 10th STREET

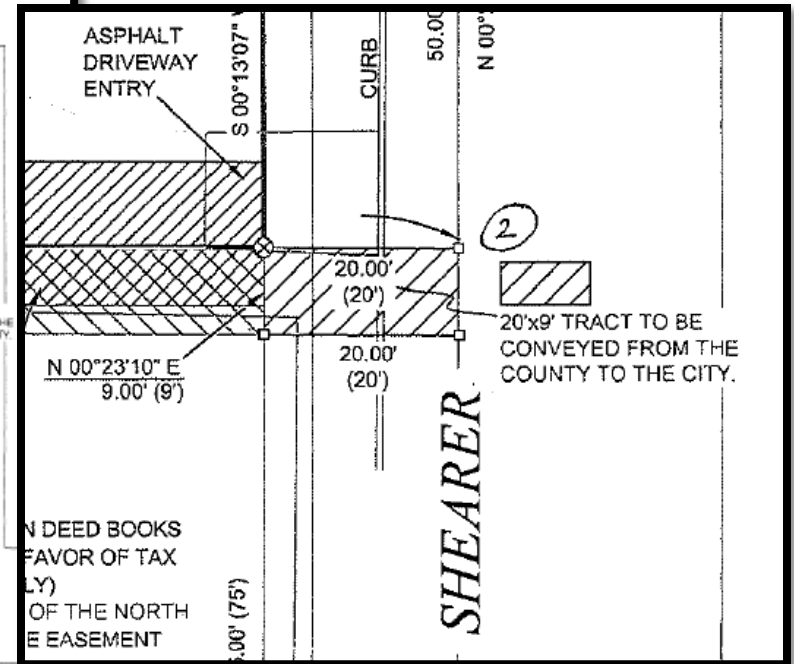
(87' WIDE)



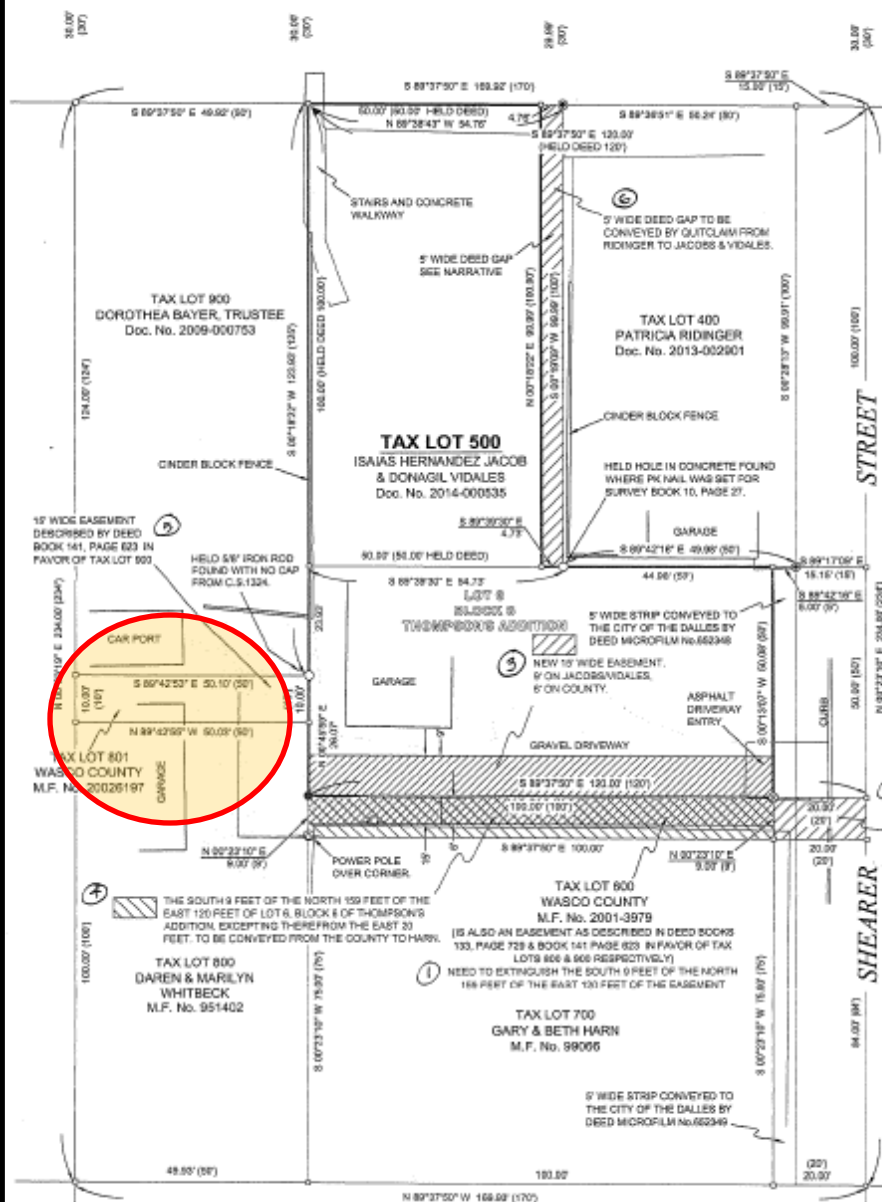
Step 1:

Order of Dedication

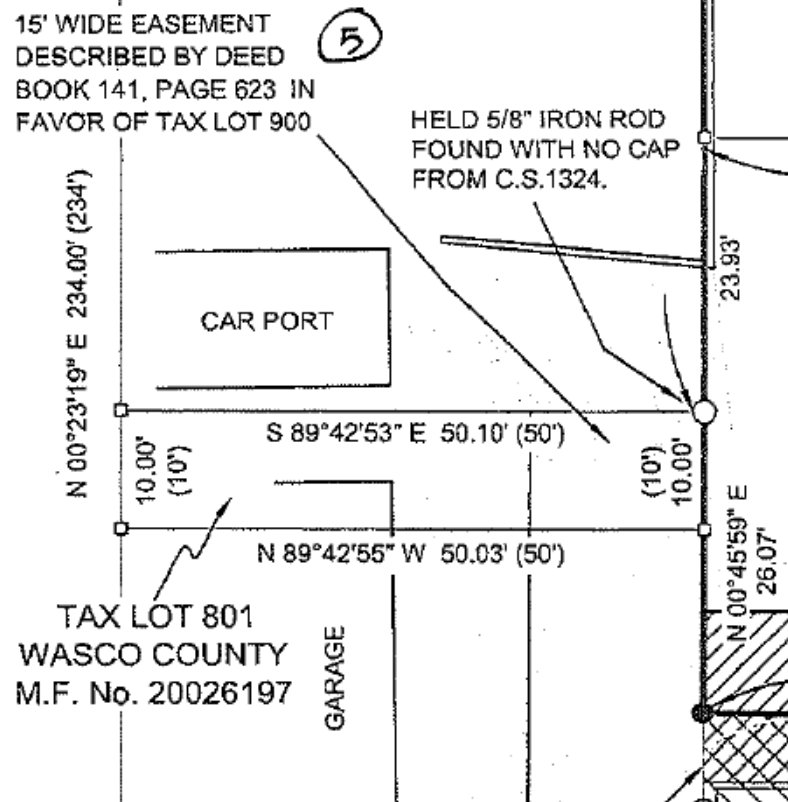
Process: (A) Notice of land transfer was published May 21 and 28, 2015 in *The Dalles Chronicle*; (B) City has acknowledged acceptance of dedication.

