



County of San Mateo

Inter-Departmental Correspondence

Department: HEALTH

File #: 20-966

Board Meeting Date: 12/8/2020

Special Notice / Hearing: None
Vote Required: Majority

To: Honorable Board of Supervisors

From: Louise F. Rogers, Chief, San Mateo County Health
Lisa Mancini, Director, Aging and Adult Services

Subject: Agreement with Balzan Laboratories, Inc. for Professional Jewelry Appraisal Services

RECOMMENDATION:

Adopt a resolution authorizing the Chief of San Mateo County Health, or the Chief's designee, to enter into an agreement and all subsequent amendments with Balzan Laboratories, Inc. for professional jewelry appraisal services for conserved clients of the Public Guardian and decedent estates of the Public Administrator for the term January 1, 2021 through December 31, 2023, in an amount not to exceed \$300,000 in aggregate.

BACKGROUND:

Aging and Adult Services (AAS) operates the Public Guardian (PG) program, which acts under the authority of the Superior Court to manage the estates of conserved individuals who are deemed by the court to be unable to care for themselves. AAS also operates the Public Administrator (PA) program, which is regularly appointed by the Superior Court to administer the estates of deceased County residents when there is no one available to take on this responsibility.

State law requires that valuable property belonging to PG clients and PA decedents be inventoried and appraised for court accountings. Valuable items may be distributed in accordance with a will or may need to be sold for income to pay off debt or assist with daily living expenses.

DISCUSSION:

AAS has contracted with Balzan Laboratories, Inc. since July 1, 2016 to provide jewelry appraisal services for PG and PA clients. Their performance has been satisfactory to the County. In September 2020, AAS released a Request for Purchase for jewelry appraisal services and selected Balzan Laboratories, Inc. as the awardee. Since Balzan Laboratories, Inc. comes to county locations to provide appraisal services, AAS does not need to transport client property offsite. Balzan is an experienced company with valid credentials and they provide a clear breakdown of

costs with no hidden fees.

The agreement and resolution have been reviewed and approved by County Counsel as to form.

The resolution contains the County's standard provisions allowing further amendment of the County fiscal obligations by a maximum of \$25,000 (in aggregate).

It is anticipated that Balzan will complete the Department's Inventory Record by providing written estimates for every appraised item 100% of the time.

PERFORMANCE MEASURE:

Measure	FY 2021-22 Estimated	FY 2022-23 Projected
Complete Department's Inventory Record providing written estimates for every appraised item	100%	100%

FISCAL IMPACT:

The term of these agreements is January 1, 2021, through December 31, 2023. The amount of the agreement is \$300,000 in aggregate. Payments will be made from PG and PA clients' accounts. The County will not be liable for disbursement of funds and this agreement does not need to be included in the County Budget. There is No Net County Cost associated with this agreement.

ATTACHMENT:

RFP Matrix