

File No. 260191

Committee Item No. 2

Board Item No. 8

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date March 25, 2026

Board of Supervisors Meeting Date April 14, 2026

Cmte Board

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| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Resolution |
| <input type="checkbox"/> | <input type="checkbox"/> | Ordinance |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Budget and Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Youth Commission Report |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Introduction Form |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| • ASR Supplemental Information | | |
| <input type="checkbox"/> | <input type="checkbox"/> | MOU |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Information Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontract Budget |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Contract/Agreement |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Form 126 – Ethics Commission |
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| <input type="checkbox"/> | <input type="checkbox"/> | Public Correspondence |

OTHER ([Click on the hyperlinks to be redirected to the Legislative Research Center to view the entirety of voluminous documents](#))

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| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Executed Agreement 10/1/2018 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Amendment No. 1 1/1/2023 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Request for Proposals 10/27/2017 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | ASR Presentation 3/25/2026 |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Sapient Initial Change Request Proposal |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | ASR Attribution |
| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Sapient Operations and Maintenance Cost |
| <input type="checkbox"/> | <input type="checkbox"/> | |
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Completed by: Brent Jalipa Date March 19, 2026

Completed by: Brent Jalipa Date April 9, 2026

1 [Contract Amendment - Sapiient Corporation - Property Assessment System Replacement
2 Project - Not to Exceed \$33,912,702]

3 **Resolution authorizing the Office of the Assessor-Recorder to execute Amendment No.**
4 **2 to Contract 1000010122 with Sapiient Corporation for the implementation and**
5 **maintenance of the Property Assessment System Replacement Project; increasing the**
6 **contract by \$6,754,000 for a new total not to exceed amount of \$33,912,702 and**
7 **extending the contract duration from nine years and two months to 13 years and eight**
8 **months, for a total term from November 1, 2018, through June 30, 2032.**

9
10 WHEREAS, Amendment No. 2 is substantially in the form attached and on file with the
11 Clerk of the Board of Supervisors in File No. 260191, which is hereby declared to be a part of
12 this Resolution as if set forth fully herein; and

13 WHEREAS, Charter, Section 9.118(b) requires the Board of Supervisors to approve by
14 Resolution amending contracts previously approved by BOS but only when the cumulative
15 increases of those contracts are greater than \$500,000; and

16 WHEREAS, The Office of the Assessor-Recorder (ASR) conducted a competitive
17 solicitation through a Request for Proposals, RFP ASR 2017-01, for development of the new
18 Property Assessment System, including all services related to delivery, installation, integration,
19 customization, data conversion, training, documentation, deployments, and project
20 management, to replace the obsolete legacy system currently in use, in which the City
21 selected Contractor as a qualified proposer pursuant to the RFP; and

22 WHEREAS, Pursuant to the RFP the ASR awarded the contract to Sapiient Corporation
23 to for the Property Assessment System for a 12-year term, at a not-to-exceed contract sum of
24 \$21,414,700, which includes a 20% contingency amount, to implement and configure the
25 Property Assessment System; and

1 WHEREAS, The Local Business Entity (“LBE”) subcontracting participation requirement
2 for the Agreement is 4% of the total value of professional services awarded to the Contractor;
3 and

4 WHEREAS, The Agreement commenced on November 1, 2018, with an initial term of
5 12 years through November 1, 2030 and included a five-year option to extend; and

6 WHEREAS, Amendment No. 1 to the Agreement adjusted the end date of the
7 agreement to December 31, 2027, and include five-year option to extend; and

8 WHEREAS Amendment No. 1 increased the not to exceed amount of the Agreement by
9 \$5,744,002 from \$21,414,700 to \$27,158,702; and

10 WHEREAS, The Civil Service approval of Amendment No. 2 has been granted under
11 File No. DHRPSC0001962; and

12 WHEREAS, Amendment No. 2 to this Agreement will adjust the end date of the
13 agreement to June 30, 2032; and

14 WHEREAS, Amendment No. 2 will increase the not to exceed amount of the Agreement
15 by \$6,754,000 from \$27,158,702 to \$33,912,702; and

16 WHEREAS, The Contract includes price-holds, discounts, retainage, and/or other terms
17 sufficient to justify the price and term; now, therefore, be it

18 RESOLVED, That the Board of Supervisors authorizes the Purchaser and the Office of
19 the Assessor-Recorder to execute Amendment No. 2 to Contract 1000010122 with Sapient
20 Corporation for the implementation and maintenance of the Property Assessment System
21 Replacement Project; increasing the contract by \$6,754,000 for a total not to exceed amount
22 of \$33,912,702 and extending the contract duration from nine years and two months to 13
23 years and eight months from December 31, 2027 to June 30, 2032; and, be it

1 FURTHER RESOLVED, That within 30 days of the contracts being fully executed by all
2 parties, the Purchaser and the Office of the Assessor-Recorder shall provide the final contracts
3 to the Clerk of the Board for inclusion into the official file.

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Item 2 File 26-0191	Department: Office of the Assessor-Recorder
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EXECUTIVE SUMMARY

Legislative Objectives

- The proposed resolution would approve the second amendment between the Office of the Assessor-Recorder (ASR) and Sapiant Corporation (Sapiant) for ongoing support and maintenance of the System for Managing Assessments, Records and Transactions (SMART), extending the term from nine years and two months to 13 years and eight months, for a total term from November 1, 2018, through June 30, 2032, and increasing the amount by \$6,754,000 for a total not-to-exceed amount of \$33,912,702.

Key Points

- Under the Property Assessment and Tax System (PATS) project, the ASR, the Treasurer & Tax Collector and the Controller’s Office are replacing the City’s two legacy property tax systems. Through an existing contract with the Sapiant Corporation (Sapiant), ASR is replacing the Property Assessment System, which is now called the System for Managing Assessments, Records and Transactions (SMART).
- Phase 2 of the SMART project experienced significant delays due to inaccurate vendor delivery assumptions and an underestimation of project complexity. A joint root cause analysis largely assigned responsibility for the delays to the vendor. Phase 2 went live in September 2025, and the system is largely implemented, with the vendor completing remaining requirements as it transitions to ongoing maintenance.
- Under the proposed amendment, Sapiant will continue to provide maintenance and support services for SMART through June 30, 2032. Maintenance activities include defect and incident resolution, technical support and testing, completion of outstanding requirements, software upgrades, and implementation of enhancements. ASR intends to transition system support in-house in the future, but existing staff capacity is not currently sufficient.

Fiscal Impact

- The proposed amendment increases the contract amount by \$6,754,000 for a total not-to-exceed amount of \$33,912,702. Maintenance costs are \$1.2 million in FY 2027-28 and increase by 4.5 percent annually. Costs are funded by the General Fund.
- The City’s implementation costs under the Sapiant contract increased from approximately \$15.1 million to \$24.8 million, an increase of approximately \$9.7 million or 64.5 percent. In addition, Sapiant contributed \$15.3 million toward project implementation following negotiations and a joint root cause analysis, which assigned each party a percent responsibility for the project delays and increased costs.

Recommendation

- Approve the proposed resolution.

MANDATE STATEMENT

City Charter Section 9.118(b) states that any contract entered into by a department, board or commission that (1) has a term of more than ten years, (2) requires expenditures of \$10 million or more, or (3) requires a modification of more than \$500,000 is subject to Board of Supervisors approval.

BACKGROUND

The City’s Office of the Assessor-Recorder (ASR) is responsible for carrying out property assessment related functions, such as identifying property ownership and assessing the value of property. The Property Assessment and Tax System (PATS) project is a multi-phase initiative among ASR, the Treasurer & Tax Collector and the Controller’s Office to modernize and replace the City’s aging legacy property tax systems and was approved by the Committee on Information and Technology in FY 2015-16. In November 2018, the Board of Supervisors approved two contracts for the Assessor’s implementation of the property assessment system replacement effort, including a contract with the Sapient Corporation (Sapient) for implementation services and ongoing support for a not-to-exceed amount of \$21,414,700 and 12-year term from November 1, 2018 through November 1, 2030 (File 18-1037). The contract included one five-year option to extend through November 1, 2035, for a total potential term of 17 years. In March 2023, the Board of Supervisors approved the first amendment to the contract with Sapient, increasing the agreement by \$5,744,002 from \$21,414,700 to \$27,158,702, and reducing the initial term from 12 years to nine years and two months to expire on December 31, 2027 (File 23-0233). The amendment maintained the one five-year option to extend through December 2032 for a total potential term of 14 years and two months.

Project Status

ASR and Sapient renamed the Property Assessment System to the System for Managing Assessments, Records and Transactions (SMART) and launched the project in January 2019 with an anticipated go-live date of November 2021. Phase 2 (Secured Property, Change in Ownership and Possessory Interest implementation) of the project experienced significant delays due to inaccurate vendor delivery assumptions and an underestimation of project complexity. In 2024, ASR identified a significant system design flaw and issued a change order. Following a joint root cause analysis, ASR reported that responsibility was attributed as follows: eight percent to ASR and 92 percent to Sapient. As a result of the multiple delays and change order, Phase 2 went live in September 2025, though the vendor continues completion of phase 2.x requirements. According to ASR, the majority of SMART implementation is complete and the system is transitioning to ongoing operations and maintenance.

DETAILS OF PROPOSED LEGISLATION

The proposed resolution would approve the second amendment between the Office of the Assessor-Recorder (ASR) and Sapient Corporation (Sapient) for ongoing support and

maintenance of the System for Managing Assessments, Records and Transactions (SMART), extending the term from nine years and two months to 13 years and eight months, for a total term from November 1, 2018, through June 30, 2032, and increasing the amount by \$6,754,000 for a total not-to-exceed amount of \$33,912,702. The second amendment would exercise the one five-year extension option but reduces the total term by six months.

We recommend that ASR amend the draft second amendment to clarify that there are no options to extend remaining.

Services

Under the proposed amendment, Sapient will continue to provide maintenance and support services for SMART through June 30, 2032. According to ASR, the five-year extension is needed to support post-implementation operations, including ongoing system maintenance, resolution of post-go-live issues, implementation of upgrades and security patches, and the transfer of knowledge to ensure effective system operation and troubleshooting. ASR states that vendor maintenance staffing of 10 FTE positions¹ has been confirmed for FY 2025-26, and maintenance needs will be negotiated annually. Maintenance activities generally include defect and incident resolution, technical support and testing, completion of outstanding system requirements and software upgrades, and implementation of enhancements.

ASR's long-term objective is to transition system support in-house and reduce reliance on vendors. However, current staffing capacity is insufficient to support this transition. ASR is developing a phased plan to assess and build internal capacity in future years. This effort is expected to include additional FTE, though staffing levels have not yet been determined. ASR states the department does not plan to competitively solicit vendors for system maintenance following the conclusion of the current Sapient contract.

Project Monitoring

According to ASR, there are multiple mechanisms in place for project monitoring. The project team from Sapient and the department meet weekly to review the status of upcoming software releases and assess risks and system issues. Sapient is also required to develop reports and dashboards to track and summarize support incidents and defects, as well as detail the status and proposed actions for unresolved issues.

The contract also includes a performance service credits provision that establishes financial penalties if the vendor fails to meet defined service level agreements for response and resolution times. According to ASR, no service credits have been assessed during the contract term.

¹ This includes one Product Manager, one Senior Architect, three Senior Developers, two Developers, two Senior Quality Assurance Engineers, and one Quality Assurance Engineer

FISCAL IMPACT

Exhibit 1 below shows the basis for the proposed \$33,912,702 total amount. Actual and encumbered expenditures since FY 2018-19 total \$25,758,702, which is 94.5 percent of the existing not to exceed amount. ASR expects to fully expend the existing contract not to exceed amount of \$27,158,702 in FY 2026-27. Maintenance costs for FY 2025-26 and FY 2026-27 are funded under the existing contract amount. \$739,950 of existing contingency was reallocated to offset maintenance costs during the extension period. According to ASR staff, \$885,304 remains in existing contingency funds, which is approximately 12 percent of the proposed budget less expenditures to date.

Exhibit 1: Contract Agreement Not to Exceed Amount

	Existing Agreement	Proposed Amendment	Change
Implementation	\$18,728,109	\$20,028,109	\$1,300,000
Phase 1 Maintenance During Implementation	1,861,476	2,546,426	684,950
Contingency	2,969,117	2,229,167	(739,950)
<i>Subtotal, Total Implementation Costs</i>	<i>\$23,558,702</i>	<i>\$24,803,702</i>	<i>\$1,245,000</i>
Maintenance After Go Live*	3,600,000	9,109,000	5,509,000
Total	\$27,158,702	\$33,912,702	\$6,754,000

Source: Proposed Amendment 2

*Amendment 1 included \$3.6 million for four years of maintenance after go live, and the proposed amendment includes approximately \$5.5 million for seven years of maintenance after go live

Exhibit 2 below shows the annual spending on the contract during the extension period.

Exhibit 2: Proposed System Maintenance Costs, FY 2027-28 to FY 2031-32

Year	Amount
FY 2027-28	\$1,234,000
FY 2028-29	1,290,000
FY 2029-30	1,348,000
FY 2030-31	1,409,000
FY 2031-32	1,473,000
Total	\$6,754,000

Source: ASR

Proposed maintenance costs for FY 2027-28 through FY 2031-32 increase by approximately 4.5 percent annually. ASR indicates the increases are consistent with salary and benefit cost-of-living adjustments. The department anticipates renegotiating costs downward in future years as the system stabilizes, incident volumes decline, and internal staffing capacity to maintain the system

is developed. Annual maintenance costs are based on the vendor's 2023 estimate of \$1.2 million (which excluded inflationary adjustments).

The source of funds for the contract is the General Fund.

Increase in Total Project Costs

According to ASR, the total project costs for the Property Assessment and Tax System, including the Treasurer and Tax Collector and Controller project are \$84.4 million. This amount includes ASR's SMART implementation costs under the Sapien contract but does not include ongoing maintenance costs. Total costs exceed the estimated costs at project approval in 2018 (\$72.4 million) by \$12.0 million, or 16.6 percent. The City's implementation costs under the Sapien contract have increased from approximately \$15.1 million to approximately \$24.8 million, an increase of approximately \$9.7 million or 64.5 percent. In addition to the City's implementation costs under the contract, Sapien contributed \$15.3 million towards project implementation following negotiations and a joint root cause analysis which assigned each party a percent responsibility for the project delays and increased costs.

Operational Savings

Section 26.1 of the Administrative Provisions of the Annual Appropriation Ordinances since FY 2017-18 and FY 2018-19 directs the Controller to apply operational savings from the offices of the Assessor, Controller, and Tax Collector to the property tax system replacement project, to minimize future General Fund appropriations required for the project. Section 26.1 requires a report on these savings to be provided to the Board of Supervisor's Budget & Finance Committee and its Budget & Legislative Analyst's Office. According to ASR, a total of \$28 million in operational savings has been applied to the project and the provision is still needed to complete Phase 2.x.

RECOMMENDATION

Approve the proposed resolution.

Publicis Sapient Change Request Estimate

Summary	
POD	Cost
POD1	\$1,643,520
POD2	\$1,643,520
POD3	\$2,054,400
POD4	\$2,054,400
Governance and Cross POD	\$7,162,680
Test Case Automation	\$1,167,030
Sub-Total	\$15,725,550
Misc - VISA/ Travel Expenses - @5%	\$786,278
Contingency - People Benefit - @5%	\$786,278
Total Cost (Incl. Misc and Contingency)	\$17,298,105

POD1						
Skill	Role	Location	Allocation	Monthly Cost	No of Months	Total Cost
Dev	Technical Architect	India	1	\$14,896	12	\$178,752
Dev	Sr. Developer	Local	1	\$10,775	12	\$129,300
Dev	Sr. Developer	India	1	\$10,775	12	\$129,300
Dev	Sr. Developer	India	1	\$10,775	12	\$129,300
Dev	Developer	India	1	\$6,443	12	\$77,316
Dev	Developer	India	1	\$6,443	12	\$77,316
Product	Senior Associate	Local	1	\$18,967	12	\$227,604
QE	Senior Associate L2	India	1	\$7,308	12	\$87,696
QE	Senior Associate L2	India	1	\$7,308	12	\$87,696
QE	Senior Associate L2	India	1	\$7,308	12	\$87,696
QE	Associate L2	India	1	\$5,083	12	\$60,996
QE	Associate L2	India	1	\$5,083	12	\$60,996
Data/ Integration	Data Arcitect	Local	1	\$14,896	12	\$178,752
Scrum Master	Project Manager	India	1	\$10,900	12	\$130,800
Total Cost Per Month				\$136,960		\$1,643,520

POD2						
Skill	Role	Location	Allocation	Monthly Cost	No of Months	Total Cost
Dev	Technical Architect	India	1	\$14,896	12	\$178,752
Dev	Sr. Developer	Local	1	\$10,775	12	\$129,300
Dev	Sr. Developer	India	1	\$10,775	12	\$129,300
Dev	Sr. Developer	India	1	\$10,775	12	\$129,300
Dev	Developer	India	1	\$6,443	12	\$77,316
Dev	Developer	India	1	\$6,443	12	\$77,316
Product	Senior Associate	Local	1	\$18,967	12	\$227,604
QE	Senior Associate L2	India	1	\$7,308	12	\$87,696
QE	Senior Associate L2	India	1	\$7,308	12	\$87,696
QE	Senior Associate L2	India	1	\$7,308	12	\$87,696
QE	Associate L2	India	1	\$5,083	12	\$60,996
QE	Associate L2	India	1	\$5,083	12	\$60,996
Data/ Integration	Data Arcitect	Local	1	\$14,896	12	\$178,752
Scrum Master	Project Manager	India	1	\$10,900	12	\$130,800
Total Cost Per Month				\$136,960		\$1,643,520

POD3						
Skill	Role	Location	Allocation	Monthly Cost	No of Months	Total Cost
Dev	Technical Architect	India	1	\$14,896	15	\$223,440
Dev	Sr. Developer	Local	1	\$10,775	15	\$161,625
Dev	Sr. Developer	India	1	\$10,775	15	\$161,625
Dev	Sr. Developer	India	1	\$10,775	15	\$161,625
Dev	Developer	India	1	\$6,443	15	\$96,645
Dev	Developer	India	1	\$6,443	15	\$96,645
Product	Senior Associate	Local	1	\$18,967	15	\$284,505
QE	Senior Associate L2	India	1	\$7,308	15	\$109,620
QE	Senior Associate L2	India	1	\$7,308	15	\$109,620
QE	Senior Associate L2	India	1	\$7,308	15	\$109,620
QE	Associate L2	India	1	\$5,083	15	\$76,245
QE	Associate L2	India	1	\$5,083	15	\$76,245
Data/ Integration	Data Arcitect	Local	1	\$14,896	15	\$223,440
Scrum Master	Project Manager	India	1	\$10,900	15	\$163,500
Total Cost Per Month				\$136,960		\$2,054,400

POD4						
Skill	Role	Location	Allocation	Monthly Cost	No of Months	Total Cost
Dev	Technical Architect	India	1	\$14,896	15	\$223,440
Dev	Sr. Developer	Local	1	\$10,775	15	\$161,625
Dev	Sr. Developer	India	1	\$10,775	15	\$161,625
Dev	Sr. Developer	India	1	\$10,775	15	\$161,625
Dev	Developer	India	1	\$6,443	15	\$96,645
Dev	Developer	India	1	\$6,443	15	\$96,645
Product	Senior Associate	Local	1	\$18,967	15	\$284,505
QE	Senior Associate L2	India	1	\$7,308	15	\$109,620
QE	Senior Associate L2	India	1	\$7,308	15	\$109,620
QE	Senior Associate L2	India	1	\$7,308	15	\$109,620
QE	Associate L2	India	1	\$5,083	15	\$76,245
QE	Associate L2	India	1	\$5,083	15	\$76,245
Data/ Integration	Data Arcitect	Local	1	\$14,896	15	\$223,440
Scrum Master	Project Manager	India	1	\$10,900	15	\$163,500
Total Cost Per Month				\$136,960		\$2,054,400

Governance and Cross POD Roles						
Skill	Role	Location	Allocation	Monthly Cost	No of Months	Total Cost
Program	VP	Local	1	\$77,406	15	\$1,161,090
Program	Senior Director	India	1	\$22,847	15	\$342,705
Program	Director	India	1	\$16,089	15	\$241,335
SalesForce	Sr. Director	India	1	\$26,789	15	\$401,835
QE	Sr. Manager	Local	1	\$43,384	15	\$650,760
QE	Sr. Manager	India	1	\$10,900	15	\$163,500
SalesForce	Technical Architect	Local	1	\$43,510	15	\$652,650
Data Migration	Data/ Int. Architect	Local	1	\$33,000	15	\$495,000
Dev	Build & Release Manager	India	1	\$10,775	15	\$161,625
EZAccess SME	Product Manager	Local	1	\$18,967	15	\$284,505
EZAccess SME	Product Manager	Local	1	\$18,967	15	\$284,505
EZAccess SME	Product Manager	Local	1	\$18,967	15	\$284,505
EZAccess SME	Product Manager	Local	1	\$18,967	15	\$284,505
OCM	Product Manager	Local	1	\$18,967	15	\$284,505
OCM	Product Manager	Local	1	\$18,967	15	\$284,505
OCM	Content Writer	India	1	\$9,038	15	\$135,570
OCM	Content Writer	India	1	\$9,038	15	\$135,570
OCM	Content Writer	India	1	\$9,038	15	\$135,570
Data Migration	Technical Architect	India	1	\$14,896	15	\$223,440
Scrum Master	Project Manager	India	1	\$10,900	15	\$163,500
Scrum Master	Project Manager	Local	1	\$26,100	15	\$391,500
Total Cost Per Month				\$477,512		\$7,162,680

Test Cases Automation						
Skill	Role	Location	Allocation	Monthly Cost	No of Months	Total Cost
QE	Senior Associate L2	India	10	\$7,308	11	\$803,880
QE	Associate L2	India	5	\$5,083	10	\$254,150
QE	QE Manager	India	1	\$10,900	10	\$109,000
Total Cost Per Month				\$15,983		\$1,167,030

Publicis Sapient Change Request Proposal

Work Item	Est Story Points	Cost	PS Investment Philosophy	PS Investment	ASR Cost
1 – Roll Adjustment Framework	2,500	\$2,888,875	PS takes 100% accountability for cost of redesign / redevelopment . However, cost of automating these test cases represents ~10% and is net-new work. PS Invests 90% of total cost	\$2,599,988	\$288,888
2 – Original 2.X Scope	2,500	\$2,888,875	This work was already funded in CR-1; therefore PS covers all costs.	\$2,888,875	
3 – Current 2.X Scope	4,000	\$4,622,200	This is net-new expected work to cover full 2.X functionality that has never been estimated before. ASR covers this cost		\$4,622,200
4 – 2.0 Defects	1,500	\$1,733,325	This work was already funded in original SOW; therefore PS covers all costs	\$1,733,325	
5 – Unfunded CR's	1,500	\$1,738,180	This is additional work required after stories were agreed upon between PS and ASR. ASR covers this cost .		\$1,738,180
6 – Improved Requirements Process	1,000	\$1,115,550	This is a risk mitigation / process improvement to reduce subsequent CR's. PS funds 50% of this work.	\$577,775	\$577,775
7 – Automated ASR QA and UAT test cases	2,000	\$2,311,100	This is a process improvement and investment for the future, but PS also stands to gain from this. PS funds 50% of this work.	\$1,115,550	\$1,115,550
Total	15,000	\$17,298,105		\$8,915,513	\$8,342,593

Root Causes (From Fishbone Analysis)	Allocation of cause of delay (What % did this problem cause the delay)	Assessment of source (In What % did this party cause this root cause)			
		ASR Assessment	PS Assessment		
SCOPE	30	5	95	2%	29%
<i>Baseline never developed</i>		5	95		
<i>Lack of Traceability</i>		-	100		
<i>Acceptance Criteria not objective / complete</i>		10	90		
SOLUTION	35	5	95	2%	33%
<i>Stories based on Scenarios</i>		5	95		
<i>Requirements details based on Scenarios</i>		5	95		
<i>Acceptance Criteria not objective</i>		10	90		
<i>Overall Design Process / Completeness</i>		5	95		
<i>Poor use of external SME / Hamer</i>		-	100		
PROCESS	20	3	97	1%	19%
<i>FDD / TDD missing on many stories</i>		5	95		
<i>Stopped Daily Scrum, Demos, other processes</i>		-	100		
<i>Poor Issue Risk Management</i>		5	95		
ENVIRONMENT	5	-	100	0%	5%
<i>Lack of Robust QA Environment</i>		-	100		
<i>lack of QA Testing End to End</i>		-	100		
<i>Legacy Data cleanup slowness impacts delivery</i>		-	100		
PEOPLE	5	30	70	2%	4%
<i>High Turnover</i>		-	100		
<i>ASR Decision making</i>		100	-		
<i>Poor use of external SME / Hamer</i>		-	100		
<i>Key roles not fully effective (Product Owners, Architect)</i>		20	80		
OTHER	5	50	50	3%	3%
<i>COVID drove remote interaction</i>					
Total (Should =100)	100			8%	92%

Sapient M&O Budget by Resource		25-26			26-27			27-28			28-29		
Role	Name	Headcount	fte	Annual	Headcount	fte	Annual	Headcount	fte	Annual	Headcount	fte	Annual
Infra/Tech	Surya	1	0.50	156,154			-			-			-
Product Manager	Nitika - Toronto	1	0.75	180,681	1	1.00	242,380	1	1.00	253,472	1	1.00	264,975
Technical Architect	Ankur - India	1	1.00	160,564	1	1.00	189,997	1	1.00	198,692	1	1.00	207,709
Sr Developer	India	3	2.75	338,651	3	3.00	368,853	3	3.00	385,734	3	3.00	403,239
Developer	India	2	2.00	138,940	2	2.00	151,424	2	2.00	158,354	2	2.00	165,540
Sr Quality Engineer	India	2	1.50	145,232	2	2.00	169,760	2	2.00	177,528	2	2.00	185,584
Quality Engineer	India	1	1.00	54,778	1	1.00	57,586	1	1.00	60,220	1	1.00	62,953
		11	9.50	1,175,000	10	10.00	1,180,000	10	10.00	1,234,000	10	10.00	1,290,000

Sapient M&O Budget by Resource		29-30			30-31			31-32		
Role	Name	Headcount	fte	Annual	Headcount	fte	Annual	Headcount	fte	Annual
Infra/Tech	Surya			-			-			-
Product Manager	Nitika - Toronto	1	1.00	276,889	1	1.00	289,419	1	1.00	302,565
Technical Architect	Ankur - India	1	1.00	217,048	1	1.00	226,870	1	1.00	237,175
Sr Developer	India	3	3.00	421,368	3	3.00	440,436	3	3.00	460,443
Developer	India	2	2.00	172,982	2	2.00	180,810	2	2.00	189,022
Sr Quality Engineer	India	2	2.00	193,928	2	2.00	202,704	2	2.00	211,912
Quality Engineer	India	1	1.00	65,785	1	1.00	68,761	1	1.00	71,883
		10	10.00	1,348,000	10	10.00	1,409,000	10	10.00	1,473,000

**City and County of San Francisco
Office of Contract Administration
Purchasing Division**

Second Amendment

THIS **SECOND AMENDMENT** (“Amendment”) is made as of XXX XX, 2026, in San Francisco, California, by and between **Sapient Corporation** (“Contractor”), and the City and County of San Francisco, a municipal corporation (“City”), acting by and through its Director of the Office of Contract Administration.

Recitals

WHEREAS, City and Contractor have entered into the Agreement (as defined below); and

WHEREAS, City and Contractor desire to modify the Agreement on the terms and conditions set forth herein to extend the performance period, increase the contract amount, and update standard contractual clauses; and

WHEREAS, Contractor was competitively selected pursuant to a Request for Proposals entitled Property Assessment Solution issued through Sourcing Event ID ASR2017-01 and this Amendment is consistent with the terms of the RFP and the awarded Contract; and

WHEREAS, this is a contract for Services, there is a Local Business Enterprise (“LBE”) subcontracting participation requirement, and this Amendment is consistent with that requirement; and

WHEREAS, this Amendment is consistent with an approval obtained on May 19, 2025 from the Civil Service Commission under PSC number DHRPSC0001962 in the amount of \$34,000,000 for the period of 13 years and 8 months; and

WHEREAS, this Amendment is consistent with an approval obtained from the City’s Board of Supervisors under Resolution [XXX-XX] approved on [insert date] in the amount of \$33,912,702 for the period commencing November 1, 2018 and ending June 30, 2032; and

WHEREAS, the Department has filed Ethics Form 126f2 (Notice of Submission of Proposal) because this Agreement has a value of \$100,000 or more in a fiscal year and will require the approval of an elected officer of the City; and

WHEREAS, the Department has filed Ethics Form 126f4 (Notification of Contract Approval) because this Agreement, as amended herein, has a value of \$100,000 or more in a fiscal year and will require the approval of an elected officer of the City; and

Now, THEREFORE, the parties agree as follows:

Article 1 Preface

The following definitions shall apply to this Amendment:

1.1 **Agreement.** The term “Agreement” shall mean the Agreement dated November 1, 2018 between Contractor and City, as amended by the:

First Amendment, dated January 1, 2023.

1.2 **Other Terms.** Terms used and not defined in this Amendment shall have the meanings assigned to such terms in the Agreement.

1.3 **San Francisco Labor and Employment Code.** As of January 4, 2024, San Francisco Administrative Code Chapters 21C (Miscellaneous Prevailing Wage Requirements), 12B (Nondiscrimination in Contracts), 12C (Nondiscrimination in Property Contracts), 12P (Minimum Compensation), 12Q (Health Care Accountability), and 12U (Sweatfree Contracting) are redesignated as Articles 102 (Miscellaneous Prevailing Wage Requirements), 131 (Nondiscrimination in Contracts), 132 (Nondiscrimination in Property Contracts), 111 (Minimum Compensation), 121 (Health Care Accountability), and 151 (Sweatfree Contracting) of the San Francisco Labor and Employment Code, respectively. Wherever this Agreement refers to San Francisco Administrative Code Chapters 21C, 12B, 12C, 12P, 12Q, and 12U, it shall be construed to mean San Francisco Labor and Employment Code Articles 102, 131, 132, 111, 121, and 151, respectively.

1.4 **Open For Business Legislative Changes.** In October 2025, San Francisco enacted legislation that reduced obligations the City places on contactors. These changes went into effect January 1, 2026. Articles 141 and 142 were repealed, to the extent those conditions appear in this Agreement, they should be treated as nullified. The dollar value threshold for application for Administrative Code Chapters 12F, 12N, 12L, 12Y, and 101 and Labor and Employment Code Article 151 were increased. If the Agreement is valued at less than \$230,000, 12N, 12Y and 101 are not in effect. If the Agreement is valued at \$230,000 or less, 12F and 151 are not in effect. If the Agreement is valued at less than \$1,000,000, Chapter 12L is not in effect. Any clause in the Agreement concerning a condition referenced above that is not in effect shall be treated as nullified.