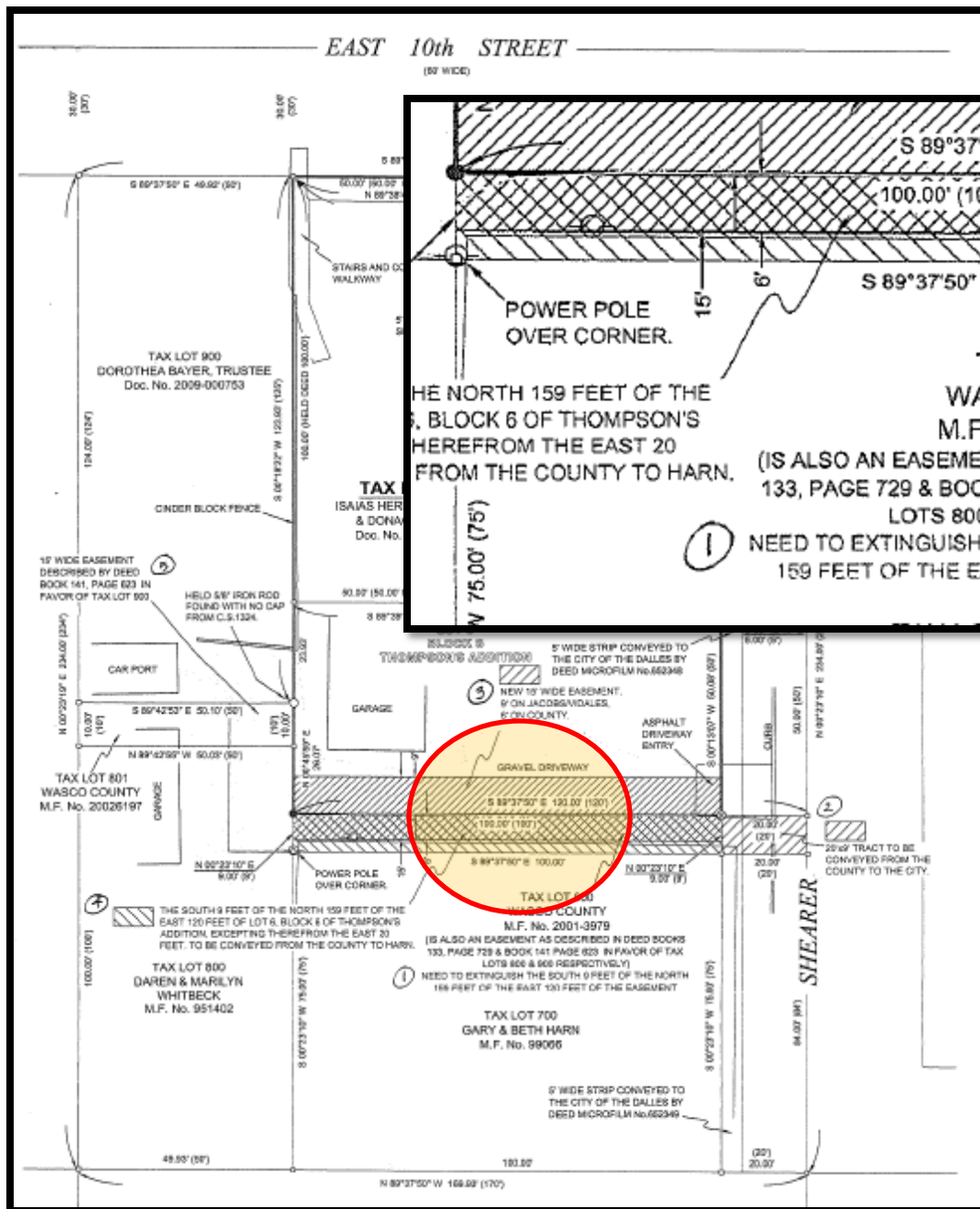


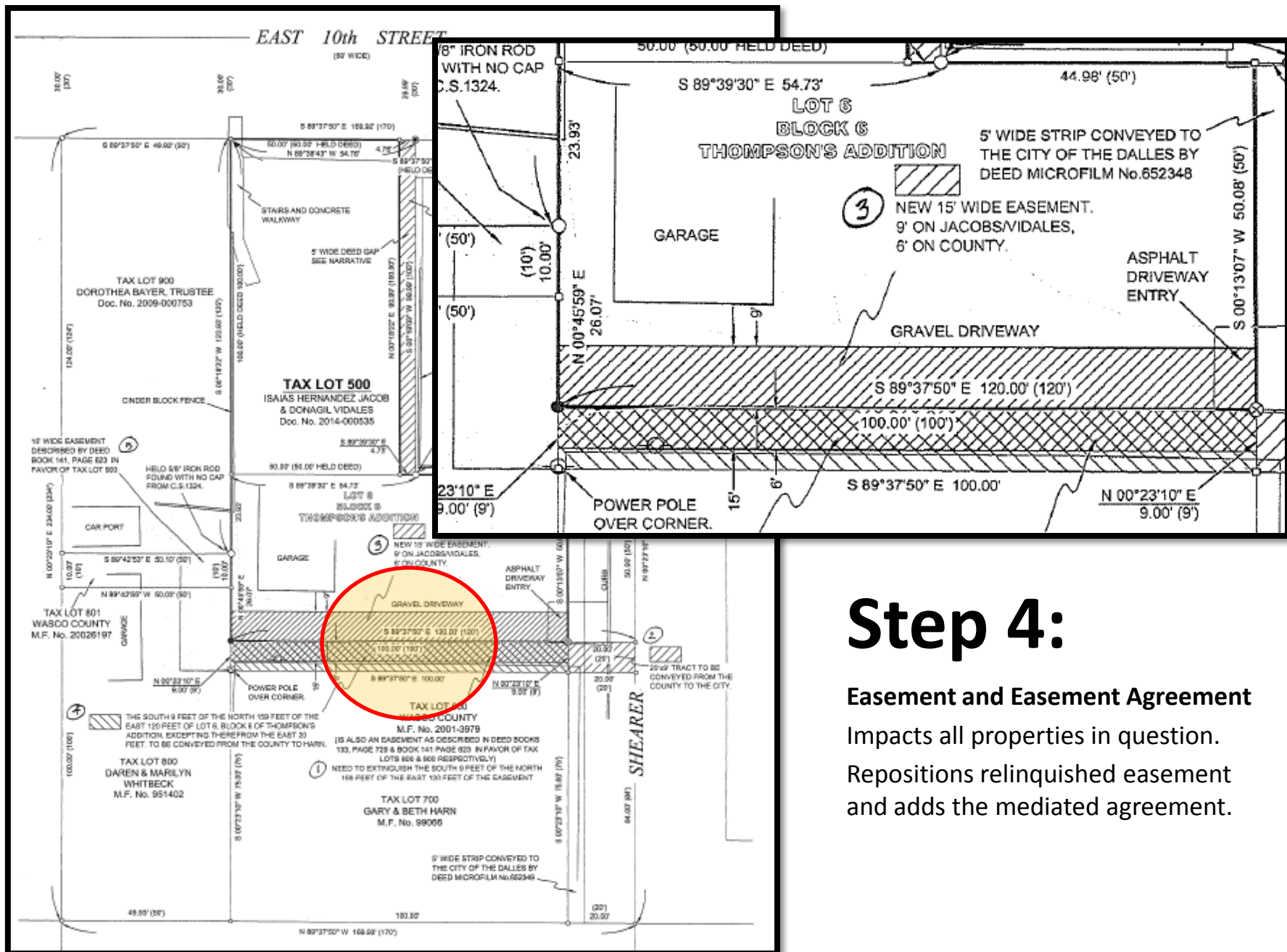
187 WICE



Quit Claim Deed :
Wasco County to Roark
(previously Whitbeck)





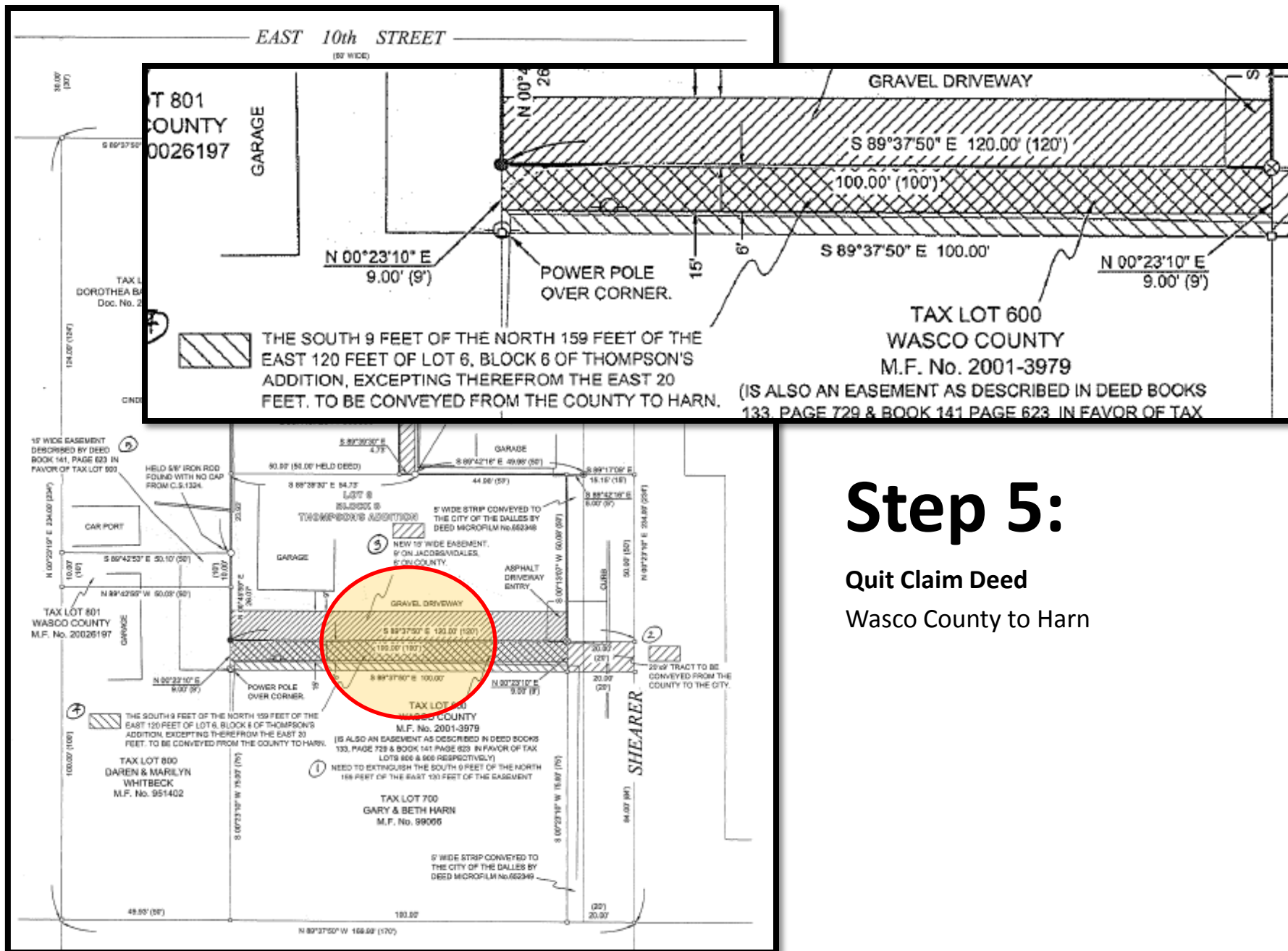


Step 4:

Easement and Easement Agreement

Impacts all properties in question.

Repositions relinquished easement and adds the mediated agreement.



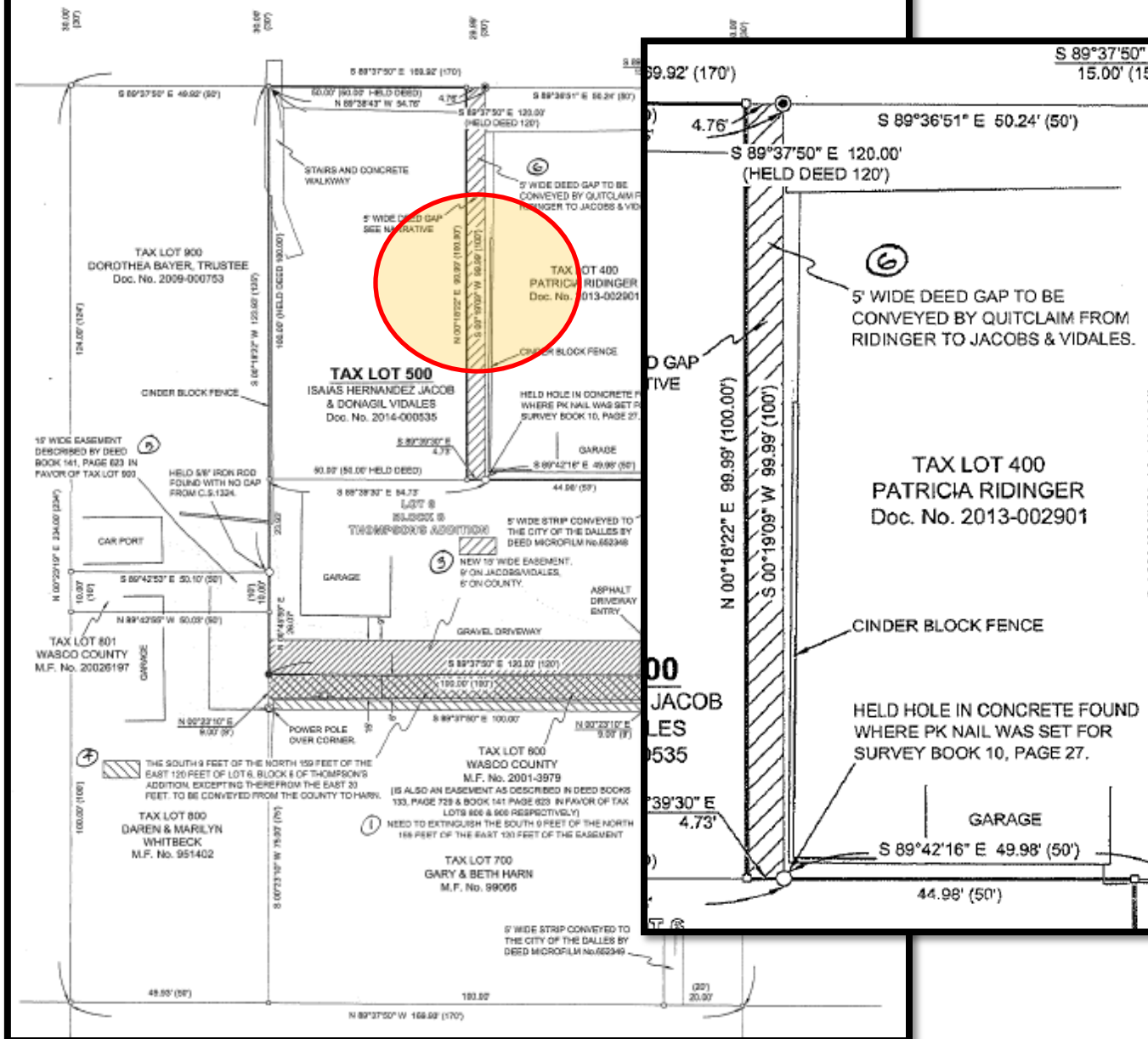
Step 5:

Quit Claim Deed

Wasco County to Harn

EAST 10th STREET

(57' WIDE)



Note:

Quit Claim Ridinger to Vidalis-Jacobs

- Discovered during the survey process.

- Resolving to avoid future tax lot and foreclosure case.

- Does not require action by the Board of Commissioners.

Final Steps

- Once documents are approved by the Board and forwarded to the City as appropriate, they will be made available for private landowner signature at the Wasco County Clerk's Office.
- Landowners have been made aware they are responsible for recording costs.
- Planning Department will coordinate with individual landowners to ensure timely recording.

Questions?

Staff Contacts:

- Angie Brewer, Planning Department
- Dan Boldt and Brad Cross, County Surveyors
- Jill Amery, Wasco County Assessor
- Kristen Campbell, County Counsel

Agenda Item

Work Session

- [Thompson Reuters Contract and Supporting Documents](#)
- [Implementation Presentation](#)



THOMSON REUTERS™

COPY

Wasco Co Assmt & Tax

AUG 27 2012

RECEIVED

August 22, 2012

Mr. Tim Lynn
Assessor/Tax Collector
Wasco County
511 Washington Street, #208
The Dallas, OR 97058-2237

Dear Mr. Lynn:

Enclosed are fully executed Manatron Schedules OR2010.001.01 – Chng 2. This document is for your records.

Please feel free to contact me if I may be of further assistance. Thank you.

Sincerely,

Mary T. Ammar
Contract Administrator

Enc.

COPY

**SCHEDULES FOR MASTER AGREEMENT FOR LICENSED
SOFTWARE, HARDWARE AND SERVICES**

The attached Schedules numbered OR2010.001.01-Chng#2 are made and entered into pursuant to, and subject to the terms and conditions of, a certain Master Agreement for Licensed Software, Hardware and Services No. OR2010.001 between Manatron, Inc. and the undersigned Customer (the "Agreement").

By and Between	And
MANATRON, INC. – A THOMSON REUTERS BUSINESS 510 E. Milham Avenue Portage, Michigan 49002 ("Manatron")	WASCO COUNTY, OREGON 511 Washington Street, #208 The Dalles, Oregon 97058-2237 ("Customer")
Attention: <u>Matthew Henry, Senior Contract Administrator</u> Telephone No.: <u>(866) 471-2900 x 7099</u> Fax No.: <u>(269) 567-2930</u> E-mail Address: <u>matt.henry@manatron.com</u>	Attention: <u>Tim Lynn, Assessor / Tax Collector</u> Telephone No.: _____ Fax No.: _____ E-mail Address: _____

The parties have executed these Schedules as of the dates set forth below their respective signatures.

MANATRON, INC.

By: _____

(Signature)

Its: _____

(Title)

Date: _____

Witnessed: _____

(Signature)

By: _____

WASCO COUNTY, OREGON

By: _____

(Signature)

Its: _____

(Title)

Date: _____

By: _____

(Signature)

Its: _____

(Title)

Date: _____

By: _____

(Signature)

Its: _____

(Title)

Date: _____

Witnessed: _____

(Signature)

Date: _____

SIGNATURE PAGE

Date: July 12, 2012 B.T.

APPROVED AS TO FORM

Eric Nisley, County Counsel

PROFESSIONAL SERVICES SCHEDULE FOR WASCO COUNTY, OREGON

Schedule No. OR2010.001.01-Chng#2 to the Master Agreement for Licensed Software, Hardware and Services.

This Schedule is made and entered into pursuant, and subject to the terms and conditions of, a certain Master Agreement for Licensed Software, Hardware and Services No. OR2010.001 between Manatron, Inc. and the undersigned Customer (the "Agreement").

PROFESSIONAL SERVICES						
GENERAL DESCRIPTION OF SERVICES		QTY	Unit Price	Total Price	Annual Fee	Comments
Changes will be made to the Acceptance Statement of Work and Acceptance Milestones in Schedule B of the SOW.						
Total Professional Services Fees:				\$ -		

Date: July 12, 2012 B.T.

Change Order #2 - Adjusted Project Timeline and Milestone Billing Schedule

The following table defines the major project milestones and estimated completion dates following project initiation for parallel conversion tracks for ProVal Plus and Ascend. In addition, milestone billing for professional services will be broken into 3 installments and appropriate payment months will fall under item 5 for milestone billing #1 (May 2011), item 15 for milestone billing #2 (December 2011) and item 20 for milestone billing #3 (July 2013).

Item	Description	ProVal Task	Ascend Task	County
1	Project Kickoff	January 2011	January 2011	January 2011
2	Extract Legacy Data	January 2011	February 2011	Assist
3	Software Installation	February 2011	March 2011	Assist
4	Data Conversion Planning	January 2011	April 2011	Assist
5	First Data Conversion Cycle	February 2011	February 2012	Assist
6	Migrate Conversion to Wasco Servers	March 2011	June 2011	Assist
7	Interface Fit-Gap		March 2011	Assist
8	Establish VPN and dev environment			February 2011
9	Second Data Conversion Cycle	March – May 2011	September 2012	Assist
10	Map Commercial, Res and Comps	April-June 2011		Assist
11	Conversion Balancing/Audits		October 2012	Assist
12	Training Plan	March 2011	April 2013	Assist
13	Value Roll Integration	June 2013	June 2013	Assist
14	Tax Extension Planning		April 2013	Assist
15	Third Data Conversion Cycle	July 2011	Jan. - Feb. 2013	Assist
16	Go Live Planning	July 2011	April 2013	Assist
17	Training	August 2011	May 2013	Participate
18	Final Data Conversion	September 2011	June 2013	Assist
19	Go-Live	October 2011	June 2013	Assist
20	Support Transition	November 2011	July 2013	Participate

Change Order #2

SCHEDULE B

Acceptance Milestone No. 3

Purpose:

The purpose of this Milestone Acceptance Form is for the County to confirm completion of the Milestone(s) listed in Statement of Work # OR2010.001.01-SOW associated with this Acceptance signoff.

Milestone No. 3:

Item	Description	ProVal Task	Ascend Task	County
9	Second Data Conversion Cycle		September 2012	Assist
11	Conversion Balancing/Audits		October 2012	Assist
12	Training Plan		April 2013	Assist
13	Value Roll Integration		June 2013	Assist
14	Tax Extension Planning		April 2013	Assist
15	Third Data Conversion Cycle		Jan. – Feb. 2013	Assist
16	Go-Live Planning		April 2013	Assist
17	Training Plan		May 2013	Participate
18	Final Data Conversion		June 2013	Assist
19	Go-Live		June 2013	Assist
20	Support Transition		July 2013	Participate

We, the undersigned, agree that the work described above is complete, and that under the conditions of the Agreement, the County will be billed \$52,734.00 upon signing this Milestone Acceptance Form.

Wasco County	Manatron
<p>Wasco County, Oregon 511 Washington Street #208 The Dalles, Oregon 97058-2237</p> <p>By: _____ Printed Name: _____ Title: _____ Date: _____</p>	<p>Manatron, Inc. 510 East Milham Avenue Portage, Michigan 49002</p> <p>By: _____ Printed Name: _____ Title: _____ Date: _____</p>

MANATRON - CONTRACT #OR2010.001.01

FUND - 322.18.6122.53504

P O #18-0072 \$225,400.00

<u>PMT DATE</u>	<u>INVOICE #</u>	<u>CHECK #</u>	<u>AMT PAID</u>	<u>BALANCE</u>
1/26/2011	54568	93625	\$15,000.00	\$210,400.00
5/18/2011	55771	94787	\$52,733.00	\$157,667.00
9/7/2011	56634,	95994	\$38,200.00	\$119,467.00
12/16/2011	57573	96998	\$ 52,733.00	\$ 66,734.00

Ascend Statement of Work (SOW)

For Wasco County, Oregon

November 3, 2010

1. Project Overview

- They need to have these mapped out ahead of time or we will be charged.*
- a. Ascend will be implemented in Wasco County as a configurable off-the-shelf software package that eliminates source code programming changes, but requires user input to configure in preparation for deployment. The project includes the implementation of AscendWeb. Minor modifications are allowed to Ascend to meet interface requirements. Significant changes to any of the interfaces would be an additional charge. A Fit-Gap analysis meeting would be required in the spring to map interface data elements. Three critical areas for the project are training, configuration and data validation. The final training schedule will be established in the spring and will address classroom training and on-site support and training during the system go-live. The second critical area is the data configuration effort, lead by the Ascend assessment and taxation analysts. While most of the Oregon-specific Ascend configuration tasks have already been addressed by the seven other Oregon Counties running Ascend, there are still county-specific items, such as tax district names, that are specific to Wasco and require user participation. Finally, Wasco County will be asked to help validate the data conversion by logging into the Ascend test system during the data conversion process and notifying the analyst when problems are identified.

