

CONTRACT ROUTING FORM

1. Complete the information below BEFORE printing and completing items 2 through 7. Items in red are required.

Department: Tax

Department contract file name (use effective date): SouthData Inc_20231215

Project Code: Click here to enter text.

Contract type: Agreement

Contracted Services/Goods: Print and mail services

Contract Component: Amendment

Change Order Number/Addendum Number: Click here to enter text.

Vendor Name: SouthData Inc

Effective Date: 12/15/2023

Approved by: Commissioners

Date approved by the BOC: 11/20/2023

Ending Date: Click here to enter a date.

Total Amount: Click here to enter text.

Please Return Contract to:

Name: Jenny Williams

Email: jenny.williams@chathamcountync.gov

Special Instructions for Clerks

Office:

2. Department Head or his/her designee has read the contract in its entirety.

By: Jenny Williams (Department Head signature required)

3. County Attorney has reviewed and approved the contract

County Attorney has reviewed and rejects the contract Reason: _____

This is an automatic renewal and does not require approval from the County Attorney: Yes No

If this box is checked the County Attorney's Office has reviewed the contract but has not made needed changes to protect the County because the contract is a sole source contract and the services required by the County are not available from another vendor.

4. Technical/MIS Advisor has reviewed the contract if applicable. Yes No

5. Vendor has signed the contract. Yes No

6. A budget amendment is necessary before approval. Yes No

If budget amendment is necessary, please attach to this form.

7. Approval

Requires approval by the BOC - contracts over \$100,000.00. Follow Board submission guidelines.

Requires approval by the Manager – contracts \$100,000 or less.

8. Submit to Clerk.

Clerk's Office Only

Finance Officer has signed the contract

The Finance Officer is not required to sign the contract

Jenny Williams

From: Ann Hammack
Sent: Monday, July 10, 2023 3:50 PM
To: Jenny Williams
Subject: FW: SouthData First Amendment
Attachments: 2023-05-24 Chatham County_Amendment No.1 South Data.doc

Jenny,

Please see Bob's comments below.

From: Robert E. Hagemann <RHagemann@poynerspruill.com>
Sent: Monday, July 10, 2023 3:46 PM
To: Ann Hammack <ann.hammack@chathamcountync.gov>
Subject: RE: SouthData First Amendment

Ok then. I guess this is the best we can do given the lapse.

Since this is 3 + 1 years, would need BOC approval. If Jenny doesn't want to go to the BOC, take out the renewal.

Although this is tacking on to the 2016 contract, in reality it's effectively a new three year contract.

Approved.

From: Ann Hammack <ann.hammack@chathamcountync.gov>
Sent: Thursday, June 15, 2023 8:06 AM
To: Robert E. Hagemann <RHagemann@poynerspruill.com>
Subject: FW: SouthData First Amendment

Bob,

Please see Jenny's response below.

From: Jenny Williams <jenny.williams@chathamcountync.gov>
Sent: Thursday, June 15, 2023 6:49 AM
To: Ann Hammack <ann.hammack@chathamcountync.gov>
Subject: RE: SouthData First Amendment

No we have not done anything since 2015.

Thank you,

Jenny Williams

Tax Administrator

Chatham County Government

Tax Department

Jenny.williams@chathamcountync.gov

919-545-8404 (Phone) | 919-542-2963 (Fax)

www.chathamcountync.gov

12 East Street | P.O. Box 908
Pittsboro, NC 27312

In keeping with the NC Public Records Law, e-mails, including attachments, may be released to others upon request for inspection and copying

From: Ann Hammack <ann.hammack@chathamcountync.gov>
Sent: Tuesday, June 13, 2023 1:58 PM
To: Jenny Williams <jenny.williams@chathamcountync.gov>
Subject: FW: SouthData First Amendment

Please see Bob's comments below.

From: Robert E. Hagemann <RHagemann@poynerspruill.com>
Sent: Tuesday, June 13, 2023 1:57 PM
To: Ann Hammack <ann.hammack@chathamcountync.gov>
Subject: RE: SouthData First Amendment

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The original agreement from 2015 was for three years with a one year option. Can you check on whether we've done anything since then?

From: Ann Hammack <ann.hammack@chathamcountync.gov>
Sent: Tuesday, June 13, 2023 10:07 AM
To: Robert E. Hagemann <RHagemann@poynerspruill.com>
Subject: SouthData First Amendment

Ann Hammack

County Paralegal
Chatham County Government
County Manager's Office
Email: Ann.Hammack@chathamcountync.gov
919-545-8308 (Phone) | 919-542-8272 (Fax)
Chathamcountync.gov
12 East Street | P.O. Box 1809
Pittsboro, NC 27312

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AMENDMENT NO.1 BILLING SERVICE AGREEMENT

This Amendment No. 1 (the “Amendment”) effective as of October 20, 2023, (“Amendment Effective Date”) amends the Billing Service Agreement (the “Agreement”) between SouthData, Inc., including its subsidiaries and other affiliated entities (“SouthData”) and Chatham County ("Client") effective as of June 19, 2015 (“Agreement Effective Date”).

WHEREAS, SouthData and Client desire to amend the Agreement in the manner set forth herein;

WHEREAS, capitalized terms used but not otherwise defined in this Amendment (the “Amendment”) shall have the same meanings respectively ascribed to them in the Agreement; and

NOW, THEREFORE, in consideration of the mutual promises, covenants, and agreements made and contained herein, and intending to be legally bound hereby, the Parties hereto agree as follows:

1. Section 5. Term of Agreement is deleted in its entirety and replaced as follows:

5. Term of Agreement

The Term of this Agreement shall continue in effect for three (3) years as of June 19, 2023, through June 18, 2026 (“Renewal Term”). The Agreement shall then renew for a period of twelve (12) months or unless terminated by either party in writing more than sixty (60) days prior to the end of the Renewal Term.

| | |
|-----------------------------------|---------------|
| Miscellaneous Image | 0.065 |
| Real & Personal Prop. Listing | 0.1714 |
| Property Tax Notice | 0.18 |
| Business Personal Prop. Listing | 0.2214 |
| Chatham County Tax Office | 0.18 |
| Business Pers. FARM Prop. Listing | 0.2214 |
| Public Utility Bills | 0.1154 |
| Debt Setoff/Delinquent Notice | 0.1464 |
| Reappraisal/Revaluation Notice | 0.1144 |

2. New pricing will result in a waiver of recovery surcharges when signed by an authorized signor of the client.
3. All other terms of the Contract shall remain unchanged by this Amendment.

IN WITNESS WHEREOF, the parties have executed this Amendment No. 1 as of the Amendment Effective Date by their duly authorized representatives.

SouthData, Inc.

County of Chatham

By: _____

By:  _____

Name: _____

Name: Dan Lamontagne _____

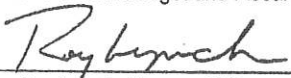
Title: _____

Title: County Manager _____

Date: _____

Date: 12/18/2023 _____

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.



Roy Lynch, Finance Officer