Article 2 Modifications of Scope to the Agreement

The Agreement is hereby modified as follows:

2.1 **Term.** Section 2.1 of the Agreement currently reads as follows:

The term of this agreement shall commence on November 1, 2018 and expire on December 31, 2027.

Such section is hereby amended in its entirety to read as follows:

The term of this agreement shall commence on November 1, 2018 and expire on June 30, 2032.

2.2 Payment. Section 3.3.1 of the Agreement currently reads as follows:

*Contractor shall provide an invoice to the City for Work on a monthly basis for Work completed in accordance with the Acceptance Criteria set forth in the Implementation Statement of Work, in the immediate preceding month, unless a different schedule is set out in Appendix B (Calculation of Charges). Payment for the Work provided under the Maintenance Statement of Work shall be invoiced and paid annually in advance of the provision of such Work, unless a different schedule is set out in Appendix B (Calculation of Charges). To the extent the City requests Contractor to provide any As-Needed Professional Services, payment for the As-Needed Professional Services shall be paid on a time and materials basis monthly in arrears. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists in accordance with Section 11.6.1. In no event shall the amount of this Agreement exceed **\$27,158,702** [TWENTY SEVEN MILLION, ONE HUNDRED AND FIFTY EIGHT THOUSAND, SEVEN HUNDRED AND TWO DOLLARS]. This amount shall include a \$2,969,117 contingency to be expended only at the request of the City and upon mutual agreement of the Parties. The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated herein by this reference as though fully set forth herein. In no event shall City be liable for interest or late charges for any late payments.*

Such section is hereby amended in its entirety to read as follows:

*Contractor shall provide an invoice to the City for Work on a monthly basis for Work completed in accordance with the Acceptance Criteria set forth in the Implementation Statement of Work, in the immediate preceding month, unless a different schedule is set out in Appendix B-2 (Calculation of Charges). Payment for the Work provided under the Maintenance Statement of Work shall be invoiced and paid annually in advance of the provision of such Work, unless a different schedule is set out in Appendix B-2 (Calculation of Charges). To the extent the City requests Contractor to provide any As-Needed Professional Services, payment for the As-Needed Professional Services shall be paid on a time and materials basis monthly in arrears. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists in accordance with Section 11.6.1. In no event shall the amount of this agreement exceed **\$33,912,702** [THIRTY-THREE MILLION, NINE HUNDRED AND TWELVE THOUSAND, SEVEN HUNDRED AND TWO DOLLARS]. This amount shall include a \$2,229,167 contingency to be expended only at the request of the City and upon mutual agreement of the Parties. The breakdown of charges associated with this Agreement appears in Appendix B-2 (Calculation of Charges), attached hereto and incorporated herein by this reference as though fully set forth herein. In no event shall City be liable for interest or late charges for any late payments.*

2.3 **Appendix A-2a.** Appendix A-2a is hereby replaced in its entirety by Appendix A-2b, attached to this Amendment and fully incorporated within the Agreement. To the extent the Agreement refers to Appendix A-2 or A-2a in any place, the true meaning shall be Appendix A-2b, which is a correct and updated version.

2.4 **Appendix B-1.** Appendix B-1 is hereby replaced in its entirety by Appendix B-2, attached to this Amendment and fully incorporated within the Agreement. To the extent the Agreement refers to Appendix B or B-1 in any place, the true meaning shall be Appendix B-2, which is a correct and updated version.

Article 3 Updates of Standard Terms to the Agreement

The Agreement is hereby modified as follows:

3.1 **Article 1 Definitions.** *The following definitions are hereby added to the Agreement in Article 1 Definitions. If the terms are currently defined in the Agreement, then the included terms below supersede and expressly replace the existing definitions:*

“Artificial Intelligence” or “Artificial Intelligence Model” means an engineered or machine-based system that varies in its level of autonomy and that can, for explicit or implicit objectives, infer from the input it receives how to generate outputs that can influence physical or virtual environments.

“Artificial Intelligence System” means a machine-based system that is designed to operate with varying levels of autonomy and that may exhibit adaptiveness after deployment, and that, for explicit or implicit objectives, infers, from the input it receives, how to generate outputs such as predictions, content, recommendations, or decisions that can influence physical or virtual environments.

“City Data” means all data collected, used, maintained, processed, stored, and/or generated by or on behalf of City in connection with this Agreement. City Data includes, without limitation, Confidential Information and Deliverable Data.

“Confidential Information” means confidential City information including, but not limited to, personal identifiable information (“PII”), protected health information (“PHI”), or individual financial information (collectively, “Proprietary or Confidential Information”) that is subject to local, state or federal laws restricting the use and disclosure of such information. Confidential Information includes, without limitation, City Data.

“Deliverable Data” means any data that is required to be delivered to City as a Deliverable, or as a part of a Deliverable, under this Agreement.

“Generative Artificial Intelligence” means artificial intelligence that can generate derived synthetic content, such as text, images, video, and audio, that emulates the structure and characteristics of the artificial intelligence’s training data.

“Personal Identifiable Information (PII)” means information that identifies, relates to, describes, is reasonably capable of being associated with, or could reasonably be linked, directly or indirectly, with a particular individual or household. Personal information

includes, but is not limited to, the following if it identifies, relates to, describes, is reasonably capable of being associated with, or could be reasonably linked, directly or indirectly, with a particular individual or household as further defined in the California Consumer Privacy Act.

3.2 **Section 4.3 Personnel.** *Section 4.3 of the Agreement is hereby replaced in its entirety to read as follows:*

4.3 **Qualified Personnel.** Contractor represents and warrants that it is qualified to perform the Services required by City, and that all Services will be performed by competent personnel with the degree of skill and care required by current and sound professional procedures and practices. Contractor will comply with City's reasonable requests regarding assignment and/or removal of personnel, but all personnel, including those assigned at City's request, must be supervised by Contractor. Contractor shall commit sufficient resources for timely completion within the project schedule.

3.3 **Section 4.12 Assignment.** *Section 4.12 of the Agreement is hereby replaced in its entirety to read as follows:*

4.12 **Assignment.** Services to be performed by Contractor are personal in character. This Agreement may not be directly or indirectly assigned, novated, or otherwise transferred unless first approved by City by written instrument executed and approved in the same manner as this Agreement. Any purported assignment made in violation of this provision shall be null and void.

3.4 **Section 10.16 Notification of Legal Requests.** *Section 10.16 of the Agreement is hereby replaced in its entirety to read as follows:*

10.16 **Notification of Legal Requests.** Contractor shall immediately notify City upon receipt of any subpoenas, service of process, litigation holds, discovery requests and other legal requests ("Legal Requests") related to all data given to Contractor by City in the performance of this Agreement ("City Data" or "Data"), or which in any way might reasonably require access to City's Data, and in no event later than 24 hours after it receives the request. Contractor shall not respond to Legal Requests related to City without first notifying City other than to notify the requestor that the information sought is potentially covered under a non-disclosure agreement. Contractor shall retain and preserve City Data in accordance with the City's instruction and requests, including, without limitation, any retention schedules and/or litigation hold orders provided by the City to Contractor, independent of where the City Data is stored.

3.5 **Article 12 Data and Security.** *Article 12 is hereby replaced in its entirety to read as follows:*

12.1 **Nondisclosure of Private, Proprietary or Confidential Information.**

12.1.1 **Protection of Private Information.** If this Agreement requires City to disclose "Private Information" to Contractor within the meaning of San Francisco Administrative Code Chapter 12M, Contractor and subcontractor shall use such information only in accordance with the restrictions stated in Chapter 12M and in this Agreement and only

as necessary in performing the Services. Contractor is subject to the enforcement and penalty provisions in Chapter 12M.

12.1.2 City Data; Confidential Information. In the performance of Services, Contractor may have access to, or collect on City’s behalf, City Data, which may include proprietary or Confidential Information that if disclosed to third parties may damage City. If City discloses proprietary or Confidential Information to Contractor, or Contractor collects such information on City’s behalf, such information must be held by Contractor in confidence and used only in performing the Agreement. Contractor shall exercise the same standard of care to protect such information as a reasonably prudent contractor would use to protect its own proprietary or Confidential Information.

12.2 Reserved (Payment Card Industry (“PCI”) Requirements).

12.3 Reserved (Business Associate Agreement).

12.4 Management of City Data.

12.4.1 Use of City Data. Contractor agrees to hold City Data received from, or created or collected on behalf of, City, in strictest confidence. Contractor shall not use or disclose City Data except as permitted or required by the Agreement or as otherwise authorized in writing by City. Any work by Contractor or its authorized subcontractors using, or sharing or storage of, City Data outside the United States is prohibited, absent prior written authorization by City. Access to City Data must be strictly controlled and limited to Contractor’s staff assigned to this project on a need-to-know basis only. City Data shall not be distributed, repurposed or shared across other applications, environments, or business units of Contractor. Contractor is provided a limited non-exclusive license to use City Data solely for performing its obligations under the Agreement and not for Contractor’s own purposes or later use, provided, however, that no City Data may be used by Contractor to train, modify or improve any Artificial Intelligence Systems or Models without City’s prior written consent, which may be withheld or withdrawn at City’s sole discretion. Nothing herein shall be construed to confer any license or right to City Data, by implication, estoppel or otherwise, under copyright or other intellectual property rights, to any third-party. Unauthorized use of City Data by Contractor, subcontractors or other third-parties is prohibited. For purpose of this requirement, the phrase “unauthorized use” means the data mining or processing of data and/or machine learning from the data, stored or transmitted by the service, for unrelated commercial purposes, advertising or advertising-related purposes, or for any purpose that is not explicitly authorized other than security or service delivery analysis.

12.4.2 Use of Generative Artificial Intelligence in Deliverables. Contractor is prohibited from using Generative Artificial Intelligence in the development of Deliverables without City’s prior written consent. Contractor represents and warrants to City that Deliverables will not be developed in a manner that conflicts with the City’s rights in and to the Deliverables under Article 9, “Rights in Deliverables,” or the City Data confidentiality and security requirements under Article 13, “Data and Security,” of this Agreement.

12.4.3 Disposition of City Data. Except as otherwise provided for in this Agreement, upon City’s request, termination or expiration of this Agreement, or the

expiration of any required document retention period or litigation hold, Contractor shall promptly, but in no event later than thirty (30) calendar days, return all City Data given to, or collected or created by Contractor on City's behalf, which includes all original media. Once Contractor has received written confirmation from City that the City Data has been successfully transferred to City, Contractor shall, within ten (10) business days, securely dispose, clear, purge, and/or physically destroy, all copies of all City Data from its servers, files, hosted environments used in performance of this Agreement (including subcontractors' environments), work stations used to process or produce the data, and any other work files stored by Contractor in whatever medium. Contractor shall provide City with written certification that such secure disposal occurred within five (5) business days of the disposal. Secure disposal shall be accomplished by "clearing," "purging" or "physical destruction," in accordance with National Institute of Standards and Technology (NIST) Special Publication 800-88 or most current industry standard.

12.5 Ownership of City Data. The Parties agree that as between them, all rights, including all intellectual property rights, in and to City Data and any derivative works of City Data is the exclusive property of City.

12.6 Loss or Unauthorized Access to City's Data; Security Breach Notification. Contractor shall comply with all applicable laws that require the notification to individuals in the event of unauthorized release of PII, PHI, or other event requiring notification. Contractor shall notify City of any actual or potential exposure or misappropriation of City Data (any "Leak") within twenty-four (24) hours of the discovery of such, but within twelve (12) hours if the Data Leak involved PII or PHI. Contractor, at its own expense, will reasonably cooperate with City and law enforcement authorities to investigate any such Leak and to notify injured or potentially injured parties. The remedies and obligations set forth in this subsection are in addition to any other City may have. City shall conduct all media communications related to such Leak.

12.7 Cybersecurity Risk Assessment. If a Cybersecurity Risk Assessment ("CRA") was required before entering the Agreement, Contractor must complete an annual CRA to demonstrate that it has maintained the data privacy and information security program required for City contractors. If Contractor does not satisfactorily complete an annual CRA, the City shall have the right, without further obligation or liability to Contractor, to terminate this Agreement or exercise any of its other remedies hereunder. Any failure by Contractor to comply with this Section shall be a material breach of this Agreement.

Article 4 Effective Date

Each of the modifications set forth in this Amendment shall be effective on and after "the date of this Amendment".

Article 5 Legal Effect

Except as expressly modified by this Amendment, all of the terms and conditions of the Agreement shall remain unchanged and in full force and effect.

IN WITNESS WHEREOF, Contractor and City have executed this Amendment as of the date first referenced above.

CITY
Recommended by:

CONTRACTOR
Sapient Corporation

Simone Jacques
Deputy Assessor of Finance and
Administration
Office of the Assessor-Recorder

Ryan Walsh
Chief Financial Officer
Ryan.Walsh@publicissapient.com

City Supplier number: 0000036670

Approved as to Form:

David Chiu
City Attorney

By: _____
Moe Jamil
Deputy City Attorney

Approved:

Sailaja Kurella
Director of the Office of Contract
Administration, and Purchaser

By: _____
Wil Alderman

Attached Appendices:

A-2b: Maintenance Statement of Work

B-2: Calculation of Charges

Appendix A-2b Maintenance Statement of Work

AMENDMENT 2 - APPENDIX A-2b - MAINTENANCE STATEMENT OF WORK Property Assessment Solution



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1.0 Hosted Environment Upgrades

After City has obtained access to the Hosted Services, the Contractor or ASR, depending on responsibilities as defined in Section 3.0, at the direction of the ASR Product Manager, will complete Software version upgrades, revisions and patches working with the Product Vendor(s) and ASR on the following schedule:

1. **Major version upgrade** (3 times per year for Salesforce. Per the release schedule of additional software vendors)
2. **Minor version revisions** (per an agreed-to schedule between ASR and Contractor based on hot fixes and/or desired changes to the solution)
3. **Support Packs / Patches** – Monthly / weekly/emergency as needed during maintenance window
4. **Interface Hosting upgrade - As needed**

Contractor and ASR will perform regression testing on all software upgrades after the completion of contracted requirements (including version revisions and patches) to ensure any upgrades will not adversely impact the application. Prior to the completion of contracted requirements Contractor will document regression test results and provide the results to the City. After the completion of contracted requirements and the City will commence testing and document regression test results. ASR will establish criteria and plan for coordinating environment software upgrades. Work products will be created explaining the related approach, activities, procedures, tools, and templates. These work products include:

1. Configuration migration procedures
2. Object/code migration procedures
3. Methodology for developing and applying software patches and fixes
4. Training, Knowledge Transfer and Updated artifacts where necessary

Contractor will apply fixes, patches and bundles as needed (except for Major releases), when available from Salesforce and in consultation and coordination with the City and with the approval from ASR.

1.1 Software Upgrade Roles and Responsibilities

Contractor	ASR
Contractor will contribute to an Environment Software Upgrade Plan	ASR will review and approve.

Unless as otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, City and Contractor shall have a mutually agreed upon test period (“Test Period”) to test any maintenance changes prior to Contractor introducing such maintenance changes into production. Prior to the start of the Major or Minor Version Test Period the Contractor will provide associated Release Notes. At the end of the Test Period, Contractor and ASR will elect if the maintenance changes will be implemented or not (except for Major Releases from Salesforce that are mandatory).

Contractor will assist with questions and provide technical assistance regarding Release Notes, new functionality and new application workflows. Contractor will provide documentation on new features.

Contractor will provide standard training on the Vendor’s standard upgrade tools to the support team.

Contractor will lead the testing process for each interface for upgrades and when changes are made. Contractor will perform initial regression testing for Vendor code updates. Also perform testing of new features introduced in Vendor upgrades and release notes that are mutually agreed-to between ASR and Contractor.

2.0 Open Source Software Upgrades

Contractor will ensure all Open Source Software patches/upgrades are applied as needed. Contractor will perform regression testing to ensure all Open Source Software patches/upgrades does not adversely impact the Property Assessment Solution. After the Contractor performs the regression testing, they will provide City the opportunity to test the upgrade.

Unless as otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, Contractor and City shall have a mutually agreed upon test period (“Test Period”) to test any Open Source Software patches/upgrades changes prior to Contractor introducing such maintenance changes into production. Contractor will provide associated Release Notes. At the end of the Test Period, Contractor and City elect if the maintenance changes will be implemented or not.

3.0 Support

This project uses ASR and Contractor personnel to perform Support of the system in accordance with the following diagram:

Teams	Business Facing Technology Teams			Business/Engineering Technology Teams				
Functions	Operational Teams	Product Management	Project Management	BI/Reporting	Cloud P	Development/DevOps	QA	Service Providers
	Operational team members use the SMART system. Decision Managers and their Reporters can request and verify the business needs for the system. Business owners will assist with day to day production support and overall business productivity.	Product managers are responsible for the lifecycle of the system, the product vision and strategy, ensuring that it aligns with business goals. Business analysts will analyze business processes, gather requirements, and recommend improvements to achieve organizational objectives.	Project managers will ensure that all SaaS within their scope are performed effectively and timely, managed to completion.	BI/Reporting teams will manage and maintain SMART reports.	Cloud P teams will manage the infrastructure, security, access and data across all environments. Teams will focus on system support and improvements.	Development team members will build new and update features, debug, monitor calls, perform regular maintenance tasks, resolve incidents, and develop and maintain technical documentation.	QA team members will perform test planning, execution, and update documentation, e.g., test cases including automated test cases.	Third party tools and services that work with ASR resources and support team to support the SMART system.
Roles & Resources	<ul style="list-style-type: none"> Internal Users <ul style="list-style-type: none"> ASR Staff External Users <ul style="list-style-type: none"> DPW Staff TR/COR Staff Other Dept Staff Business Administration <ul style="list-style-type: none"> Mary Jean Chiu Kim Blackfield Decision Managers <ul style="list-style-type: none"> Dana Connor Chris Castle Mike Jarr Corinna Vindell Ron Salanki Corinna Wong David Ah Niu Tina Reeves Kurt Fischer Shutwin Maugh Data Analysts <ul style="list-style-type: none"> Christina Peck Data Governance <ul style="list-style-type: none"> David Josthwa Reporting Specialists <ul style="list-style-type: none"> Patrick Quach 	<ul style="list-style-type: none"> Product Managers <ul style="list-style-type: none"> Windy Ng Business Analysts <ul style="list-style-type: none"> Sarahina BC Way Davis Frankie Sosa Sarah Nayman Lee Curtis Shella Aroni 	<ul style="list-style-type: none"> Project Managers <ul style="list-style-type: none"> Jordan Aquino Wesley Johnson 	<ul style="list-style-type: none"> BI Developers <ul style="list-style-type: none"> Curtis Lee BI Analysts <ul style="list-style-type: none"> Curtis Lee ETL Developers <ul style="list-style-type: none"> Ron Sim Domingo 	<ul style="list-style-type: none"> Infrastructure <ul style="list-style-type: none"> Moses Cuijman Dennis Tan Cybersecurity <ul style="list-style-type: none"> Sean Finney Help Desk/IT Support <ul style="list-style-type: none"> Aaron Husky Dennis Tan Database Administration <ul style="list-style-type: none"> Moses Cuijman Dennis Tan Systems Analysts <ul style="list-style-type: none"> Ron Sim Domingo System Administration <ul style="list-style-type: none"> Aaron Husky Dennis Tan Moses Cuijman 	<ul style="list-style-type: none"> Technical Architects <ul style="list-style-type: none"> Arthur Guzik CloudOps <ul style="list-style-type: none"> Shirley Peifer Shirley Peifer/Sherwin Tomas Yankee Knight Phoenyx/Dev 	<ul style="list-style-type: none"> QA/QE Teams <ul style="list-style-type: none"> Automation Teams <ul style="list-style-type: none"> LORAN LAM Yan G Z Corinna Vindell 	<ul style="list-style-type: none"> Subcontractors SMART/Comms Relias for OnBase Database for OnBase

In particular, Contractor is providing Salesforce expertise to support and deliver the Product Management, Development and QA functions of SMART, including management of the junior contractor resources, and ASR is providing Project Management across the functions and ASR resources, Product Management, as well as technical expertise related to BI/Reporting and Core IT. For the avoidance of doubt, the ASR Project manager is not responsible for managing the development or QA teams.

Contractor will:

- a. provide Critical Severity priority resolution for Salesforce/SMART related defects;
- b. provide Salesforce Technical Experts trained and familiar with the City's production environment;
- c. participate in quarterly defects trend analysis between ASR and Contractor;
- d. provide support for the current Version of all software vendor products, including Selenium and Talend. Patches for critical issues will only be applied to the final release of a supported Version.
- e. Manage and oversee support for all third-party software supplied by City or Contractor as part of this application.
- f. Provide support for integrations/interfaces (working with ASR)
- g. Manage and oversee the City on-going relationship with Hosting Provider (or internal hosting services) vendor to ensure services are performed according to contract.

The support model for this engagement along with the coverage and ownership is depicted below:



3.1 Support Scope L1 (Helpdesk)

ASR will be responsible for level 1 support that comprises of the Helpdesk (HD) to answer user queries and provide operational support to the users of the system. ASR will setup the Help Desk in the form of a mailbox, a hotline number etc. to perform the following activities:

- a) User query (phone calls/emails) resolution
- b) User Provisioning and account management
 - o New user requests
 - o Modify access/roles for existing users
 - o Reset passwords
 - o Terminate user access
- c) Logging, routing and escalating complex incidents to L2/L3 team and follow-ups
- d) Communicating and liaising with users raising the incident
- e) Maintenance and update of knowledge articles, standard operating procedures.
- f) System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - US Hours
- g) Liaising with auxiliary system owner POC for incident resolution such as data correction, Replay of messages (as applicable)
- h) Contractor will be responsible for supporting ASR Helpdesk by providing documentation and system user manuals for resolving common user queries.

3.2 Helpdesk Roles and Responsibilities

Contractor	ASR
Contractor will be responsible for enabling ASR Helpdesk to resolve queries around System Operations and Administration, User Provisioning and account management by providing training and documentation to the ASR Helpdesk team.	<ol style="list-style-type: none"> 1. ASR will be responsible for resolving user queries and providing operational support based on documentation and standard operating procedures 2. ASR will be responsible for incident logging, documenting details about incident and testing the solutions suggested by Contractor support team. 3. ASR and Contractor will be responsible for System monitoring (See L1 and L2 sections)

3.3 Support Scope L2 (Production Support)

Contractor will be responsible for providing skilled Salesforce personnel to provide level 2 production support which includes technical Help Desk that would provide problem resolutions to Incidents being tracked. ASR will be responsible for providing BI/Reporting and infrastructure personnel to provide level 2 production support. The various activities to be taken care under this level of support would be:

- a) Resolving complex business and technical queries assigned by Level-1 Helpdesk team
- b) Performing a root cause analysis of the issues and acting on the remediation steps if in the responsibility of the L2 support team
- c) Communication of remediation steps which are outside scope of L2 support team to business team
- d) Problem re-Prioritization based on root cause analysis
- e) Proposing alternate solutions for issues with no known solution for business continuity
- f) Documentation on known solutions for business users and L1 Helpdesk team
- g) Handling and managing crisis and major incidents as per the Crisis Management Procedures
- h) Escalating product issues to vendor and follow up on solutions
- i) Escalating complex issues to L3 Support Team and resolution coordination
- j) Handling user requests for ad-hoc activities/process runs on the application
- k) Certification of feature requests (if any) raised by L2 Team for L3 Team
- l) Periodic monitoring of logs & alarms
- m) System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - India Hours
- n) Document and seek approval on production release process and timing

3.4 Production Support Roles and Responsibilities

Contractor	ASR
1. Contractor will be responsible for performing activities in the incident lifecycle including identifying, triaging, classifying, prioritizing, resolving. 2. Contractor will be responsible for System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - India Hours	1. ASR will be responsible for incident logging, documenting details about incident and testing the solutions suggested by Contractor support team. 2. ASR will be responsible for assigning and escalating complex business and technical queries to the Contractor 3. ASR will perform production releases in accordance with the documented process and at the direction of the Contractor

3.5 Support Scope L3 (Ongoing Maintenance)

Contractor will be responsible for providing skilled Salesforce personnel to provide L3 support which includes defect fixes & enhancements and will work in a Software Development Life Cycle (SDLC) approach to plan for the release of the fixes/enhancements. Enhancements are defined as updates to the existing system and adding new features and functionality to the system. Enhancements should be completed as stories, and should not exceed 21 story points in any one story. New features and functionality may include changes to the revenue and taxation code and legislative requirements and will be mutually agreed to by ASR and Contractor.

The various activities to be taken care under this level of support would be:

- a) Prioritization of Enhancements/change requests, at the direction of the ASR Product Manager
- b) Implement fixes, both long & short term.
- c) Support key business activities such as annual Roll Close, including any required testing and development work
- d) Provide preventive maintenance
- e) Performance tuning
- f) Execution of release processes for upgrades, patches and fixes. Release planning will be completed by the Product Manager working with the Sapient Product Manager, based on the capacity of the available resources and the story point estimations. In addition perform regression testing to ensure updates, patches and fixes will not adversely impact the application. Contractor will run test scripts and provide test results to ASR.
- g) Quality Management, Training and Documentation
- h) Coordinating with third-party vendors for technical assistance

3.6 Support Coverage

As part of this support engagement Contractor will provide support coverage as per below timeline:

- a) Critical Incidents
 - Business Hours: Weekdays - 8:00 AM PST to 5:00 PM PST
 - Non-Business Hours: On call support, will immediately start working on P1 defects, and work with maximum effort until there is a fix or successful workaround
- b) Non-critical incidents:
 - Business Hours: Weekdays - 8:00 AM PST to 5:00 PM PST

4.0 Assigned Resources and Locations

The Contractor assigned resources for operations and maintenance shall consist of:

- (1) Product Manager – Local (Canada)
- (1) Senior Architect - India
- (1) Infrastructure/Technical Architect – Local (Canada) (Jan 2026 – June 2026 only)
- (3) Sr. Developers - India
- (2) Developers- India
- (2) Sr. Quality Assurance – (India)
- (1) Quality Assurance – (India)

These resources will work from Contractor offices in the United States, Canada and India.

ASR and Contractor shall evaluate project needs on a quarterly basis to mutually agree on changes to team size or composition. The project team can be upsized or downsized at any time as initiated by ASR and mutually agreed upon, with 30 days notice. Contractor shall provide 30 days notice if assigned resources are offboarded and provide a resume for newly proposed resources. Newly proposed resources must be approved by ASR.

The capacity of work that can be accomplished is based solely on this team size, and can be impacted by time spent resolving critical incidents and/or personnel availability due to illness, public holidays or vacation.

Appendix B2 contains monthly bill rates for each resource, by year, to be used in the event of changes to team size.

5.0 Maintenance Invoicing

Invoices shall be submitted quarterly in accordance the defined with Appendix B2.

6.0 Response Definition and Expectation Table

- 6.1** Response Time: This column represents Contractor’s direct acknowledgement that a problem has been received and an estimated timeframe to begin the information gathering and troubleshooting processes.
- 6.2** Resolution Time: This column represents the timeframe in which Contractor will work with ASR and Product Vendor(s) including Salesforce to address the problems and provide a permanent solution to restore the Systems to operate in accordance with the service specifications. The goal is to provide solution for a problem as soon as possible. If a long-term solution is not feasible as the first course of action, the Contractor shall provide a temporary workaround in accordance with service expectations, and remain responsible for the long-term solution in a scheduled release mutually agreed upon by Contractor and ASR.
- 6.3** Communication Expectations: This column represents the expectations for the Contractor to communicate the progress of troubleshooting and resolution of the problem, including the frequency of updates.

Severity/Urgency	Response Time SLA	Resolution Time SLA	Communication Expectations
Critical Severity Issues (Priority 1): Supported Service is non-functional or seriously affected and there is no reasonable workaround available (e.g. business is halted).	Confirmation of receipt within one (1) business hour	Work starts immediately upon acknowledgement and continues until resolved. Contractor will put forth commercially reasonable efforts with ASR and product vendors up to and including assigning personnel into shifts to cover 24 hour days, 7 days a week, through holidays and weekends until a long-term fix or workaround is provided to restore Service to production working state. Restoration of service should be completed within one (1) business day, but	A long-term fix provided in a scheduled release mutually agreed upon by Contractor and ASR. Status updates every 1 hour, or

		<p>may depend upon the nature of the defect. If a workaround was necessary to restore service, a long-term fix will be provided in a scheduled release mutually agreed upon by Contractor and ASR.</p>	
<p>High Severity Issues (Priority 2): Supported Service is affected and there is no workaround available or the workaround is impractical. E.g. System response is very slow, day to day operations continue but are impacted by the work around.</p>	<p>Confirmation of receipt within one (1) business hour.</p>	<p>Work starts immediately upon acknowledgement and continues until resolved. Contractor will put forth commercially reasonable efforts with ASR and product vendors to restore service within five (5) business days. If a workaround was necessary to restore service, a long-term fix will be provided in a scheduled release mutually agreed upon by Contractor and ASR.</p>	<p>Status updates every 4 hours</p>
<p>Medium Severity Issues (Priority 3): Supported Service is non-functional however a known workaround exists, E.g. Non-critical feature is unavailable or requires additional user intervention.</p>	<p>Confirmation of receipt within one (1) business hours.</p>	<p>Contractor will work with ASR and product vendors to prioritize and resolve the issue within a mutually agreed upon timeline</p>	<p>As appropriate</p>
<p>Low Severity Issue (Priority 4): System or application feature works, but there is a minor problem. E.g. Incorrect label, or cosmetic defect.</p>	<p>Confirmation of receipt within one (1) business hours</p>	<p>Resolution for the issue may be released as a patch set or be incorporated into future scheduled release of Supported Service.</p>	<p>As Appropriate</p>

7.0 Reporting

Contractor will develop reports and dashboards independently and at with input from the ASR Product Manager that will allow ASR to view the summary of support incidents and defects handled by the support team.

Defect Resolution Reports includes sprint-based reporting on defects and enhancements completed including time to complete (from initial report to final resolution) and story points utilized. System Defect Resolution Reports. All within scope defect resolution requests must be documented and communicated with ASR within a reasonable, agreed upon time frame. The Defect Resolution Report must contain the description of the maintenance request, resolution status, and the proposed course of action for remedying all open defect resolution requests.

All changes and fixes will be implemented based on a mutually agreed upon schedule, based on the available capacity of the team. Changes will go through all phases of testing by the Contractor and ASR. The Contractor shall document the test results and provide them to ASR for approval before a decision is made to put a new release into production. At the conclusion of any Property Assessment System changes, the Contractor shall update all required system documentation as appropriate and provide it to ASR.

The Contractor shall provide Defect Resolution Reports to ASR that include the elements described above.

