



APAS: Change Request (CR-027): APAS Project Amendment 10 changes to (Exhibit A, SOW # 1) and (Exhibit C, SOW # 2)

CR Status (Completed by APAS Program Manager)

| | | |
|------------------|-------------------|-------------|
| Change Request # | 69285-CR-027 | Version 1.0 |
| Date Closed | December 19, 2023 | |
| Status at Close | Approved | |

CR Identification (Completed by Requestor)

| | |
|--|---|
| Requested By | Mahesh Naik |
| Request Date | December 17, 2023 |
| Short Description | Extension of the APAS Development Agreement to include Phase 3 90-Day Warranty, move the remaining components and associated funding of Phase 5A and Phase 5B to Phase 3 Warranty period and Year 1 of the Maintenance & Operations (M&O) Support. Include additional services to to the year 1 of the APAS M&O Agreement. |
| Priority (C, H, M, L) | C |
| Team | APAS Project team |
| Due Date | December 20, 2023 |
| Phase | Warranty and Year 1 of the M&O |
| Evaluator | Paul Paulose |
| Detailed Description/ Justification | <p><u>Problem Description:</u></p> <p>During the User Acceptance Testing of the Secured System (Real Property), the team identified that Phase 5A and Phase 5B couldn't be completed concurrently with the resource demands of Phase 3 development and production implementation of the APAS Secured system and would need to be implemented after the installation of the APAS Secured Real Property system. Sapient will implement the Phase 5 scope items concurrent with the 90-day Warranty Services and 1st year of the Maintenance Agreement. Additionally, the APAS project team identified requirements and technical complexity which will require additional programming development by Sapient.</p> <p>The transition from EZ Access to APAS will require key Sapient functional and technical staff worked on APAS Phase 3 to remain on the team for the first 4 ½ months of the maintenance period. The retention of senior functional and technical resources from Sapient is important for the 2024 roll close. Additionally, Sapient Salesforce and technical architects who worked on the implementation phase of the project will be retained in the 1st year of APAS M&O.</p> <p><u>ACRE and Sapient Shared Cost</u></p> |



**ASSESSOR-COUNTY CLERK-
RECORDER & ELECTIONS**
COUNTY OF SAN MATEO

| # | Deliverables | Hours | Hourly Rate | Total Amount | ACRE Share % | PS Share % | ACRE Share Amount | PS Share Amount |
|--|---|-------|-------------|---------------|--------------|------------|------------------------|----------------------|
| APAS Development Agreement | | | | | | | | |
| 1 | Phase 3 late discoveries and additional complexity (Sapient Implemented) | 2860 | \$ 135.00 | \$ 386,100.00 | 24% | 77% | \$ 90,734 | \$ 295,367 |
| 2 | APAS Integration with ACRE Network Drive (J:Drive) | 400 | \$ 185.00 | \$ 74,000.00 | 100% | 0% | \$ 74,000.00 | \$ - |
| 3 | APAS Integration with GIS System | 200 | \$ 185.00 | \$ 37,000.00 | 0% | 100% | \$ - | \$ 37,000.00 |
| 4 | APAS feed to Parcel Quest | 100 | \$ 185.00 | \$ 18,500.00 | 0% | 100% | \$ - | \$ 18,500.00 |
| 5 | Environment setup to support user testing and training | 3000 | \$ 135.00 | \$ 405,000.00 | 20% | 80% | \$ 81,000.00 | \$ 324,000.00 |
| Total Development Agreement Amount | | | | | | | \$ 245,734 | \$ 674,867 |
| APAS Maintenance Agreement (Year 1) | | | | | | | | |
| 6 | Phase 3 In scope enhancements (all stories created after July 1, 2023) (Includes Phase 3 Hotfix, Phase 3.1, 3.2, 3.3, Phase 5B) | 1624 | \$ 135.00 | \$ 219,240.00 | 50% | 50% | \$ 109,620.00 | \$ 109,620.00 |
| 7 | APAS Integration (data feed) with Kofax | 200 | \$ 185.00 | \$ 37,000.00 | 100% | 0% | \$ 37,000.00 | \$ - |
| 8 | Key functional and technical staff support from March 15, 2024 through July 31, 2024) | 3510 | \$ 215.00 | \$ 754,650.00 | 50% | 50% | \$ 377,325.00 | \$ 377,325.00 |
| 9 | Phase 3 Enhancements (Phase 3/Phase 3.1/Phase 3.2/Phase 3.3) not counted in CR 25 | 3472 | \$ 135.00 | \$ 468,720.00 | 50% | 50% | \$ 234,360.00 | \$ 234,360.00 |
| 10 | APAS M&O Support (Support Model 1) (1 onshore and 6 offshore for Year 1 from 3/15/24 to 3/14/25) | 14672 | \$ 45.00 | \$ 660,240.00 | \$ - | | \$ 73,360.00 | |
| 11 | APAS M&O Support "Additional Services" for Year 1 - 6/15/24 to 3/15/25 | 1440 | \$ 217.00 | \$ 312,480.00 | 100% | 0% | \$ 312,480.00 | |
| 12 | Phase 4 Enhancements not counted in CR 25 | 2800 | \$ 55.00 | \$ 154,000.00 | | | \$ 77,000.00 | \$ 77,000.00 |
| 13 | Implementation M&O Funds balance carry forward | | | | | | \$ (207,082.00) | |
| Total Maintenance Agreement Funds | | | | | | | \$ 1,014,063.00 | \$ 798,305.00 |
| Total Development and Maintenance Agreement Funds | | | | | | | \$ 1,259,797 | \$ 1,473,172 |

NOTE:

- The details of the Phase 3 late discoveries and additional complexities implemented by Sapient are in this SharePoint link → https://smcgov.sharepoint.com/:x:/r/teams/ARC/itp/_layouts/15/Doc.aspx?sourcedoc=%7B6A396B37-0298-4C32-8B9C-974E6153111B%7D&file=Enhancements%20Created%20After%20July%2001%202023%20-%20Already%20Worked.xlsx&action=default&mobileredirect=true
- Phase 3 in scope enhancements for all stories (116 story points) created after July 1, 2023 are detailed in the SharePoint link → https://smcgov.sharepoint.com/:x:/r/teams/ARC/itp/_layouts/15/Doc.aspx?sourcedoc=%7B2ABCCC64-440F-4F33-A114-DC80B100BD2D%7D&file=Enhancements%20Created%20After%20July%2001%202023%20-%20Not%20Yet%20Worked.xlsx&action=default&mobileredirect=true
- The following Sapient key functional, technical and management resources (Delivery Lead, Integration Architect, Functional Lead, Salesforce Architect, Program Manager) will be retained to support the APAS project as appropriate and provide additional support for the first 4 ½ months of APAS M&O (March 15, 2024 thru July 31, 2024)
- The details for Phase 3 enhancements created before July 1, 2023 and were not included in CR-025 are identified in the SharePoint link → https://smcgov.sharepoint.com/:x:/r/teams/ARC/itp/_layouts/15/Doc.aspx?sourcedoc=%7BE583BF09-14A1-4157-AA09-58069DC80508%7D&file=Enhancements%20Created%20Before%20July%2001%202023%20-%20Not%20Yet%20Worked.xlsx&action=default&mobileredirect=true
- ACRE elected to utilize the APAS Support Model 1 identified in Exhibit C - Post Production 10-Year M&O Support. Effective January 1, 2022, a 3.5% Cost of Living Adjustment (COLA) is applied to the total cost of Year 1 M&O Support cost. Additionally, ACRE will use "Additional Services" onshore support from Senior Salesforce Architect.
- The Phase 5A and Phase 5B components will be spread across the APAS 90-day Phase 3 Warranty period and year 1 of the APAS Maintenance Agreement. The APAS Phase 5A and Phase 5B funding will



| | |
|--|---|
| | <p>be moved to the year 1 APAS Maintenance Agreement. The deliverables and associated payments for Phase 5A and Phase 5B are detailed in Exhibit B - Fee Methodology and Payments # 10 (SOW #1). Phase 5B deliverables will be completed by June 30, 2024 and Phase 5A Deliverables will be completed by March 15, 2025 or earlier.</p> <ol style="list-style-type: none">7. Sapient will allocate 1.5 staff resources for Phase 4 M&O Support from 12/1/23 to 3/15/24. Additionally Sapient will allocate approximately 2 offshore technology developers to work on 200 story points of Phase 4 not counted in CR-025.8. APAS Development Contingency (ACRE Reserved) fund balance of \$61,881 (Exhibit B) and ACRE Data Cleansing and Conversion Contingency fund balance of \$71,875 (Exhibit F, Reso # 077335) will be moved to Year 1 of APAS Maintenance Agreement.9. The details of the CR-027 shared cost is identified in SharePoint folder under Change Requests.10. Sapient will maintain the staffing level as required to meet the delivery dates outlined in APAS HLP and Heatmap.11. As shared with the APAS Executive Steering Committee, ACRE and Sapient are reviewing the adequacy of the multi-year Maintenance Agreement cost structure. <p>Relative benefit of accepting the change request:</p> <p>Developing the enhancements will provide efficiency and productivity to staff and enhance the service provided to San Mateo County constituents. Additional staffing support from Sapient will reduce the transition challenges from EZ Access to APAS. The retention of senior functional and technical resources from Sapient is important for the 2024 roll close in APAS.</p> <p>Relative cost of rejecting the change request:</p> <p>The APAS project team will not be able to complete the desired changes and transformation of the Assessor business operations.</p> |
|--|---|

CR Evaluation Results (Completed by Evaluator)

| | |
|----------------------------------|---|
| Date Evaluation Completed | December 19, 2023 |
| Work Effort Impact | None |
| Deliverable Impact | None |
| Schedule Impact | Extending Exhibit A, SOW # 1 till March 15, 2024 and Maintenance Agreement (Exhibit C) to March 15, 2034. |
| Functional/Solution Impact | None |
| Resource/Cost Impact | \$2,732,969 |
| Impact on Other tracks/ modules | None |
| Impact to Other External Systems | None |
| Other Comments | None |
| Overall Recommendation | Approved |

Scope / Execution Risk Assessment (Completed by APAS Program Manager)

| | | |
|---|------------------------------------|----------------------|
| Total Cost: | \$2,732,969 | |
| Is this shared scope risk? | No | |
| Is this scope increase or decrease the overall cost to the project? | Increased Cost: \$2,732,969 | Decreased Cost: None |
| ACRE Cost: | \$1,259,797.00 | |
| Sapient Absorbed Cost: | \$1,473,172.00 | |



| | |
|----------------------------|-----|
| Sapient Non-absorbed Cost: | N/A |
|----------------------------|-----|

CCB Review Results (Completed by APAS Program Manager)

| | |
|------------------------|-------------------|
| CR Review Completed | December 19, 2023 |
| Review Findings | None |
| New Scope Cap/Limit | None |
| Other Comments | None |
| Overall Recommendation | Approved |

Approval Signatures

| | |
|--|--|
| Sapient Project/Program Manager | |
| ACRE Project/Program Manager | |
| ACRE Chief Appraiser (supporting APAS) | |
| ACRE IT Director | |