2. Pull data extract from County in pre-defined format

3. Perform initial data conversion migration work on Manatron in-house servers.

4. Configure Financial Data

- a. Charge Type Review (taxes, special assessments, costs, fees, interest, etc.)
- b. Account Review
- c. Fund Balancing
- d. Mortgage Companies (for purposes of tape exchange)
- e. Code Table Review
- f. Review Parameters

5. Configure Assessment Data

- a. Test Validate Value Rule
- b. Audit Levy Rates
- c. Value Balancing by TCA
- d. Exemption Balancing
- e. Property Account Balancing by TCA
- f. Security Set up
- g. Code Table Review

- h. Review Parameters
 - i. Review Workflow
- 6. Annual Process Planning
 - a. Value Roll
 - b. Levy Processing
 - c. Tax Extension
 - d. Data Exchange
- 7. Configure Security
- 8. Migrate Ascend Conversion Data Base to Wasco test server
- 9. Data Conversion Test Cycles
 - a. Convert Data
 - b. User Data Validation
 - c. Revise Financial and Assessment Configuration
 - d. This conversion process will be repeated 3 times.
- 10. Production Cutover Planning
 - a. Select Target Go-Live Date
 - b. Plan on-site support
 - c. Production Freeze Planning during final Conversion
- 11. Create Training Schedule
 - a. Two weeks classroom training augmented by one on one personalized training during onsite visits and the system go-live. Additional training will be provided during each business process milestone through the year such as levy and value roll.
- 12. Interfaces
 - a. Eden Systems Permitting – AS400 System that requires property and property account characteristic from the ProVal/Ascend SQLServer data base. **The GetParcelInfo API is a SQLServer stored procedure that can be marginally modified to retrieve and display property characteristics. Significant changes to the existing API would be an additional cost.**
 - b. GIS (Arc Map) – AS400 application that requires assessment characteristics from ProVal and Ascend. . **The GetParcelInfo API is a SQLServer stored procedure that can be marginally modified to retrieve and display property characteristics.**
 - c. Viewing Assessor Information – **The Ascend Public Access module (APA) provides read-only access of property data to the public. APA is a standard Ascend feature.**
 - d. E-Permitting - request to access property characteristics from ProVal/Ascend for publishing on web-based interface. **Ascend has several existing extract programs that provide flat-file views of the data. Modifications can be made to the existing extracts if needed, for an addition fee.**

This will have to happen to meet our requirements.

- e. Clerk Deeds – access to existing Helion Document imaging system. **Ascend has a document viewer function that may provide an appropriate solution. However, a Fit-Gap analysis meeting would be required to determine the viability of this option.**
- f. Finance/Treasurer – Eden Software – **The G/L interface program in Ascend provides all accounting transactions in flat-file format. All 25 Ascend customers use this function daily.**

Creation of reports

*List of Reports
with a sample*

Ascend / ProVal Statement of Work (SOW) # OR2010.001.01-SOW

For Wasco County, Oregon

December 10, 2010

Project Summary

Manatron will replace Wasco County's existing appraisal, valuation, assessment and property tax software with ProVal Plus and Ascend during an 18-month implementation project scheduled for completion in July, 2012. The go-live dates for the two applications will be staggered, with ProVal Plus going into production in October, 2011 followed by Ascend in July, 2012.

ProVal Plus and Ascend are an off-the-shelf integrated software solution configured specifically for Oregon jurisdictions. This project does not require source code changes but does require customer cooperation to configure, implement, and deploy. Property is valued in ProVal Plus, and the resulting values are rolled into Ascend where they are used to calculate tax rates and subsequently extend taxes, print statements, collect tax payments, and prepare the revenue 'turnover' to the taxing districts.

The project includes the implementation of AscendWeb for viewing property and tax information on the Internet. Minor modifications (requiring two [2] hours or less programming effort) can, and, where necessary, will be made to Ascend in order to meet the requirements identified in the **Interfaces** section below.

This statement of work describes the professional services provided to Wasco County by Manatron in order to implement ProVal Plus and Ascend.

Professional Services

Manatron and ASI will provide professional services for data conversion, system configuration, database development, training, and software deployment in order to successfully complete the installation of ProVal Plus and Ascend in Wasco County.

ProVal Plus and Ascend will move on separate data conversion tracks, with ProVal coming up live before Ascend. The values will be moved into Ascend for tax certification once they are certified in ProVal Plus.

Interfaces

The County has identified the following system interfaces to Ascend. Following the interface name and description is a short description of the approach that will be taken by the implementation staff to integrate Ascend with the external interface entity.

- a. Eden Systems Permitting – AS400 System that requires property and property account characteristic from the ProVal/Ascend SQLServer data base. **The GetParcelInfo Application Program Interface (“API”) is a SQLServer (a relational database sold and supported by Microsoft) stored procedure that can be marginally modified (requiring three [3] hours or less programming effort) to retrieve and display property characteristics. Significant changes (requiring more than three [3] hours of programming effort) to the existing API would be an additional cost.**
- b. GIS (ArcGIS Desktop 10) – PC application that requires assessment characteristics from ProVal and Ascend. **The GetParcelInfo API is a SQLServer stored procedure that can be marginally modified to retrieve and display property characteristics.**
- c. Viewing Assessor Information – **The Ascend Public Access (“APA”) module provides read-only access of property data to the public. APA is a standard Ascend feature.**
- d. E-Permitting - Request to access property characteristics from ProVal/Ascend for publishing on web-based interface. **Ascend has several existing extract programs that provide flat-file views of the data that can be used to populate this interface.**
- e. Clerk Deeds – Access to existing Helion Document imaging system. **Ascend has a document viewer function that may provide an appropriate solution, creating a runstring with a token, such as account number. However, a Fit-Gap analysis (a project task to determine software suitability to its intended use) meeting would be required to determine the viability of this option.**
- f. Eden Financial Software (General Ledger) – **Ascend generates a standard General Ledger (“GL”) export file, and this is the basis for the import file fed into the general ledger. It is compliant with Generally Accepted Accounting Principles (“GAAP”) and has all necessary information to meet accounting standards.**

County Roles

The County will be expected to provide an on-site network and data base support, and establish a secured Virtual Private Network (“VPN”) connection accessible by Manatron and ASI. The County will also be expected to act as a partner with Manatron to validate data converted into Ascend and ProVal during the data conversion process.

The County will be expected to participate in project planning meetings, training classes, and configuration.


Project Timeline and Milestone Billing Schedule for Professional Services

The following table defines the major project milestones and estimated completion dates following project initiation for parallel conversion tracks for ProVal Plus and Ascend. In addition, milestone billing for professional services will be broken into three installments as follows: Item #5 for Milestone Billing #1 (May, 2011) - \$52,733.00; Item 15 for Milestone Billing #2 (December, 2011) - \$52,733.00; and Item 20 for Milestone Billing #3 (August, 2012) - \$52,734.00.

Item	Description	ProVal Task	Ascend Task	County
1	Project Kickoff	January 2011	January 2011	January 2011
2	Extract Legacy Data	January 2011	February 2011	Assist
3	Software Installation	February 2011	March 2011	Assist
4	Data Conversion Planning	January 2011	April 2011	Assist
5	First Data Conversion Cycle	February 2011	May 2011	Assist
6	Migrate Conversion to Wasco Servers	March 2011	June 2011	Assist
7	Interface Fit-Gap		March 2011	Assist
8	Establish VPN and dev environment			February 2011
9	Second Data Conversion Cycle	March – May 2011	June – August 2011	Assist
10	Map Commercial, Res and Comps	April-June 2011		Assist
11	Conversion Balancing/Audits		August – October 2011	Assist
12	Training Plan	March 2011	June 2011	Assist
13	Value Roll Integration	September 2011	September 2011	Assist
14	Tax Extension Planning		October 2011	Assist
15	Third Data Conversion Cycle	July 2011	December 2011	Assist
16	Go- Live Planning	July 2011	April 2012	Assist
17	Training	August 2011	June 2012	Participate
18	Final Data Conversion	September 2011	June 2012	Assist
19	Go-Live	October 2011	July 2012	Assist
20	Support Transition	November 2011	August 2012	Participate

MANATRON

The power to manage well.

initial:


SCHEDULE B

Acceptance Milestone No. 2

Purpose:

The purpose of this Milestone Acceptance Form is for the County to confirm completion of the Milestone(s) listed in Statement of Work # OR2010.001.01-SOW associated with this Acceptance signoff..

Milestone No. 2:

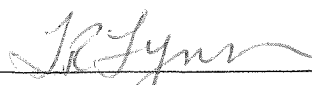
Manatron has completed Milestones 6-15 as listed below and in the above referenced Statement of Work.

3, 6, 7, 9, 10, 12, 15, (Proval related from #3) 16, 17, 18, 19, 20)

Item	Description	ProVal Task	Ascend Task	County
6	Migrate Conversion to Wasco Servers	March 2011	June 2011	Assist
7	Interface Fit-Gap		March 2011	Assist
8	Establish VPN and dev environment	→ Milestone #1		February 2011
9	Second Data Conversion Cycle	March - May 2011	June - August 2011 (#3)	Assist
10	Map Commercial, Res and Comps	April-June 2011		Assist
11	Conversion Balancing/Audits	Milestones #3 ←	August - October 2011	Assist
12	Training Plan	March 2011	June 2011 (#3)	Assist
13	Value Roll Integration → Milestone #3	September 2011	September 2011	Assist
14	Tax Extension Planning → Milestone #3		October 2011	Assist
15	Third Data Conversion Cycle	July 2011	December 2011 (#3)	Assist

3 Software installation
 16-20 (proval) go-live planning, training, final data conversion, go-live, Support transition

We, the undersigned, agree that the work described above is complete, and that under the conditions of the Agreement, the County will be billed **\$52,733.00** upon signing this Milestone Acceptance Form.

Wasco County	Manatron
<p>Wasco County, Oregon 511 Washington Street #208 The Dalles, Oregon 97058-2237</p>	<p>Manatron, Inc. 510 East Milham Avenue Portage, Michigan 49002</p>
<p>By: </p>	<p>By: _____</p>
<p>Printed Name: <u>TIM R. LYNN</u></p>	<p>Printed Name: _____</p>
<p>Title: <u>ASSESSOR/TAX COLLECTOR</u></p>	<p>Title: _____</p>
<p>Date: <u>12-6-11</u></p>	<p>Date: _____</p>

PROFESSIONAL SERVICES SCHEDULE FOR WASCO COUNTY, OREGON

Schedule No. OR2010.001.01-Chng#1 to the Master Agreement for Licensed Software, Hardware and Services.