8.0 Performance Service Credits

Should the City determine, based upon an objective commercially reasonable standard, that Contractor is has not met its performance obligations for three consecutive months, the following service credits shall apply. Any dispute regarding response time performance may be submitted to Dispute Resolution under Section 11.5 of the Agreement. If submitted, no service credits may be assessed until the conclusion of the Dispute Resolution process. For clarity, service credits apply only to issues that a root cause analysis shows are solely attributable to Contractor, unless otherwise agreed by the parties.

Performance Category	Missed SLA Occurrences (monthly)	Service Credit (monthly)
Response Time	If response time is > 1 day, then:	10%
Resolution Time	If resolution time is > 1 day (or initial estimated time if >1 day) for P1, or > 5 days for P2, then:	5%

Contractor will strive to hit all performance categories each month. The Contractors ability to deliver against these SLA's is dependent on staffing levels, which the City has the ability to modify. Reduction in allocated staff may required modifications to the SLAs, which shall be jointly discussed prior to executing the staffing allocation change.

The first failure to meet a service level in a calendar year will be considered as a warning – all subsequent failures will result in service credits. The service credits payable each month shall be capped at twenty-five (25) percent of the monthly fee (Calculated: Quarterly Fee/3). A sum representing the service credit

shall be credited by Contractor to City as a non-transferable credit (not convertible to cash) that may be applied forward to any additional Work performed under the Implementation Statement of Work or this Maintenance Statement of Work (for clarity, service credits, if any, shall be deducted from/credited against future sums billed by and owed to Contractor). The service credits set forth in this Section shall be the exclusive remedy of the City for any failure by Contractor to meet its performance obligations. Service credits shall not apply to performance problems that are not solely attributable to Contractor. For clarity, service credits shall not apply to performance problems or defects caused by the City or its personnel, third party delays, or a force majeure event.

9.0 Upgrade/Downgrade of Severity Level.

If, during the Support Request process the issue either warrants assignment of a higher severity level than currently assigned or no longer warrants the severity level currently assigned based on its current impact on the production operation of the System, then the severity level will be upgraded or downgraded accordingly to the severity level that most appropriately reflects its current impact as mutually agreed by the Parties.

10.0 Escalation

If Contractor does not respond within the time frames set forth above, City may use the escalation procedures as provided in this paragraph. As a first stage, party subject matter experts will seek to resolve the issue. If that attempt is unsuccessful, either party may escalate the issue per the table below. The goal of the escalation procedures will be to (i) resolve the specific problem as quickly as possible; and (ii) ensure that future delays in service response times are prevented. At each stage of this process, the individuals occupying the positions listed below, or their functional equivalents, if the titles within the organizations have changed, will confer and attempt to resolve the relevant issues. Each party understands that depending on the circumstances, it may be impossible to reach one or more of the individuals set forth below. These discussions may occur by telephone, videoconference or in person. Escalation at each step of this process will occur based on City determination that the existing level of involvement is not satisfactorily resolving the problem.

The parties will exchange mutual peer escalation lists (including lead application) as the point persons for issue resolution. This will ensure that the parties have peer to peer subject matter experts to work on issue resolution. On City’s side, the issue leads will be maintained at the City service desk.

The focus of this process is to resolve the problem as quickly as possible. The escalation path will be:

Contractor	City
Product Manager	ASR Product Manager
Contractor Executive	Chief Information Officer

11.0 Help Desk Issue Management Software Tool

The Contractor will use ASR help desk issue management software tool (e.g. JIRA) to collect and track all L2 issues submitted to the Contractor for production support. ASR will use a help desk software tool

(e.g.Sharepoint) to track all L1 issues submitted for production support. ASR will create L2 tickets with associated L1 ticket numbers in Jira until ASR decides to stop using Jira.

Contractor will participate in regular issue calls with the City's team. Review care concerns and assist with mitigation.

12.0 Environments

The following functions/activities will be supported within an agreed-to number of environments for the Property Assessment Solution and related integrations.

1. Development (for Developers)
2. Test (for Sapient)
3. Test (for ASR)
4. Training (for ASR)
5. Staging – An environment available to the City to test new Contractor application releases against their production configuration.
6. Production – The environment used by the City to submit, tract and manage live transactions and associated data.

This list of environments will be supported by the agreed-to licensing between ASR and Contractor. The environments will be refreshed with configuration, code and data on a schedule that is mutually agreed to by ASR and Contractor. Production code and data will only be touched by ASR. The schedule will ensure that activities including testing and deployment are properly supported and completed successfully. Refreshes may occur on a quarterly basis or on an as needed basis as mutually agreed to by ASR and Contractor.

13.0 Ongoing Training

Contractor will provide training/demo on new features and enhancements to city designated key end-user personnel. Contractor will also provide documentation, configuration guides (if needed) and operating procedures documentation to ASR's L1 Helpdesk Team to enable them to perform post release maintenance and provide support.

14.0 Upgrades and Enhancements.

ASR Product Manager will schedule all upgrades and enhancements. Contractor will provide City with detailed plans and processes, as well as report status of all upgrades and enhancements. ASR will perform all upgrades in Production.

Appendix B-2 Calculation of Charges

#	Description of Parent Deliverables	Planned Invoice Date	RPB #2	Change	Amendment 1	Change	RPB #4
68	Roll Management Deliverables	31-May-24				658,259	658,259
69	cPOD UAT 1 (Epic ASR2050, Stories related to Timely Events without penalty and Untimely events without subsequent events (no penalty))	31-Jul-24				131,652	131,652
70	rPOD UAT 1 (Epic ASR-25963, ASR-1881 and ASR-53193)	31-Jul-24				131,652	131,652
71	qPOD UAT 1 & 2 & 3 (Epic ASR-873,874,875,876,877,878, 879,880,827,828,829,830, 1924,1928)	31-Jul-24				131,652	131,652
72	sPOD UAT 1, 2 & 3 (Epic ASR-852, 1818, 1033, 23788,24225, 24226, 853, 860, 2179)	31-Jul-24				131,652	131,652
73	cPOD UAT 2 (Epic ASR-2050, Stories related to Untimely events with subsequent events (no penalty) and Untimely events with subsequent events)	30-Nov-24				131,652	131,652
74	rPOD UAT 2 (Epic ASR-846,847, 19844, 1881, 53193)	30-Nov-24				131,652	131,652
75	qPOD UAT 4&5 (Epic ASR-34958, 870,871,872,869,863,864,1031,24482)	30-Nov-24				131,652	131,652
76	sPOD UAT 4, 5 & 6 (Epic ASR-1032,1030, 33944,1812, 1813, 24483,19841)	30-Nov-24				131,652	131,652
77	Phase 2.0 sit 1 sign off (Roll Open / Close)	31-Jul-24				329,129	329,129
78	Phase 2.0 sit 2 sign off (Entire application)	31-Oct-24				329,129	329,129
79	Phase 2.0 final uat sign off	31-Jan-25				263,303	263,303
80	Acceptance of change management plan, training plan, training guides and materials	28-Feb-25				197,478	197,478
81	Phase 2.0 data migration and cutover sign off	28-Feb-25				329,129	329,129
82	Production freeze sign off all P1 and P2 defects fixed	30-Mar-25				329,129	329,129
83	Training – Phase 2.0 – Train the trainer and end user training completed	30-Jun-25				131,652	131,652
84	Go Live – Phase 2.0 – Acceptance of Secured Implementation Deliverables	31-Jul-25				1,316,517	1,316,517
85	First Roll Close and Acceptance of Secured Implementation Deliverables (20% retainage)	31-Jul-26				1,645,647	1,645,647
86	Phase 2.x	TBD				1,645,647	1,645,647
			12,988,109	5,740,000	18,728,109	1,300,000	20,028,109

#	Maintenance During Implementation Revised Description of Parent Deliverables	Planned Invoice Date	RPB #2	Change	Amendment 1	Change	RPB #4
1	Phase 1 Maintenance (after Phase 1 go-live) - 2.2 Months	15-Jan-21	533,033		533,033		533,033
2	Phase 1.1 Maintenance (after Phase 1.1 go-live) - 12 Months	22-Mar-21	228,443		228,443		228,443
3	Phase 1 Maintenance (after Phase 1 go-live)	23-Dec-22		660,000	660,000		660,000
4	Phase 1 Maintenance (after Phase 1 go-live)	15-Dec-23		440,000	440,000		440,000
5	Phase 1 Maintenance (after Phase 1 go-live) - 12 months through December 2024	31-Dec-24				410,971	410,971
6	Phase 1 Maintenance (after Phase 1 go-live) - 8 months through August 2025	30-Aug-25				273,980	273,980
			761,476	1,100,000	1,861,476	684,950	2,546,426

#	Maintenance After Phase 2 Go-Live Revised Description of Parent Deliverables	Planned Invoice Date	RPB #2	Change	Amendment 1	Change	RPB #4	Change	Amendment 2
7		-	504,025	(504,025)					
8		-	504,025	(504,025)					
9		-	504,025	(504,025)					
10		-	504,025	695,975	1,200,000	(1,200,000)			
11		-	504,025	495,975	1,000,000	(1,000,000)			
12	Year 1 Maintenance	October, January, April, July	504,025	295,975	800,000	200,000	1,000,000	175,000	1,175,000
13	Year 2 Maintenance	October, January, April, July	504,025	95,975	600,000	15,050	615,050	564,950	1,180,000
14	Year 3 Maintenance	October, January, April, July	504,025	(504,025)				1,234,000	1,234,000
15	Year 4 Maintenance	October, January, April, July	504,025	(504,025)				1,290,000	1,290,000
16	Year 5 Maintenance	October, January, April, July	159,776	(159,776)				1,348,000	1,348,000
17	Year 6 Maintenance	October, January, April, July	159,776	(159,776)				1,409,000	1,409,000
18	Year 7 Maintenance	October, January, April, July						1,473,000	1,473,000
	Total Maintenance After Phase 2 Go-Live		4,696,001	(1,096,001)	3,600,000	(1,984,950)	1,615,050	7,493,950	9,109,000
105	Office of the Assessor-Recorder Contingency		2,969,117		2,969,117		2,969,117	(179,950)	2,229,167
TOTAL NOT TO EXCEED AMOUNT			21,414,703	5,743,999	27,158,702		27,158,702	6,754,000	33,912,702

Milestone Payment Detail

Payment Schedule						
#	Description	Child Deliverables	Planned Invoice Date	CR \$	Unpaid Final Deliverables	Grand Total
1	Roll Management Deliverables	Track a deliverables: 1. Functional Design Document 2. Technical Design Document 3. System Process Flow Diagrams 4. List of Business Rules 5. Consolidated list of Assessment Calculations/Formulas 6. Consolidated list of definitions related for value fields (Data Dictionary) 7. Requirements Traceability Matrix (RTM) 8. Validate flow diagram against business scenarios 9. Proof-of- Concept	5/31/2024	104,000	554,259	658,259
2	cPOD UAT 1 (Epic ASR-2050, Stories related to Timely Events without penalty and Untimely events without subsequent events (no penalty)	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	7/31/2024	20,800	110,852	131,652
3	rPOD UAT 1 (Epic ASR-25983, ASR-1881 and ASR-53193)	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	7/31/2024	20,800	110,852	131,652
4	qPOD UAT 1 & 2 & 3 (Epic ASR-873,874,875,876,877,878, 879,880,827,828,829,830, 1924,1928)	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	7/31/2024	20,800	110,852	131,652
5	sPOD UAT 1, 2 & 3 (Epic ASR-852, 1818, 1033, 23789,24225, 24228, 853, 860, 2179)	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	7/31/2024	20,800	110,852	131,652
6	cPOD UAT 2 (Epic ASR-2050, Stories related to Untimely events with subsequent events (no penalty) and Untimely events with subsequent events (with penalty), and ASR-19843	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	11/30/2024	20,800	110,852	131,652
7	rPOD UAT 2 (Epic ASR-846,847, 19844, 1881, 53193)	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	11/30/2024	20,800	110,852	131,652
8	qPOD UAT 4&5 (Epic ASR-34958, 870,871,872,869,863,864,1031,24482)	UAT entry/exit requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	11/30/2024	20,800	110,852	131,652

Payment Schedule						
#	Description	Child Deliverables	Planned Invoice Date	CR \$	Unpaid Final Deliverables	Grand Total
9	sPOD UAT 4, 5 & 6 (Epics ASR-1032,1030, 33944,1812, 1813, 24483,19841)	UAT entry/exit requirements satisfied – https://oosfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts Note: Excludes the following UAT Entry Requirement - Testing documentation	11/30/2024	20,800	110,852	131,652
10	Phase 2.0 sit 1 sign off (Roll Open / Close)	SIT entry/exit requirements satisfied Zero P1 and P2 Updated integration specification document Updated mapping documents All final test results documented and provided Help desk documentation updated (i.e., error messages and recovery steps)	7/31/2024	52,000	277,129	329,129
11	Phase 2.0 sit 2 sign off (Entire application)	SIT entry/exit requirements satisfied Zero P1 and P2 Updated integration specification document Updated mapping documents All final test results documented and provided Help desk documentation updated (i.e., error messages and recovery steps)	10/31/2024	52,000	277,129	329,129
12	Phase 2.0 final uat sign off	UAT entry/exit requirements satisfied – https://oosfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts	1/31/2025	41,800	221,703	263,303
13	Acceptance of change management plan, training plan, training guides and materials	OCM communication plan Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	2/28/2025	31,200	166,278	197,478
14	Phase 2.0 data migration and outover sign off	Zero P1, P2, and acceptable and mutually agreed number of P3s All data migrated successfully within acceptable performance timeframes for ASR. Acceptable performance timeframe Acceptable and mutually agreed with PS, ASR IT Director and CIO Final data conversion plan Final mapping documents Note: bugs arising from data cleanup are not PS responsibilities	2/28/2025	52,000	277,129	329,129
15	Production freeze sign off all P1 and P2 defects fixed	Zero P1, P2, and acceptable and mutually agreed number of P3s	3/30/2025	52,000	277,129	329,129
16	Training – Phase 2.0 – Train the trainer and end user training completed	Project training	6/30/2025	20,800	110,852	131,652
17	Go Live – Phase 2.0 – Acceptance of Secured Implementation Deliverables	Go Live entry requirements satisfied - Go_NoGoCriteria_Phase2_Release1.docx Final requirements traceability for Go Live - functional Final requirements traceability for Go Live - non-functional System incident and corrective action report (SOW 7.4.2) Deployment bill of materials (SOW 7.3) Documented implementation project closeout (SOW 10.1) Support transition plan (SOW 10.4) Software configuration management (SOW 5.1.6) Software successfully installed and data fully migrated without errors During the warranty period there will be rapid detection and escalation of issues and quick resolution and communication	7/31/2025	208,000	1,108,517	1,316,517
23	First Roll Close and Acceptance of Secured Implementation Deliverables (20% retainage)	Successful roll close Zero P1 and P2 bugs	7/31/2026	260,000	1,385,647	1,645,647
24	Phase 2 x	Deliverables and payment schedule to be determined through agreed upon change request		260,000	1,385,647	1,645,647
				1,300,000	6,928,233	8,228,233

Operations & Maintenance Schedule & Rates

Operations & Maintenance Invoice Schedule

FY	Q1 - October	Q2 - January	Q3 - April	Q4 - July	Annual Total
2025-26	144,000	300,000	365,000	365,000	1,175,000
2026-27	295,000	295,000	295,000	295,000	1,180,000
2027-28	308,500	308,500	308,500	308,500	1,234,000
2028-29	322,500	322,500	322,500	322,500	1,290,000
2029-30	337,000	337,000	337,000	337,000	1,348,000
2030-31	352,250	352,250	352,250	352,250	1,409,000
2031-32	368,250	368,250	368,250	368,250	1,473,000
					9,109,000

Publicis Sapient Monthly Billing Rates

Role	Year 1 2025-26	Year 2 2026-27	Year 3 2027-28	Year 4 2028-29	Year 5 2029-30	Year 6 2030-31	Year 7 2031-32
Product Manager	\$18,967	\$19,821	\$20,712	\$21,644	\$22,619	\$23,636	\$24,700
Technical Architect	\$14,896	\$15,566	\$16,267	\$16,999	\$17,764	\$18,563	\$19,398
Sr Developer	\$10,775	\$11,260	\$11,767	\$12,296	\$12,849	\$13,428	\$14,032
Developer	\$6,443	\$6,733	\$7,036	\$7,353	\$7,683	\$8,029	\$8,390
Sr Quality Engineer	\$7,308	\$7,637	\$7,981	\$8,340	\$8,715	\$9,107	\$9,517
Quality Engineer	\$5,083	\$5,312	\$5,551	\$5,801	\$6,062	\$6,334	\$6,619

Incorporates edits from Andy Brawer from their Appendix B3 - 9/16/25

Property Assessment System Replacement Project Publicis Sapiant 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	BLOCK	LOT	SEQ	YEAR	BILL	CHANGE NUMBER	DATE	TYPE
4474	037	01		15-16	093069		03-01-2015	
ASSEES: [REDACTED] STATUS: [REDACTED] AV								
ASSESSED VALUE								
LAND 647,500								
STRUCTURE 277,500								
FIXTURE								
CORTAC 9211 0086076								
PERS PROP								
GROSS TAX 925,000 TAX RATE 1.1826 4								
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 DW CODE ENF 52.00								
PENALTY DUE								
COST DUE								
NSF DUE								
TOTAL DUE 5,686.66 5,686.66								
TOTAL PAID 5,686.66 0.00								
BALANCE DUE 0.00 5,686.66								
DATE PAID 602100 12-04-2015								
T0654 32 INQUIRY COMPLETED TAX AND SPECIAL ASSESSMENT DATA DISPLAYED								

Vol	Block	Lot	Year	Roll	Roll Date	Seq	Sec	Area
4474	037	01	2014	2/29/1968	001	13C	000	0.00
Location: CITY HILL								
Owner: CITY PROPERTY								
Care of: DIRECTOR OF ASSESSMENT								
Address: 25 ANN HILL AVE								
City/Zip: SAN FRANCISCO, CA 94103								
<ul style="list-style-type: none"> 01 Ownership History 02 Change of Ownership 03 Enrollment History 04 Sales History 05 Value Screen 06 Partial Interest 07 Valuation Methods 08 Notes Screen 09 New Construction 10 New Construction Sum 11 Appeals Tracking 12 Parcel Split/Combo 13 Class Code/Status Cho 14 Chars. Summary 15 Land Characteristics 16 Office/Retail Chars 								



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

- 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 My Details 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 GPP statements and/or exemptions for Accounts linked to view information and request

Property

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-409456
2 PE-409457
3 PE-409458
4 PE-409459
5 PE-409460
6 PE-409461
7 PE-409462
8 PE-409463
9 PE-409464
10 PE-409465

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%	7/1/1985	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-01151036	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-00355082	3/1/1993	10/17/2018				Conversion (Legacy)

[View All](#)

**City and County of San Francisco
Office of Contract Administration
Purchasing Division
City Hall, Room 430
1 Dr. Carlton B. Goodlett Place
San Francisco, California 94102-4685**

**Implementation and Maintenance Services Agreement between the City and County of San
Francisco and**

Sapient Corporation

Click on this page to be redirected to the Legislative Research Center to view the entirety of this voluminous document

**City and County of San Francisco
Office of Contract Administration
Purchasing Division**

First Amendment

THIS AMENDMENT (this “Amendment”) is made as of January 1, 2023, in San Francisco, California, by and between **Sapient Corporation** (“Contractor”), and the City and County San Francisco, a municipal corporation (“City”), acting by and through its Office of the Assessor.

Recitals

WHEREAS, City and Contractor have entered into the Agreement (as defined below); and

WHEREAS, City and Contractor desire to modify the Agreement on the terms and conditions set forth herein to extend the project schedule to complete project implementation, provide for ongoing maintenance of Phase 1, and adjust the period of maintenance after go-live; and

WHEREAS, the Agreement was competitively procured as required by San Francisco Administrative Code Chapter 21.1 through Request for Proposals ASR2017-01 issued October 27, 2017 and this modification is consistent therewith; and

WHEREAS, approval for the original Agreement was obtained on January 22, 2018 and amended on October 12, 2018 from the Civil Service Commission under PSC number 47331 – 17/18 in the amount of \$29,000,000 for the period of 12 years and 51 weeks; and

WHEREAS, the City’s Board of Supervisors approved this Agreement by 136-23 on March 21, 2023; and

WHEREAS, the Contractor is responsible for providing all resources at Contractor’s own cost to ensure an on-time, on-budget completion and satisfying all of the remaining business requirements included in Appendix A2, Exhibit 6, Requirements and all mutually agreed-to contract change orders. Contractor’s current submission of the remaining project plan is in draft form and does not include all activities, resources, and/or critical path. The City is willing to accept the draft project plan for purposes of seeking Board of Supervisor’s approval of this Amendment.; and

WHEREAS, the Contractor’s complete resource and cost loaded detailed project plan with critical path as outlined in the Statement of Work is due within 30 days of formal adoption by the Board of legislation approving the contract modification.

WHEREAS, the Contractor further understands and agrees that should Contractor fail timely to deliver its services, satisfy all business requirements and complete implementation on time and on budget in the manner specified in the contract modification, then under San Francisco Administrative Code Section 21.33, the City may terminate the contract and/or purchase services from another source and if a greater price than named in the contract is paid by the City for the completion work, then Contractor will be charged and responsible for all such increased costs.

NOW, THEREFORE, Contractor and the City agree as follows:

Article 1 Definitions

The following definitions shall apply to this Amendment:

1.1 **Agreement.** The term "Agreement" shall mean the Agreement dated November 1, 2018 between Contractor and City.

Other Terms. Terms used and not defined in this Amendment shall have the meanings assigned to such terms in the Agreement.

Article 2 Modifications of Scope to the Agreement

The Agreement is hereby modified as follows:

2.1 Term. Section 2.1 of the Agreement currently reads as follows:

The term of this Agreement shall commence on November 1, 2018, and expire twelve (12) years later on November 1, 2030, unless earlier terminated as otherwise provided herein.

Such section is hereby amended in its entirety to read as follows:

The term of this agreement shall commence on November 1, 2018 and expire on December 31, 2027

2.2 Payment. Section 3.3.1 of the Agreement currently reads as follows:

Contractor shall provide an invoice to the City for Work on a monthly basis for Work completed in accordance with the Acceptance Criteria set forth in the Implementation Statement of Work, in the immediate preceding month, unless a different schedule is set out in Appendix B (Calculation of Charges)." Payment for the Work provided under the Maintenance Statement of Work shall invoiced and paid annually in advance of the provision of such Work, unless a different schedule is set out in Appendix B (Calculation of Charges). To the extent the City requests Contractor to provide any As-Needed Professional Services, payment for the As-Needed Professional Services shall paid on a time and materials basis monthly in arrears. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists in accordance with Section 11.6.1. In no event shall the amount of this Agreement exceed **\$21,414,700** [TWENTY ONE MILLION AND FOUR

HUNDRED AND FOURTEEN THOUSAND AND SEVEN HUNDRED DOLLARS]. This amount shall include a \$3,569,117 contingency to be expended only at the request of the City and upon mutual agreement of the Parties. The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated herein by this reference as though fully set forth herein. In no event shall City be liable for interest or late charges for any late payments.

Such section is hereby amended in its entirety to read as follows:

Contractor shall provide an invoice to the City for Work on a monthly basis for Work completed in accordance with the Acceptance Criteria set forth in the Implementation Statement of Work, in the immediate preceding month, unless a different schedule is set out in Appendix B (Calculation of Charges)." Payment for the Work provided under the Maintenance Statement of Work shall invoiced and paid annually in advance of the provision of such Work, unless a different schedule is set out in Appendix B (Calculation of Charges). To the extent the City requests Contractor to provide any As-Needed Professional Services, payment for the As-Needed Professional Services shall paid on a time and materials basis monthly in arrears. Payment shall be made within 30 calendar days of receipt of the invoice, unless the City notifies the Contractor that a dispute as to the invoice exists in accordance with Section 11.6.1. In no event shall the amount of this Agreement exceed **\$27,158,702** [TWENTY SEVEN MILLION, ONE HUNDRED AND FIFTY EIGHT THOUSAND, SEVEN HUNDRED AND TWO DOLLARS]. This amount shall include a \$2,969,117 contingency to be expended only at the request of the City and upon mutual agreement of the Parties. The breakdown of charges associated with this Agreement appears in Appendix B, "Calculation of Charges," attached hereto and incorporated herein by this reference as though fully set forth herein. In no event shall City be liable for interest or late charges for any late payments.

2.3 **Appendix A-1.** Appendix A-1a is hereby added as a new appendix, attached to this Amendment, and fully incorporated within the Agreement and is intended to restate and describe certain key Deliverables and phases that remain outstanding under Appendix A-1.

2.4 **Appendix A-2.** Appendix A-2 is hereby replaced in its entirety by Appendix A-2a, attached to this Amendment and fully incorporated within the Agreement. To the extent the Agreement refers to Appendix A-2 in any place, the true meaning shall be Appendix A-2a, which is a correct and updated version.

2.5 **Appendix B.** Appendix B is hereby replaced in its entirety by Appendix B-1, attached to this Amendment and fully incorporated within the Agreement. To the extent the Agreement refers to Appendix B in any place, the true meaning shall be Appendix B-1 which is a correct and updated version.

2.6 **Appendix C.** Appendix C is hereby added as a new appendix, attached to this Amendment, and fully incorporated within the Agreement.

Article 3 Updates of Standard Terms to the Agreement

The Agreement is hereby modified as follows:

3.1 **Definitions.** *The following is hereby added to the Agreement as a Definition in Article 1:*

1.10 “Confidential Information” means confidential City information including, but not limited to, personally-identifiable information (“PII”), protected health information (“PHI”), or individual financial information (collectively, “Proprietary or Confidential Information”) that is subject to local, state or federal laws restricting the use and disclosure of such information, including, but not limited to, Article 1, Section 1 of the California Constitution; the California Information Practices Act (Civil Code § 1798 et seq.); the California Confidentiality of Medical Information Act (Civil Code § 56 et seq.); the federal Gramm-Leach-Bliley Act (15 U.S.C. §§ 6801(b) and 6805(b)(2)); the privacy and information security aspects of the Administrative Simplification provisions of the federal Health Insurance Portability and Accountability Act (45 CFR Part 160 and Subparts A, C, and E of part 164); and San Francisco Administrative Code Chapter 12M (Chapter 12M).

3.2 **Withholding.** *The following is hereby added to Article 7 of the Agreement:*

7.3 **Withholding.** Contractor agrees that it is obligated to pay all amounts due to the City under the San Francisco Business and Tax Regulations Code during the term of this Agreement. Pursuant to Section 6.10-2 of the San Francisco Business and Tax Regulations Code, Contractor further acknowledges and agrees that City may withhold any payments due to Contractor under this Agreement if Contractor is delinquent in the payment of any amount required to be paid to the City under the San Francisco Business and Tax Regulations Code. Any payments withheld under this paragraph shall be made to Contractor, without interest, upon Contractor coming back into compliance with its obligations.

3.3 **Consideration of Salary History.** *The following is hereby added to Article 10 of the Agreement,:*

10.16 **Consideration of Salary History.** Contractor shall comply with San Francisco Administrative Code Chapter 12K, the Consideration of Salary History Ordinance or “Pay Parity Act.” Contractor is prohibited from considering current or past salary of an applicant in determining whether to hire the applicant or what salary to offer the applicant to the extent that such applicant is applying for employment to be performed on this Agreement or in furtherance of this Agreement, and whose application, in whole or part, will be solicited, received, processed or considered, whether or not through an interview, in the City or on City property. The ordinance also prohibits employers from (1) asking such applicants about their current or past salary or (2) disclosing a current or former employee’s salary history without that employee’s authorization unless the salary history is publicly available. Contractor is subject to the enforcement and penalty provisions in Chapter 12K. Information about and the text of Chapter 12K is available on the web at <https://sfgov.org/olse/consideration-salary-history>. Contractor is required to comply with all of the applicable provisions of 12K, irrespective of the listing of obligations in this Section.

3.4 **Limitations on Contributions.** *The following is hereby added to Article 10 of the Agreement, replacing the previous Section 9.11 in its entirety:*

9.11 Limitations on Contributions. By executing this Agreement, Contractor acknowledges its obligations under Section 1.126 of the City’s Campaign and Governmental Conduct Code, which prohibits any person who contracts with, or is seeking a contract with, any department of the City for the rendition of personal services, for the furnishing of any material, supplies or equipment, for the sale or lease of any land or building, for a grant, loan or loan guarantee, or for a development agreement, from making any campaign contribution to (i) a City elected official if the contract must be approved by that official, a board on which that official serves, or the board of a state agency on which an appointee of that official serves, (ii) a candidate for that City elective office, or (iii) a committee controlled by such elected official or a candidate for that office, at any time from the submission of a proposal for the contract until the later of either the termination of negotiations for such contract or twelve months after the date the City approves the contract. The prohibition on contributions applies to each prospective party to the contract; each member of Contractor’s board of directors; Contractor’s chairperson, chief executive officer, chief financial officer and chief operating officer; any person with an ownership interest of more than 10% in Contractor; any subcontractor listed in the bid or contract; and any committee that is sponsored or controlled by Contractor. Contractor certifies that it has informed each such person of the limitation on contributions imposed by Section 1.126 by the time it submitted a proposal for the contract, and has provided the names of the persons required to be informed to the City department with whom it is contracting.

3.5 Notification of Legal Requests. *The following section is hereby added and incorporated in Article 10 of the Agreement:*

10.16 Notification of Legal Requests. Contractor shall immediately notify City upon receipt of any subpoenas, service of process, litigation holds, discovery requests and other legal requests (“Legal Requests”) related to all data given to Contractor by City in the performance of this Agreement (“City Data” or “Data”), or which in any way might reasonably require access to City’s Data, and in no event later than 48 hours after it receives the request. Unless otherwise required by applicable law, Contractor shall not respond to Legal Requests related to City without first notifying City other than to notify the requestor that the information sought is potentially covered under a non-disclosure agreement. Contractor shall retain and preserve City Data in accordance with the City’s instruction and requests, including, without limitation, any retention schedules and/or litigation hold orders provided by the City to Contractor, independent of where the City Data is stored.

3.6 Contractor Vaccination Policy. *The following section is hereby added and incorporated in Article 4 of the Agreement:*

4.3.1 Contractor Vaccination Policy.

(a) Contractor acknowledges that it has read the requirements of the 38th Supplement to Mayoral Proclamation Declaring the Existence of a Local Emergency (“Emergency Declaration”), dated February 25, 2020, and the Contractor Vaccination Policy for City Contractors issued by the City Administrator (“Contractor Vaccination Policy”), as those documents may be amended from time to time. A copy of the Contractor Vaccination Policy can be found at: <https://sf.gov/confirm-vaccine-status-your-employees-and-subcontractors>.

