

# **Property Assessment System Replacement Project Publicis Sapien Implementation and Maintenance Agreement - Amendment #2**

Presented to the Budget and Finance Committee March 25, 2026

---



Office of the Assessor-Recorder  
City and County of San Francisco



# Property Assessment and Tax System Replacement Program Summary

Joint effort between financial services Departments to replace two legacy information systems that together enable the assessment, billing, collection and apportionment of \$4.2 billion in annual property tax revenue.

- Treasurer and Tax Collector (TTX) / Controller (CON) - CICSP
  - ✓ Tax collection and bill
  - ✓ Apportion and allocate
- Assessor-Recorder (ASR) – EZ Access
  - ✓ Real, personal, possessory interest valuation, assessment, noticing, mapping
  - ✓ Exemptions processing
  - ✓ Changes in Ownership, assessability and exclusions

IB	VOL	BLOCK	LOT	SEQ	YEAR	BILL	CHANGE NUMBER	DATE	TYPE
18	2424	037	01	15-18	03009			03-01-2015	
ASSEESSEE									
ASSESS VALUE									
AV									
LAND 647,500									
STRUCTURE 277,500									
FIXTURE									
CORTAC 5211 0086076									
PERS PROP									
GROSS TAX 925,000									
TAX RATE 1.1826 %									
HO EXEMPT									
QT EXEMPT									
SEE SUPPLEMENTAL ROLL									
NET TAXABLE 925,000									
TAX AMOUNT 10,939.04									
DELINQUENT DATE 12-10-2015									
04-11-2016 29 RENT BOARD 37.00									
TAXES DUE 5,686.66									
5,686.66 79 DN CODE ENF 52.00									
PENALTY DUE									
89 SFUSD FACIL. 35.34									
COST DUE									
91 SFCCD TAX 79.00									
NSF DUE									
98 SF - TEACHER 230.94									
TOTAL DUE 5,686.66									
5,686.66									
TOTAL PAID 5,686.66									
0.00									
BALANCE DUE 0.00									
5,686.66									
TOTAL TAX 11,373.32									
DATE PAID 602100 12-04-2015									
T0854 32: INQUIRY COMPLETED: TAX AND SPECIAL ASSESSMENT DATA DISPLAYED									

Vol	Block	Lot	Roll	Year	EvDate	Seq	Sec	ENR	ES
087005	0787	001	2014	2/29/1969	001	NSC	ENR	ES	
Location CITY HALL									
Typ REG 0 REG ROLL Date 5/30/2014									
Bill Num Res# 09174									
Owner CITY PROPERTY									
Not Date Next									
Care of DIRECTOR OF PROPERTY									
Address 25 VAN NESS AVE									
TransCde									
City&Zip SAN FRANCISCO CA 94102									
Date 2/29/1969									
.....									
01 Ownership History									
07 Valuation Methods									
13 Class Code/Situs Cho									
02 Change of Ownership									
08 Notes Screen									
14 Chara. Summary									
03 Enrollment History									
09 New Construction									
15 Land Characteristics									
04 Sales History									
18 NewConstruction Sum									
16 Office/Retail Chara									
05 Value Screen									
11 Appeals Tracking									
06 Partial Interest									
12 Parcel Split/Combo									



# Project Highlights

---

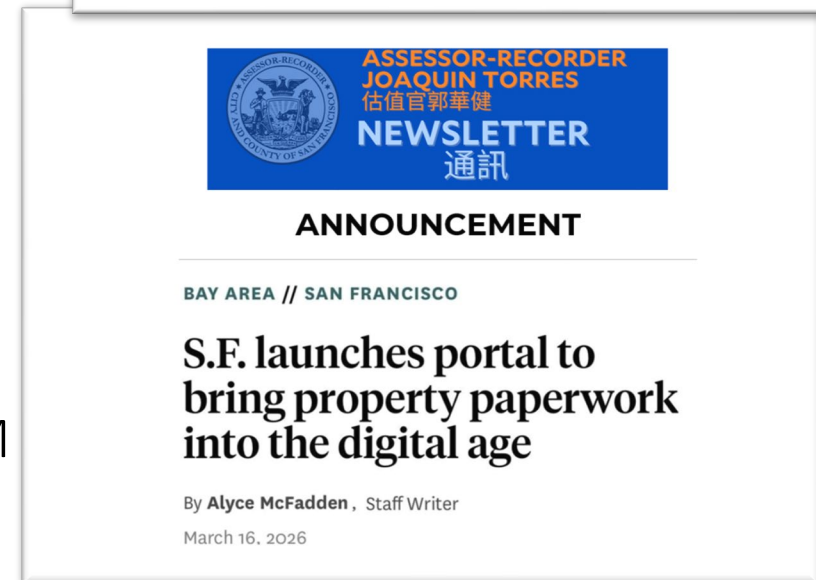
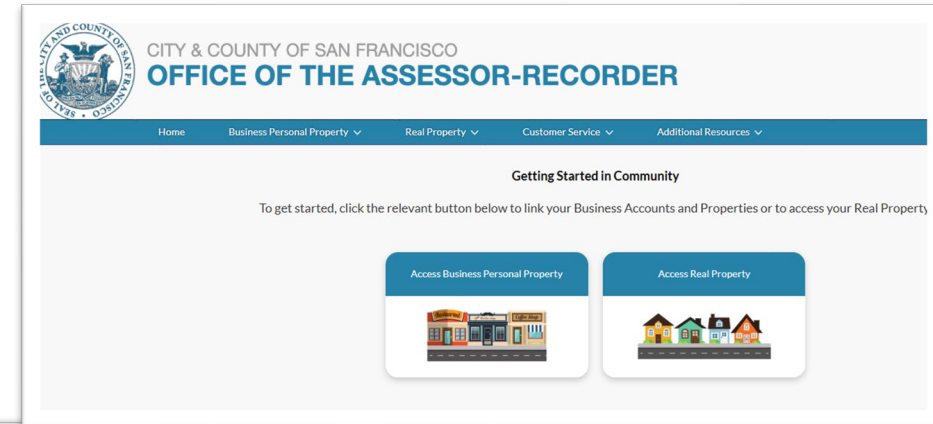
- Property Tax System: TTX/CON, TaxSys completed go-live in 2020
- Property Assessment System: ASR System for Managing Assessment, Records & Transactions (SMART)
  - Completed Phase 1 go-live in January 2021
  - Completed Phase 2 go-live in September 2025
  - Continue implementing Phase 2.x requirements through completion