This Schedule is made and entered into pursuant, and subject to the terms and conditions of, a certain Master Agreement for Licensed Software, Hardware and Services No. OR2010.001 between Manatron, Inc. and the undersigned Customer (the "Agreement").

PROFESSIONAL SERVICES						
GENERAL DESCRIPTION OF SERVICES		QTY	Unit Price	Total Price	Annual Fee	Comments
Add the following line item.						
Travel related expenses not-to-exceed \$5,000.00	TRAVEL	1	Billed As Used	Billed As Used	N/A	
Total Professional Services Fees:				\$ -		

Replace the original section:
"PROFESSIONAL & CONSULTATION/TRAINING SERVICES PAYMENT TERMS:
with the following revised language:

PROFESSIONAL & CONSULTATION/TRAINING SERVICES PAYMENT TERMS: Manatron has subcontracted the conversion and interface, to ASI. Software installation, Training, including a fit analysis, and assistance to ASI with the Conversion and Interface will be provided by Manatron and conducted over a mutually agreeable time period. In order to document that these services have been provided, Client Service Records (CSR's) will be presented to the County for signing and verification of services provided. Any additional training days requested by Customer shall be billed, as used, at the rate in effect at the time of service. Professional and Consultation/Training Services fees are due and payable after Manatron performs such service in accordance with Manatron's invoice(s) that shall be sent to the Customer. Travel-related expenses associated with Manatron's Professional and Consultation/Training Services shall not exceed \$5,000.00 and will be invoiced following the completion of the project / receipt of the final Deliverable Acceptance Statement. Project completion and receipt of the final DAS is expected to be June 2012.

Date: October 3, 2010 B.T.

**SCHEDULES FOR MASTER AGREEMENT FOR LICENSED
SOFTWARE, HARDWARE AND SERVICES**

The attached Schedules Numbered OR2010.001.01-Chng#1 are made and entered into pursuant, and subject to the terms and conditions of, a certain Master Agreement for Licensed Software, Hardware and Services No. OR2010.001 between Manatron, Inc. and the undersigned Customer (the "Agreement").

By and Between	And
MANATRON, INC. 510 E. Milham Avenue Portage, Michigan 49002 ("Manatron")	WASCO COUNTY, OREGON 511 Washington Street #208 The Dalles, Oregon 97058-2237 ("Customer")
Attention: <u>Matthew Henry, Senior Contract Administrator</u>	Attention: <u>Tim Lynn, Assessor / Tax Collector</u>
Telephone No.: <u>(866) 471-2900 x 7099</u>	Telephone No.: _____
Fax No.: <u>(269) 567-2930</u>	Fax No.: _____
E-mail Address: <u>matt.henry@manatron.com</u>	E-mail Address: _____

The parties have executed these Schedules as of the dates set forth below their respective signatures.

MANATRON, INC.

By: _____

(Signature)

Its: V.P. of Risk Management

(Title)

Date: October 5, 2011

Witnessed: _____

By: Matthew Henry

WASCO COUNTY, OREGON

By: _____

(Signature)

Its: _____

(Title)

Date: _____

By: _____

(Signature)

Its: _____

(Title)

Date: _____

By: _____

(Signature)

Its: _____

(Title)

Date: _____

Witnessed: _____

Date: _____

SIGNATURE PAGE

Date: October 3, 2010 B.T.



SCHEDULE B

Acceptance Milestone No. 1

Purpose:

The purpose of this Milestone Acceptance Form is for the County to confirm completion of the Milestone(s) listed in Statement of Work # OR2010.001.01-SOW associated with this Acceptance signoff.

Milestone No. 1:

Manatron has completed Milestones ~~1-5~~ as listed below and in the above referenced Statement of Work.

1-2, 8 - 4 & 5 (except Ascend)

1-2 & 4-5 & 8 & 11

Item	Description	ProVal Task	Ascend Task	County
1	Project Kickoff	January 2011	January 2011	January 2011
2	Extract Legacy Data	January 2011	February 2011	Assist
3	Software Installation → MILESTONE NO. 2	February 2011	March 2011	Assist
4	Data Conversion Planning	January 2011	April 2011	Assist
5	First Data Conversion Cycle	February 2011	May 2011	Assist

8 ESTABLISH VPN & DEV ENVIRONMENT

9 SECOND DATA CONVERSION CYCLE

10 MAP COMMERCIAL RES AND COMPS

11 CONVERSION BALANCING / AUDITS

We, the undersigned, agree that the work described above is complete, and that under the conditions of this Change Request, the County will be billed \$52,733.00 upon signing this Milestone Acceptance Form.

Wasco County	Manatron
<p>Wasco County, Oregon 511 Washington Street #208 The Dalles, Oregon 97058-2237</p>	<p>Manatron, Inc. 510 East Milham Avenue Portage, Michigan 49002</p>
By: _____	By: _____
Printed Name: _____	Printed Name: _____
Title: _____	Title: _____
Date: _____	Date: _____

Project Timeline and Milestone Billing Schedule for Professional Services

The following table defines the major project milestones and estimated completion dates following project initiation for parallel conversion tracks for ProVal Plus and Ascend. In addition, milestone billing for professional services will be broken into three installments as follows: Item #5 for Milestone Billing #1 (May, 2011) - \$52,733.00; Item 15 for Milestone Billing #2 (December, 2011) - \$52,733.00; and Item 20 for Milestone Billing #3 (August, 2012) - \$52,734.00.

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Ascend / ProVal Statement of Work (SOW) # OR2010.001.01-SOW

For Wasco County, Oregon

December 10, 2010

Project Summary

Manatron will replace Wasco County's existing appraisal, valuation, assessment and property tax software with ProVal Plus and Ascend during an 18-month implementation project scheduled for completion in July, 2012. The go-live dates for the two applications will be staggered, with ProVal Plus going into production in October, 2011 followed by Ascend in July, 2012.

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The project includes the implementation of AscendWeb for viewing property and tax information on the Internet. Minor modifications (requiring two [2] hours or less programming effort) can, and, where necessary, will be made to Ascend in order to meet the requirements identified in the **Interfaces** section below.

This statement of work describes the professional services provided to Wasco County by Manatron in order to implement ProVal Plus and Ascend.

Professional Services

Manatron and ASI will provide professional services for data conversion, system configuration, database development, training, and software deployment in order to successfully complete the installation of ProVal Plus and Ascend in Wasco County.

ProVal Plus and Ascend will move on separate data conversion tracks, with ProVal coming up live before Ascend. The values will be moved into Ascend for tax certification once they are certified in ProVal Plus.

Interfaces

The County has identified the following system interfaces to Ascend. Following the interface name and description is a short description of the approach that will be taken by the implementation staff to integrate Ascend with the external interface entity.

- a. Eden Systems Permitting – AS400 System that requires property and property account characteristic from the ProVal/Ascend SQLServer data base. **The GetParcelInfo Application Program Interface (“API”) is a SQLServer (a relational database sold and supported by Microsoft) stored procedure that can be marginally modified (requiring three [3] hours or less programming effort) to retrieve and display property characteristics. Significant changes (requiring more than three [3] hours of programming effort) to the existing API would be an additional cost.**
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- f. Eden Financial Software (General Ledger) – **Ascend generates a standard General Ledger (“GL”) export file, and this is the basis for the import file fed into the general ledger. It is compliant with Generally Accepted Accounting Principles (“GAAP”) and has all necessary information to meet accounting standards.**

County Roles

The County will be expected to provide an on-site network and data base support, and establish a secured Virtual Private Network (“VPN”) connection accessible by Manatron and ASI. The County will also be expected to act as a partner with Manatron to validate data converted into Ascend and ProVal during the data conversion process.

The County will be expected to participate in project planning meetings, training classes, and configuration.

FILED
WASCO COUNTY

2010 DEC 16 3:09

KAREN LEBRETON COATS
COUNTY CLERK

IN THE BOARD OF COMMISSIONERS OF THE STATE OF OREGON
IN AND FOR THE COUNTY OF WASCO

IN THE MATTER OF THE PURCHASE OF)
APPRAISAL, ASSESSMENT AND TAX) RESOLUTION
SOFTWARE FOR WASCO COUNTY,) #10-045
OREGON.)

NOW ON THIS DAY, the above-entitled matter having come on
regularly for consideration, said day being one duly set in term for the
transaction of public business and a majority of the Board of Commissioners
being present; and

WHEREAS, on March 24, 1976, the Wasco County Court adopted by
Ordinance, pursuant to ORS 279.055, designating the Court as the Local
Contract Review Board for Wasco County, Oregon; and

WHEREAS, on May 26, 1976, the Wasco County Court adopted by
Resolution rules governing Public Contracts in Wasco County, Oregon; and

WHEREAS, on November 21, 2001, February 16, 2005, and
August 3, 2005, the Wasco County Court adopted by Resolution amended
rules governing public contracts in Wasco County, Oregon; and

////

1 WHEREAS, Section 22 of the Wasco County Contract Review Board
2 Amended Rules allows cooperative procurements to be made without
3 competitive solicitation for the purchase of goods or services from a supplier
4 when the original contract was obtained through a competitive selection
5 process; and

6
7 NOW, THEREFORE, IT IS HEREBY RESOLVED: That the Local
8 Contract Review Board finds that Benton County, Oregon, has obtained
9 through a competitive selection process a contract for the purchase of
10 Appraisal, Assessment and Tax Software and that said Software meets the
11 requirements of Wasco County.

12 IT IS HEREBY FURTHER RESOLVED: That the Local Contract
13 Review Board in accordance with Section 22 of the Contract Review Board
14 Amended Rules finds that the purchase of Appraisal, Assessment and Tax
15 Software through a cooperative procurement is exempt from competitive
16 bidding; and

17
18 IT IS HEREBY FURTHER RESOLVED: That the Local Contract
19 Review Board finds that the original contracting agency allows others to
20 piggyback and the vendor agrees to extend the terms, conditions and price to
21 other public agencies for the purchase of said Software; and

22
23 IT IS HEREBY FURTHER RESOLVED: That the Wasco County
24 Assessment and Tax Office is hereby authorized to purchase Appraisal,
25 Assessment and Tax Software, conversion and other soft costs associated
26

1 with the installation and implementation of the new software from Manatron,
2 Inc. at the cost of \$225,400.