(b) A Contract subject to the Emergency Declaration is an agreement between the City and any other entity or individual and any subcontract under such agreement, where Covered Employees of the Contractor or Subcontractor work in-person with City employees in connection with the work or services performed under the agreement at a City owned, leased,

or controlled facility. Such agreements include, but are not limited to, professional services contracts, general services contracts, public works contracts, and grants. Contract includes such agreements currently in place or entered into during the term of the Emergency Declaration. Contract does not include an agreement with a state or federal governmental entity or agreements that do not involve the City paying or receiving funds.

(c) In accordance with the Contractor Vaccination Policy, Contractor agrees that:

(i) Where applicable, Contractor shall ensure it complies with the requirements of the Contractor Vaccination Policy pertaining to Covered Employees, as they are defined under the Emergency Declaration and the Contractor Vaccination Policy, and insure such Covered Employees are either fully vaccinated for COVID-19 or obtain from Contractor an exemption based on medical or religious grounds; and

(ii) If Contractor grants Covered Employees an exemption based on medical or religious grounds, Contractor will promptly notify City by completing and submitting the Covered Employees Granted Exemptions Form (“Exemptions Form”), which can be found at <https://sf.gov/confirm-vaccine-status-your-employees-and-subcontractors> (navigate to “Exemptions” to download the form)..

Article 4 Effective Date

Each of the modifications set forth in Articles 2 and 3 shall be effective on and after “the date of this Amendment”.

Article 5 Legal Effect

Except as expressly modified by this Amendment, all of the terms and conditions of the Agreement shall remain unchanged and in full force and effect.

[SIGNATURES ON FOLLOWING PAGE]


IN WITNESS WHEREOF, Contractor and City have executed this Amendment as of the date first referenced above.

CITY

CONTRACTOR

Recommended by:

Sapient Corporation

DocuSigned by:

097C32EA6568497...
Simone Jacques
Simone Jacques
Deputy Assessor of Finance and Administration
Office of the Assessor-Recorder
Simone.jacques@sfgov.org

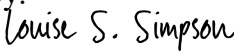
DocuSigned by:

9290DEF0AD92466...
Ryan Walsh
Ryan Walsh
Chief Financial Officer
Ryan.Walsh@publicissapient.com

City Supplier Number: 0000036670

Approved as to Form:

David Chiu
City Attorney

DocuSigned by:
By: 
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Louise S. Simpson
Louise S. Simpson
Deputy City Attorney

Approved:

DocuSigned by:

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sailaja kurella
Sailaja Kurella
Director of the Office of Contract Administration,
and Purchaser

Appendices

A-1a: Phase Two Completion Tasks and Critical Deliverables

A-2: Maintenance Statement of Work

B-1: Calculation of Charges

C: List of Remaining Phase 1.x, Phase 2.0 and Phase 2.x Requirements

Appendix A-1a

Phase Two Completion Tasks and Critical Deliverables

- A. This Appendix A-1a (this "Appendix A-1a") sets forth the key deliverables and phases to be delivered by Contractor under Appendix A1. Unless otherwise modified, amended or supplemented by the terms of this Appendix A-1a, the terms of Appendix A1 shall remain in full force and effect. In the event of any conflict between the terms of this Appendix A-1a and the terms of Appendix A-1, the terms of this Appendix A-1a shall control. Updated Resource and Cost Loaded Schedule Including Project Status Reporting
1. **Final Completion Schedule:** Contractor's completion schedule with critical path as outlined in Appendix A1 is due within 30 days of formal adoption by the Board of legislation approving the Amendment. In the event Contractor fails to deliver the completion schedule within such thirty (30) day period, and such failure is solely the result of Contractor's failure to perform its obligations under the Agreement, the City may, acting in its sole discretion, may issue a notice of default in accordance with Section 8.3.1 of the Agreement. Upon receipt of such notice, Contractor shall be entitled to a thirty (30) day period to cure such default.
 2. **Interim Project Plan:** Pending Contractor's delivery of a completion schedule as required in Section A.1 above, the parties shall utilize a draft project plan (in excel format) with an implementation date of December 2023 for Phase 2.0 and February 2024 for Phase 2.x.
 3. **Project Status Reporting:** Contractor must comply with all project status reporting requirements set forth in the Appendix A-1, including but not limited to the submission of weekly status reports in a template format acceptable to the City.

B. Implementation – Remaining Phases

- I. The remaining phases for SMART as described in Appendix A1 are as follows with the associated stories defined in Appendix C:
1. Phase 1.x – Business Personal Property Remaining Scope
 2. Phase 2.0 – Real Property Minimum Viable Product
 3. Phase 2.x – Real Property Remaining Scope

C. Deliverables

The following Deliverables have been identified as the remaining critical deliverables under Appendix A1. Subject to City's responsibilities set forth in Appendix A1, Contractor shall deliver these deliverables in accordance with the terms of Appendix A1 and the Agreement

C.1) (Appendix A1 Section 2.2) Business Reporting Functionality

Contractor must develop all reports and dashboards listed in the original SOW Exhibit 6.

C.2) (Appendix A1 Section 2.3) External System Integrations

Contractor will implement system integrations between the SMART system and the following systems:

- i. ASR's Document Management System (Onbase)
- ii. Recorder System
- iii. City's Enterprise Address System
- iv. Controller/Tax Collector system
- v. Appeals Board
- vi. External City Department Files (e.g., Property Characteristics, Ownership and Address).
- vii. Department of Building Inspections System
- viii. ASR's BI/Analytical tool

C.3) (Appendix A1, Section 4.4.6) Functional Design Document (FDD):

- i. Drafts of the Functional Design Document are due at the end of each sprint, subject to City review and approval acting in its sole discretion. City shall provide written feedback within five (5) business days of receipt, unless otherwise agreed between the parties. Contractor will provide any requested revisions within seven (7) calendar days of City's written feedback.
- ii. The final Functional Design Document will be delivered by Contractor to City on or before final delivery of the Property Assessment System (phase 2.x), subject to City review and approval acting in its sole discretion.

C.4) (Appendix A1, Section 4.4.7) Technical Design Document (TDD) and Security Design Document (SDD):

- i. Drafts of the Technical Design Document will be delivered to the City at the end of each calendar quarter subject to City review and approval acting in its sole discretion. City shall provide written feedback within five (5) business days of receipt, unless otherwise agreed between the parties. Contractor will provide any requested revisions to the Technical Design Document drafts within seven (7) calendar days of City's written feedback..
- ii. The final Technical Design Document will be delivered by Contractor to City on or before final delivery of the Property Assessment System (phase 2.x), subject to City review and approval acting in its sole discretion.

C.5) (Appendix A1, Section 10.4) Support Transition Plan: Due December 2023

The following documentation, at a minimum, shall be prepared by the Contractor and included in the System Maintenance, Support and Transition Plan provided to ASR:

- i. Development of a System support structure and organization, including estimates of the Contractor and Assessor-Recorder manpower requirements to support operation and maintenance of the System
- ii. The skill sets required to operate and maintain the System should be specified, with recommendations of the skills, knowledge, and abilities required by

Assessor-Recorder business and technical staff

- iii. System Installation and Administration Manual
- iv. Operating procedures manual, including diagnostic procedures, backup and restore procedures and disaster recovery procedures
- v. Maintenance manual, including Information to aid in analyzing and debugging the software, apart from information already available in other delivered documentation
- vi. Maintenance and repair policies and procedures
- vii. System “Run Book” as defined by ASR

Appendix A-2
AMENDMENT 1 - APPENDIX A-2 - MAINTENANANCE STATEMENT OF WORK
Property Assessment Solution



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13.0	Ongoing Training	14
14.0	Upgrades and Enhancements.	15

1.0 Hosted Environment Upgrades

After City has obtained access to the Hosted Services, the Contractor will complete Software version upgrades, revisions and patches working with the Product Vendor(s) and ASR on the following schedule:

- a. **Major version upgrade** (3 times per year for Salesforce. Per the release schedule of additional software vendors)
- b. **Minor version revisions** (per an agreed-to schedule between ASR and Contractor based on hot fixes and/or desired changes to the solution)
- c. **Support Packs / Patches** – Monthly / weekly as needed, on Thursday night during maintenance window
- d. **Interface Hosting upgrade - As needed**

Contractor will perform regression testing on all software upgrades to ensure any upgrades will not adversely impact the application. Contractor will document regression test results and provide the results to the City before the City commences testing.

Contractor will establish criteria and plan for coordinating environment software upgrades. Work products will be created explaining the related approach, activities, procedures, tools, and templates. These work products include:

1. Configuration migration procedures
2. Object/code migration procedures
3. Methodology for developing and applying software patches and fixes

Contractor will apply fixes, patches and bundles as needed (except for Major releases), when available from Salesforce and in consultation and coordination with the City. and with the approval from the ASR Project Manager

1. Roles and Responsibilities

Topic	Contractor	ASR
Environment Software Upgrades	1. Contractor will provide an Environment Software Upgrade Plan	ASR Project Manager will review and approve.

Unless as otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, City and Contractor shall have a mutually agreed upon test period (“Test Period”) to test any maintenance changes prior to Contractor introducing such maintenance changes into production. Prior to the start of the Major or Minor Version Test Period the Contractor will provide associated Release Notes. At the end of the Test Period, Contractor and ASR will elect if the

maintenance changes will be implemented or not (except for Major Releases from Salesforce that are mandatory).

Contractor will assist with questions and provide technical assistance regarding Release Notes, new functionality and new application workflows. Contractor will provide documentation on new features.

Contractor will provide standard training on the Vendor's standard upgrade tools to the support team.

Contractor will lead the testing process for each interface for upgrades and when changes are made. Contractor will perform initial regression testing for Vendor code updates. Also perform testing of new features introduced in Vendor upgrades and release notes that are mutually agreed-to between ASR and Contractor.

2.0 Open Source Software Upgrades

Contractor will ensure all Open Source Software patches/upgrades are applied as needed. Contractor will perform regression testing to ensure all Open Source Software patches/upgrades does not adversely impact the Property Assessment Solution. After the Contractor performs the regression testing, they will provide City the opportunity to test the upgrade.

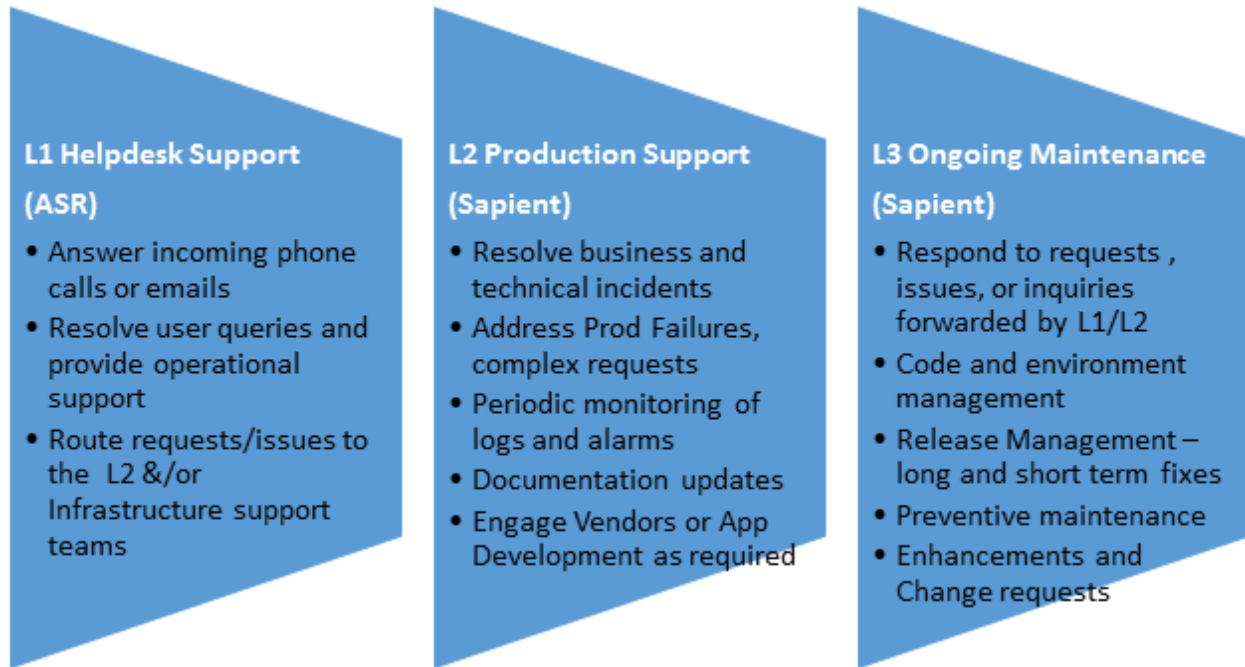
Unless as otherwise agreed to by City on a case-by-case basis, for non-emergency maintenance, Contractor and City shall have a mutually agreed upon test period ("Test Period") to test any Open Source Software patches/upgrades changes prior to Contractor introducing such maintenance changes into production. Contractor will provide associated Release Notes. At the end of the Test Period, Contractor and City elect if the maintenance changes will be implemented or not.

3.0 Support.

Contractor will:

- a. provide Critical Severity priority resolution;
- b. provide Technical Experts trained and familiar with the City's production environment;
- c. schedule quarterly defects trend analysis between ASR and Contractor;
- d. provide support for the current Version of all software vendor products. Patches for critical issues will only be applied to the final release of a supported Version.
- e. Manage and oversee support for all third-party software supplied by City or Contractor as part of this application..
- f. Provide support for interfaces (working with ASR)
- g. Manage and oversee the City on-going relationship with Hosting Provider (or internal hosting services) vendor to ensure services are performed according to contract.

The support model for this engagement along with the coverage and ownership is depicted below:



3.1 Support Scope L1 (Helpdesk)

ASR will be responsible for level 1 support that comprises of the Helpdesk (HD) to answer user queries and provide operational support to the users of the system. ASR will setup the Help Desk in the form of a mailbox, a hotline number etc. to perform the following activities:

- User query (phone calls/emails) resolution
- User Provisioning and account management
 - New user requests
 - Modify access/roles for existing users
 - Reset passwords
 - Terminate user access
- Logging, routing and escalating complex incidents to L2/L3 team and follow-ups
- Communicating and liaising with users raising the incident
- Maintenance and update of knowledge articles, standard operating procedures.
- System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - US Hours
- Liaising with auxiliary system owner POC for incident resolution such as data correction, Replay of messages (as applicable)

Contractor will be responsible for enabling ASR Helpdesk by providing documentation and system user manuals for resolving common user queries.

3.1.1 Roles and Responsibilities

Topic	Contractor	ASR
Helpdesk	<ol style="list-style-type: none"> 1. Contractor will be responsible for enabling ASR Helpdesk to resolve queries around System Operations and Administration, User Provisioning and account management by providing training and documentation to the ASR Helpdesk team. 	<ol style="list-style-type: none"> 1. ASR will be responsible for resolving user queries and providing operational support based on documentation and standard operating procedures 2. ASR will be responsible for incident logging, documenting details about incident and testing the solutions suggested by Contractor support team. 3. ASR and Contractor will be responsible for System monitoring (See L1 and L2 sections)

3.2 Support Scope L2 (Production Support)

Contractor will be responsible for providing level 2 production support which includes technical Help Desk that would provide problem resolutions to Incidents being tracked. The various activities to be taken care under this level of support would be:

- a) Resolving complex business and technical queries assigned by Level-1 Helpdesk team
- b) Performing a root cause analysis of the issues and acting on the remediation steps if in the responsibility of the L2 support team
- c) Communication of remediation steps which are outside scope of L2 support team to business team
- d) Problem re-Prioritization based on root cause analysis
- e) Proposing alternate solutions for issues with no known solution for business continuity
- f) Documentation on known solutions for business users and L1 Helpdesk team
- g) Handling and managing crisis and major incidents as per the Crisis Management Procedures
- h) Escalating product issues to vendor and follow up on solutions
- i) Escalating complex issues to L3 Support Team and resolution coordination
- j) Handling user requests for ad-hoc activities/process runs on the application
- k) Certification of feature requests (if any) raised by L2 Team for L3 Team
- l) Periodic monitoring of logs & alarms
- m) System monitoring of Scheduled jobs and communicating the failure and delays to

respective team (auxiliary system owner POCs or L2 team as applicable) - India Hours

3.2.1 Roles and Responsibilities

Topic	Contractor	ASR
Production Support	<ol style="list-style-type: none"> Contractor will be responsible for managing incident lifecycle including identifying, triaging, classifying, prioritizing, resolving, tracking and reporting. Contractor will be responsible for System monitoring of Scheduled jobs and communicating the failure and delays to respective team (auxiliary system owner POCs or L2 team as applicable) - India Hours 	<ol style="list-style-type: none"> ASR will be responsible for incident logging, documenting details about incident and testing the solutions suggested by Contractor support team. ASR will be responsible for assigning and escalating complex business and technical queries to the Contractor

3.3 Support Scope L3 (Ongoing Maintenance)

Contractor will be responsible for providing L3 support which includes defect fixes & enhancements and will work in a Software Development Life Cycle (SDLC) approach to plan for the release of the fixes/enhancements. Enhancements are defined as updates to the existing system and adding new features and functionality to the system. New features and functionality may include changes to the revenue and taxation code and legislative requirements and will be mutually agreed to by ASR and Contractor.

The various activities to be taken care under this level of support would be:

- Prioritization of Enhancements/change requests
- Implement fixes, both long & short term
- Provide preventive maintenance
- Performance tuning
- Release Planning for upgrades, patches, fixes. In addition perform regression testing to ensure updates, patches and fixes will not adversely impact the application. Contractor will run test scripts and provide test results to ASR.
- Quality Management, Training and Documentation

- Coordinating with third-party vendors for technical assistance

3.4 Support Coverage

As part of this support engagement Contractor will provide support coverage as per below timeline:

- Non critical incidents:
 - Business Hours: Weekdays - 8:00 AM PST to 5:00 PM PST
- Critical Incidents
 - Business Hours: Weekdays - 8:00 AM PST to 5:00 PM PST
 - Non Business Hours: On call support

3.5 Reporting

Contractor will develop reports and dashboards per agreed-to scope at pre-agreed frequency that will allow ASR to view the summary of support incidents handled by the support team. Some example reports are listed below:

- Incident Status Summary - Reported, resolved, open, work in progress
- Incident summary by application area
- Incident response and resolution time charts
- Incident Ageing report
- Monthly reporting on Maintenance and Enhancement utilization and balances

3.6 Assumptions

- For L2 support: Average Per Day Volume of incidents that will be managed by support personnel will be determined based on the data gathered in the initial 2 months of maintenance post completion of each implementation phase.
-
- For L3 support: If support hours is less than 5,600 hours, than the residual hours will be applied toward the enhancements. Enhancement hours is anticipated to be 20% of the total team allocation.
-

Go-Live	Description	Total Team Allocation (Hrs./year)	Enhancements (Hrs./year) *	% Enhancement allocation
2024	RP + BPP Maintenance	7000	1400	20%
2025	RP + BPP Maintenance	5600	1120	
2026	RP + BPP Maintenance	4480	896	
2027	RP + BPP Maintenance	3580	716	

- The total team allocation from year 2025 through year 2027 is assumed to be 20% less than the previous year as the system stability and team efficiency improves.
-
- ASR will identify and provide on-demand access to subject matter experts to the

contractor for resolution of queries during enhancements implementation and bug fixes.

4.0 Assigned Resources

Contractor will provide a team consisting of Relationship Manager, Support Case Manager, Technical Support team, Quality Assurance with the following allocation

Year	Description	Role	Allocation		
2024	RP + BPP Maintenance	Relation Ship Manager	0.25		
		Support Case Manager	0.25		
		Technical Support (Salesforce + Integration)	4.5		
		Quality Assurance	1		
2025		Relation Ship Manager	0.25		
		Support Case Manager	0.25		
		Technical Support (Salesforce + Integration)	3.75		
		Quality Assurance	1		
2026		Relation Ship Manager	0.25		
		Support Case Manager	0.25		
		Technical Support (Salesforce + Integration)	3		
		Quality Assurance	1		
2027		Relation Ship Manager	0.25		
		Support Case Manager	0.25		
		Technical Support (Salesforce + Integration)	2.5		
		Quality Assurance	1		

5.0 Phase 2.0 Maintenance Invoicing

Maintenance payments for 2024 will be tied to the % of system that is put into production. If phase 2 represents 80% of all remaining work, ASR will pay 80% of the maintenance budget after phase 2 go-live. ASR will begin paying maintenance on phase 2.x once phase 2.x goes-live.

6.0 Live Incident Handling and Case Handling

The following incident handling, time frames and support are applicable for Support only to City’s live-production environment.

7.0 Response Definition and Expectation Table

Step 1: This column represents Contractor’s acknowledgement of a problem and the time by which Contractor will begin the information gathering and the trouble shooting processes.

Step 2: This column represents the timeframe in which Contractor will work with ASR and Product Vendor(s) including Salesforce to address the problems and provide a fix or workaround to restore the Systems to operate in accordance with the service specifications. The goal is to provide a fix or a workaround for a problem as soon as possible. Contractor shall work on critical issues continually until a satisfactory problem resolution can be reached.

Step 3: This column indicates the time by when Contractor will work with ASR and Product Vendor(s) including Salesforce to provide a solution. This may be in the form of a tested application fix, completely new coding, or patch from ASR/Salesforce/Other Product Vendor

depending on the problem requirements and timetable.

Severity/Urgency	Step 1 - Confirmation	Step 2 – Assignment and Resolution	Step 3 – Long-Term Fix
<p>Critical Severity Issues (Priority 1): Supported Service is non-functional or seriously affected and there is no reasonable workaround available (e.g. business is halted).</p>	<p>Confirmation of receipt within one (1) business hour</p>	<p>Work starts immediately upon acknowledgement and continues until resolved. Contractor will put forth commercially reasonable efforts with ASR and product vendors up to and including 24 hour days, 7 days a week, through holidays and weekends until a fix or workaround is provided to restore Service to production state.</p>	<p>A long-term fix provided in a scheduled release mutually agreed upon by Contractor and ASR</p>
<p>High Severity Issues (Priority 2): Supported Service is affected and there is no workaround available or the workaround is impractical. E.g. System response is very slow, day to day operations continue but are impacted by the work around.</p>	<p>Confirmation of receipt within two (2) business hours.</p>	<p>Work starts immediately upon acknowledgement and continues until resolved. Contractor will put forth commercially reasonable efforts with ASR and product vendors to provide a workaround or long-term fix or estimated completion date within five (5) business days after the problem has been</p>	<p>A long-term fix provided in a scheduled release mutually agreed upon by Contractor and ASR</p>

		diagnosed and replicated	
<p>Medium Severity Issues (Priority 3):</p> <p>Supported Service is non-functional however a known workaround exists, E.g. Non-critical feature is unavailable or requires additional user intervention.</p>	Confirmation of receipt within four (4) business hours.	Contractor will work with ASR and product vendors to prioritize and resolve the issue within a mutually agreed upon timeline	As appropriate
<p>Low Severity Issue (Priority 4):</p> <p>System or application feature works, but there is a minor problem. E.g. Incorrect label, or cosmetic defect.</p>	Confirmation of receipt within eight (8) business hours	Resolution for the issue may be released as a patch set or be incorporated into future scheduled release of Supported Service.	As Appropriate

1. System Defect Resolution Reports

All within scope defect resolution requests must be documented and communicated with ASR within a reasonable, agreed upon time frame. The Defect Resolution Report must contain the description of the maintenance request, resolution status, and the proposed course of action for remedying all open defect resolution requests.

All changes and fixes will be implemented based on a mutually agreed upon schedule. Changes will go through all phases of testing by the Contractor and ASR. The Contractor shall document the test results and provide them to ASR for approval before a decision is made to put a new release into production. At the conclusion of any Property Assessment System changes, the Contractor shall update all required system documentation as appropriate and provide it to ASR.

The Contractor shall provide System Incident and Defect Resolution Reports to ASR that include the elements described above.

2. Roles and Responsibilities

Topic	Contractor	ASR
Project Team Availability	1. Contractor's project team will be available during deployment activities.	1. ASR Project Manager will review and approve.
System Incident and Corrective Action Reports	2. Contractor shall document all incidents and defects that occur during System Deployment.	2. ASR Project Manager will review and approve.
System Defect Resolution Reports	3. Contractor will provide a System Defect Resolution Reports.	3. ASR Project Manager will review and approve.

8.0 Performance Service Credits

Should the City determine, based upon an objective commercially reasonable standard, that Contractor is not meeting its performance obligations, the following service credits shall apply. Any dispute regarding response time performance may be submitted to Dispute Resolution under Section 11.5 of the Agreement. If submitted, no service credits may be assessed until the conclusion of the Dispute Resolution process. For clarity, service credits apply only to issues that a root cause analysis shows are solely attributable to Contractor, unless otherwise agreed by the parties.

Performance Category	Missed SLA Occurrences (monthly)	Service Credit (monthly)
Step 1 – Confirmation	95% of total incidents AND 95% of Priority 1 incidents	10%
Step 2 – Assignment and Resolution	95% of total incidents AND 95% of Priority 1 incidents	10%
Step 3 – Long Term Fix	95% of total incidents AND 95% of Priority 1 incidents	5%

The service credits payable each month shall be capped at twenty five (25) percent of the monthly fee (Calculated: Annual Fee/12). A sum representing the service credit shall be credited by Contractor to City as a non-transferable credit (not convertible to cash) that may be applied forward to any additional Work performed under the Implementation Statement of Work or this Maintenance Statement of Work (for clarity, service credits, if any, shall be deducted from/credited against future sums billed by and owed to Contractor). The service credits set forth in this Section shall be the exclusive remedy of the City for any failure by Contractor to meet its performance obligations. Service credits shall not apply to performance problems that are not solely attributable to Contractor. For clarity, service credits shall not apply to performance problems or defects caused by the City or its personnel, third party delays, or a force majeure event.

9.0 Upgrade/Downgrade of Severity Level.

If, during the Support Request process the issue either warrants assignment of a higher severity level than currently assigned or no longer warrants the severity level currently assigned based on its current impact on the production operation of the System, then the severity level will be upgraded or downgraded accordingly to the severity level that most appropriately reflects its current impact as mutually agreed by the Parties.

10.0 Escalation.

If Contractor does not respond within the time frames set forth above, City may use the escalation procedures as provided in this paragraph. As a first stage, party subject matter experts will seek to resolve the issue. If that attempt is unsuccessful, either party may escalate the issue per the table below. The goal of the escalation procedures will be to (i) resolve the specific problem as quickly as possible; and (ii) ensure that future delays in service response times are prevented. At each stage of this process, the individuals occupying the positions listed below, or their functional equivalents, if the titles within the organizations have changed, will confer and attempt to resolve the relevant issues. Each party understands that depending on the circumstances, it may be impossible to reach one or more of the individuals set forth below. These discussions may occur by telephone, videoconference or in person. Escalation at each step of this process will occur based on City determination that the existing level of involvement is not satisfactorily resolving the problem.

The parties will exchange mutual peer escalation lists (including lead application) as the point persons for issue resolution. This will ensure that the parties have peer to peer subject matter experts to work on issue resolution. On City's side, the issue leads will be maintained at the City service desk.

The focus of this process is to resolve the problem as quickly as possible. The escalation path will be:

Contractor	City
Assigned Support Resource	Service Desk

Support Case Manager	Property Assessment Support Manager
Contractor Executive	ASR Deputy Director Finance and Administration

11.0 Help Desk Issue Management Software Tool.

The Contractor will use a help desk issue management software tool (e.g. JIRA) to collect and track all issues submitted to the Contractor for production support. The Contractor will additionally provide ASR with an export (in excel or other format specified) of the contents of the help desk issue management software suite used by the Contractor's Production Support staff to import into ASR's Help Desk software tool (If a decision is made to use a Contractor proprietary tool and not the ASR provided Tool like JIRA) .

Contractor will participate in regular issue calls with the City's team. Review care concerns and assist with mitigation.

12.0 Environments

The following functions/activities will be supported within an agreed-to number of environments for the Property Assessment Solution and related integrations.

- a. Development (for Developers)
- b. Test (for Sapient)
- c. Test (for ASR)
- d. Training (for ASR)
- e. Staging – An environment available to the City to test new Contractor application releases against their production configuration.
- f. Production – The environment used by the City to submit, tract and manage live transactions and associated data.

This list of environments will be supported by the agreed-to licensing between ASR and Contractor.

The environments will be refreshed with configuration, code and data on a schedule that is mutually agreed to by ASR and Contractor. The schedule will ensure that activities including testing and deployment are properly supported and completed successfully. Refreshes may occur on a quarterly basis or on an as needed basis as mutually agreed to by ASR and Contractor.

13.0 Ongoing Training

Contractor will provide training/demo on new features and enhancements to city designated key end-user personnel. Contractor will also provide documentation, configuration guides (if needed) and operating procedures documentation to ASR's L1 Helpdesk Team to enable them to perform post release maintenance and provide support.

14.0 Upgrades and Enhancements.

Contractor will provide City with notice of the availability of all Upgrades and Enhancements.

