

COUNTY OF SONOMA  
PURCHASING DIVISION

**SINGLE OR SOLE SOURCE WAIVER REQUEST**

**Directions:** Use this form to justify a single or sole source transaction (see selection criteria below). Departments are encouraged to consult with the Purchasing Division prior to submitting this request to Purchasing. The single or sole source request should be approved before the department makes a commitment to the supplier, and before funds are encumbered. If the request is denied, the department will be advised by the Purchasing Division as to next steps (e.g., conduct a competitive process to select the supplier/contractor).

Choose one below:

Sole Source – Services or Goods are available from only one supplier (e.g., proprietary software, licensed or patented good or service).

Single Source – More than one source exists (selecting one supplier out of all that are available). The County selects a particular provider over others for reasons such as (1) safety, (2) training or standardization, (3) logistical requirements (e.g. local presence needed) (4) only one prospective supplier is willing to enter into an agreement with the County (5) item has design and/or performance features that are essential to the department and no other source satisfies the County's requirements.

Department: Clerk-Recorder-Assessor

Date Submitted: 4/1/2020

Contact: Kim Barrett

Phone: 3471

Supplier Name: Harold W. Bertholf, Inc.

Contract: Geothermal and Power Plant Appraisal Services

Other \_\_\_\_\_

Amount: \$ NTE \$568,200 Requisition #/Name of Contract: Geothermal Appraisal Services

Describe the product or service:

Evaluation of geothermal properties and all related facilities to assist the Assessor in the appraisal of geothermal properties located in Sonoma County.

Describe the basis for your sourcing recommendation. Include what due diligence you have performed in selecting the supplier. Explain why this is the only product or service that will meet the County's needs. Why is this supplier or contractor the one that can provide the services or products? What steps were taken to verify that the goods or services are not available from another source? Explain what efforts were made to obtain the best possible cost (e.g., current benchmark data from industry, other agencies)

The Geysers area, which borders Sonoma and Lake Counties, is the world's largest geothermal resources. The steam produced in this area, is the fuel that drives the power plants that were built in the Geysers area during the late 1960's and the early 1970's. The power plants produce "green energy" in the form of electricity. The valuation of the steam reservoir and the 20 power plans in the Geysers area is an extremely complex appraisal assignment. Because of the complexity of the appraisal and the amount of technical knowledge involved, especially in the field of geology, no assessor's office staff is qualified to value this property. For the last 18 years, we have contracted with Harold W. Bertholf, Inc. to perform the annual appraisal, value supplemental assessments, value calamity reviews and defend any assessment appeals for all of the Geysers properties. In the last few years the RFPs were issued, only Harold W. Bertholf, Inc. met all the requirements and a single source waiver was granted beginning in FY 2012-13. Employees of Harold W. Bertholf, Inc. possess all the necessary expertise in both geology and California property tax laws related to geothermal steam fields and power plants. Their evaluations determine the values put onto the annual property tax roll for geothermal properties, as well as appraise any supplemental assessments and defense of any assessment appeals. There are no other companies we are aware of that meet all of the requirements for this type of appraisal and if there were they would lack the historical knowledge to provide defense of any assessment appeals.

Department Head or Designee Signature: \_\_\_\_\_

Date: 4/8/2020

Single/Sole Source Approved:  \_\_\_\_\_

Single/Sole Source Denied: \_\_\_\_\_

Reason for Determination

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Purchasing Staff: \_\_\_\_\_

Date: 4 / 1 7 / 2 0 2 0