3 DATED this 15th day of December, 2010.


4 WASCO COUNTY BOARD
5 OF COMMISSIONERS

6 
7 Dan Ericksen, Chair of Commission

8 
9 Sherry Holliday, County Commissioner

10 
11 Bill Lennox, County Commissioner

12
13 APPROVED AS TO FORM:

14 
15
16 Eric J. Nisley
17 Wasco County District Attorney

Tentative Start Date
1/2/11

ID **WASCO County Software Project Schedule**

- 1 Develop Project Team -
- 2 Identify project team members and their roles -
- 3 Identify conversion team members
- 4 Identify QA team members
- 5 Identify Implementation team members
- 6 Collect Source Data
- 7 Acquire data set from Oregon users
- 8 Restore Oregon data to proper location
- 9 Identify Benchmark set of parcels for conversion testing
- 10 **Database Extracts**
- 11 Create Oregon ASCII Extract Files
- 12 Create SQL Server files for code conversion
- 13 Create Lookup tables for conversion
- 14 **Install ProVal Application Software at Jurisdiction**
- 30 Install current version of ProVal Plus application software
- 31 Provide customer Overview on installation of ProValPlus application
- 32 **Configure Network, Database and operating systems**
- 25 Insure client computers are configured on a network according to minimum specs
- 26 Insure database software is installed and configured to vendor's specs
- 27 Insure client computers have Windows 7 or Windows XP Professional edition
- 28 **Process conversion programs for Property Admin Data**
- 21 Run/Verify conversion programs to populate ProVal Database
- 22 Quality Assurance of Converted Property Administrative Data
- 23 Modify conversion program for QA issues
- 24 Deliver/Install ProVal Database (Admin Data) to Jurisdiction
- 29 **Execute Admin Data Conversion Test Plan**
- 33 Prepare Admin Data conversion Test Plan, Scenarios and Expected Results
- 34 Provide ProVal Admin Data Training (informal training)
- 35 Test Plan Execution Training
- 36 Property Admin Subset Data Conversion and Program Acceptance
- 38 **Data Analysis - Administrative, Land & Improvements**
- 39 **Data Analysis - Property Administrative Data & Land**
- 15 Identify User Defined Codes for Mapping
- 16 Perform data mapping for Property Admin & Land data
- 17 Mapping for User defined Codes
- 18 Identify conversion issues
- 19 Receive from customer issue register and solutions
- 20 Prepare Improvements Conversion Mapping Templates
- 40 **Residential Sketch Data**
- 41 Perform mapping of residential sketch labels
- 42 Perform mapping of commercial sketch labels
- 43 **Residential Improvement Data**
- 44 Perform Mapping from current system to Mapping Templates
- 45 Perform Code conversion for residential properties
- 46 Finalize Mapping and Code conversion Templates
- 47 Validate Mapping and Code conversion Templates
- 48 **Commercial Improvement Data**
- 49 Perform Mapping from current system to Mapping Templates
- 50 Perform Code conversion for commercial properties
- 51 Finalize Mapping and Code conversion Templates
- 52 Validate Mapping and Code conversion Templates
- 53 **Comparable Sales Data**
- 54 Perform Data analysis
- 55 Perform Mapping from current system to Mapping Templates
- 56 Finalize Mapping Templates
- 57 Validate Mapping Templates
- 58 **Income Data**
- 59 Perform Data Analysis
- 60 Perform Mapping from current system to Mapping Templates
- 61 Perform Codes Conversion for Income properties
- 62 Finalize Mapping and Code conversion Templates
- 63 Validate Mapping and Code conversion Templates
- 64 **Data Conversion - Improvements**
- 65 Run/Verify conversion programs to populate ProVal Database
- 66 Internal QA testing
- 67 Deliver Subset Data to Test Site (Sql Server)
- 68 **Data Conversion Testing by Implementation Team**
- 69 Provide ProVal Functional Training (informal training)
- 70 Provide Test Plan Execution Training (informal training)
- 71 Data Conversion Programs Acceptance by Implementation Team
- 72 **ProVal PRODUCT REVIEW**
- 73 Install Accepted Data set
- 74 **Review Interfaces/Reports**

by?

- 75 **Awbrey - Manatron Interface (Programming Stored Procedures etc)**
- 76 Building Permits Import (If applicable)
- 77 Other Interfaces (PCI Administrative)
- 78 **ProVal CONFIGURATION AND Table Setup**
- 79 Prepare Manatron System Test Plan
- 80 Refine ProVal Configuration & Table Set-Up
- 81 Define each area of table setup required to properly review data
- 82 GIS Configuration and Preparation
- 83 **ProVal Rollout, Communication and Transition Planning**
- 84 Develop Rollout Plan
- 85 Develop Communications Plan
- 86 Develop Operations/Transition Plan
- 87 **FULL DATABASE CONVERSION TEST**
- 88 Run Accepted Conversion Programs against Full Database Extracts
- 89 Address potential data anomalies
- 90 Full Database Verification Complete
- 91 ProValPlus GIS Software Acceptance
- 92 **Complete Database Conversion**
- 93 **Preparation**
- 94 Determine Tax year records to convert
- 95 Run Accepted Conversion Programs against Full Database Extracts
- 96 **Full Production Database Data Verification**
- 97 Restore final converted database
- 98 Execute Full Database Verification Plan and Scenarios
- 99 Address potential data conversion anomalies
- 100 Full Database Verification Complete
- 101 **SYSTEM ACCEPTANCE**
- 102 **Install ProVal Application Software**
- 103 Install ProVal software on target computers
- 104 Configure Software for use with final converted data
- 105 **Preparation**
- 106 **Conduct Training Planning Meeting**
- 107 Complete details for Training Plan
- 108 Develop Training Materials
- 109 Provide Training Facility Requirements
- 110 Prepare Training Facilities
- 111 Execute TTT & User Training Plan
- 112 **PRODUCTION**
- 113 **Initiate Production**
- 114 Activate Manatron Software Support
- 115 Activate Operations Plan/Transition Plan
- 116 Initiate Production
- 117 Implementation Support
- 118 Project Closure Review

<u>Task Name</u>	<u>Resource Name</u>
Acquire data set from Oregon users	ASI/County
Restore Oregon data to proper location	Manatron
Identify Benchmark set of parcels for conversion testing (Use All Parcels for Small Counties)	County
Create Oregon ASCII Extract Files	ASI
Create SQL Server files for code conversion	ASI
Create Lookup tables for conversion	ASI/Manatron
Identify User Defined Codes for Mapping	Manatron
Perform data mapping for Property Admin & Land data	Manatron/County/ASI
Mapping for User defined Codes	County
Mapping for User defined Codes	County/ASI
Identify conversion issues	Manatron/County/ASI
Receive from customer issue register and solutions	County
Run/Verify conversion programs to populate ProVal Database	Manatron
Quality Assurance of Converted Property Administrative Data	Manatron
Insure client computers are configured on a network according to minimum specs	County
Insure database software is installed and configured to vendor's specs	County
Insure client computers have Windows 2000 or Windows XP Professional edition	County
Deliver/Install ProVal Database (Admin Data) to Jurisdiction	Manatron/County/ASI
Install current version of ProVal Plus application software	Manatron/County/ASI
Train customer on installation of ProValPlus application	Manatron/County/ASI
Prepare Admin Data conversion Test Plan, Scenarios and Expected Results	Manatron/County/ASI
Provide ProVal Admin Data Training (informal training)	Manatron
Test Plan Execution Training	Manatron/County/ASI
Execute Admin Data Conversion Test Plan and Scenarios	County
Property Admin Subset Data Conversion and Program Acceptance	County
Property Admin Subset Data Conversion and Program Acceptance	Manatron
Prepare Improvements Conversion Mapping Templates	Manatron
Perform mapping of residential sketch labels	Manatron/County/ASI
Perform mapping of commercial sketch labels	Manatron/County/ASI
Perform Mapping from current system to Mapping Templates	Manatron/County/ASI
Perform Code conversion for residential properties	County
Finalize Mapping and Code conversion Templates	County
Validate Mapping and Code conversion Templates	Manatron/County/ASI
Perform Mapping from current system to Mapping Templates	Manatron/County/ASI
Perform Code conversion for commercial properties	County
Finalize Mapping and Code conversion Templates	County
Validate Mapping and Code conversion Templates	Manatron/County/ASI
Perform Mapping from current system to Mapping Templates	Manatron/County/ASI
Finalize Mapping Templates	County
Validate Mapping Templates	Manatron/County/ASI
Perform Mapping from current system to Mapping Templates	Manatron/County/ASI
Perform Codes Conversion for Income properties	County
Finalize Mapping and Code conversion Templates	County
Validate Mapping and Code conversion Templates	Manatron/County/ASI
Internal QA testing	Manatron
Run Accepted Conversion Programs against Full Database Extracts	Manatron/County/ASI
Restore final converted database	County
Execute Full Database Verification Plan and Scenarios	County
Address potential data conversion anomalies	Manatron/County/ASI
Full Database Verification Complete	Manatron/County/ASI

STATEMENT OF WORK

Wasco County - ProVal and Ascend Implementations

Develop Project Team -

Identify implementation team members and their roles -

Begin Project Scope and Requirements Definitions

Review Interfaces/Reports

Generate Detailed Implementation Plan including Milestones and Tasks

Database Extracts

Generate Extract Files from Awbrey System

Create SQL Server files for code conversion

Create Lookup tables for conversion

Install Manatron Applications Software at County

Install current version of ProVal Plus application software

Provide customer Overview on installation of ProValPlus application

Configure Network, Database and operating systems

Insure client computers are configured on a network according to minimum specs

Insure database software is installed and configured to vendor's specs

Insure client computers have Windows 7 or Windows XP Professional edition

Process conversion programs

Run/Verify conversion programs to populate Manatron Databases

Quality Assurance of Converted Data

Modify conversion program for QA issues

Deliver/Install Manatron Databases to County

Execute Admin Data Conversion and Test

Prepare Admin Data conversion Test Plan, Scenarios and Expected Results

Provide Manatron Data Training (informal training)

Test Plan Execution Training

Data Conversion and Program Acceptance

Side by Side Testing of Systems

Verify Systems, Data, and Processes

"Go Live" and Initiate Production

Activate Manatron Software Support

Activate Operations Plan/Transition Plan

Initiate Production

Project Closure Review

GIS -- Arc Map -- Front End Access to Manatron Data Tables

Similar to Web Access Data made available to Public and Title companies
(i.e., Assessment, Ownership/Values, Appraisal, Land and Improvement Data, Sales, Taxes)

Clerk -- Helion -- Deeds

Access Document Images thru Manatron (i.e., Hot Links to recorded documents)

Planning - Eden -- Permitting Software (Duplicate Current Interface)

Automatic population of fields in Eden w/current A&T data.