Appendix B-1 Calculation of Charges

#	Description of Parent Deliverables	Revised Description of Parent Deliverables (Amd 1)	Planned Invoice Date	RPB #2	Change	Amendment 1
1.0	Definition Phase - Establish Baseline Project Work Plan and Schedule			229,836	-	229,836
2.0	Definition Phase - Document System Implementation Strategy			229,836	-	229,836
3.0	Definition Phase - Document Master Testing Strategy			229,836	-	229,836
4.0	Definition Phase - Develop Requirements Traceability Matrix			229,836	-	229,836
5.0	Definition Phase - Develop Data Migration Plan and Document Integration Strategy			229,836	-	229,836
6.0	Phase 1 - Confirm User Stories			419,055	-	419,055
7.0	Phase 1 - Sprint #1 Complete and Sprint #2 Complete (Invoice 1 of 2)			550,010	-	550,010
8.0	Phase 1.0 - Sprints #3 - Sprint #10 Complete		15-May-20	1,867,682	-	1,867,682
9.0	Phase 1.0 - Sprint #11 and Sprint #12 Complete		30-Jun-20	358,767	-	358,767
10.0	Phase 1.0 - Sprint #13 and Sprint #14 Complete		10-Aug-20	358,767	-	358,767
11.0	Phase 1.0 - Sprint #15 and Sprint #16 Complete		15-Sep-20	358,767	-	358,767
12.0	Phase 1.0 - Develop Technical Design Document and Security Design Document (which includes security profiles)		30-Sep-20	138,271	-	138,271
13.0	Phase 1.0 - Complete System (QA) Testing and Document System Test Results		30-Oct-20	504,640	-	504,640
14.0	Phase 1.0 - Complete User Acceptance Testing (UAT)		15-Dec-20	224,287	-	224,287
15.0	Phase 1.0 - Complete Project Training and Training Manuals, Guides, and Materials		31-Dec-20	224,287	-	224,287
18.0	Phase 1.0 - Acceptance of all Phase 1.0 Implementation Deliverables		15-Jan-21	549,664	-	549,664
19.0	Phase 1.1 - Sprint 1 Complete		31-Jan-21	148,961	-	148,961
20.1	Phase 1.1 - Sprint 2 Complete		26-Feb-21	50,000	-	50,000
20.2	Phase 1.2 - Sprints Complete		15-May-21	50,000	-	50,000
22.1	Phase 1.1 - Complete User Acceptance Testing (UAT)		16-Mar-21	8,000	-	8,000
22.2	Phase 1.2 - Complete User Acceptance Testing (UAT)		16-May-21	8,000	-	8,000
23.1	Phase 1.1 - Complete Project Training and Update Training Manuals , Guides, and Materials		16-Mar-21	8,000	-	8,000
23.2	Phase 1.2 - Complete Project Training and Update Training Manuals , Guides, and Materials		16-May-21	7,000	-	7,000
24.2	Phase 1.2 - Acceptance of all Phase 1.2 Implementation Deliverables		22-May-21	23,000	-	23,000
24.3	Phase 1.3 - Implementation of Audits		31-Dec-21	87,231	(87,231)	-
24.5	Phase 1.3 - Implementation of Audits - MVP		30-Jan-23		50,000	50,000
24.6	Phase 1.3 - Implementation of Audits(Increments) + Others		30-Jun-23		37,231	37,231
24.7	Phase 1.1 - Acceptance of all Phase 1.1 Implementation Deliverables		22-Mar-21	23,000	-	23,000
25.0	Phase 2 - Sprint #1 Complete and Sprint #2 Complete		26-Feb-21	370,609	-	370,609
26.0	Phase 2 - Sprint #3 Complete and Sprint #4 Complete		15-Apr-21	370,609	-	370,609
27.0	Phase 2 - Sprint #5 Complete and Sprint #6 Complete		31-May-21	370,609	-	370,609
28.0	Phase 2 - Sprint #7 Complete and Sprint #8 Complete		15-Jul-21	370,609	-	370,609
29.0	Phase 2 - Sprint #9 Complete and Sprint #10 Complete		30-Aug-21	370,609	-	370,609
30.0	Phase 2 - Sprint #11 Complete and Sprint #12 Complete		30-Sep-21	370,609	-	370,609
31.0	Phase 2 - Sprint #13 Complete and Sprint #14 Complete		15-Nov-21	370,609	-	370,609
32.0	Phase 2 - Sprint #15 Complete and Sprint #16 Complete		31-Dec-21	370,609	-	370,609
33.0	Phase 2 - Confirm User Stories - Sprint #1 to #20		28-Feb-22	68,772	-	68,772
34.0	Phase 2 - Confirm User Stories - Sprint #21 to #25		30-Jun-22	276,989	-	276,989
35.0	Phase 2 - Confirm User Stories - Sprint #26 to #30		3-Feb-23	267,028	-	267,028
36.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Sprint #1 to #20		28-Feb-22	46,666	-	46,666
37.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Sprint #21 to #25		30-Jun-22	34,568	-	34,568
38.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Sprint #26 to #30		3-Feb-23	39,753	-	39,753
39.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Sprint #1 to #20		28-Feb-22	78,283	-	78,283
40.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Sprint #21 to #25		30-Jun-22	208,754	-	208,754
41.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Sprint #26 to #30		3-Feb-23	195,707	-	195,707
42.0	Phase 2 - Complete Project Training and Training Manuals, Guides, and Materials - Sprint #1 to #25		30-Jun-22	29,844	-	29,844
43.0	Phase 2 - Complete Project Training and Training Manuals, Guides, and Materials - Sprint #26 to #30		3-Feb-23	29,844	-	29,844

**Amendment 1
Appendix B-1
Calculation of
Charges**

#	Description of Parent Deliverables	Revised Description of Parent Deliverables (Amd 1)	Planned Invoice Date	RPB #2	Change	Amendment 1
44.0	Phase 2 - Confirm User Stories - Final Delivery	(Moved to final delivery milestones 52 - 67)	31-Jan-23	94,241	(94,241)	-
45.0	Phase 2 - Update Technical Design Document and Security Design Document (which includes security profiles) - Final Delivery	(Moved to final delivery milestones 52 - 67)	31-Mar-23	17,284	(17,284)	-
46.0	Phase 2 - Complete System (QA) Testing and Document System Test Results - Final delivery	(Moved to final delivery milestones 52 - 67)	31-Mar-23	104,377	(104,377)	-
47.0	Phase 2 - Complete User Acceptance Test (UAT) - MVP	(Moved to final delivery milestones 52 - 67)	31-Dec-22	293,561	(293,561)	-
48.0	Phase 2 - Complete User Acceptance Test (UAT) - Final RP Release	(Moved to final delivery milestones 52 - 67)	31-Mar-23	293,561	(293,561)	-
49.0	Phase 2 - Complete Project Training and Training Manuals, Guides, and Materials - Final delivery	(Moved to final delivery milestones 52 - 67)	31-Mar-23	119,375	(119,375)	-
50.0	Phase 2 - Acceptance of Phase 2 Secured Implementation Deliverables - 1 - Sprint 35	(Moved to final delivery milestones 52 - 67)	31-Jan-23	354,031	(354,031)	-
51.0	Phase 2 - Acceptance of Phase 2 Secured Implementation Deliverables - 2 - Post 2023 Roll Close	(Moved to final delivery milestones 52 - 67)	30-Jul-23	354,031	(354,031)	-
52.0		SIT 4.2 Complete (zero P1 and P2 errors)	31-Jan-23		294,818	294,818
53.0		SIT 5.1 Complete (zero P1 and P2 errors)	24-Mar-23		147,409	147,409
54.0		SIT 5.3 Complete (zero P1 and P2 errors)	30-Jun-23		147,409	147,409
55.0		Platform Build Complete 2.0	11-Jul-23		884,455	884,455
56.0		Data Migration Complete (post data recon by ASR) 2.0	11-Jul-23		589,637	589,637
57.0		Performance Testing Complete 2.0	22-Aug-23		117,927	117,927
58.0		UAT Start 2.0	23-Aug-23		471,709	471,709
59.0		UAT – Phase 2 Complete User Acceptance Testing 2.0	14-Nov-23		589,637	589,637
60.0		Go Live – Phase 2 – Acceptance of Phase 2 Secured Implementation Deliverables 1 for 2.0	11-Dec-23		1,179,274	1,179,274
61.0		Training – Phase 2 – Complete Project Training and Training Materials, Guides and Materials for 2.0	5-Dec-23		294,818	294,818
62.0		Platform Build Complete 2.x	5-Dec-23		235,855	235,855
63.0		UAT Start 2.x	27-Dec-23		235,855	235,855
64.0		UAT – Phase 2.x Complete User Acceptance Testing	6-Feb-24		235,855	235,855
65.0		Training – Phase 2.x – Complete Project Training and Training Materials, Guides and Materials	20-Feb-24		235,855	235,855
66.0		Go Live – Phase 2.x – Acceptance of Phase 2.x Secured Implementation Deliverables	26-Feb-24		235,855	235,855
67.0		First Roll Close – Phase 2 Acceptance of Phase 2 Secured Implementation Deliverables 2 for 2.0	30-Jul-24		1,474,092	1,474,092
				12,988,109	5,740,000	18,728,109
#	Maintenance During Implementation Revised Description of Parent Deliverables		Planned Invoice Date	RPB #2	Change	Amendment 1
68.0		Phase 1 Maintenance (after Phase 1 go-live) - 2.2 Months	15-Jan-21	533,033	-	533,033
69.0		Phase 1.1 Maintenance (after Phase 1.1 go-live) - 12 Months	22-Mar-21	228,443	-	228,443
70.0		Phase 1 Maintenance (after Phase 1 go-live)	23-Dec-22		660,000	660,000
71.0		Phase 1 Maintenance (after Phase 1 go-live)	15-Dec-23		440,000	440,000
				761,476	1,100,000	1,861,476
#	Maintenance After Phase 2 Go-Live Revised Description of Parent Deliverables		Planned Invoice Date	RPB #2	Change	Amendment 1
72.0		Year 1 Maintenance (after Phase 2 go-live)	0	504,025	(504,025)	-
73.0		Year 2 Maintenance	0	504,025	(504,025)	-
74.0		Year 3 Maintenance	0	504,025	(504,025)	-
75.0	Year 4 Maintenance	Year 1 Maintenance (after Phase 2 go-live)	01-Jan-24	504,025	695,975	1,200,000
76.0	Year 5 Maintenance	Year 2 Maintenance	01-Jan-25	504,025	495,975	1,000,000
77.0	Year 6 Maintenance	Year 3 Maintenance	01-Jan-26	504,025	295,975	800,000
78.0	Year 7 Maintenance	Year 4 Maintenance	01-Jan-27	504,025	95,975	600,000
79.0	Year 8 Maintenance	Year 5 Maintenance	01-Jan-28	504,025	(504,025)	-
80.0	Year 9 Maintenance	Year 6 Maintenance	01-Jan-29	504,025	(504,025)	-
81.0	Year 10 Maintenance (3.8 months - through July 15, 2031)	Year 7 Maintenance	01-Jan-30	159,776	(159,776)	-
Total Maintenance After Phase 2 Go-Live				4,696,001	(1,096,001)	3,600,000
Office of the Assessor-Recorder Contingency				2,969,117	-	2,969,117
TOTAL NOT TO EXCEED AMOUNT				21,414,703	5,743,999	27,158,702

**Amendment 1
Appendix B-1
Calculation of
Charges**

ASR Proposed Payment Schedule for Final Deliverables and \$5.74M CR									80%	20%			80%	20%	80%	20%
#	Description	Child Deliverables	Planned Invoice Date	CR \$	Unpaid Final Deliverables	Grand Total	payment basis - % of subtotal	Total CR Cost	Payment	Retainage	Unpaid Final Deliverables	Payment	Retainage	Total Payment	Total Retainage	
1	SIT 4.2 Complete (zero P1 and P2 errors)	Zero P1 and P2 Updated integration specification document Updated mapping documents All final test results documented and provided Help desk documentation updated (i.e., error messages and recovery steps)	1/31/2023	229,600	65,218	294,818	5%	287,000	229,600	57,400	81,523	65,218	16,305	294,818	73,705	
2	SIT 5.1 Complete (zero P1 and P2 errors)	See SIT 4.2 Completed Child Deliverables	3/24/2023	114,800	32,609	147,409	3%	143,500	114,800	28,700	40,762	32,609	8,152	147,409	36,852	
3	SIT 5.3 Complete (zero P1 and P2 errors)	See SIT 4.2 Completed Child Deliverables	6/30/2023	114,800	32,609	147,409	3%	143,500	114,800	28,700	40,762	32,609	8,152	147,409	36,852	
4	Platform Build Complete	Updated technical design document Updated functional design document Updated security design document Updated security matrix Updated integration specification document Software development standards Help desk documentation related to platform updated (i.e., error messages and recovery steps, etc) Updated Requirements Traceability Matrix - Functional and Non Functional	7/11/2023	688,800	195,655	884,455	15%	861,000	688,800	172,200	244,569	195,655	48,914	884,455	221,114	
5	Data Migration Complete (post data recon by ASR)	Zero P1, P2, and acceptable and mutually agreed number of P3s All data migrated successfully within acceptable performance timeframes for ASR. Acceptable performance timeframe Acceptable and mutually agreed with PS, ASR IT Director and CIO Final data conversion plan Final mapping documents Note: bugs arising from data cleanup are not PS responsibilities	7/11/2023	459,200	130,437	589,637	10%	574,000	459,200	114,800	163,046	130,437	32,609	589,637	147,409	
6	Performance Testing Complete 2.0	All final performance test results documented and provided to ASR Performance test requirements will be mutually agreed to by PS and the ASR IT Director and CIO	8/22/2023	91,840	26,087	117,927	2%	114,800	91,840	22,960	32,609	26,087	6,522	117,927	29,482	
7	UAT Start	UAT entry requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated scripts	8/23/2023	367,360	104,349	471,709	8%	459,200	367,360	91,840	130,437	104,349	26,087	471,709	117,927	
8	UAT – Phase 2 Complete User Acceptance Testing	UAT remaining defect report and results presentation by Sapient Zero P1 and P2 defects	11/14/2023	459,200	130,437	589,637	10%	574,000	459,200	114,800	163,046	130,437	32,609	589,637	147,409	
9	Go Live – Phase 2 – Acceptance of Phase 2 Secured Implementation Deliverables	Go Live entry requirements satisfied - Go_NoGoCriteria_Phase2_Release1.docx Final requirements traceability for Go Live - functional Final requirements traceability for Go Live - non-functional System incident and corrective action report (SOW 7.4.2) Deployment bill of materials (SOW 7.3) Documented implementation project closeout (SOW 10.1) Support transition plan (SOW 10.4) Software configuration management (SOW 5.1.6) Software successfully installed and data fully migrated without errors During the warranty period there will be rapid detection and escalation of issues and quick resolution and communication	12/11/2023	918,400	260,874	1,179,274	20%	1,148,000	918,400	229,600	326,092	260,874	65,218	1,179,274	294,818	
10	Training – Phase 2 – Complete Project Training and Training Materials, Guides and Materials	OCM communication plan Project training Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	12/5/2023	229,600	65,218	294,818	5%	287,000	229,600	57,400	81,523	65,218	16,305	294,818	73,705	
11	Platform Build Complete 2.x	Updated technical design document Updated functional design document Updated security design document Updated security matrix Updated integration specification document Software development standards Help desk documentation related to platform updated (i.e., error messages and recovery steps, etc) Updated Requirements Traceability Matrix - Functional and Non Functional	12/5/2023	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964	
12	UAT Start 2.x	UAT entry requirements satisfied – https://ccsfasr.atlassian.net/wiki/spaces/ASR/pages/1751580687/UAT+Entry+Exit+Criteria Inventory of QA test scenarios, test cases and test scripts Test results will be compared with the current system to the new process* *Based on ASR provided sample AS400/EZ Access screens to compare with SMART Documented QA system test results Documented QA Regression test results Documented Defect tracking results Provide Automation scripts and inventory of automated script	12/27/2023	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964	
13	UAT – Phase 2.x Complete User Acceptance Testing	UAT remaining defect report and results presentation by Sapient Zero P1 and P2 defects	2/6/2024	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964	
14	Training – Phase 2.x – Complete Project Training and Training Materials, Guides and Materials	OCM communication plan Project training Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	2/20/2024	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964	

**Amendment 1
Appendix B-1
Calculation of
Charges**

ASR Proposed Payment Schedule for Final Deliverables and \$5.74M CR																
#	Description	Child Deliverables	Planned Invoice Date	CR \$	Unpaid Final Deliverables	Grand Total	payment basis - % of subtotal	Total CR Cost	80%		20%		80%		20%	
									Payment	Retainage	Unpaid Final Deliverables	Payment	Retainage	Total Payment	Total Retainage	
15	Go Live – Phase 2.x – Acceptance of Phase 2.x Secured Implementation Deliverables	OCM communication plan Project training Training manuals, guides and materials (documents will be stored in Sharepoint) Knowledge transfer Help desk scripts	2/26/2024	183,680	52,175	235,855	4%	229,600	183,680	45,920	65,218	52,175	13,044	235,855	58,964	
16	First Roll Close and Acceptance of Secured Implementation Deliverables (20% retainage)	Zero P1 and P2 defects related to first roll close Successful roll close with No Pending P1 and P2 defects from First Roll Close and TTX acceptance of the roll During the warranty period there will be rapid detection and escalation of issues and quick resolution and communication Acceptance of all secured implementation deliverables	7/30/2024	-	-	1,474,092		-	-	-	-	-	-	-	-	
				4,592,000	1,630,460	7,370,460	100%	5,740,000	4,592,000	1,148,000	1,630,460	1,304,368	326,092	5,896,368	1,474,092	

UAT Entry & Exit Criteria

As of 3-30-2023

#	ENTRY CRITERIA	OWNER	
1	FEATURE SET: Prior to moving from System Testing to UAT, the System's feature set shall be fully defined and static.	ASR/Sapient	
2	FINAL RELEASE SOURCE CONTROL: The final release version shall have been built from source control.	Sapient	
3	FINAL RELEASE QA: This final version shall have passed a formal Contractor quality assurance acceptance test.	Sapient	
4	PRODUCTION DATA: Production copy data shall be used for UAT	ASR/Sapient	
5	<p>P1/P2 DEFECTS: The requirements for release to UAT shall be zero Priority 1 and zero Priority 2 defects. ASR and Contractor Project managers will meet and mutually agree on an acceptable level of Priority 3 defects in order to move forward. Defect levels of Priority are defined as:</p> <ul style="list-style-type: none"> ▪ Priority 1 (P1) Show Stopper: The Deliverable cannot provide core functionality and/or the system has stopped working unless the issue is resolved ▪ Priority 2 (P2) High: A major function of the Deliverable produces the wrong result and there is no acceptable workaround. An acceptable workaround is one that does not pose a significant risk to ASR operations, will not cause missed SLAs and must have a reasonable level of effort ▪ Priority 3 (P3) Medium: The Deliverable is operable with only moderate deficiency and a work-around exists ▪ Priority 4 (P4) Low: Functionality of the Deliverable is not affected, and only minor, cosmetic changes are required <p>Note: This includes System Integration Testing (SIT) having no P1/P2 defects.</p>	Sapient	
--	The team shall perform the following activities prior to UAT:		
6	UAT TESTING PLAN & SCHEDULE: Development of the overall UAT Testing plan and schedule	ASR/Sapient	
7	UAT SYSTEM RELEASE: Build the UAT System release	Sapient	
8	TEST ENVIRONMENT CONFIGURATION: Install and configure the UAT release System components and database(s) on the designated testing environments	Sapient	
9	DATABASE LOAD: Load database(s) with complete and validated production-ready datasets (converted Legacy ASR data)	Sapient	
10	TESTING DOCUMENTATION: Develop and provide the required UAT Testing documentation (e.g. end user guides, systems administration manuals, user help files) and provide to ASR for approval during UAT activities. The documentation may be in draft or the latest version, and not required to be in final state for UAT entry	Sapient	
11	<p>SECURITY ROLES SET UP: Ensure security roles are in the ASRTEST environment. We need ASRTEST to mimic PROD exactly from a security perspective in order to effectively test.</p> <p>Note: The security roles will be set up by PS then verified by and officially approved by ASR before entering UAT</p>	Sapient	
12	SYSTEM INTEGRATION JOBS: System integration jobs are scheduled and set to run automatically, in ASRTEST. The Jobs should not be overwritten before UAT starts	Sapient/ASR	
13	SERVICE LEVEL REQUIREMENTS: Ensure Service Level Requirements are met by system functions (excluding ASR load testing for transaction volumes)	Sapient	
14	S.I.T COMPLETION: Complete SIT and resolved all P1/P2 defects related to SIT	ASR/Sapient	
15	QA FINAL REGRESSION: Complete QA final regression testing and resolved all P1/P2 defects related to final regression	Sapient	
16	ENVIRONMENT DATA REQUIREMENTS: Ensure environment data requirements are met for UAT execution	ASR/Sapient	
17	ENVIRONMENT IMPACT PLAN: Develop a plan to address environment impacts during UAT duration e.g. Salesforce upgrades	Sapient	
18	UAT SUPPORT RESOURCES: Identification and allocation of the required ASR and Contractor resources to support UAT activities (Contractor/ASR)	Sapient/ASR	
19	DEFECT MANAGEMENT PLAN: Development of the defect resolution management plan	Sapient	
20	DEFECT MANAGEMENT PLAN: Review and acceptance of the defect management plan	ASR	
#	EXIT CRITERIA	OWNER	

1	<p>P1/P2 DEFECTS: The requirements for release from UAT are zero Priority 1 and zero Priority 2 identified defects. The ASR Project Manager, ASR Product Owners, and Contractor Project Managers will meet and mutually agree on an acceptable level of Priority 3 defects in order to move forward. Defect levels of priority are as defined above</p>	Sapient	
2	<p>ASR SIGN-OFF: All known problems are to be reviewed by ASR Project Manager, ASR Product Owner and any additionally designated staff. Supporting materials such as release notes, user manuals, and training manuals shall be in final form and shall also been verified by the Contractor's quality assurance or other appropriate reviewers. Customer support (if applicable) shall be fully prepared to support the product at this point</p>	ASR	
3	<p>REPORT OF OPEN ISSUES: Sapient shall also prepare a report detailing any remaining defects of all severities and the expected impacts of each, and deliver the report at the same time as the presentation. ASR will review the results and approve or reject the completion of the UAT phase.</p>	Sapient	

**Go/No Go Criteria
Phase 2 – Release 1
FINAL – March 30, 2023**

Criteria	Sign Off Owner	Expected Sign Off Date	Status	Criteria Met	Deliverable Acceptance Criteria
Application Readiness					
1. UAT Passed with No P1, P2 and acceptable P3	Chris Connie	TBD			No P1, P2 and acceptable P3 in the Functional, Integration and Data Migration programs
2. Confirmation of SMART-TaxSys integration tested and approved	Chris Connie Jordyn	TBD			No P1, P2 and acceptable P3 in the integration test results
3. Data Migrated, Data Reconciled and Validated (includes data cleanup)	Chris Connie Dana Inna	TBD			ASR approved data migrated and reconciled in Datamig. For example, when ASR runs a Volume Report it matches AS400. If there are deltas, ASR is able to explain it and is OK with it.
4. Non-Functional Requirements Tested and Approved	Sean	TBD			Sapient provides evidence of satisfying Non-Functional requirements from a testing and RTM perspective. Non-Functional requirements that require testing will be mutually agreed to by PS and ASR.
5. SMART Reports Tested and Approved by ASR	Chris Connie Dana	TBD			ASR reports are satisfied – ability to run standard reports and create ad hoc reports as mutually agreed to.
6. Ability to Shut Down EZ Access	Sean Chris Connie Dana Megan	TBD			EZ Access will be read only. EZ Access is not needed for doing ASR business and will be done in SMART

Criteria	Sign Off Owner	Expected Sign Off Date	Status	Criteria Met	Deliverable Acceptance Criteria
7. Approval of Cut Over Plan and UAT cutover test.	Chris Connie Dana Megan Simone Bill	TBD			Cutover plan has been tested (dry run) and approved by ASR. Note: The dry run will be done as part of preparing our UAT environment.
8. Approved RTM	Chris Connie Dana Megan Simone Sean Bill Wendy	TBD			ASR approves RTM for Phase 2, Release 1. ASR approves what is outstanding in RTM. The RTM format will be in alignment with our SOW and include the following information: <ol style="list-style-type: none"> 1. Requirement (Template D) 2. EPIC 3. User Stories 4. Test Cases
9. ASR Sign Off on QA Regression Test Results	Chris Connie Dana	TBD	.		ASR will review and approve QA Regression test results.
11. Disaster recovery plan documented and tested successfully	Sean Bill				ASR will successfully execute the Disaster Recovery plan with the support of Sapien.
Maintenance and Operations Readiness					
1. Trouble Shooting Guide	Sean Bill Wendy				Confirm trouble shooting documentation is sufficient.
2. M & O Staffing Plan	Simone Sean Bill	TBD			Confirm M & O Staff Plan has been documented per SOW

Organizational Readiness					
User Guide (End Users)					
1. Technical Support Guide	Sean Bill	TBD			Confirm technical support material satisfies SOW requirements (e.g., System installation and administration manual, administrative manual, etc.).
2. Train the Trainer Trained	Chris Connie Megan Simone	TBD			ASR Trainers fully trained as per the TTT plan / Curriculum defined and agreed by ASR/PS. Note: TTX CON staff will be trained on the appropriate functions in SMART.
3. IT Support Staff Trained	Sean Bill	TBD			IT Support staff fully trained as per the TT plan / Curriculum defined and agreed by ASR/PS.
4. Deployment Bill of Materials	Sean Bill	TBD			Confirm Deployment Bill of Material as defined in SOW completed and approved by ASR.
5. User Guides	Cecilia Connie Chris	TBD			<ul style="list-style-type: none"> Confirm User Guides completed and approved by ASR Confirm Work arounds full documented and approved by ASR
6. System Implementation Strategy Document	Sean Bill	TBD			Confirm the System Implementation Strategy document completed and approved by ASR.
7. Other:					
a. Contingency Plan	Sean Bill Simone	TBD			Confirm contingency plan has been completed and approved by ASR.
b. Split Warranty Plan	Simone Megan	TBD			Sprint warranty plan approved.

Appendix C List of Remaining Phase 1.x, Phase 2.0 and Phase 2.x Requirements

Remaining Phase 1.x Stories as of January 21, 2023

Status (Multiple Items)

Note: The appendix does not represent an exhaustive list as stories continue to be added in accordance with Exhibit 6. Requirements

Row Labels	Count of Issue Type	Sum of Story Points
Integration, Data Migration & Infra	1	5
Phase 1.x	1	5
Platform	57	501
Phase 1.x	57	501
TBD	4	-
Phase 1.x	4	-
Grand Total	62	506

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38230	Penalties for audit adjustment cases should be copied f	High	Backlog	12/29/2022 12:29	Phase 1.x	ASR-2054	TBD	
Story	ASR-24050	Convert Form 576-D Vessel Statement VIP Form to a Scr	Medium	Backlog	2/7/2022 21:03	Phase 1.x		TBD	
Story	ASR-24049	Convert Form 571-STR Short-term Rental Statement VIP	Medium	Backlog	2/7/2022 21:02	Phase 1.x		TBD	
Story	ASR-24048	Convert Form 571-R Apartment Statement VIP Form to a	Medium	Backlog	2/7/2022 20:59	Phase 1.x		TBD	
Story	ASR-38925	Refactor ASR-1549: Update Property Roll Code for BPP	Medium	Business Analysis	1/20/2023 16:03	Phase 1.x	ASR-2048	Platform	
Story	ASR-38722	Display Rework Button on Revision of Rejected Audit Pa	High	Ready for Internal Test	1/13/2023 10:13	Phase 1.x	ASR-836	Platform	5
Story	ASR-38579	Generate Closeout Escape Notice Letter for Manual crea	Medium	Backlog	1/11/2023 9:59	Phase 1.x	ASR-2056	Platform	13
Story	ASR-38343	Allow Vessel owner to Update Email Address from Porta	Medium	Backlog	1/4/2023 11:36	Phase 1.x	ASR-831	Platform	
Story	ASR-36706	Placeholder- New Document Type of Supporting Docum	Medium	Business Analysis	11/21/2022 9:38	Phase 1.x	ASR-907	Platform	
Story	ASR-36420	Add a Threshold Value Field in Roll Year Object to Only G	High	Business Analysis	11/14/2022 19:51	Phase 1.x	ASR-858	Platform	
Story	ASR-13581	Send Assessment details to Taxpayer (Mass Generation)	Medium	Business Analysis	4/27/2021 10:52	Phase 1.x	ASR-1807	Platform	21
Story	ASR-13530	Translation on Community Portal	Medium	Business Analysis	4/22/2021 14:23	Phase 1.x	ASR-833	Platform	
Story	ASR-12364	Add restrictions & alerts for deleting records	High	Backlog	3/4/2021 10:28	Phase 1.x	ASR-1881	Platform	13
Story	ASR-11694	Prevent Document Generation Request for Email if Email	Medium	Backlog	1/4/2021 10:54	Phase 1.x	ASR-2052	Platform	
Story	ASR-11185	Auto-update Accounts and Properties using Mismatch R	Medium	Business Analysis	11/18/2020 12:25	Phase 1.x	ASR-833	Platform	
Story	ASR-10672	Phase 2.0 - User Interface Updates - Platform	Medium	In Progress	10/6/2020 13:52	Phase 1.x	ASR-833	Platform	34
Story	ASR-9945	Submit 571L (and the associated Billboard fields) in Com	Low	Business Analysis	8/27/2020 14:08	Phase 1.x	ASR-833	Platform	0
Story	ASR-9079	Restrict Location City to San Francisco	High	In Progress	7/10/2020 9:50	Phase 1.x	ASR-833	Platform	8
Story	ASR-9066	Enforce Unique Assessment Line Items	Low	Backlog	7/9/2020 14:43	Phase 1.x	ASR-1807	Platform	13
Story	ASR-9013	Require Specific Phone Format	Medium	Design	7/8/2020 14:18	Phase 1.x	ASR-833	Platform	8
Story	ASR-8781	Create only one Assessment line Item for Supplies and C	High	Backlog	6/26/2020 10:39	Phase 1.x	ASR-833	Platform	8
Story	ASR-8439	Compare Property Costs Across Years in 571-R and 571-	Medium	Business Analysis	6/8/2020 12:35	Phase 1.x	ASR-833	Platform	21
Story	ASR-8200	Provide Statements for Archiving in OnBase (Flow 1)	Medium	Blocked	5/27/2020 20:48	Phase 1.x	ASR-834	Platform	13
Story	ASR-7859	Notice to File 571-L (Translated)	Medium	Backlog	5/1/2020 16:40	Phase 1.x	ASR-832	Platform	13
Story	ASR-7858	Direct Bill and Low Value Exemption Notice - Business (T	Medium	Backlog	5/1/2020 16:38	Phase 1.x	ASR-832	Platform	13
Story	ASR-7444	Mass Generation of Barcodes for BPP/Vessel Properties	Medium	Backlog	4/2/2020 12:42	Phase 1.x	ASR-1039	Platform	5
Story	ASR-5661	Choose Contact Preferences	Low	Business Analysis	11/22/2019 15:01	Phase 1.x	ASR-24226	Platform	3
Story	ASR-4399	Upload Landlord Report in Community	Medium	Backlog	9/16/2019 10:55	Phase 1.x	ASR-831	Platform	13
Story	ASR-4374	Smartcomm Print Screen Functionality	Medium	Business Analysis	9/12/2019 9:25	Phase 1.x	ASR-832	Platform	
Story	ASR-4333	Generate Depreciation Factor w/Billboards, all depreciat	Medium	Business Analysis	9/9/2019 14:38	Phase 1.x	ASR-1807	Platform	8
Story	ASR-4330	Select Predetermined Useful Life for Billboards and Asse	Medium	Business Analysis	9/9/2019 13:05	Phase 1.x	ASR-1807	Platform	13
Story	ASR-4207	Select Predetermined Useful Life for Billboards and Asse	Medium	Business Analysis	9/4/2019 10:14	Phase 1.x	ASR-1807	Platform	13
Story	ASR-4205	Create Caltrans Payment Schedule	Medium	Business Analysis	9/4/2019 9:21	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3810	Mass Change in Valuation [PENDING]	Low	Business Analysis	7/24/2019 10:44	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3809	Mass Change in Ownership for Property Records (Billboa	Low	Business Analysis	7/24/2019 10:43	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3547	Current Year Cost Calculation (Billboards)	Medium	Business Analysis	7/12/2019 14:15	Phase 1.x	ASR-1807	Platform	8
Story	ASR-3546	Base Year Cost Calculation (Billboards)	Medium	Business Analysis	7/12/2019 14:06	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3535	Determine if Other Assets Need Review (Phase 2)	Medium	Business Analysis	7/11/2019 14:58	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3534	Select Costs from Caltran Payment	Medium	Business Analysis	7/11/2019 14:40	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3528	Select Lower Total Value (Billboards)	Medium	Business Analysis	7/11/2019 13:42	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3303	Set Base Year for Billboards	Low	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3296	Calculate and Display Billboard Final Summed Value (Ph	High	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3294	Identify Non-Billboard Properties? (Phase 2)	Low	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	5
Story	ASR-3293	Determine if Property is a Billboard	Low	Business Analysis	6/21/2019 10:44	Phase 1.x	ASR-1807	Platform	13
Story	ASR-3219	In Case Assessment build Vessels Comparables to view	High	Backlog	6/21/2019 9:34	Phase 1.x	ASR-1808	Platform	13
Story	ASR-2989	Identify any Bounced Emails	Low	Backlog	6/14/2019 13:51	Phase 1.x	ASR-833	Platform	3
Story	ASR-2607	Review and Calculate Vessel Valuation Using Comparabl	High	Business Analysis	5/28/2019 19:19	Phase 1.x	ASR-1808	Platform	13
Story	ASR-2598	Select and Adjust Vessel Comparables	Medium	Business Analysis	5/28/2019 19:06	Phase 1.x	ASR-1808	Platform	5
Story	ASR-2245	Receive Agent Registration Email	Low	Business Analysis	5/6/2019 13:08	Phase 1.x	ASR-833	Platform	5
Story	ASR-1612	Add Comparable Characteristics For Marine Comparable	Medium	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-1808	Platform	13
Story	ASR-1611	View Values for Comparable Vessels	High	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-1808	Platform	5
Story	ASR-1598	Route Customer Service Requests to Auditor	Low	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-32944	Platform	3
Story	ASR-1571	Prompt Agent to Register to Community	Medium	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-833	Platform	13
Story	ASR-1570	Provide Authorization Information - Agent	High	Business Analysis	3/19/2019 23:31	Phase 1.x	ASR-833	Platform	5
Story	ASR-1404	Select Properties for Landlord Report Request (Phase 2)	High	Business Analysis	3/18/2019 17:11	Phase 1.x	ASR-831	Platform	13
Story	ASR-1158	Assignment Issues and automatically reassign Audit Pack	Medium	Backlog	3/13/2019 16:04	Phase 1.x	ASR-836	Platform	8
Story	ASR-1145	Receive Statute Expiration Warning	High	Backlog	3/13/2019 16:04	Phase 1.x	ASR-837	Platform	5
Story	ASR-1144	Generate Statute of Limitations Waiver- Mass Approval	Medium	Business Analysis	3/13/2019 16:04	Phase 1.x	ASR-837	Platform	13
Story	ASR-1142	Assign Businesses to Specific Auditors- OmniChannel	Low	Business Analysis	3/13/2019 16:04	Phase 1.x	ASR-32944	Platform	1
Story	ASR-1139	Receive Notification - Taxpayer Response to Audit Notifi	Medium	Business Analysis	3/13/2019 16:04	Phase 1.x	ASR-836	Platform	13
Story	ASR-1135	Select Businesses for Audit Using Business Rules (System	Medium	Backlog	3/13/2019 16:04	Phase 1.x	ASR-836	Platform	21
Story	ASR-10818	OnBase Integration : Update Integration layer to provide	Medium	Blocked	10/20/2020 14:36	Phase 1.x	ASR-834	Integration, Data Migra	5

