

**SECOND AMENDMENT TO AGREEMENT  
BETWEEN THE COUNTY OF SAN MATEO AND  
INTERNATIONAL BUSINESS MACHINES COPORATION**

THIS SECOND AMENDMENT TO THE AGREEMENT, entered into this \_\_\_\_ day of \_\_\_\_\_, 2026, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and International Business Machines Corporation (IBM), hereinafter called "Contractor";

W I T N E S S E T H:

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof; and

WHEREAS, the parties entered into an Agreement with Applications Software Technology LLC (AST) for the design, development, implementation, and maintenance of the Assessment Appeals Board System Project on May 20, 2025; and

WHEREAS, on January 21, 2026, the parties amended the Agreement to assign all rights and obligations under the Agreement to IBM, due to IBM's acquisition of AST; and

WHEREAS, the parties now wish to amend the Agreement a second time to add IBM's User Interface/User Experience services to enhance the Experience Cloud Portal, improving usability and simplifying navigation, and increasing the maximum fiscal obligation under the Agreement by \$72,289.63, for a new not-to-exceed amount of \$1,856,738.63.

**NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO AS FOLLOWS:**

1. Section 3 of the Agreement is amended to read as follows:

In consideration of the services provided by Contractor in accordance with all terms, conditions, and specifications set forth in this Agreement and in Exhibit A, County shall make payment to Contractor based on the rates and in the manner specified in Exhibit B. In accordance with the acceptance process in the SOW, County reserves the right to withhold payment if County determines that the quantity or quality of the work performed is unacceptable. In no event shall County's total fiscal obligation under this Agreement exceed ONE MILLION, EIGHT HUNDRED FIFTY-SIX THOUSAND, SEVEN HUNDRED THIRTY-EIGHT DOLLARS AND SIXTY-THREE CENTS (\$1,856,738.63). In the

event that the County makes any advance payments, Contractor agrees to refund any amounts in excess of the amount owed by the County at the time of contract termination or expiration. Contractor is not entitled to payment for work not performed as required by this agreement.

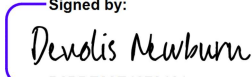
- 2. Exhibit A of the Agreement is amended to include the following added service:

Document	Title
Exhibit A-5	Change Request 01

- 3. Attachment Exhibit A-5 Change Request 01 is added to this Agreement as attached.
- 4. Original Exhibit B is replaced with Revised Exhibit B (rev. April 14, 2026).
- 5. **All other terms and conditions of the agreement dated May 20, 2025, as amended on January 21, 2026, between the County and Contractor shall remain in full force and effect.**

In witness of and in agreement with this Amendment's terms, the parties, by their duly authorized representatives, affix their respective signatures:

**For Contractor: International Business Machines Corporation**

Signed by:  B6BDE93E4078461...	4/30/2026	Devolis Newburn
Contractor Signature	Date	Contractor Name (please print)

---

**For County:**

COUNTY OF SAN MATEO

By:  
President, Board of Supervisors, San Mateo County

Date:

ATTEST:

By:  
Clerk of Said Board

Exhibit B (rev. April 14, 2026)

In consideration of the services provided by Contractor described in Exhibit A and subject to the terms of the Agreement, County shall pay Contractor based on the following fee schedule and terms:

1. Design, Development and Implementation

Phase	Project Milestone Deliverable	Percentage Due	Amount
P-01	Project Kickoff	15%	\$145,105.80
P-02	Solution Design Accepted	10%	\$96,737.20
P-03	100% of Sprints Completed	25%	\$241,843.00
P-04	UAT Completed	15%	\$145,105.80
P-05	Go-Live Deployment Completed	25%	\$241,843.00
P-06	Post-production Supported Completed	10%	\$96,737.20
Total		100%	\$967,372.00

The County shall be invoiced when each phase is completed and formally accepted by the County as defined in Section 12 of the SOW (Exhibit A), along with any supporting deliverables as listed in SOW (Exhibit A).

2. AAB Portal UI/UX Enhancements

The cost for AAB Portal UI/UX Enhancements (Change Request 01) is \$72,289.63. The County shall be invoiced upon successful completion and formal acceptance by the County along with any supporting deliverables.

3. Managed Services

Year	Support Hours Per Month	Managed Service Monthly Fee	Managed Services Annual Fee
1	135 Hours	\$12,825	\$153,900.00
2	135 Hours	\$13,210	\$158,517.00
3	135 Hours	\$13,606	\$163,273.00
4	135 Hours	\$14,014	\$168,171.00
5	135 Hours	\$14,435	\$173,216.00
Total			\$817,077.00

Annual billing for Managed Services shall begin upon the successful completion of the Post-Production Support. County shall be invoiced for a twelve (12) month period commencing upon the successful completion and acceptance of the Post-Production Support of the configured product. Thereafter, County will be billed annually in advance.