Also interested in the GIS interface

Suggests Eden might automatically update/notify A&T system for new construction (permits)

Need continued R/O Access to A&T data

Planning wants to provide their data over the web

Finance/Treasurer -- Eden -- Finance Software (Transfer distribution amounts)

Tax Distribution data from AS400 now entered BY HAND into EDEN system

Treasurer also enters interest in AS400 to calculate distribution

ProVal-Ascend Implementation Kickoff Meeting

Wasco County

The Dalles, Oregon

January 18, 2011

Agenda

- Introductions
- Why are we here?
- Project Overview
- Contract Deliverables
- ProVal Features
- Ascend Features
- ORMUG Community Support
- Risks
- Project Schedule
- County Resource Commitments
- Fit Analysis
 - First Round of Questions
- Any Questions?

Introductions

ASI

Corey Wilcox – Project Manager

Vern Miller – Consultant

Todd Bony – Consultant

Manatron

Steve Young – Senior Project Manager

David Skillin – Financial Business Analyst

Daniel Kelley – Business/Conversion Analyst

Sam Wilkins – CAMA Business Analyst

Kurt Layman – Levy Business Analyst

Why are we here?

- To begin the process of implementing ProVal and Ascend in Wasco County by October 2011 and July 2012, respectively.

Project Overview

- ProVal-Ascend Integration
- Commercial Off-the-Shelf Software (COTS)
- Repeatable Data Conversion Process
- Start with Partially Pre-Configured Ascend Database using Clackamas Data
 - Financial Transaction Types
 - Value Types
 - Delinquency and Foreclosure Process
 - Reports
- County-Specific Configuration
 - Tax District Names
- Hybrid Configuration
 - Pre-configured Payment Plans and Installments
 - Tie to Charge Schedules
- Data Conversion and Validation
 - Properties, Names, Addresses and Characteristics
 - Charges and Receipts
- Shared and On-Site Training
- County Business Process Review

Contract Deliverables

- Manatron MVP ProVal
- Map Tab
- Ascend Assessment Administration, Property Tax, Billing and Collection Software
- Ascend Web Inquiry
- Ascend Statement Server
- Professional Services – (Implementation)
 - Project Planning and Management
 - Fit Analysis
 - Software Delivery and Installation
 - System Interfaces
 - Data Conversion Services
 - Reports – configuration and client deployment
 - Training – 5 days classroom plus 2 days go-live oversight
- Product Support
- Support for Legislative Changes

ProVal Features

ProVal features a highly productive, integrated sketch package and an extremely accurate valuation engine for calculating property values. It is the most widely deployed, nationally recognized CAMA software product available today.

The software includes:

- A native, fully integrated sketching module, not a third party interface
- Robust Cost, Market and Income approaches to value
- Advanced, flexible land valuation
- Full neighborhood management, viewing and processing capability
- Property Record Cards with sketch
- Notices of Assessment Change
- Certified Assessment/Tax Roll
- Tracking and reporting of reasons for value change
- Graphical User Interface (GUI) for data entry
- User defined comparable sales and assessment search models
- Integration with GIS for both parcel maintenance and analysis
- Easy management of user developed reports
- Snapshot and storage of parcel description at the time of the sale
- Advanced sales analysis and statistical reporting
- Integrated digital photographs
- Unlimited number of value changes per year with full history of each change

Take ProVal to the Field

In addition to the features listed above, the same ProVal system that you use at your desktop PC can also be fully field deployed including sketching and GIS capabilities on a laptop, tablet, Pen-based PC, PDA, Handheld, or other portable devices. Field units can access your CAMA servers real-time using wireless technology or can be enabled for docking and synchronization of daily work tasks. Also, GPS, digital photos, and laser measuring technology is fully supported in our field system and used by many of our clients. The best part? – Field Unit functionality is included with your basic system configuration *at no additional cost.*



NATRON.
The power to manage well.

Ascend Features

Ascend is a comprehensive property tax collection system

- Property account management – names, addresses, characteristics
- Real property and personal property
- Segregations and mergers
- Exemptions
- Property transfers
- Value modifications
- Tax management (bankruptcy, delinquencies, file maintenance)
- Cashiering
- Financial accounting (double entry account posting)
- Levy Administration
- Oregon Data Exchange
- Pre-configured for Oregon (additional configuration per county)
- Over 100 core and Oregon-specific reports
- Integration with ProVal CAMA and general ledger interface
- Standard counter tax statement, point of sale interest calculation
- Annual tax statement process – creates file for printing
- Security by user, function and device

ORMUG Community Support

- Oregon Manatron Users Group (ORMUG)
- OR County Memberships
 - Benton
 - Clackamas
 - Crook
 - Gilliam
 - Lake
 - Lane
 - Wheeler
- Benefits
 - Custom Non-Covered Work
 - Custom Oregon Specific Training
 - Added Weight for Manatron Changes
 - Standardization
 - Online Google Group
 - Automated Mailing List
 - Regular Face to Face Meetings

Risks

- Business Process Changes
- Interfaces

Project Schedule

Item	Description	ProVal Task	Ascend Task	County
1	Project Kickoff	Jan-11	Jan-11	Jan-11
2	Establish VPN and dev environment	Jan-11		Jan-11
3	Data Conversion Planning	Feb-11	Jun-11	Assist
4	Extract Legacy Data	Feb-11	Jun-11	Assist
5	Map Commercial, Res and Comps	Mar-11		Assist
6	First Data Conversion Cycle	Mar-11	Jul-11	Assist
6A	Conversion Balancing/Audits	April 2011	July 2011	Assist
7	Second Data Conversion Cycle	April – May 2011	July – October 2011	Assist
7A	Conversion Balancing/Audits	Jun-11	November 2011	Assist
8	Server Install @ Wasco	June or July 2011	June or July 2011	
9	Software Installation @ Wasco	June or July 2011	June or July 2011	Assist
10	Migrate Conversion to Wasco Servers	Jul-11	Jul-11	Assist
11	Interface Fit-Gap	Jul-11	Oct-11	Assist
12	Training Plan	Jul-11	Jul-11	Assist
13	Third Data Conversion Cycle	Jul-11	Dec-11	Assist
13A	Conversion Balancing/Audits	Aug-11	Jan-12	Assist
14	Value Roll Integration	Sep-11	Sep-11	Assist
15	Tax Extension Planning		Oct-11	Assist
16	Go Live Planning	Aug-11	Apr-12	Assist
17	Training	August - September 2011	Jun-12	Participate
18	Final Data Conversion	Sep-11	Jun-12	Assist
19	Go-Live	Oct-11	Jul-12	Assist
20	Support Transition	Nov-11	Aug-12	Participate

County Resource Commitments

- Fit Analysis Web Meetings
 - Review business processes
- Attend Training & Practice
- Flexibility
- Deployment Assistance
- ***Data Conversion Balancing and Validation***
- Call Customer Support

Fit Analysis

Definition: “The analysis and redesign of workflows and processes to establish the most effective approach for implementing Ascend”

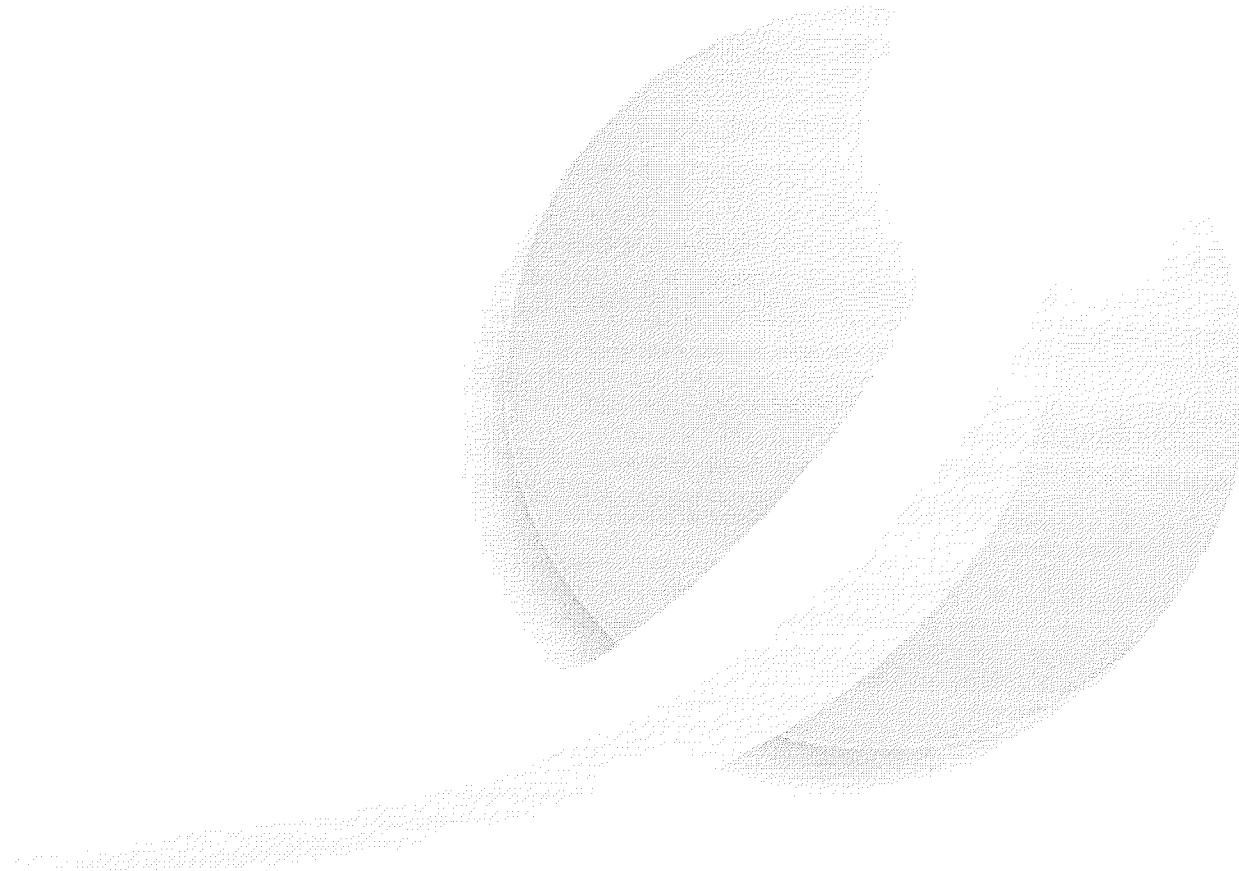
a.k.a.: Fit Gap Process, BPR, Gap Analysis

Fit Analysis

- First Round of Questions...

