



# County of San Mateo

## Inter-Departmental Correspondence

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**Department:** ASSESSOR-COUNTY CLERK-  
RECORDER-ELECTIONS

**File #:** 24-418

Board Meeting Date: 6/11/2024

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

**To:** Honorable Board of Supervisors

**From:** Mark Church, Assessor-County Clerk-Recorder & Chief Elections Officer

**Subject:** Amendment 8 to the Agreement with AgreeYa Solutions, Inc. for the services of Dipti Bhosale to Provide Quality Assurance Testing Services for the Assessor Property Assessment System (APAS)

### **RECOMMENDATION:**

Adopt a resolution authorizing an amendment to the agreement with AgreeYa Solutions, Inc. for the services of Dipti Bhosale to provide quality assurance testing services for the Assessor Property Assessment System (APAS), extending the term from June 3, 2020 through June 30, 2024, to June 3, 2020 through June 30, 2025, and increasing the amount payable by \$167,088 to an amount not to exceed \$602,743.

### **BACKGROUND:**

At the core of business operations of the Assessor Clerk Recorder & Elections' (ACRE) Appraisal Services Division is the Assessor Property Assessment System (APAS), a state-of-the-art digital data management system which stores and processes data relating to the ownership, characteristics, and assessment values of all taxable properties in the County. On June 30, 2024, APAS will deliver the FY 24-25 Local Combined Property Assessment Roll to the Controller and the Board of Equalization. As the new official system of record, APAS has ushered in a new era of efficiency in assessment practices through enhanced data quality, technological workflow advancements and complete transparency of all property assessments.

At its December 11, 2018, meeting, this Board approved the APAS Agreement ("APAS Agreement") to replace the Assessor's legacy data management system. 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 Project Staffing Cost budget includes seven (7) contractors to fill project-specific technical roles as laid out in the APAS project documents. The contractor positions are project-specific and will span 24-60 months as identified in the APAS project plan. The expertise required of these contractors

cannot be filled from the County's current IT staff and the positions will be eliminated at the end of the APAS project. The positions will be onboarded and phased in and out over the life of the APAS development project.

**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 2023 Roll in APAS. On December 15, 2023, the APAS Secured sub-system (Real Property) went into production. Following the production deployment of the APAS Secured sub-system (Real Property), Sapiient has implemented additional system features in two releases and initiated the development of Phase 5 scope items concurrent with the Warranty Services and 1<sup>st</sup> year of the Maintenance Agreement.

The APAS project is a multi-year system development project that requires a stable and experienced project team. Each team member will gain invaluable experience and knowledge about the Assessor Department business requirements and operations and how they should be integrated into the APAS project. Therefore, it is important that the contractors hired for the APAS project possess specific skills and experience to fulfill the duties for the positions described in the APAS project and remain throughout the duration of the project.

The current contract with AgreeYa Solutions, Inc. for the services of Dipti Bhosale to provide ongoing Quality Assurance Testing Services for the APAS project ends on June 30, 2024. ACRE Management is requesting the Board extend the term of the Agreement by twelve months through June 30, 2025 for the quality testing services for the remainder of Phase 5A and Phase 5B production implementation, production rollout support, and increase the amount payable by \$167,088 for a new not to exceed amount of \$602,743.

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

**FISCAL IMPACT:**

Appropriations to cover the costs of the amended agreement are included in the Assessor-County Clerk-Recorder-Elections Department FY 2024-25 Recommended Budget. There is no Net County Cost associated with the amendment.