Appendix C
List of Remaining Stories
PHASE 2.0

Remaining Phase 2.0 Stories as of January 21, 2023

Note: The appendix does not represent an exhaustive list as stories continue to be added in accordance with Exhibit 6. Requirements

Status (Multiple Items)

Row Labels	Count of Issue Type	Sum of Story Points
Integration, Data Migration & Infra	8	59
Phase 2.0	8	59
Platform	307	2,646
Phase 2 Release 2.x;Phase 2.0	9	-
Phase 2.0	298	2,646

		Grand Total			315			2,705		
Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points	
Story	ASR-38889	Processing Any Other Event: Subsequent	Critical	Business Analysis	1/19/2023 15:32	Phase 2.0	ASR-2050	Platform		
Story	ASR-38885	Generate Quarterly Report With Situs Ad	Medium	Business Analysis	1/19/2023 15:14	Phase 2.0	ASR-1818	Platform	8	
Story	ASR-38881	Manually enter Primary situs address in S	Medium	Business Analysis	1/19/2023 14:55	Phase 2.0	ASR-1818	Platform	13	
Story	ASR-38874	Choose Primary situs address in SMART	Medium	Business Analysis	1/19/2023 14:11	Phase 2.0	ASR-1818	Platform	13	
Story	ASR-38796	Process PMGT with Multiple Parent APNs	Medium	Business Analysis	1/17/2023 15:30	Phase 2.0	ASR-853	Platform	5	
Story	ASR-38730	Creating Prop 19 Status field	Medium	Design	1/13/2023 12:11	Phase 2.0	ASR-24483	Platform		
Story	ASR-38729	Submit by TU for Prop 19	Medium	Business Analysis	1/13/2023 12:03	Phase 2.0	ASR-24483	Platform		
Story	ASR-38728	Adding button for Validating Prop 19	Medium	Design	1/13/2023 12:00	Phase 2.0	ASR-24483	Platform		
Story	ASR-38727	Processing Grantor/ Grantee for Prop 19	Medium	Business Analysis	1/13/2023 11:56	Phase 2.0	ASR-24483	Platform		
Story	ASR-38726	Capture all the codes used for Prop 19	Medium	Design Review	1/13/2023 11:45	Phase 2.0	ASR-24483	Platform		
Story	ASR-38695	Generate Spreadsheet - DC (Retail) | Sale	Medium	CCSF Final Review	1/13/2023 0:23	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38694	Generate Spreadsheet - DC (Retail) | Java	Medium	Business Analysis	1/13/2023 0:18	Phase 2.0	ASR-1032	Platform	1	
Story	ASR-38693	Generate Spreadsheet - DC (Industrial) | J	Medium	Backlog	1/13/2023 0:11	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38692	Generate Spreadsheet - DC (Residential) |	Medium	Backlog	1/13/2023 0:05	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38691	Generate Spreadsheet - DC (Office) | Java	Medium	Backlog	1/12/2023 23:59	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38689	Generate Spreadsheet - DC (Mixed Use) |	Medium	Backlog	1/12/2023 23:49	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38687	Generate Spreadsheet Java Development	Medium	Backlog	1/12/2023 23:32	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38684	Generate Spreadsheet - DC (Industrial) | S	Medium	Backlog	1/12/2023 23:11	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38678	Generate Spreadsheet - DC (Residential) |	Medium	Backlog	1/12/2023 22:38	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38676	Generate Spreadsheet - DC (Office) | Sale	Medium	Backlog	1/12/2023 22:26	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38666	Generate Spreadsheet - DC (Mixed Use) |	Medium	Backlog	1/12/2023 13:52	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38665	Generate Spreadsheet - DCF (Hotel) | Sale	Medium	Backlog	1/12/2023 13:31	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38664	Generate Spreadsheet - DC (Retail) | Expo	Medium	Backlog	1/12/2023 13:12	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38663	Generate Spreadsheet - DC (Industrial) | G	Medium	Backlog	1/12/2023 13:02	Phase 2.0	ASR-1032	Platform	1	
Story	ASR-38662	Generate Spreadsheet - DC (Residential) |	Medium	Backlog	1/12/2023 12:51	Phase 2.0	ASR-1032	Platform	1	
Story	ASR-38659	Generate Spreadsheet - DC (Office) | Expo	Medium	Backlog	1/12/2023 10:58	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38656	Generate Spreadsheet - DC (Mixed Use) |	Medium	Backlog	1/12/2023 10:36	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38655	Generate Spreadsheet - DCF (Hotel) | Exp	Medium	Backlog	1/12/2023 10:00	Phase 2.0	ASR-1032	Platform	8	
Story	ASR-38654	New Screen - Regression Valuation Output	Medium	Business Analysis	1/12/2023 9:23	Phase 2.0	ASR-24482	Platform	13	
Story	ASR-38653	Ingest Regression Valuation Output into S	Medium	Business Analysis	1/12/2023 9:21	Phase 2.0	ASR-24482	Platform	13	
Story	ASR-38607	Stop creating DGR (Document Generation)	Critical	Backlog	1/11/2023 14:47	Phase 2.0	ASR-34958	Platform	8	
Story	ASR-38589	Purge Old Notice Tracker Records for NAV	High	Backlog	1/11/2023 14:13	Phase 2.0	ASR-34958	Platform	8	
Story	ASR-38584	UI Story for VR and FMV	Medium	Business Analysis	1/11/2023 11:42	Phase 2.0	ASR-24483	Platform		
Story	ASR-38583	UI Story, capturing and documenting layo	Medium	Business Analysis	1/11/2023 11:36	Phase 2.0	ASR-24483	Platform		
Story	ASR-38581	Calculate & Apply Penalty - RTC 214.13	Critical	Business Analysis	1/11/2023 11:17	Phase 2.0	ASR-2050	Platform	5	
Story	ASR-38562	General Updates for TIC	High	Requirements Review	1/10/2023 16:24	Phase 2.0	ASR-873	Platform	13	
Story	ASR-38548	Update Logic for CIO PE's on PMGT record	High	Business Analysis	1/9/2023 17:55	Phase 2.0	ASR-853	Platform	8	
Story	ASR-38542	Fix to Determine Effect of Transaction on	Medium	Ready for Internal Testing	1/9/2023 13:49	Phase 2.0	ASR-847	Platform	8	
Story	ASR-38539	Do Not Auto-Approve Homeowner Exempt	Medium	Backlog	1/9/2023 13:20	Phase 2.0	ASR-846	Platform	8	
Story	ASR-38536	Informal Adjustment: Other Appeals (TU,	Medium	Business Analysis	1/9/2023 10:43	Phase 2.0	ASR-828	Platform	8	
Story	ASR-38527	Negative Supps - Cannot have Exemption	Critical	Business Analysis	1/6/2023 15:22	Phase 2.0	ASR-2050	Platform	13	
Story	ASR-38510	Assessment Impacts - Supplemental Appe	Critical	Business Analysis	1/5/2023 17:56	Phase 2.0	ASR-2050	Platform	34	
Story	ASR-38504	Generate & Send Historical Condo Output	Medium	Business Analysis	1/5/2023 12:46	Phase 2.0	ASR-24482	Platform	13	
Story	ASR-38503	Generate & Send Pending Condo Output	Medium	Backlog	1/5/2023 12:44	Phase 2.0	ASR-24482	Platform	13	
Story	ASR-38500	Informal Adjustment: Escape Appeal (RP-	High	CCSF Final Review	1/5/2023 10:20	Phase 2.0	ASR-828	Platform	21	
Story	ASR-38345	Reinstate DVET when TU Reopens a Trans	Medium	Ready for Internal Testing	1/4/2023 12:45	Phase 2.0	ASR-847	Platform	8	
Story	ASR-38295	Create Customer Service component for R	Medium	In Progress	1/3/2023 11:45	Phase 2.0	ASR-24226	Platform	8	
Story	ASR-38211	Update to 268-A - Submit Public School E	Medium	CCSF Final Review	12/28/2022 13:18	Phase 2.0	ASR-24226	Platform	8	
Story	ASR-38209	Update to 265 - Submit Cemetery Exempt	Medium	Business Analysis	12/28/2022 13:16	Phase 2.0	ASR-24226	Platform	13	
Story	ASR-38208	Update to 269-AH - Submit Claim for Vete	Medium	CCSF Final Review	12/28/2022 13:06	Phase 2.0	ASR-24226	Platform	8	
Story	ASR-38207	Update to 263-C Submit Church Lessor's E	Medium	CCSF Final Review	12/28/2022 12:53	Phase 2.0	ASR-24226	Platform	8	
Story	ASR-38206	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:24	Phase 2.0	ASR-1032	Platform	3	
Story	ASR-38205	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:24	Phase 2.0	ASR-1032	Platform	3	
Story	ASR-38204	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:23	Phase 2.0	ASR-1032	Platform	3	
Story	ASR-38203	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:22	Phase 2.0	ASR-1032	Platform	3	
Story	ASR-38202	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/28/2022 12:19	Phase 2.0	ASR-1032	Platform	3	
Story	ASR-38184	Exemptions - Impacts of another PE	Critical	Backlog	12/27/2022 12:51	Phase 2.0	ASR-2050	Platform	13	
Story	ASR-37806	Create Work Item from Prop. 19 Stateme	High	Business Analysis	12/14/2022 10:56	Phase 2.0	ASR-24483	Platform	8	
Story	ASR-37764	Save and Submit for Review | Direct Cap	Medium	Backlog	12/13/2022 11:48	Phase 2.0	ASR-1032	Platform	13	
Story	ASR-37763	Save and Submit for Review | Direct Cap	Medium	Backlog	12/13/2022 11:47	Phase 2.0	ASR-1032	Platform	13	
Story	ASR-37762	Save and Submit for Review | Direct Cap	Medium	Backlog	12/13/2022 11:47	Phase 2.0	ASR-1032	Platform	13	
Story	ASR-37761	Save and Submit for Review | Direct Cap	Medium	Backlog	12/13/2022 11:47	Phase 2.0	ASR-1032	Platform	13	
Story	ASR-37734	Informal Adjustment: Supplemental Appe	Medium	Ready for Internal Testing	12/12/2022 13:34	Phase 2.0	ASR-828	Platform	34	
Story	ASR-37727	Indicate Primary Assessee on RP & PI Ass	High	Blocked	12/12/2022 11:10	Phase 2.0	ASR-2050	Platform	8	
Story	ASR-37640	Update FBYU Logic For PI Declining Term	Medium	Design	12/8/2022 14:59	Phase 2.0	ASR-1812	Platform	5	

Appendix C
List of Remaining Stories
PHASE 2.0

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track
Story	ASR-37612	Prop 19-V (Transfer of Base Year Value to	High	In Progress	12/7/2022 18:08	Phase 2.0	ASR-24483	Platform
Story	ASR-37610	Prop 19-P (Transfer Between Parent and	High	Ready for Internal Testing	12/7/2022 18:03	Phase 2.0	ASR-24483	Platform
Story	ASR-37606	Prop 19-D (Transfer of Base Year Value, S	High	Ready for Internal Testing	12/7/2022 16:35	Phase 2.0	ASR-24483	Platform
Story	ASR-37562	Prop 19-B (Transfer of Base Year Value, A	High	In Progress	12/6/2022 12:17	Phase 2.0	ASR-24483	Platform
Story	ASR-37525	Valuation Method for Direct Cap (DC)	Medium	Backlog	12/5/2022 12:57	Phase 2.0	ASR-1032	Platform
Story	ASR-37522	Generate Spreadsheet by clicking on Sub	Medium	Backlog	12/5/2022 11:17	Phase 2.0	ASR-1032	Platform
Story	ASR-37521	Save and Submit for Review | Direct Cap -	Medium	Backlog	12/5/2022 11:14	Phase 2.0	ASR-1032	Platform
Story	ASR-37469	System Moves Mapping Doc PE to Closed	High	Business Analysis	12/2/2022 7:46	Phase 2.0	ASR-853	Platform
Story	ASR-37422	Adding fields in (NAV) Letter - RP Properti	Medium	Ready for Internal Testing	12/1/2022 10:45	Phase 2.0	ASR-34958	Platform
Story	ASR-37400	Notice of value Reduction (with Open App	Medium	Business Analysis	11/30/2022 12:09	Phase 2.0	ASR-827	Platform
Story	ASR-37338	Updates for Handling Penalties- RP/PI	High	Business Analysis	11/29/2022 10:22	Phase 2.0	ASR-1881	Platform
Story	ASR-37320	Create Mills Act PEs for Properties with Ex	High	Business Analysis	11/28/2022 19:17	Phase 2.0	ASR-869	Platform
Story	ASR-37112	Request Informal Review of Reassessment	High	Design	11/23/2022 15:29	Phase 2.0	ASR-24226	Platform
Story	ASR-37111	Request Informal Review/Prop 8 (Online)	High	Design	11/23/2022 15:22	Phase 2.0	ASR-24226	Platform
Story	ASR-36767	RP Appraiser can change status field on c	High	Requirements Review	11/22/2022 17:02	Phase 2.0	ASR-25963	Platform
Story	ASR-36765	Read access to all the SMART object for al	High	Business Analysis	11/22/2022 16:28	Phase 2.0	ASR-1881	Platform
Story	ASR-36764	Remove Property Address Validation on a	High	Business Analysis	11/22/2022 16:13	Phase 2.0	ASR-853	Platform
Story	ASR-36760	Display Parent Ownership and "0" values	High	Business Analysis	11/22/2022 14:23	Phase 2.0	ASR-853	Platform
Story	ASR-36759	Update to Monitor System For Required I	Medium	Business Analysis	11/22/2022 12:49	Phase 2.0	ASR-853	Platform
Story	ASR-36664	Community Access for PI Properties	High	Requirements Review	11/20/2022 19:34	Phase 2.0	ASR-24226	Platform
Story	ASR-36642	Update for Adjust Penalty on Enrolled No	Critical	Requirements Review	11/18/2022 9:52	Phase 2.0	ASR-2050	Platform
Story	ASR-36539	Manage HOX Exemptions for Unsegregate	Medium	Design Review	11/16/2022 19:07	Phase 2.0	ASR-846	Platform
Story	ASR-36531	Prior Event Mills Act with Subsequent Eve	Medium	Business Analysis	11/16/2022 14:37	Phase 2.0	ASR-869	Platform
Story	ASR-36461	Identify records whose ownership end da	Medium	Business Analysis	11/15/2022 15:46	Phase 2.0	ASR-873	Platform
Story	ASR-36418	File Exemptions Tab on Property Detail Pa	Medium	Requirements Review	11/14/2022 15:33	Phase 2.0	ASR-24226	Platform
Story	ASR-36351	Update property characteristics Pt 6	Medium	Business Analysis	11/10/2022 14:27	Phase 2.0	ASR-860	Platform
Story	ASR-36035	Populate Is Open Appeal check box on Ac	Medium	Business Analysis	11/9/2022 12:07	Phase 2.0	ASR-827	Platform
Story	ASR-35854	Cancel All Assessments with same Assess	Medium	Business Analysis	11/8/2022 6:18	Phase 2.0	ASR-2050	Platform
Story	ASR-35307	Other Filings Tab on Property Detail Page	Medium	Design Review	10/31/2022 17:47	Phase 2.0	ASR-24226	Platform
Story	ASR-35306	File Exclusions Tab on Property Detail Pag	Medium	Design Review	10/31/2022 17:44	Phase 2.0	ASR-24226	Platform
Story	ASR-35115	Comparable Analysis Matching properties	Medium	Ready for Internal Testing	10/26/2022 14:24	Phase 2.0	ASR-1032	Platform
Story	ASR-35076	64 - Submit Seismic Exclusion - Online	Medium	CCSF Final Review	10/24/2022 10:26	Phase 2.0	ASR-24226	Platform
Story	ASR-35062	Update Logic for Calamity Values	Critical	Backlog	10/21/2022 14:57	Phase 2.0	ASR-2050	Platform
Story	ASR-35061	OnBase - Tracking Information for Taxpay	Medium	Business Analysis	10/21/2022 14:47	Phase 2.0	ASR-34958	Platform
Story	ASR-34982	Submit Builder's Exclusion via Online	Medium	CCSF Final Review	10/19/2022 11:29	Phase 2.0	ASR-24226	Platform
Story	ASR-34946	Display search criteria filters (Operating S	Medium	Ready for Internal Testing	10/18/2022 20:13	Phase 2.0	ASR-1032	Platform
Story	ASR-34945	Calculate initial indicated values _Hotel (	Medium	Business Analysis	10/18/2022 19:54	Phase 2.0	ASR-1032	Platform
Story	ASR-34938	View and Submit Lien Date or Completed	Medium	Design	10/18/2022 11:25	Phase 2.0	ASR-24226	Platform
Story	ASR-34931	Updates to Cost Approach	Medium	Design Review	10/18/2022 10:06	Phase 2.0	ASR-1033	Platform
Story	ASR-34911	Board Decision Letter-(AAB)	Medium	Business Analysis	10/17/2022 23:54	Phase 2.0	ASR-830	Platform
Story	ASR-34899	Update Lease Management Records	Medium	Ready for Internal Testing	10/17/2022 14:35	Phase 2.0	ASR-1813	Platform
Story	ASR-34898	Adjusting Legacy Assessments with Exem	Medium	Business Analysis	10/17/2022 12:40	Phase 2.0	ASR-2050	Platform
Story	ASR-34712	Assessment Impacts - Informal Review of	Critical	Backlog	10/13/2022 13:04	Phase 2.0	ASR-2050	Platform
Story	ASR-34584	Calculate & Apply Homeowners' Exempti	Medium	Design	10/10/2022 10:28	Phase 2.0	ASR-846	Platform
Story	ASR-34558	Parcel Management UI Updates	Medium	Business Analysis	10/9/2022 20:11	Phase 2.0	ASR-853	Platform
Story	ASR-34508	Integration - AAB (Assessment and Appea	Medium	Business Analysis	10/6/2022 12:39	Phase 2.0	ASR-830	Platform
Story	ASR-34387	Update Logic for CIO PE's on PMGT record	Medium	Business Analysis	10/3/2022 17:15	Phase 2.0	ASR-853	Platform
Story	ASR-34381	"No Intention to Split" Box Only for PMGT	Medium	Business Analysis	10/3/2022 16:29	Phase 2.0	ASR-853	Platform
Story	ASR-34314	Update Cancel Assessment Status When F	Critical	Business Analysis	9/30/2022 6:48	Phase 2.0	ASR-2050	Platform
Story	ASR-34299	Access to Parcel Management Cases to Pu	Medium	CCSF Final Review	9/29/2022 12:30	Phase 2.0	ASR-25963	Platform
Story	ASR-34278	Specify order of categories for default his	Medium	Business Analysis	9/28/2022 10:57	Phase 2.0	ASR-1032	Platform
Story	ASR-34277	Require Approval for Cancellations of NC/	Medium	Business Analysis	9/28/2022 10:57	Phase 2.0	ASR-2050	Platform
Story	ASR-34272	Adjust Transaction OBY Record Creation U	Medium	Backlog	9/28/2022 10:15	Phase 2.0	ASR-2050	Platform
Story	ASR-34124	Adjust BYV for Partial Demolition - Multip	Medium	Requirements Review	9/22/2022 22:41	Phase 2.0	ASR-863	Platform
Story	ASR-33985	Refactoring for Secured BPP Assessments	Critical	Backlog	9/19/2022 15:30	Phase 2.0	ASR-2050	Platform
Story	ASR-33934	System should provide capability of select	Medium	Business Analysis	9/16/2022 12:42	Phase 2.0	ASR-828	Platform
Story	ASR-33901	Updates for Special HOX Handling for TICs	Medium	Design	9/15/2022 11:43	Phase 2.0	ASR-846	Platform
Story	ASR-33854	System receives PH date from AAB and nd	Medium	Business Analysis	9/14/2022 13:01	Phase 2.0	ASR-829	Platform
Story	ASR-33853	System records Info on PHC approval.	Medium	Business Analysis	9/14/2022 12:56	Phase 2.0	ASR-829	Platform
Story	ASR-33808	Assessment Impacts - Informal Review of	Medium	Business Analysis	9/13/2022 13:22	Phase 2.0	ASR-2050	Platform
Story	ASR-33603	Transaction Cancellation OBY & Ownersh	High	Requirements Review	9/7/2022 10:44	Phase 2.0	ASR-2050	Platform
Story	ASR-33410	Apply 270 Penalty and Interest after Appr	Critical	Business Analysis	8/31/2022 11:11	Phase 2.0	ASR-2050	Platform
Story	ASR-33360	Reports & List Views - PI	Medium	Business Analysis	8/29/2022 18:45	Phase 2.0	ASR-1812	Platform
Story	ASR-33359	Setup Reports & List Views for Mapping S	Low	Business Analysis	8/29/2022 18:38	Phase 2.0	ASR-852	Platform
Story	ASR-33357	Modify - Add per sq. ft. for residential ten	Medium	Requirements Review	8/29/2022 17:22	Phase 2.0	ASR-1032	Platform
Story	ASR-33341	Reports & List Views - Other RP (Workloa	Medium	Requirements Review	8/29/2022 12:24	Phase 2.0	ASR-863	Platform
Story	ASR-33156	Update Roll (Assessments) for Cancelled	Low	Business Analysis	8/22/2022 9:48	Phase 2.0	ASR-2050	Platform
Story	ASR-33155	Processing CIO or Completed NC: Subseq	High	Requirements Review	8/22/2022 9:20	Phase 2.0	ASR-2050	Platform
Story	ASR-32704	Automate Applying the Assessment Penal	High	Design	8/11/2022 20:07	Phase 2.0	ASR-869	Platform
Story	ASR-32691	Identify Properties for Annual Prop 8 Revi	Medium	Business Analysis	8/11/2022 10:03	Phase 2.0	ASR-872	Platform
Story	ASR-32464	Manual Work-Around: Processing Prior P	Critical	Requirements Review	8/5/2022 6:38	Phase 2.0	ASR-2050	Platform
Story	ASR-32406	Processing Prior Partial CIO: Subsequent	High	Requirements Review	8/4/2022 6:25	Phase 2.0	ASR-873	Platform
Story	ASR-31971	HOLD - Mass Upload Situs Address for Chi	High	Business Analysis	7/22/2022 20:08	Phase 2.0	ASR-853	Platform
Story	ASR-31957	Rearrange order of subject details and ad	Medium	Business Analysis	7/22/2022 12:45	Phase 2.0	ASR-1030	Platform
Story	ASR-30407	Re-Bucket PI Leases	High	Design	6/17/2022 12:17	Phase 2.0	ASR-1813	Platform
Story	ASR-30337	Exception Scenarios for Adjusting Escape	Critical	Business Analysis	6/16/2022 14:27	Phase 2.0	ASR-2050	Platform
Story	ASR-26149	Applying Validations for RTC 482 Non-LE	Critical	Business Analysis	4/11/2022 11:02	Phase 2.0	ASR-2050	Platform
Story	ASR-26033	Maintain land sales database	Medium	Business Analysis	4/6/2022 14:45	Phase 2.0	ASR-1030	Platform