# System for Managing Assessments Records and Transactions (SMART)

[sf.gov/ASR](https://sf.gov/ASR)

- Integrate directly with the Treasurer and Controller's tax collection, billing and apportionment system and improves data integrity between our offices
- Integrate with our Recorder System, DBI's permit system and incorporates functionality to better manage parcel management with DPW
- Creates a community portal for taxpayers to manage mailing addresses, see property data and communicate with our office
- FY 25-26 Budget included final year of funding for project implementation \$1.56M
- FY 26-27 and FY 27-28 baseline budgets include \$1.2M for ongoing maintenance





# Proposed Contract Amendment

- Increase the contract not-to-exceed by \$6.7M for maintenance and operations from FY 27-28 through FY 31-32.
  
- Amendment 2 (2026): \$33,912,702, 14-year term, no options to extend
  - Implementation - \$20M
  - Contingency - \$2.2M
  - Maintenance - \$11.7M
    - ✓ Exercises 5-year extension from Amendment 1
    - ✓ Creates a more realistic maintenance team than originally proposed
    - ✓ Contemplates downsizing the team as internal capacity to maintain the system improves



# Thank You

sf.gov/ASR

CITY & COUNTY OF SAN FRANCISCO  
**OFFICE OF THE ASSESSOR-RECORDER**

Home MyDetails Additional Resources

Welcome to the City and County of San Francisco Assessor-Recorder's new web portal

On our new web portal, you can electronically file your Statements and Exemptions Forms, review and manage your Business Accounts and Property Locations, as well as create customer support cases.

**Getting Started in Community**  
 To get started, click the button below to link your Business Accounts and Properties. You will be asked to input an Entity ID and Access PIN, which can be found on the Notice to File that was mailed this year. Once a Business Account is linked, you will be able to see all the associated Properties below. You may also link multiple Accounts and Properties.

**Request a Replacement PIN**  
 To request a replacement Entity ID and Access PIN to view information online, please request a replacement notice. You may request this by navigating to the Additional Resources tab above and selecting General Inquiry which will create a customer service case with our office.

**Accessing Additional Information**  
 You can access additional information about your Accounts and Properties by clicking on the My Details tab above. There you can also view your past filings, assessment history, and any customer service cases.

[Add Account/Property](#)

**Filing Statements and Viewing P**  
 To file BPP statements and/or exemptions for Accounts linked to view information and req

Property + Follow Edit Delete New Note

Record Type: Real Property Neighborhood: North Waterfront Real Property Use: Commercial Real Property Type: Accommodations Real Property Subtype: Hotel

Details **Related** Exception Assessment History AIMS Property Events Valuations Ownership History Base Year Value History Activity Chatter Document Generator

**Related Parcel Managements (0)**

**Property Events (10-)**  
 10+ Items • Updated a minute ago

	Property Event Name
1	PE-408456
2	PE-408457
3	PE-408458
4	PE-408459
5	PE-408460
6	PE-408461
7	PE-408462
8	PE-408463
9	PE-408464
10	PE-408465

**Ownership (3)**  
 3 items • Sorted by End Date • Updated 2 minutes ago

	Ownership Num...	Owner Name	Value Date	Ownership %	Start Date	End Date ↑	Status	Creating Document Nu...
1	OW-1297963		10/17/2018	100.0000%	10/17/2018		Current	2018K68357800
2	OW-637285		3/1/1993	100.0000%	11/22/1983	7/1/1986	Retired	1983 D425073-77
3	OW-782240		3/1/1993	100.0000%	7/1/1986	10/17/2018	Retired	1986 D624793-95

[View All](#)

**Property Values (8)**  
 8 items • Sorted by Value Date • Updated a few seconds ago

	Name	Value Date ↓	Retirement Date	Fair Market Value	Fair Market Value - Land	Fair Market Value - Impr...	Event Type
1	PV-00557881	9/27/2021			\$0		New Construction
2	PV-00744300	1/1/2021	9/26/2021	\$0	\$0	\$0	CIP
3	PV-00684613	1/1/2020	12/31/2020	\$0	\$0	\$0	CIP
4	PV-01151836	10/17/2018					Change in Ownership
5	PV-00138756	1/1/2011	12/31/2011	\$0	\$0	\$0	Proposition 8
6	PV-00963791	1/1/2010	12/31/2010	\$0	\$0	\$0	Proposition 8
7	PV-00610841	1/1/2009	12/31/2009	\$0	\$0	\$0	Proposition 8
8	PV-00355882	3/1/1993	10/17/2018				Conversion (Legacy)

[View All](#)