Fit Analysis

1. What is the procedure for printing refund checks?



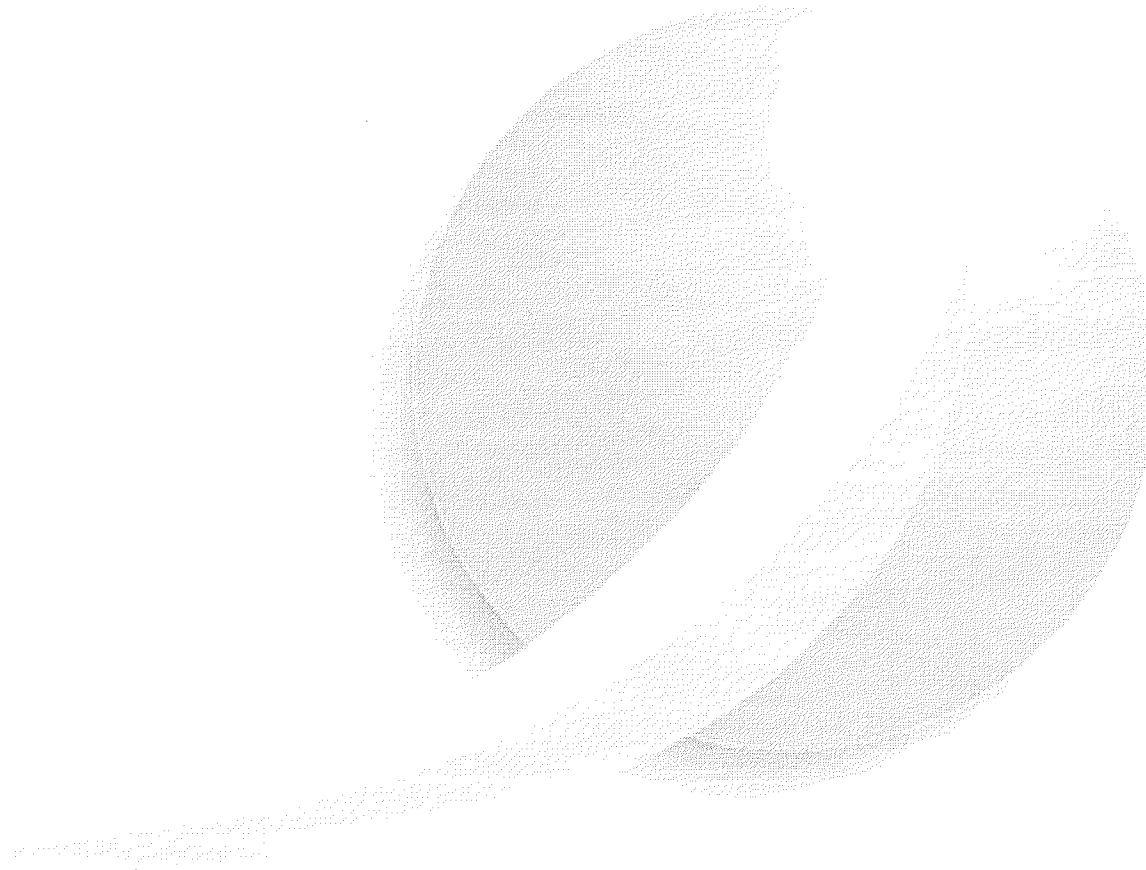
Fit Analysis

2. How do you print annual tax statements?

Do you use the state printing service?

Fit Analysis

3. How do you print value notices?

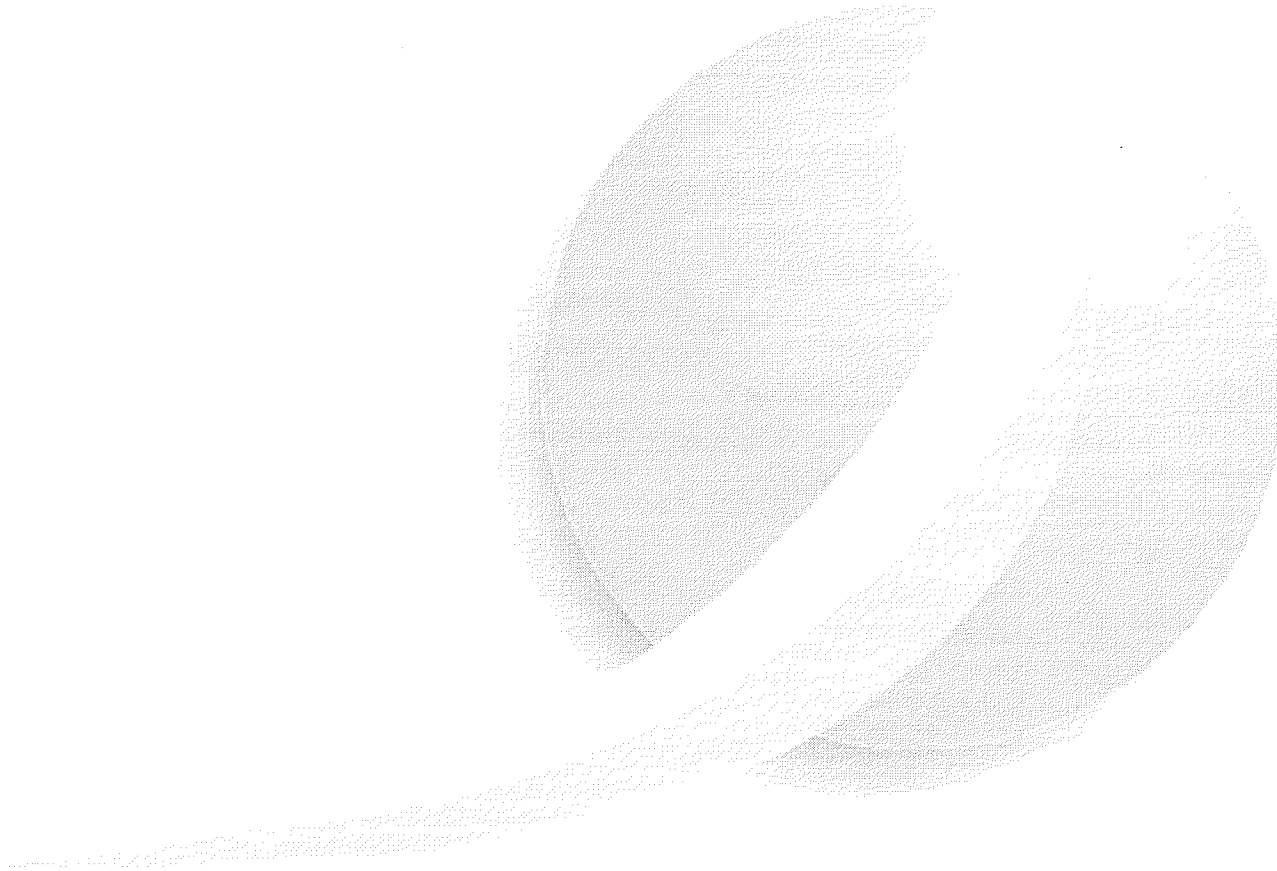


Fit Analysis

4. Do you print counter tax statements?

Fit Analysis

5. How do you use the Turnover Report?



Fit Analysis

6. When does the Levy Process start?

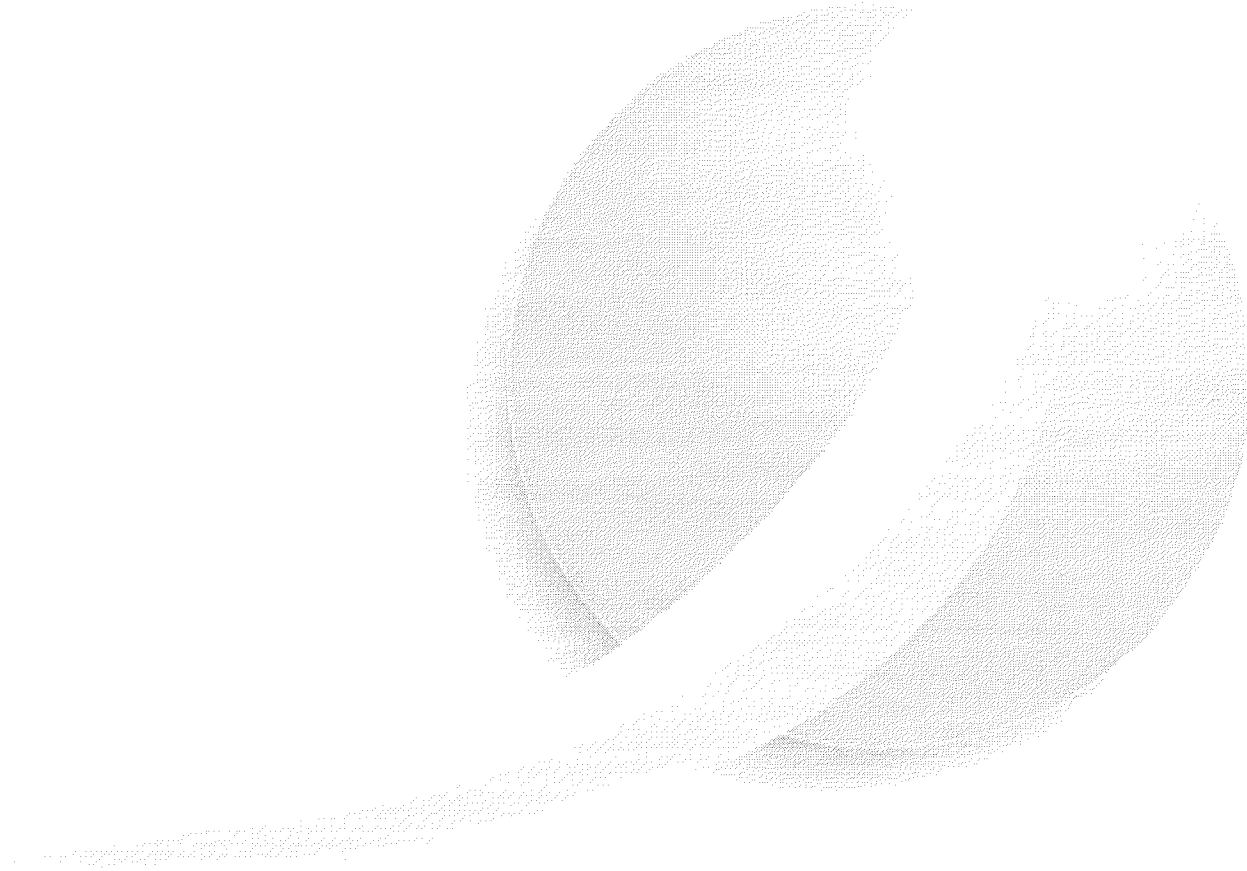
When are values rolled?

When are rates certified?

When are taxes extended?

Fit Analysis

7. How do you record bankruptcy information?



Questions?



ProVal-Ascend Implementation Kickoff Meeting

Thank You!