Appendix C
List of Remaining Stories
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Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-25820	Modify - Specify order of categories for d	Medium	Ready for Internal Testing	3/31/2022 11:19	Phase 2.0	ASR-1032	Platform	13
Story	ASR-25748	Use Value from Single Valuation Approac	Medium	Business Analysis	3/30/2022 17:04	Phase 2.0	ASR-2179	Platform	5
Story	ASR-25736	Create task/work item to review master l	High	Business Analysis	3/30/2022 12:38	Phase 2.0	ASR-1812	Platform	8
Story	ASR-25733	Adjusting Value on Legacy Inactive PI Pro	High	Business Analysis	3/30/2022 12:38	Phase 2.0	ASR-1812	Platform	8
Story	ASR-25719	Add/update rent database	Medium	Business Analysis	3/30/2022 9:30	Phase 2.0	ASR-1032	Platform	13
Story	ASR-25676	GoLive | Community | Kiosk Login | Login	Medium	Backlog	3/28/2022 15:23	Phase 2.0	ASR-24225	Platform	3
Story	ASR-25615	Placeholder - Comparables for Land Prop	Medium	Business Analysis	3/25/2022 11:03	Phase 2.0	ASR-1030	Platform	5
Story	ASR-25614	Allow User to do a Land Valuation	Medium	Requirements Review	3/25/2022 11:02	Phase 2.0	ASR-1030	Platform	5
Story	ASR-25452	Update List Views & Related Tabs	Low	Business Analysis	3/22/2022 15:50	Phase 2.0	ASR-2179	Platform	8
Story	ASR-25072	Waiting to test - Issue adjustment/supple	Medium	Requirements Review	3/10/2022 16:06	Phase 2.0	ASR-2050	Platform	13
Story	ASR-25023	Allow Logged In User to Update their Sett	Medium	CCSF Final Review	3/9/2022 12:52	Phase 2.0	ASR-24226	Platform	8
Story	ASR-24964	Calamity Updates - PE, VLU etc.	High	Business Analysis	3/7/2022 12:54	Phase 2.0	ASR-870	Platform	5
Story	ASR-24941	Update Peter Daly Name Convention - Co	High	Ready for Internal Testing	3/4/2022 11:20	Phase 2.0	ASR-1033	Platform	21
Story	ASR-24619	Refine search results in map view (market	Medium	Ready for Internal Testing	2/24/2022 11:53	Phase 2.0	ASR-1032	Platform	13
Story	ASR-24519	Process EAS address records	Medium	Business Analysis	2/22/2022 11:49	Phase 2.0	ASR-1818	Platform	13
Story	ASR-24437	Institutional Exemption - First Filing Proce	Medium	Business Analysis	2/18/2022 10:22	Phase 2.0	ASR-19844	Platform	21
Story	ASR-24410	Request Property Update Tab on Real Pro	Medium	In Progress	2/17/2022 13:54	Phase 2.0	ASR-24226	Platform	8
Story	ASR-24385	Updates for PI Potential Match & Exact M	Medium	Backlog	2/17/2022 10:39	Phase 2.0	ASR-1812	Platform	13
Story	ASR-24310	Upload the PDF for Peter Daly Cost Guide	Medium	Business Analysis	2/15/2022 15:28	Phase 2.0	ASR-1033	Platform	8
Story	ASR-24139	Calculate Cost Approach Values (Non-Pet	High	Business Analysis	2/9/2022 14:38	Phase 2.0	ASR-1033	Platform	21
Story	ASR-24135	Display Taxpayer-Reported Information -	Medium	Business Analysis	2/9/2022 12:18	Phase 2.0	ASR-1033	Platform	13
Story	ASR-23992	Process Foreign Improvements	Medium	Business Analysis	2/4/2022 11:53	Phase 2.0	ASR-1812	Platform	13
Story	ASR-23508	Auto-process Existing Leases with No Cha	Medium	Design	1/24/2022 20:12	Phase 2.0	ASR-1812	Platform	8
Story	ASR-23150	Input vacancy and collection loss	Medium	Business Analysis	1/11/2022 15:21	Phase 2.0	ASR-1032	Platform	8
Story	ASR-23116	Create default historical grid templates (r	Medium	In Progress	1/10/2022 17:45	Phase 2.0	ASR-1032	Platform	8
Story	ASR-22640	Create Default Sales Comp Valuation Grid	Medium	Design	12/17/2021 11:46	Phase 2.0	ASR-1030	Platform	13
Story	ASR-22549	Retired legacy properties BYV to handle d	Medium	Business Analysis	12/13/2021 14:05	Phase 2.0	ASR-860	Platform	8
Story	ASR-22415	Exemptions Update	Medium	Business Analysis	12/7/2021 12:09	Phase 2.0	ASR-19844	Platform	8
Story	ASR-22376	Create Default Sales Comp Valuation Grid	Medium	Blocked	12/6/2021 10:29	Phase 2.0	ASR-1030	Platform	8
Story	ASR-22100	Calamity and Prop8 together in same yea	Medium	Design	11/23/2021 13:23	Phase 2.0	ASR-871	Platform	13
Story	ASR-22014	PLACEHOLDER: Suppress Noticing for BPP	Critical	Business Analysis	11/22/2021 9:12	Phase 2.0	ASR-2054	Platform	13
Story	ASR-21589	Setup Profiles & Homepages for Mapping	Low	Business Analysis	10/27/2021 15:40	Phase 2.0	ASR-852	Platform	8
Story	ASR-21544	Display User-Friendly Info (ex. APN vs Rel	Medium	Requirements Review	10/26/2021 9:13	Phase 2.0	ASR-852	Platform	5
Story	ASR-21260	Automate application of completed NC va	Medium	Business Analysis	10/13/2021 9:18	Phase 2.0	ASR-853	Platform	8
Story	ASR-20527	Close all linked property events/valuation	Medium	Design	10/7/2021 12:52	Phase 2.0	ASR-2179	Platform	8
Story	ASR-20109	Setup Homepages For RP Appraiser, RP Pr	Low	Business Analysis	9/28/2021 19:12	Phase 2.0	ASR-2179	Platform	21
Story	ASR-20036	Profiles and Access for City Departments	Medium	Business Analysis	9/23/2021 1:45	Phase 2.0	ASR-23788	Platform	5
Story	ASR-19902	EPIC ESTIMATE STORY FOR : REF 10.01 E	Medium	Business Analysis	9/15/2021 19:19	Phase 2.0	ASR-1818	Platform	50
Story	ASR-19633	Display Potential Duplicates & Merge - PI	Medium	Requirements Review	8/30/2021 15:07	Phase 2.0	ASR-1813	Platform	5
Story	ASR-19602	Submit Disaster Relief Application Online	Low	CCSF Final Review	8/26/2021 12:31	Phase 2.0	ASR-24226	Platform	8
Story	ASR-19146	OnBase - Notify of Documents from OnBa	Medium	Business Analysis	8/16/2021 14:39	Phase 2.0	ASR-34958	Platform	21
Story	ASR-19015	The number of property unit records shou	Medium	Business Analysis	8/10/2021 10:49	Phase 2.0	ASR-2179	Platform	5
Story	ASR-17491	Manually add PI lease lists into system (m	Medium	Business Analysis	6/30/2021 16:44	Phase 2.0	ASR-1813	Platform	8
Story	ASR-13814	Setup Profiles & Homepages for PI	Low	Business Analysis	5/12/2021 10:17	Phase 2.0	ASR-1813	Platform	8
Story	ASR-13507	Delete Assessments and Revert PVS, OBYS	Critical	Design	4/20/2021 15:07	Phase 2.0	ASR-860	Platform	8
Story	ASR-13444	Analyst Access to SMART System (Securit	Medium	Business Analysis	4/15/2021 10:54	Phase 2.0	ASR-25963	Platform	3
Story	ASR-12496	SMART Access rights for other City depart	Medium	Business Analysis	3/17/2021 13:02	Phase 2.0	ASR-25963	Platform	5
Story	ASR-12152	Determine Statute of limitation for Exemp	Medium	Business Analysis	2/11/2021 16:44	Phase 2.0	ASR-2050	Platform	3
Story	ASR-12044	RP Appraiser Adjusts or Cancels Legacy Pr	Medium	Requirements Review	2/4/2021 9:34	Phase 2.0	ASR-872	Platform	5
Story	ASR-11847	Update Fields per Cost Source Chosen	Medium	Design	1/19/2021 11:34	Phase 2.0	ASR-1033	Platform	8
Story	ASR-11824	Placeholder -- Associate unit(s) and/or ow	Medium	Business Analysis	1/15/2021 18:41	Phase 2.0	ASR-1033	Platform	13
Story	ASR-11717	Allocate FMV Between TIC Units - Update	Medium	Design Review	1/6/2021 11:02	Phase 2.0	ASR-2179	Platform	8
Story	ASR-11590	Respond to New Construction Letter (Har	High	Design	12/22/2020 20:02	Phase 2.0	ASR-24226	Platform	5
Story	ASR-11588	OnBase - Input Taxpayer Response From	Medium	Design	12/22/2020 18:33	Phase 2.0	ASR-34958	Platform	5
Story	ASR-11158	Reinstate HOX when TU Reopens a Transa	Medium	Ready for Internal Testing	11/17/2020 16:51	Phase 2.0	ASR-846	Platform	13
Story	ASR-10875	Indicate Assessment in Informal Review &	Medium	Design	10/27/2020 12:02	Phase 2.0	ASR-24226	Platform	8
Story	ASR-10662	Apply Penalty to Assessment After Enroll	Medium	Business Analysis	10/5/2020 12:32	Phase 2.0	ASR-2050	Platform	5
Story	ASR-9773	Principal Reviews Valuation Report/Packa	Medium	Business Analysis	8/19/2020 12:21	Phase 2.0	ASR-2179	Platform	8
Story	ASR-9764	Reconcile Values from Multiple Valuation	Medium	Design	8/19/2020 12:10	Phase 2.0	ASR-2179	Platform	8
Story	ASR-9763	Display Values from All Valuation Method	Medium	Design	8/19/2020 12:09	Phase 2.0	ASR-2179	Platform	5
Story	ASR-9762	Select Additional Valuation Method	Medium	Design	8/19/2020 12:08	Phase 2.0	ASR-2179	Platform	3
Story	ASR-9731	Process Supplementals for CIOs with Sam	Medium	Business Analysis	8/18/2020 9:59	Phase 2.0	ASR-2050	Platform	13
Story	ASR-9628	Add or Update Customer Service case	Medium	Requirements Review	8/12/2020 10:32	Phase 2.0	ASR-23788	Platform	5
Story	ASR-8886	OnBase - Taxpayer provides requested 44	Medium	Design	7/2/2020 7:01	Phase 2.0	ASR-34958	Platform	8
Story	ASR-8230	OnBase - Send Exemption Notice (Non-BP	Low	Design	6/1/2020 10:17	Phase 2.0	ASR-34958	Platform	5
Story	ASR-6432	Create or Link Cemetery Exemption Prop	Low	Backlog	1/8/2020 7:30	Phase 2.0	ASR-19844	Platform	13
Story	ASR-6400	OnBase - Create Exemptions Notice to Fil	Medium	Design	1/7/2020 15:35	Phase 2.0	ASR-34958	Platform	5
Story	ASR-6364	Calculate Exemption of Leased Property U	Low	Design	1/7/2020 7:52	Phase 2.0	ASR-19844	Platform	5
Story	ASR-6229	EAS Interface - Data Correction Story	High	Business Analysis	12/13/2019 11:27	Phase 2.0	ASR-1818	Platform	13
Story	ASR-6228	EAS Interface - Process Story	High	Design	12/13/2019 11:27	Phase 2.0	ASR-1818	Platform	13
Story	ASR-4884	View History Tracking - Appeals	Medium	Business Analysis	10/18/2019 8:31	Phase 2.0	ASR-1924	Platform	5
Story	ASR-4169	Assign Calamity to BPP	Medium	Design	8/29/2019 12:01	Phase 2.0	ASR-870	Platform	5
Story	ASR-3968	Reports, Dashboards, List Views (Appeals)	Medium	Business Analysis	8/7/2019 17:39	Phase 2.0	ASR-1924	Platform	5
Story	ASR-3806	Calculate & Apply statutes to Affected Ass	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-6266	Platform	8
Story	ASR-3805	Summarize Modifications for Approval	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-6266	Platform	8
Story	ASR-3803	Update Assessment Info based on AAB De	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-6266	Platform	8
Story	ASR-3800	Review & Approve Assessment Modificati	High	Requirements Review	7/24/2019 1:28	Phase 2.0	ASR-1928	Platform	5
Story	ASR-3798	Resolve Issues with Modified Assessment	Critical	Business Analysis	7/24/2019 1:28	Phase 2.0	ASR-1928	Platform	5

Appendix C
List of Remaining Stories
PHASE 2.0

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-3797	Create Assessments Based on AAB Decis	Critical	Design	7/24/2019 1:28	Phase 2.0	ASR-1928	Platform	5
Story	ASR-3767	Update Current/Prior Year RP Assessmen	Critical	Business Analysis	7/18/2019 20:16	Phase 2.0	ASR-2050	Platform	3
Story	ASR-3752	Updates to Handle Subsequent Non-asses	Critical	Business Analysis	7/18/2019 20:16	Phase 2.0	ASR-2050	Platform	13
Story	ASR-3461	Updates for CIO Adjustments/Cancellatio	Critical	Blocked	7/9/2019 11:20	Phase 2.0	ASR-2050	Platform	21
Story	ASR-3422	Informal Adjustment: Base Year Appeal (R	Medium	Backlog	7/1/2019 19:14	Phase 2.0	ASR-828	Platform	13
Story	ASR-3420	Display Legacy Income, Cost & Sales Com	High	Business Analysis	7/1/2019 19:14	Phase 2.0	ASR-1030	Platform	5
Story	ASR-3418	Apply Agreed Upon Corrections	Medium	Business Analysis	7/1/2019 19:14	Phase 2.0	ASR-828	Platform	5
Story	ASR-3417	Indicate if Stipulation Letter Required	Low	Business Analysis	7/1/2019 19:14	Phase 2.0	ASR-828	Platform	3
Story	ASR-3361	Receive Raise Letter Prompt	Low	Business Analysis	6/27/2019 9:56	Phase 2.0	ASR-828	Platform	5
Story	ASR-3289	Validate APN on PI Upload	Low	Design	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	8
Story	ASR-3285	Track PI Events	High	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	8
Story	ASR-3282	Generate and Send Annual Inquiry to Gov	High	Design	6/21/2019 10:44	Phase 2.0	ASR-34958	Platform	5
Story	ASR-3281	Mark PI Structural Improvements Non-As	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	3
Story	ASR-3273	Updates for PI Work Assignment by Agen	High	Ready for Internal Testing	6/21/2019 10:44	Phase 2.0	ASR-1812	Platform	13
Story	ASR-3267	Update Formal Hearing Sent From AAB to	High	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1924	Platform	5
Story	ASR-3264	Document Taxpayer Response and Route	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-1924	Platform	5
Story	ASR-3263	Send Withdrawal Email & Form to Taxpay	Low	Design	6/21/2019 10:44	Phase 2.0	ASR-828	Platform	5
Story	ASR-3260	Updates when Creating PI Property or Lin	High	CCSF Final Review	6/21/2019 10:44	Phase 2.0	ASR-1813	Platform	13
Story	ASR-3257	Handle BPP Calamity Reductions (Secured	High	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-870	Platform	3
Story	ASR-3250	Updates to Appeals Record Property Ever	High	Requirements Review	6/21/2019 10:44	Phase 2.0	ASR-1924	Platform	3
Story	ASR-3246	Notify Appeal Auditor/Appraiser that the	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-827	Platform	3
Story	ASR-3245	Track Taxpayer Response to Postpone He	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-827	Platform	3
Story	ASR-3233	Approve Appeals Package	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	5
Story	ASR-3232	Determine if Principal has Reviewed Appe	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-828	Platform	3
Story	ASR-3231	Generate Appeals Package for Hearing	High	Requirements Review	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	13
Story	ASR-3230	Assessment Impacts - Informal Review of	Low	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-828	Platform	3
Story	ASR-3223	Notify ASR Staff of Pre-Hearing Conferenc	Medium	Business Analysis	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	5
Story	ASR-3222	Receive Formal Hearing Dates from AAB	High	Requirements Review	6/21/2019 10:44	Phase 2.0	ASR-830	Platform	5
Story	ASR-2999	Create Expense Comparables Summary T	High	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-1032	Platform	13
Story	ASR-2996	Exemption Adjustment - Non-Taxable Ent	High	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-2050	Platform	13
Story	ASR-2969	Placeholder - Notify Exemptions Manager	High	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-1813	Platform	5
Story	ASR-2948	Defer - Prioritize Open Work Items on Par	Medium	Business Analysis	6/14/2019 13:51	Phase 2.0	ASR-853	Platform	3
Story	ASR-2899	Setup Reports & List Views - Exemptions	Low	Business Analysis	6/14/2019 13:12	Phase 2.0	ASR-846	Platform	5
Story	ASR-2898	DVET Assessment Calculations Update - P	Medium	Requirements Review	6/14/2019 13:12	Phase 2.0	ASR-847	Platform	13
Story	ASR-2896	Remove Homeowner Exemptions if DVET	Medium	Ready for Internal Testing	6/14/2019 13:12	Phase 2.0	ASR-846	Platform	13
Story	ASR-2892	Create or Link Service Members Civil Relie	Medium	Business Analysis	6/14/2019 13:12	Phase 2.0	ASR-19844	Platform	5
Story	ASR-2885	Disable Veteran's Exemption Update	Medium	Design	6/14/2019 13:12	Phase 2.0	ASR-847	Platform	5
Story	ASR-2883	Indicate Homeowners' Exemption Claim i	Medium	Business Analysis	6/14/2019 13:12	Phase 2.0	ASR-846	Platform	5
Story	ASR-2541	Create PI Accounts for Berths	Medium	Requirements Review	5/28/2019 19:06	Phase 2.0	ASR-1813	Platform	5
Story	ASR-2461	Request Prop 8 Review - Hard Copy	High	Ready for Internal Testing	5/16/2019 13:11	Phase 2.0	ASR-872	Platform	13
Story	ASR-2425	Remove Disaster Relief Claim - Change In	Medium	Business Analysis	5/16/2019 13:11	Phase 2.0	ASR-870	Platform	13
Story	ASR-2058	Calculate Structural Improvements - PI Va	High	Business Analysis	4/30/2019 9:03	Phase 2.0	ASR-1812	Platform	21
Story	ASR-1582	Receive Updated Controller Letter for an	High	Business Analysis	3/19/2019 23:31	Phase 2.0	ASR-830	Platform	5
Story	ASR-1564	Review and Approve Recalculated Assess	High	Business Analysis	3/19/2019 23:31	Phase 2.0	ASR-828	Platform	3
Story	ASR-1382	Assign APN (Phase 2)	Low	Business Analysis	3/18/2019 17:11	Phase 2.0	ASR-1818	Platform	3
Story	ASR-1150	Track Status & Completion Date - Audits	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-827	Platform	3
Story	ASR-1129	Select to Review and Research Appeals	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1127	Document Denied Appeal	Low	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-829	Platform	5
Story	ASR-1125	Residential Construction Project Informat	Low	Backlog	3/13/2019 16:04	Phase 2.0	ASR-863	Platform	13
Story	ASR-1124	Process Informal Adjustments	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	8
Story	ASR-1123	Review & Approve Proposed Adjustments	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1122	Informal Adjustment: Additional If Neede	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1116	Associate Multiple Assessments to Single	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	8
Story	ASR-1115	Updates for Assessments (RP, PI, RP Lega	Medium	Requirements Review	3/13/2019 16:04	Phase 2.0	ASR-2050	Platform	8
Story	ASR-1112	Propose Assessment Change	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	8
Story	ASR-1110	Receive Withdrawn Appeal Updates & No	Medium	CCSF Final Review	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1109	Prepare Appeals Package - No Agreement	High	Requirements Review	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	13
Story	ASR-1105	Process Appeal Staging to Appeal PE - Up	Medium	Backlog	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	13
Story	ASR-1100	Send Automatic 441D Letter	Medium	Business Analysis	3/13/2019 16:04	Phase 2.0	ASR-34958	Platform	5
Story	ASR-1092	Submit Recalculated Appeal Assessments	High	Requirements Review	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	5
Story	ASR-1088	UI Update - Appeal Valuation Record	Critical	Design	3/13/2019 16:04	Phase 2.0	ASR-828	Platform	3
Story	ASR-904	Determine if Appeal Can be Administrativ	Low	Requirements Review	3/12/2019 14:38	Phase 2.0	ASR-828	Platform	8
Story	ASR-365	OnBase - Select 441D Template	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-34958	Platform	5
Story	ASR-362	Store Additional Location Information	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1818	Platform	3
Story	ASR-361	Validate Address Details	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1818	Platform	3
Story	ASR-359	Store and Display Rent Information	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1032	Platform	21
Story	ASR-357	Prepopulate Income/Cost Valuations	Medium	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1032	Platform	13
Story	ASR-351	Store Historical Addresses	Low	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1818	Platform	3
Story	ASR-340	Perform Income Calculation in System	High	Business Analysis	3/4/2019 13:12	Phase 2.0	ASR-1032	Platform	21
Story	ASR-314	Updated Requirement - Generate and Ser	High	Design	3/4/2019 13:11	Phase 2.0	ASR-34958	Platform	13
Story	ASR-271	UI Updates - Sprint 2023.01/2023.02	Medium	Requirements Review	3/4/2019 13:11	Phase 2.0	ASR-1881	Platform	5
Story	ASR-249	Determine Statute of limitation for a tran	Medium	Design Review	3/4/2019 13:11	Phase 2.0	ASR-873	Platform	3
Story	ASR-236	Mark Transaction for Change in Ownershi	Medium	Design Review	3/4/2019 13:11	Phase 2.0	ASR-873	Platform	3
Story	ASR-232	OnBase - Track taxpayer response to infor	Low	Design	3/4/2019 13:11	Phase 2.0	ASR-34958	Platform	5
Story	ASR-195	Link Lien Date or Completed New Constru	Medium	Design	2/27/2019 19:36	Phase 2.0	ASR-34958	Platform	5
Story	ASR-194	Notify Appraiser of New Construction Tax	Low	Design	2/27/2019 19:36	Phase 2.0	ASR-24226	Platform	5
Story	ASR-193	OnBase - Generate and Send 441d Letter	Medium	Design	2/27/2019 19:36	Phase 2.0	ASR-34958	Platform	5
Story	ASR-38715	RP Security Model for External Users Prof	Medium	Business Analysis	1/13/2023 9:11	Phase 2 Release 2.x;Pha	ASR-25963	Platform	

Appendix C
List of Remaining Stories
PHASE 2.0

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38714	RP Security Model for Public Services Prof	Medium	Business Analysis	1/13/2023 9:10	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38713	RP Security Model for Exemption Staff Pr	Medium	Business Analysis	1/13/2023 9:08	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38712	RP Security Model for RP Community	Medium	Business Analysis	1/13/2023 9:05	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38711	RP Security Model for PI Staff Profile	Medium	Business Analysis	1/13/2023 9:04	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38710	RP Security Model for RP Staff Profile	Medium	Business Analysis	1/13/2023 9:00	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38709	RP Security Model for TU Staff Profile	Medium	Business Analysis	1/13/2023 8:58	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38708	RP Security Model for RP Business Admin	Medium	Business Analysis	1/13/2023 8:56	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38707	RP Security Model for System Admin Prof	Medium	Business Analysis	1/13/2023 8:51	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38822	Data Migration : Update to Account & Ow	Medium	Backlog	1/18/2023 8:41	Phase 2.0	ASR-873	Integration, Da	
Story	ASR-37643	Data Migration : Update RP Parcel Genea	Medium	Ready for Internal Testing	12/8/2022 16:18	Phase 2.0	ASR-852	Integration, Da	5
Story	ASR-37314	Migration : Update logic for owner snaps	Medium	Ready for Internal Testing	11/28/2022 15:15	Phase 2.0	ASR-2050	Integration, Da	2
Story	ASR-34217	Data Migration : Update RP and PI assess	Medium	Ready for Internal Testing	9/26/2022 14:15	Phase 2.0	ASR-2050	Integration, Da	3
Story	ASR-25806	Integration : Provide training data to regr	Medium	Business Analysis	3/31/2022 6:40	Phase 2.0	ASR-24482	Integration, Da	21
Story	ASR-25802	Integration - EAS(Enterprise Address Syst	High	Requirements Review	3/31/2022 6:28	Phase 2.0	ASR-1818	Integration, Da	13
Story	ASR-25176	Migration : update TIC ownership percent	Medium	In Progress	3/15/2022 0:22	Phase 2.0	ASR-873	Integration, Da	2
Story	ASR-1849	Integration - AAB (Assessment and Appea	High	Ready for Internal Testing	4/9/2019 19:00	Phase 2.0	ASR-828	Integration, Da	13

Appendix C
List of Remaining
StoriesPHASE 2.X

Remaining Phase 2.x Stories as of January 21, 2023

Note: The appendix does not represent an exhaustive list as stories continue to be added in accordance with Exhibit 6. Requirements

Row Labels	Count of Issue Type	Sum of Story Points
Platform	275	1,986
Phase 2 Release 2.x	266	1,986
Phase 2 Release 2.x;Phase 2.0	9	-
Grand Total	275	1,986

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-38869	266-E Statement (Online)	Medium	Business Analysis	1/19/2023 11:33	Phase 2 Release 2.x	ASR-846	Platform	
Story	ASR-37760	Salesforce Structure for Spreadsheet f	Medium	Business Analysis	12/13/2022 11:34	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37759	Uploading Spreadsheet for Yield Capit	Medium	Business Analysis	12/13/2022 11:04	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37731	Resume under Val Method for Yield C	Medium	CCSF Final Review	12/12/2022 13:09	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37636	(NAV) Letter - Taxpayer requesting in	Medium	Business Analysis	12/8/2022 12:59	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-37607	Prop 19-DC (Certificate of Disability) -	High	Design	12/7/2022 16:48	Phase 2 Release 2.x	ASR-24483	Platform	13
Story	ASR-37570	Request for Notification of Individual	Medium	Business Analysis	12/6/2022 18:44	Phase 2 Release 2.x	ASR-859	Platform	8
Story	ASR-37468	Route Recorder Change in Ownership	Medium	Backlog	12/2/2022 7:35	Phase 2 Release 2.x	ASR-33944	Platform	21
Story	ASR-37110	Submit for Review for Yield Capitalizat	Medium	Backlog	11/23/2022 12:25	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-37109	Save for Yield Capitalization Analysis (	Medium	CCSF Final Review	11/23/2022 12:24	Phase 2 Release 2.x	ASR-1032	Platform	21
Story	ASR-36715	Valuation Method for Yield Capitalizat	Medium	CCSF Final Review	11/21/2022 13:43	Phase 2 Release 2.x	ASR-1032	Platform	34
Story	ASR-36705	Report for Timeshare Mass Closure	Medium	Design	11/21/2022 8:56	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-36592	Value Conclusion for Yield Capitalizati	Medium	CCSF Final Review	11/17/2022 10:49	Phase 2 Release 2.x	ASR-1032	Platform	13
Story	ASR-36451	Agents should not be able to assign ite	Medium	Business Analysis	11/15/2022 9:17	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-36450	Omni-Channel to set Status = Availabl	Medium	Business Analysis	11/15/2022 9:13	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-36414	Consolidated Metrics under List View	Medium	CCSF Final Review	11/14/2022 13:10	Phase 2 Release 2.x	ASR-1032	Platform	21
Story	ASR-36108	Generate Report - Sales Comp	High	Business Analysis	11/10/2022 10:09	Phase 2 Release 2.x	ASR-1030	Platform	8
Story	ASR-35651	Create Update Exemption PE - Service	Low	Business Analysis	11/7/2022 10:51	Phase 2 Release 2.x	ASR-19844	Platform	5
Story	ASR-35320	Ability to Mass Close PEs via List View	Medium	Business Analysis	11/1/2022 7:48	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-35210	263-B: Submit Lessees' Exemption For	Medium	Business Analysis	10/27/2022 16:11	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-35144	Route Submissions of Property Statem	Medium	Business Analysis	10/27/2022 11:09	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-35143	Route Mail Bucket/OnBase Scans of C	Medium	Design	10/27/2022 11:07	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-35060	Calculate and display stabilized value	Medium	CCSF Final Review	10/21/2022 13:27	Phase 2 Release 2.x	ASR-1032	Platform	55
Story	ASR-34936	Access Notice of Assessed Value (NAV	Medium	Business Analysis	10/18/2022 10:49	Phase 2 Release 2.x	ASR-24226	Platform	13
Story	ASR-34662	Route Documents Submitted via the C	Medium	Business Analysis	10/12/2022 9:08	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-34413	Taxpayer To Submit an Amended Exe	Medium	Design	10/4/2022 12:34	Phase 2 Release 2.x	ASR-24226	Platform	21
Story	ASR-34331	Submit Request for Notification of Ind	Medium	Business Analysis	9/30/2022 16:50	Phase 2 Release 2.x	ASR-24226	Platform	8
Story	ASR-34012	261-D: Submit Service Members Civil	Medium	Design	9/20/2022 9:06	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-33988	System should provide the user with c	Medium	Business Analysis	9/19/2022 18:18	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-33163	Ability to Mass Discontinue Exemption	Medium	Business Analysis	8/22/2022 12:41	Phase 2 Release 2.x	ASR-19844	Platform	8
Story	ASR-31376	Update Exemptions Reporting Needs	Low	Business Analysis	7/5/2022 12:07	Phase 2 Release 2.x	ASR-846	Platform	5
Story	ASR-30788	Hold Current Year Roll Correction in S	Medium	Business Analysis	6/27/2022 15:29	Phase 2 Release 2.x	ASR-19841	Platform	8
Story	ASR-30685	Job Monitoring Functionality for Inbu	Medium	Business Analysis	6/25/2022 15:57	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-29734	Update Property Characteristics Cloni	Medium	Business Analysis	5/30/2022 9:25	Phase 2 Release 2.x	ASR-853	Platform	8
Story	ASR-29253	Update Functionality for Last Chance	Critical	Business Analysis	5/17/2022 14:30	Phase 2 Release 2.x	ASR-2050	Platform	8
Story	ASR-29147	Clone of Prior Year Institutional Annu	Medium	Business Analysis	5/13/2022 9:32	Phase 2 Release 2.x	ASR-19844	Platform	13
Story	ASR-24676	Lessors' Exemption Form Deadlines	Medium	Business Analysis	2/24/2022 13:19	Phase 2 Release 2.x	ASR-19844	Platform	5
Story	ASR-24520	Submit Lessors' Exemption Form (Onli	Medium	Business Analysis	2/22/2022 12:07	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-24414	Updates for BOE 267FIR in System	Medium	Business Analysis	2/17/2022 18:39	Phase 2 Release 2.x	ASR-34958	Platform	13
Story	ASR-24301	Way to "Link to access plans" for Cost	Medium	Business Analysis	2/15/2022 13:09	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-24143	Update the Cost Valuation Template (	Medium	Business Analysis	2/9/2022 15:31	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-24035	Adjusted Transactions Sent to TU Sup	Medium	Design	2/7/2022 11:36	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-23815	Defer - Property History tab on Proper	Medium	Business Analysis	2/3/2022 10:02	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-23740	Create & Route Initial Calamity Valu	Medium	Business Analysis	2/1/2022 9:57	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-23567	OnBase - Create Calamity Statement v	High	Business Analysis	1/26/2022 11:07	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-23230	View AVM (Regression) Value During	Medium	Business Analysis	1/13/2022 12:46	Phase 2 Release 2.x	ASR-1030	Platform	8
Story	ASR-23098	Submit Change in Ownership Stateme	Medium	Business Analysis	1/10/2022 10:11	Phase 2 Release 2.x	ASR-873	Platform	5
Story	ASR-23097	Submit Change in Ownership Stateme	Medium	Design	1/10/2022 10:06	Phase 2 Release 2.x	ASR-873	Platform	8
Story	ASR-22564	267-L1: Welfare Exemption Suppleme	Medium	Design	12/14/2021 9:33	Phase 2 Release 2.x	ASR-19844	Platform	3
Story	ASR-22561	267-H: Submit Supplemental Affidavit	Medium	Design	12/14/2021 9:31	Phase 2 Release 2.x	ASR-19844	Platform	13
Story	ASR-22425	502-D - Submit Change in Ownership S	Medium	Business Analysis	12/7/2021 12:37	Phase 2 Release 2.x	ASR-24226	Platform	3
Story	ASR-22424	Submit Change in Ownership Stateme	Medium	Business Analysis	12/7/2021 12:34	Phase 2 Release 2.x	ASR-24226	Platform	11
Story	ASR-22423	267-R: Welfare Exemption Supplemen	Medium	Design	12/7/2021 12:23	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22422	267-O: Welfare Exemption Supplemen	Medium	Design	12/7/2021 12:22	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22419	267-L3: Welfare Exemption Suppleme	Medium	Business Analysis	12/7/2021 12:17	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22418	267-L2: Welfare Exemption Suppleme	Medium	Business Analysis	12/7/2021 12:15	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22417	267-L1: Welfare Exemption Suppleme	Medium	Design	12/7/2021 12:13	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22416	267-L: Welfare Exemption Supplemen	Medium	Business Analysis	12/7/2021 12:11	Phase 2 Release 2.x	ASR-23788	Platform	8
Story	ASR-22414	267-H: Submit Supplemental Affidavit	Medium	Business Analysis	12/7/2021 12:03	Phase 2 Release 2.x	ASR-24226	Platform	13
Story	ASR-22095	Link & View Related Valuation Record	Medium	Business Analysis	11/23/2021 8:46	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-21706	Generate & Send Inspection PDF	Low	Business Analysis	11/4/2021 12:16	Phase 2 Release 2.x	ASR-19844	Platform	21
Story	ASR-21306	Create Property Event from Scanned	High	Business Analysis	10/14/2021 14:34	Phase 2 Release 2.x	ASR-869	Platform	8
Story	ASR-19886	New transaction to be created from a	Low	Business Analysis	9/15/2021 11:08	Phase 2 Release 2.x	ASR-877	Platform	21
Story	ASR-19828	Ensure Dates are Consistently Formatt	Low	Business Analysis	9/13/2021 14:37	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-19658	Conduct 3-Way Valuation- Mills Act	Medium	Requirements Review	9/1/2021 15:25	Phase 2 Release 2.x	ASR-869	Platform	5
Story	ASR-19644	Apply Values to Working Roll when M	Medium	Business Analysis	8/31/2021 18:57	Phase 2 Release 2.x	ASR-869	Platform	13
Story	ASR-19642	Route Case to Mills Act Appraiser whe	Medium	Business Analysis	8/31/2021 18:36	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-19631	Send Notice for Builder's Exclusion Su	High	Business Analysis	8/30/2021 13:48	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-19156	Assessment Summary Screen - Hover	Medium	Business Analysis	8/17/2021 9:50	Phase 2 Release 2.x	ASR-2179	Platform	13
Story	ASR-18028	OnBase - Provide Supporting Docume	Medium	Business Analysis	7/22/2021 10:37	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-17775	Operational Reports- Phase 2 (inc TU,	Medium	Business Analysis	7/14/2021 17:03	Phase 2 Release 2.x	ASR-1881	Platform	34