4. Overage Charges

IBM will report monthly usage as part of the service review meetings. For billing purposes, IBM will perform a semi-annual reconciliation of monthly capacity (adjusted for hours rolled over) to actual hours utilized and shall bill the County for any hours used over the contracted amount (“Overage Hours”).

5. Other Rates

Other Salesforce related services not covered under the scope of this SOW (Exhibit A) as detailed in Appendix A such as Project Work and/or Major Enhancements (modifications to

delivered/implemented functionality requiring more than 40 service hours to complete), will be estimated and billed separate from the Managed Service hours, using the rates provided below.

Resources	Hourly rate
Onshore Consultants	\$200.00
Offshore Consultants	\$65.00

The rates for Project Work are subject to an annual increase of the greater of 3% or CPI. In no event should the rates being charged to the County by the Contractor exceed their standard GSA rates.

6. Payment Schedule and Billing:

County shall not incur upfront fees prior to the delivery of services outlined in Exhibit A.

Contractor shall submit invoices to the County that detail the work completed, staff and rates as noted above that completed the work, and any other details as requested by the County. Invoice documentation must reference this Agreement No. and be accompanied by a line-item accounting for monthly expenses and evidence of work performed, including, but not limited to, timesheets, copies of bills, and/or packing slips. The Contractor shall include a written certification that the costs were actually incurred for the Project and that the supporting documentation is true, correct and complete. County shall pay all invoices from Contractor within thirty (30) business days of receipt of invoice.

The County may withhold all or part of the Contractor's total payment if County's Chief Financial Officer or designee, determines that the Contractor has not satisfactorily performed services.

In no event shall the County's financial obligation exceed \$1,856,738.63 for the term of this Agreement.



This Change Request (“CR”) sets forth the Services and Deliverables that IBM Consulting (“IBM”) shall provide to the San Mateo County (“Client”) and includes a description of the scope, timeframe and cost for the implementation of changes to the Assessment Appeals Board, Phase 1 Implementation.

The Change Request will be the governing project document outlining project scope as mutually agreed to by both parties and is being entered into and assigned to IBM on February 23, 2026.

The terms of the change request are documented at an appropriate level of detail.

## 1. Key Terms

The table below defines commonly used terms, abbreviations, or acronyms in this document.

Term	Definition
IBM	IBM Consulting
SMC	San Mateo County
CR	Change Request – Synonymous with Change Order
CO	Change Order – Synonymous with Change Request
Change Request	A formal document requesting a change in the originally defined scope of work as outlined in the Project SOW which identifies changes in scope, timeline, and/or budget and requires approval from all parties. This document would serve as an extension of the SOW to document the approval to proceed with the change in scope work efforts.

## 2. Change Request Details

		<b>Select ONLY one (1):</b>		IBM Internal Change Request	<input type="checkbox"/>
				Client Facing Change Request	<input checked="" type="checkbox"/>
<b>Client:</b>	San Mateo County	<b>Project Name:</b>	Assessment Appeals Board (AAB) Electronic System		
<b>Date Requested:</b>	02/01/2026	<b>Change Request ID #:</b>	1		
<b>Requestor:</b>	Tara George	<b>Priority:</b>	High		
<b>Target Release:</b>	June 2026	<b>Module(s) / Area:</b>	AAB Salesforce Portal		

**Summary:**

- I SMC requested support from the IBM User Interface / User Experience (UI/UX) team to provide recommendations and complete updates to the Salesforce (SF) Experience Cloud Portal, which is being developed as part of the current project.
- II This Change Order also extends the previous go-live date from May 25, 2025, to June 1, 2026 to avoid the US Memorial Day holiday.
- III Project post-deployment support (Hypercare) will also be shifted to begin on June 1, 2026, and end on June 27, 2026. The original dates were May 25, 2026, to June 20, 2026.

**Reason / Justification for Change:**

- I Changes to the SMC Experience Cloud Portal were requested by the SMC team to enhance the ease of use and make it more engaging for SMC users (Assessment Appeals Board customers, SMC Clerks, Agents, Assessors, and Attorneys).



**II** After meeting with an IBM UI/UX Designer, the SMC team confirmed that they would like all recommendations to be implemented in parallel with the current project schedule.

**Impact if Change is NOT implemented:**

A. The current SF Portal (without the UI/UX recommendations) would be deployed for Go-Live.

**Potential Alternative Solution(s):**

None

**Recommended Solution:**

A. Following is a list of the recommendations provided by the IBM UI/UX Designer and accepted by SMC for this scope of work:

Page/workflow	Source	Request or recommendation	Remediation	Notes	Assumptions
Global	SMC	Improve the user interface to be more contemporary and less flat.	Enhance CSS to align visual language closer with SMC website (fonts, colors, etc.)		Update themes using CSS. No custom LWC development to be done. Plan to take the CSS Styles in Figma and modify those in SF
Global	IBM	Strengthen wayfinding and user orientation through a clear, recognizable portal identity.	Update logo		Upload new logo, header footer alignment
Global	IBM	Improve information hierarchy and grouping to make navigation options easier to scan, understand, and use.	Revise navigation variations		Some pages may be turned off for specific user groups (agents, etc.) Assuming 6 variations for 6 Personas. There will be no additional personas or custom pages created
Homepage/All	SMC	Embed a current video that explains the appeals process.	Embed video on homepage	Effort depends on where the video is hosted	Video will be stored outside of SF and SF will host a link to the video. Video player component is compliant with dev standards
Homepage/All	SMC	Improve first impression and approachability.	Redesign hero banner so that the primary message is clear, human, and engaging at a glance.		May need some CSS config if banner overlaps with container
Homepage/All	IBM	Create a consistent, visually distinct announcement pattern so important messages are immediately recognizable and easy to find.	Add announcement component	Other config options can be considered if accelerator is not available	"Announcements for Salesforce" accelerator will be used
Homepage/All	SMC	Set clear expectations by visually explaining the end-to-end appeals process upfront.	Add a simple process illustration that shows key steps and milestones in the appeals journey.	Effort dependent on TBD design	Static visual or simple step component. Embed flowchart image from SMC



Page/workflow	Source	Request or recommendation	Remediation	Notes	Assumptions
Homepage/All	SMC	Provide paths to public-facing content such as hearings and downloadable forms so that users can access essential information without logging in.	Add nav and homepage section(s) that lead to public-facing content.		
Homepage/All	IBM	Increase visibility of support resources so users immediately know help is available without hunting through navigation.	Add a homepage section featuring select FAQs with clear links to the full support center.		
Homepage/All	IBM	Clarify the portal's value proposition by making post-login capabilities visible and tangible to users.	Add capability-focused tiles that highlight key actions available after account registration.	Component variation needed for guest vs authenticated users. Brad can likely do this with the IBM Accelerator	Plan to use banner component and property editor. May have some CSS work.
Homepage/ Applicant		Adjust visibility to specific components on the Homepage so they are relevant for Applicants	TBD	More Discovery Needed to confirm LOE	Not creating a custom layout of the homepage for each persona; rather we plan to update components and adjust visibility at the homepage level
Homepage/ Agent		Adjust visibility to specific components on the Homepage so they are relevant for Agents	TBD	More Discovery Needed to confirm LOE	
Homepage/ Attorney		Adjust visibility to specific components on the Homepage so they are relevant for Attorneys	TBD	More Discovery Needed to confirm LOE	
Homepage/ Internal County Users		Adjust visibility to specific components on the Homepage so they are relevant for Internal AAB Users	TBD	More Discovery Needed to confirm LOE	Expect 1 homepage for all internal county users.
Homepage/ Unauthenticated User		Adjust visibility to specific components on the Homepage so they are relevant for Unauthenticated Users	TBD	More Discovery Needed to confirm LOE	
Support	SMC	Keep support content contextual so users can get assistance without leaving the portal or losing task momentum.	Duplicate support articles from SMC website to SMC AAB portal		Support Articles will be created as CMS content. Requires creating new page in the Exp Cloud forum, up to 10 pages.



Page/workflow	Source	Request or recommendation	Remediation	Notes	Assumptions
Login	SMC	Improve the user interface to be more contemporary and less flat.	Enhance CSS to align visual language closer with SMC website (fonts, colors, etc.)	Effort overlaps with CSS enhancement	Dev/testing hours included in CSS enhancement effort. Added hours for Brad to design and share with SMC
Registration	SMC	Simplify registration process	Remove step to update address, potentially add to notifications on homepage	could use announcement component to do this, send targeted announcements to specific audiences	Need to adjust current registration process to remove this step, configure formula field, and configure 1 announcement to update address for users where the formula = true.
Registration	SMC	Shorten emailed link to complete registration	TBD	From email "click this link to complete registration." May not be possible using the OTB SF functionality	Confirm what SF provides OTB
Registration	SMC	Improve the user interface to be more contemporary and less flat.	Enhance CSS to align visual language closer with SMC website (fonts, colors, etc.)	Effort overlaps with CSS enhancement	Dev/testing hours included in CSS enhancement effort. Added hours for Brad to design and share with SMC
Application		Remove separate page for bulk actions and add to the Appeal Page	TBD		Bulk Actions will happen from the Appeal List View. We are not developing new LWC for this; rather we will reuse the existing LWC. May require some CSS work

**Assumptions:**

1. Discovery is not complete for several items on the list of requested changes (this is planned for the week of 2/23). Following these calls, if there are significant changes to the level of effort (LOE), this will have to go through another change control process to determine impacts to the project cost and timeline.
2. If more time is needed to complete the UI/UX Portal changes beyond March 31, 2026, this will have to go through another change control process to determine impacts to the project timeline.
3. If additional requests for UI/UX Portal changes are received from the San Mateo County team, this will have to go through another change control process to determine impacts to the Change Request hours and timeline.

