



# County of San Mateo

## Inter-Departmental Correspondence

**Department:** ASSESSOR-COUNTY CLERK-  
RECORDER-ELECTIONS  
**File #:** 24-037

Board Meeting Date: 1/23/2024

**Special Notice / Hearing:** None  
**Vote Required:** Majority

**To:** Honorable Board of Supervisors  
**From:** Mark Church, Assessor-County Clerk-Recorder & Chief Elections Officer  
**Subject:** Amendment 10 to Agreement with Sapient Corporation for the Assessor-County Clerk-Recorder & Elections (ACRE) Assessor Property Assessment System Project

### **RECOMMENDATION:**

Adopt a resolution authorizing Amendment 10 to the agreement with Sapient Corporation to:

- A) Extend the Assessor Property Assessment System (APAS) Development Agreement timeline by an additional 2 ½ months from December 30, 2023 to March 15, 2024 to include the Phase 3 90-day Warranty Services with the approved Change Request # CR-027; and
- B) Revise the term and start date of the Maintenance Agreement from December 30, 2023 through December 29, 2033 to March 16, 2024 through March 15, 2034; and
- C) Move the remaining components and the associated funding of Phase 5A and Phase 5B to the APAS 90-day Phase 3 Warranty period and year 1 of the APAS Maintenance Agreement in accordance with # CR-027; and
- D) Move the remaining Development Agreement M&O funding and remaining APAS Development and Data Contingency funds to the 1<sup>st</sup> year of the APAS 10-year Maintenance Agreement in accordance with # CR-027; and
- E) Approve additional funding of \$245,734 to the Development Agreement and \$1,014,063 to the Maintenance Agreement to a new not to exceed amount of \$25,133,446.

### **BACKGROUND:**

At the core of the business operations of ACRE's Appraisal Services Division is a digital data management system which stores and processes data relating to the ownership, characteristics, and assessment values of all taxable properties in the County. At its December 11, 2018, meeting, this Board approved the APAS Agreement ("APAS Agreement") to replace the Assessor's legacy data management system. The term of the APAS Agreement includes a 3-year term to cover the project development and implementation of the system ("Development Agreement") and a post-project 10-

year term for maintenance and operations of the system ("Maintenance Agreement").

The APAS Agreement has been amended nine times both by this Board and the Assessor-County Clerk-Recorder & Elections Officer. This Board amendments occurred on April 07, 2020 (Amendment 2), September 14, 2021 (Amendment 5), September 27, 2022 (Amendment 7), June 13, 2023 (Amendment 8). Amendment 2 incorporated the Data Cleansing and Conversion project and increased the Development Agreement amount by \$3,886,400 to a new not to exceed amount of \$20,188,348. Amendment 5 extended the Development Agreement by 6 months and moved the start date of the Maintenance Agreement commensurately. Amendment 7 extends the Development Agreement by 9 ½ months to June 30, 2023 and moved the start date of the Maintenance Agreement commensurately. Amendment 8 extends the Development Agreement by 5 months to November 30, 2023 and moved the start date of the Maintenance Agreement commensurately.

#### **DISCUSSION:**

In January 2023, the APAS Unsecured sub-system (Business Personal Property) went into production. Following the January release of the Unsecured System, the team implemented additional system features in five releases and successfully closed the unsecured roll in APAS. On December 15, 2023 the APAS Secured sub-system (Real Property) went into production. With the rollout of the Secured sub-system, the de-installation of the legacy EZ Access system is complete and EZ Access System was put into read only mode.

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 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 1<sup>st</sup> year of the Maintenance Agreement. Additionally, the APAS project team identified requirements and technical complexity which will require additional programming development by the Contractor and the cost is being included in # CR-027. These additional requirements will improve staff efficiency and productivity.

The ACRE project team determined that the complexity of the APAS system will require additional funding during the 1<sup>st</sup> year of the maintenance and operations of the APS System. It is common that the transition from a legacy system to a new system will require key personnel to remain on the team. ACRE is recommending that additional support from the key functional and technical staff from the vendor are extended for the first 4 ½ months of the maintenance period. The retention of senior functional and technical resources from the vendor is important for the 2024 roll close and was discussed with the APAS Executive Steering Committee.

To meet the Amendment 10 cost ACRE requests this Board of Supervisors approve ACRE's recommendation to approve additional funding of \$245,734 to the Development Agreement and \$1,014,063 to the Maintenance Agreement which will increase the total amount of the agreement by \$1,259,797 and approve the amendment retroactive to December 30, 2023.

The County Attorney has reviewed and approved the resolution and amendment as to form.

#### **FISCAL IMPACT:**

Appropriations to cover the costs of this agreement are not included in the Assessor-County Clerk-Recorder's FY 2023-25 Recommended Budget and will be included in future budgets. These costs will be fully funded by a transfer from Non-Departmental Services.