Appendix C
List of Remaining
StoriesPHASE 2.X

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-16188	RP Property Screen Layout - Assessed	Medium	Business Analysis	6/14/2021 11:32	Phase 2 Release 2.x	ASR-860	Platform	8
Story	ASR-13492	Prevent TU Specialist from Using Tran	Medium	Business Analysis	4/19/2021 15:32	Phase 2 Release 2.x	ASR-873	Platform	8
Story	ASR-13489	Prop 58 Transfer for more than \$1M F	Low	Business Analysis	4/19/2021 14:44	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-12825	Complete Tax Certificate Request	Medium	Business Analysis	4/8/2021 20:37	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-12824	Route Tax Certificate Case to Appraise	Medium	Business Analysis	4/8/2021 16:03	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-12774	Derive Category from Transaction Typ	Medium	Business Analysis	4/1/2021 17:40	Phase 2 Release 2.x	ASR-873	Platform	3
Story	ASR-12622	Community - View transaction history	Medium	Business Analysis	3/22/2021 14:28	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-11962	Option to select/deselect items that c	Medium	Business Analysis	1/26/2021 18:35	Phase 2 Release 2.x	ASR-1030	Platform	21
Story	ASR-11857	Run Automatic Valuation Method (AV	Medium	Design	1/19/2021 18:21	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-11819	Select Cost Source and/or Comparable	Medium	Design	1/15/2021 16:43	Phase 2 Release 2.x	ASR-1033	Platform	8
Story	ASR-11817	Add Taxpayer Costs to Cost Database	Medium	Design	1/15/2021 14:10	Phase 2 Release 2.x	ASR-1033	Platform	5
Story	ASR-11814	Search and Display Comparables - Cos	Medium	Design	1/15/2021 13:35	Phase 2 Release 2.x	ASR-1033	Platform	13
Story	ASR-11801	Use Sales Comparison Approach for N	Medium	Design	1/14/2021 11:01	Phase 2 Release 2.x	ASR-1030	Platform	5
Story	ASR-11784	Calculate HAM Estimated Value - Com	Medium	Design	1/12/2021 10:47	Phase 2 Release 2.x	ASR-863	Platform	21
Story	ASR-11778	Indicate Builder's Exclusion Applies on	Medium	Design Review	1/11/2021 19:13	Phase 2 Release 2.x	ASR-864	Platform	3
Story	ASR-11701	Route Work Items for Completed New	High	Design	1/5/2021 9:13	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11531	Route Work Items for Lien Date New	High	Design	12/17/2020 14:01	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11504	Upload Permit Information from Ports	High	Design	12/16/2020 11:55	Phase 2 Release 2.x	ASR-863	Platform	13
Story	ASR-11468	Principal Approves or Rejects Predict	Medium	Design	12/11/2020 8:44	Phase 2 Release 2.x	ASR-1031	Platform	5
Story	ASR-11467	Route accepted Prop 8 work items to	Medium	Design	12/11/2020 8:11	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-11390	Create Output Reports Based on AVM	Medium	Design	12/7/2020 15:46	Phase 2 Release 2.x	ASR-1031	Platform	8
Story	ASR-11379	INTEGRATION: Send input files for AV	Medium	Business Analysis	12/4/2020 19:23	Phase 2 Release 2.x	ASR-1031	Platform	21
Story	ASR-11378	Close Prop 8 Work Item with AVM Val	Medium	Design	12/4/2020 18:53	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11377	Update Working Roll with AVM Value	Medium	Design	12/4/2020 18:48	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11373	Compare Approved AVM Value with F	Medium	Design	12/4/2020 16:36	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11372	Accept or Reject AVM Predicted Value	Medium	Design	12/4/2020 16:22	Phase 2 Release 2.x	ASR-1031	Platform	8
Story	ASR-11371	Send AVM Output Report to Standard	Medium	Design	12/4/2020 15:30	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11368	Determine In Which Threshold Range	Medium	Design	12/4/2020 14:58	Phase 2 Release 2.x	ASR-1031	Platform	5
Story	ASR-11366	Set Threshold Ranges and Action take	Medium	Design	12/4/2020 14:00	Phase 2 Release 2.x	ASR-1031	Platform	8
Story	ASR-11365	Set Criteria for Eligible AVM proprie	Medium	Design	12/4/2020 13:54	Phase 2 Release 2.x	ASR-1031	Platform	13
Story	ASR-11309	Create/Modify Prop 8 Reports - Updat	Low	Business Analysis	12/1/2020 12:54	Phase 2 Release 2.x	ASR-872	Platform	5
Story	ASR-11300	Release Work Items for Prop 8 Review	Medium	Design	11/30/2020 23:15	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11213	Generate and Send Denial Notice for	High	Design	11/19/2020 10:59	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-11028	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/6/2020 16:13	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-11026	Request Information From Taxpayer-	Medium	Design	11/6/2020 16:08	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-11024	Close Request for Homeowners' Exem	Medium	Design	11/6/2020 16:03	Phase 2 Release 2.x	ASR-846	Platform	5
Story	ASR-11021	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/6/2020 15:37	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-11020	Routes Request to Remove Homeown	Medium	Design	11/6/2020 15:14	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-11016	OnBase - Updates to Exemption Appro	Medium	Design	11/6/2020 14:56	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10984	Request Information From Taxpayer-	High	Design	11/4/2020 7:02	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10983	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/4/2020 6:51	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10982	Notify Taxpayer of Homeowners' Exe	Medium	Design	11/4/2020 6:45	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10651	OnBase - Notify TU of New Informa	Medium	Design	10/2/2020 17:04	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-10589	Develop User Interface (UI) and Work	Medium	Business Analysis	9/29/2020 11:22	Phase 2 Release 2.x	ASR-1881	Platform	8
Story	ASR-10547	Notices and Reports generation after	Medium	Business Analysis	9/25/2020 12:54	Phase 2 Release 2.x	ASR-19841	Platform	5
Story	ASR-10538	Notify Controller and TTX of Working	Critical	Design	9/25/2020 0:11	Phase 2 Release 2.x	ASR-19841	Platform	5
Story	ASR-10488	REPORTS - Review "In Review For Ann	Medium	Design	9/22/2020 23:57	Phase 2 Release 2.x	ASR-19841	Platform	5
Story	ASR-10194	Validate & Relate Assessors Parcel Nu	Medium	Business Analysis	9/9/2020 18:33	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-9800	Route Valuation Report for Principa	Medium	Design	8/20/2020 13:22	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-9772	Notify Exemption Staff Member On Pe	Medium	Business Analysis	8/19/2020 12:19	Phase 2 Release 2.x	ASR-2179	Platform	5
Story	ASR-9771	PLACEHOLDER: Sends report to BPP if	Medium	Business Analysis	8/19/2020 12:18	Phase 2 Release 2.x	ASR-2179	Platform	5
Story	ASR-9769	Create Professional Quality Valuation	Medium	Business Analysis	8/19/2020 12:16	Phase 2 Release 2.x	ASR-2179	Platform	13
Story	ASR-9768	Associate Final Value with Owner/Bus	Medium	Business Analysis	8/19/2020 12:15	Phase 2 Release 2.x	ASR-2179	Platform	8
Story	ASR-9765	PLACEHOLDER: Allocate Value Betwee	Medium	Business Analysis	8/19/2020 12:12	Phase 2 Release 2.x	ASR-2179	Platform	8
Story	ASR-9759	PLACEHOLDER: Principal Approve Ass	Medium	Business Analysis	8/19/2020 10:40	Phase 2 Release 2.x	ASR-2179	Platform	13
Story	ASR-9716	Review Valuation Report for Approval	Medium	Business Analysis	8/18/2020 0:47	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-9699	Review and Edit Valuation Report	Medium	Design	8/17/2020 0:31	Phase 2 Release 2.x	ASR-33944	Platform	8
Story	ASR-9614	OnBase - Generate Request for Chang	Low	Design	8/10/2020 19:21	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-9467	Prop 58/193 Record, update ownersh	Low	Business Analysis	8/3/2020 12:51	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-9432	Re-assign transactions to TU specialist	Medium	Design	7/30/2020 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-9338	OnBase - Send 441d letter requesting	Low	Design	7/23/2020 13:18	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-9337	OnBase - Document and update Non-	Medium	Design	7/23/2020 12:46	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-8929	Clone Valuations from Existing Valuati	Medium	Design	7/6/2020 16:11	Phase 2 Release 2.x	ASR-1030	Platform	5
Story	ASR-8899	RP - SLA Management	Medium	Business Analysis	7/4/2020 22:58	Phase 2 Release 2.x	ASR-1881	Platform	13
Story	ASR-8898	BPP - SLA Management	Medium	Business Analysis	7/4/2020 22:58	Phase 2 Release 2.x	ASR-1881	Platform	8
Story	ASR-8873	OnBase - Send 441d letter requesting	Medium	Design	7/1/2020 16:55	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-8776	Taxpayer provides requested 441d inf	Medium	Design	6/26/2020 9:38	Phase 2 Release 2.x	ASR-24226	Platform	8
Story	ASR-8764	Re-Assigning Work Items to Appraiser	Medium	Business Analysis	6/25/2020 12:40	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-7207	Send Exemption Notice to Late Filers	Low	Business Analysis	3/16/2020 7:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-6597	Populate Prior Year Values into Exemp	Medium	Business Analysis	1/27/2020 14:27	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-6596	Exemption Form Validations (Phase 2)	Medium	Business Analysis	1/27/2020 14:22	Phase 2 Release 2.x	ASR-23788	Platform	5
Story	ASR-6450	Enter Unrelated Business Income Perc	Low	Design	1/10/2020 14:51	Phase 2 Release 2.x	ASR-19844	Platform	3
Story	ASR-6438	OnBase - Create 267F Denial Letter	High	Design	1/8/2020 10:13	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-6368	OnBase - Generate & Send Inspection	Low	Design	1/7/2020 11:43	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-6367	Route Exemption Statement & Exemp	Medium	Design	1/7/2020 11:17	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-5657	263-B: Submit Lessees' Exemption For	Medium	Business Analysis	11/22/2019 12:41	Phase 2 Release 2.x	ASR-19844	Platform	5
Story	ASR-5643	View Exemption Claims Online	Critical	Design	11/22/2019 9:14	Phase 2 Release 2.x	ASR-23788	Platform	3
Story	ASR-5045	Route to RP After TU On Bifurcated Ag	Low	Business Analysis	10/30/2019 14:48	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-4658	Group Proposed Assessment Notice b	Low	Design	10/9/2019 15:50	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-3764	Notify Controller of Working Roll Clos	Critical	Business Analysis	7/18/2019 20:16	Phase 2 Release 2.x	ASR-19841	Platform	13
Story	ASR-3754	PLACEHOLDER - Generate Quality Con	Low	Business Analysis	7/18/2019 20:16	Phase 2 Release 2.x	ASR-19841	Platform	5

Appendix C
List of Remaining
StoriesPHASE 2.X

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-3363	Send Appeal Agreement Letter	Low	Business Analysis	6/27/2019 10:50	Phase 2 Release 2.x	ASR-828	Platform	5
Story	ASR-3299	Route to Leasehold Improvement Tea	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-2379	Platform	8
Story	ASR-3290	Receive PI Notification if Non-Govt En	Low	Requirements Review	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1812	Platform	8
Story	ASR-3287	Perform Mass PI Declines	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1812	Platform	13
Story	ASR-3276	Route Leases < 35 Yrs on Government	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-3272	Request Information from Tenant- PI	High	Design	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1813	Platform	5
Story	ASR-3271	Request Information from Govt Agenc	High	Design	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1813	Platform	5
Story	ASR-3268	Generate and Send 1606 Information	Low	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1924	Platform	5
Story	ASR-3259	Route Appeal Work Items	High	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-3252	Manage Multiple Request for Info Tem	Medium	Business Analysis	6/21/2019 10:44	Phase 2 Release 2.x	ASR-1924	Platform	5
Story	ASR-3128	Community - View Current and Past Y	Low	Business Analysis	6/17/2019 10:49	Phase 2 Release 2.x	ASR-23788	Platform	3
Story	ASR-2998	Track Property Rents	Low	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-1032	Platform	5
Story	ASR-2997	OnBase - Receive Exemption Notice to	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2988	Create Tax Certificate Case in Commu	Medium	Design	6/14/2019 13:51	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2987	Prioritize CIO Property Events with PM	High	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-2965	Notify Appraiser to Work Parcel Mana	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-2964	Route Case To Mapping Staff To Revie	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2950	Send Letter to Taxpayer to File Exclui	Low	Design	6/14/2019 13:51	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2946	Send Notice for Reserved Parcels with	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-2939	Create & Route Parcel Management W	Medium	Business Analysis	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2931	Create Work Item for PI Lease Re-eval	Medium	Design	6/14/2019 13:51	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2921	Route Taxpayer Multiple Claim Respo	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2917	Prompt Taxpayer to Indicate Co-owne	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-23788	Platform	3
Story	ASR-2916	Prompt Taxpayer to Indicate County a	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2911	Notify Counties of Exemption	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2910	Identify if Taxpayer is on Final List	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2909	Identify Taxpayer Response	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2908	Scan and Enter Barcoded Letter	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2907	Display all Conflicting Exemption Claim	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2906	Generate and Send Multiple Claims Le	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2905	Send CD of Duplicates to Office Assist	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	5
Story	ASR-2904	Display and Send Homeowners and Di	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	8
Story	ASR-2901	DVET Online Submission Updates	Low	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-847	Platform	5
Story	ASR-2895	Reject DVET Claim and Notify Taxpaye	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2894	OnBase - Generate DVET Claim Issues	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2893	Route Disabled Vet Exemption	Medium	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2884	OnBase - Send Annual Notice to File L	Medium	Design	6/14/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2882	Route Homeowners' Exemption Claim	Medium	Design	6/14/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2879	Prevent Multiple Homeowners' Exem	Medium	Design	6/14/2019 13:12	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2874	Enter Principal Place of Residence - M	Low	Business Analysis	6/14/2019 13:12	Phase 2 Release 2.x	ASR-848	Platform	3
Story	ASR-2592	Link BPP and PI (Including Vessels and	Medium	Design	5/28/2019 19:06	Phase 2 Release 2.x	ASR-1813	Platform	5
Story	ASR-2473	Access Pre-populated Exemption Form	High	Business Analysis	5/16/2019 13:27	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2465	OnBase - Notify when Additional Cala	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2464	Generate and Send Prop 8 Results	Low	Design	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2460	Track Purchase and Sale Dates of 60/1	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2459	Adjust Base Values - Eligibility	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	8
Story	ASR-2458	Reject 60 if previously received 110	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2457	Reject Prop 60/110 with Reason	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2456	Reject Prop 60/110 if Previously Recei	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2455	Submit Prop 110 Documentation	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2454	Reject 60/110 Above Threshold	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2453	Route 60/110 Claim if Multi Family Re	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2452	Route Approved Property to Principal	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2451	Document Market Value of New Prop	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2450	Notify Taxpayer of 60/110 Rejection	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2449	Review and Approve 60/110 Applicati	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2448	Determine Age/Disability Certification	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2447	Close Pending Application after 30	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2446	Confirm Prop 60/110 Information	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2445	Change 60/110 Application to Pending	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	3
Story	ASR-2444	Scan and Enter 60/110 Hard Copy For	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	8
Story	ASR-2443	Submit Prop 110	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2442	Submit Prop 60 (hard copy)	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-866	Platform	5
Story	ASR-2440	Login Access for other Counties	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-2437	Notify Taxpayer if Prop 8 Review Alrea	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2434	OnBase - Generate and Send Calamity	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2428	OnBase - Generate and Send Calamity	High	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-2427	Notify Appraiser when Calamity Claim	Medium	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2423	Calculate Value per Acre for UA Applic	Low	Business Analysis	5/16/2019 13:11	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2421	Update UA Applications Based on Find	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2420	Review UA Applications	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2419	Receive UA Applications	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-868	Platform	5
Story	ASR-2414	Send Completed Calamity Information	Low	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-2413	Send Supplemental Assessment Notic	Medium	Business Analysis	5/16/2019 13:10	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-1447	Route Changes to Recorder - 571L (Ph	Medium	Business Analysis	3/18/2019 17:11	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-1393	Identify Taxpayers with Real Property	Medium	Business Analysis	3/18/2019 17:11	Phase 2 Release 2.x	ASR-2050	Platform	5
Story	ASR-1117	Send Communication to Taxpayer - In	Medium	Business Analysis	3/13/2019 16:04	Phase 2 Release 2.x	ASR-828	Platform	5
Story	ASR-1099	Route Appeals	Medium	Business Analysis	3/13/2019 16:04	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-1094	Send Recalculated Assessment Propos	Medium	Business Analysis	3/13/2019 16:04	Phase 2 Release 2.x	ASR-828	Platform	5
Story	ASR-1086	Notify Recorder When Sale Price Varie	Low	Requirements Review	3/13/2019 14:06	Phase 2 Release 2.x	ASR-2379	Platform	8
Story	ASR-881	Calculate HAM Estimated Value - Lien	Medium	Design	3/12/2019 8:30	Phase 2 Release 2.x	ASR-863	Platform	13

Appendix C
List of Remaining
StoriesPHASE 2.X

Issue Type	Key	Summary	Priority	Status	Created	Fix versions	Epic Link	Track	Story Points
Story	ASR-356	OnBase - Send 441d letter requesting	Medium	Design	3/4/2019 13:12	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-350	Place holder - Report & Export on Con	Low	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-2179	Platform	5
Story	ASR-349	Assign Real Property Valuations from	Low	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-345	Route Transaction (Change in Owners	High	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-344	Process Multiple Parcels in Transactio	High	Business Analysis	3/4/2019 13:12	Phase 2 Release 2.x	ASR-873	Platform	8
Story	ASR-334	Perform Valuation - 4 Methods	High	Requirements Review	3/4/2019 13:12	Phase 2 Release 2.x	ASR-2179	Platform	8
Story	ASR-322	Manage Transactions Work Queue	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	5
Story	ASR-313	Determine Percent of Property Value	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-312	Route work items for Prop 8 Review t	Medium	Design	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-310	Upload BOE Prop 58/193 Report Actio	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	8
Story	ASR-309	Apply Prop 58/193 Full Exclusion - App	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-308	Send Prop 58 Denial Letter	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-307	Track Taxpayer Response to Prop 58	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-306	Generate and Send Prop 58 Form	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-304	Determine If Prop 58 Eligible	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-302	Enter Exclusion Changes	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	5
Story	ASR-301	Generate and Send Prop 58 Report	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	5
Story	ASR-300	Track Proposition 58 Limit	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	5
Story	ASR-299	File Prop 58 Form Hard Copy - May no	High	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-298	Calculate Percent Excluded From Prop	High	Design	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-295	File Prop 58/193 (hard copy)	High	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-879	Platform	8
Story	ASR-292	Route CIO on Individual Timeshare to	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	3
Story	ASR-287	OnBase - Notify Entity or Taxpayer of	High	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-274	OnBase - Populate Information in a LE	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	8
Story	ASR-269	OnBase - Send LEOP Notice to Taxpay	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-262	Pre-Populate PCOR Forms	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-261	Route Prop 58 Recalculations for Appr	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-880	Platform	5
Story	ASR-260	OnBase - Document Critical Taxpayer	Medium	Design	3/4/2019 13:11	Phase 2 Release 2.x	ASR-34958	Platform	5
Story	ASR-259	Route Unrecorded Transaction to TU	Low	Backlog	3/4/2019 13:11	Phase 2 Release 2.x	ASR-33944	Platform	13
Story	ASR-243	Report - Enrolled Value vs. Reported v	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-873	Platform	5
Story	ASR-239	Document, fix and notify Recorder ind	Medium	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-873	Platform	3
Story	ASR-231	Track taxpayer response provided via	Low	Business Analysis	3/4/2019 13:11	Phase 2 Release 2.x	ASR-24226	Platform	5
Story	ASR-199	Review Construction Report	Low	Business Analysis	2/27/2019 19:36	Phase 2 Release 2.x	ASR-864	Platform	3
Story	ASR-38715	RP Security Model for External Users P	Medium	Business Analysis	1/13/2023 9:11	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38714	RP Security Model for Public Services	Medium	Business Analysis	1/13/2023 9:10	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38713	RP Security Model for Exemption Staff	Medium	Business Analysis	1/13/2023 9:08	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38712	RP Security Model for RP Community	Medium	Business Analysis	1/13/2023 9:05	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38711	RP Security Model for PI Staff Profile	Medium	Business Analysis	1/13/2023 9:04	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38710	RP Security Model for RP Staff Profile	Medium	Business Analysis	1/13/2023 9:00	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38709	RP Security Model for TU Staff Profile	Medium	Business Analysis	1/13/2023 8:58	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38708	RP Security Model for RP Business Ad	Medium	Business Analysis	1/13/2023 8:56	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
Story	ASR-38707	RP Security Model for System Admin P	Medium	Business Analysis	1/13/2023 8:51	Phase 2 Release 2.x;Pha	ASR-25963	Platform	
									2033



City and County of San Francisco

Office of the Assessor-Recorder

REQUEST FOR PROPOSALS FOR Property Assessment Solution

RFP# ASR2017-01

CONTACT: Steve Kim, (415) 554-9954, ASRcontracts@sfgov.org

Background

San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco (the "City") established by Charter in 1850, is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City's powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority.

The City's Office of the Assessor-Recorder (ASR) is responsible for administering property assessment pursuant to state law. At a high level, the areas of responsibility ASR are: recording public documents, tracking ownership and changes of ownership related to property, assessing the value of property, approving and applying exemptions, and preparing the annual assessment roll.

The City's current central property assessment system is EZ Access, which has been in place for more than 15 years. EZ Access is a COBOL, DB2 database AS400 system that is maintained by the original developer, Hamer, Inc., for ASR. EZ Access primarily functions as the system of record for the City's property and assessment information, interfacing with the property tax system of the Offices of the Controller and Treasurer & Tax Collector. Although EZ Access supports department operations, the system lacks modern day technology and ASR is looking for more robust tools to support their business needs.

The purpose of this request for proposal (RFP) is to select a Proposer to provide a Property Assessment Solution that supports the needs of the City's Office of the Assessor-Recorder's property assessment functions including all services related to the managed configuration, implementation, and ongoing support of the solution.

Intent of this RFP

The services listed below will be provided through one or more deliverable based contract(s) as negotiated between ASR and the selected Proposer. It is imperative that the proposed system be compatible and integrated with the Office of the Controller and Treasurer & Tax Collector system that is currently in procurement in RFP# TTX2017-09.

Software, Professional Services, and Maintenance and Operations Services Sought

ASR seeks qualified proposals to provide the following products and services:

1. Software (Required)
2. Professional Services (Required)
 - a. Project Initiation and Planning
 - b. System, Interface and Data Conversion Design
 - c. System Development / Configuration
 - d. System Testing
 - e. Project Training
 - f. Deployment
 - g. Implementation Closeout
3. Ongoing Maintenance and Operations (Required)
4. Hardware or Hosting (Optional)

Anticipated Contract Term

The anticipated contract term for (A) the implementation services agreement is three (3) years with five (5) options to extend for one (1) year at the City's sole and absolute discretion, and (B) the perpetual or subscription software license and maintenance agreement is five (5) years with four additional one (1) year options to extend at the City's sole and absolute discretion.

Subcontracting Requirement

The S.F. Administrative Code Chapter 14B Local Business Enterprise (LBE) **sub contracting goal** for this RFP is four percent (4%) of the total value of the goods and/or services procured. In order to be responsive, Proposers must meet the LBE goal.

Contractors Unable to do Business with the City

Contractors that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Some of the laws are included in this RFP, or in the sample terms and conditions attached. **Companies Headquartered in the Certain States** - This Contract is subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into contracts with companies headquartered in states with laws that perpetuate discrimination against LGBT populations or where any or all of the work on the contract will be performed in any of those states. Proposers are hereby advised that Proposers which have their United States headquarters in a state on the Covered State List, as that term is defined in Administrative Code Section 12X.3, or where any or all of the work on the contract will be performed in a state on the Covered State List may not enter into contracts with the City. A list of states on the Covered State List is available at the website of the City Administrator. <http://sfgov.org/oca/qualify-do-business>

Schedule*		City-Proposer Communications
RFP issued	October, 27 2017	<p>Any communications and questions regarding the RFP must be directed to Steve Kim in writing to ASRcontracts@sfgov.org</p> <p>Proposers are specifically directed NOT to contact any other employees or officials of the City regarding the RFP. Unauthorized contact may be cause for rejection of Proposals at the City's sole and absolute discretion.</p> <p>A summary of the substantive information and all questions and answers pertaining to this RFP will be posted on the City's Office of Contract Administration (OCA) website at http://mission.sfgov.org/OCABidPublication and click on the "Consultants and Professional Services" category.</p>
Deadline for Initial RFP questions	3:00 pm, Nov. 13, 2017	
Answers to Initial RFP questions posted online	November 29, 2017	
Deadline for Final RFP questions	3:00 pm, Dec. 8, 2017	
Answers to Final RFP questions posted online	December 22, 2017	
Letter of Intent to Bid	3:00 pm, Dec. 13, 2017	
Deadline for Proposals	3:00 pm, Jan. 12, 2018	
Stage 1 Notification	Week of Feb. 9, 2018	
Proposer Software Demonstrations and Selection Interviews	Week of Mar. 12, 2018	
Stage 2 Notification	Week of March 30 , 2018	
*RFP Schedule subject to change.		

Office of Assessor-Recorder • City Hall, Room 190 • 1 Dr. Carlton B. Goodlett Place • San Francisco, CA 94102 • (415) 554-5596 • <http://www.sfassessor.org/>

PROPOSAL CHECKLIST

Requirements	Description	Submitted
Proposal will need to include all of the following:	Letter of Intent to Bid by December 13, 2017 , per Section 3.1. (Due prior to proposal deadline and is mandatory prerequisite to the submission of a Proposal.) Letter of Intent to Bid should e-mailed to ASRcontracts@sfgov.org	
	One original copy of Submission Coversheet with signatures (Attachment M).	
	One original set copy of signed CMD forms (Attachment K): (1) Form 2A-CMD Contract Participation Form (2) Form 2B- CMD "Good Faith Outreach" Requirements (3) Form 3- CMD Non-Discrimination Affidavit (4) Form 4- CMD Joint Venture Form (if applicable), and (5) Form 5- CMD Employment Form	
	Ten (10) hard copy sets of the proposals (excluding Contract Monitoring Division Compliance Forms) with an electronic version of the proposal and the Contract Monitoring Division Compliance Forms on a USB stick, must be submitted by mail or in person to the Office of the Assessor-Recorder, at City Hall, Room 190.	
Proposer Response Templates (Required)		
Template A	Minimum Qualifications	
Template B	Proposer Experience	
Template C	Staff Experience	
Template D	Requirements	
Template E	Functional Approach	
Template F	Technical Approach	
Template G	Implementation Approach	
Template H	Joint System Integration Plan	
Template I	Maintenance and Operations Approach	
Template J	Cost Workbook	
Template K	Reference Verification Form	

Compliance Attachments (Complete and Submit for Processing)		
Attachment J	Standard Forms: Listing and Internet Addresses of Forms Relating to Taxpayer Identification Number and Certification, To Business Tax Declaration, and to Chapters 12B and 12C, and 14B of the S.F. Administrative Code	
Attachment K	Chapter 14B CMD Attachment 2 - Requirements for Architecture, Engineering, & Professional Services Contracts	
Attachment L	Chapter 12X – Administrative Code Memorandum	
Attachment M	Submission Coversheet w/ Certification of Headquarters in Accordance with Administrative Code Chapter 12X	

Informational Attachments (Not Scored)		
Attachment A	Glossary of Terms Used in the RFP	
Attachment B	Detailed Statement of Work	
Attachment C	Assessor Process Flows	
Attachment D	Assessor Use Cases	
Attachment E	Sample Deliverables Expectations Document	
Attachment F	Joint System Integration Plan	
Attachment G	Conceptual Data Model	
Attachment H	Professional Services Sample Template (P-600)	
Attachment I	SaaS Sample Template (P-648)	

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1 Introduction

1.1 Glossary of Terms Used in the RFP

See *Attachment A* for the Glossary of Terms used in this RFP.

1.2 City / Office of the Assessor-Recorder Overview

San Francisco is the fourth largest city in California and serves as a center for business, commerce, and culture for the West Coast. The City and County of San Francisco (the “City”) established by Charter in 1850, is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City’s powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority. The City consists of over 50 departments and agencies and has an annual budget of over \$10 billion.

The City’s Offices of the Assessor-Recorder, Controller, and Treasury & Tax Collector are responsible for administering property assessment and taxation pursuant to state law. These offices are led by the elected Assessor-Recorder, appointed Controller, and elected Treasurer, respectively. Of the estimated \$2.5 billion in 2016 property tax revenue, 64% is allocated to City services and 36% to schools and other public services, making property tax revenue a highly visible and critical source of City funding.

The City has recognized the need to procure new software to support the property assessment and tax processes executed by the City Offices. At a high level, the area of responsibilities for each Office are:

1. The Office of the Assessor-Recorder (ASR) is responsible for carrying out property assessment related functions mandated by the State, including identifying property and ownership, assessing the value of property, approving and applying exemptions, and preparing the assessment roll. As a combined Assessor-Recorder office, is also responsible for maintaining public recorded documents and levying transfer tax.
2. The Office of the Controller applies the appropriate tax rates, which include the general tax levy, locally voted special taxes, and any City or district direct assessments. After applying the tax rates, the Controller calculates the total tax amount. The Office of the Controller also apportions and distributes the property taxes that are collected.
3. The Office of the Treasurer & Tax Collector is responsible for printing and mailing out the property tax bills, collecting property tax payments and delinquent taxes, and conducting the sale of tax defaulted properties.

This RFP represents the culmination of ASR’s multi-year efforts to identify and address how ASR can replace aging legacy systems and provide more effective and efficient services to both the City’s departments and the public. ASR’s staff reviewed and analyzed the inner workings of the department’s existing processes and policies and determined that a technological upgrade and modernization of the existing systems would significantly improve both the Assessor-Recorder’s property assessment operations, as well as improve downstream tax operations for affected departments (e.g., Controller and Treasurer & Tax Collector).

The purpose of this Request for Proposals (RFP) is to solicit proposals for a system which will support the property assessment processes executed by ASR. A separate RFP will be released in parallel to procure a system to support the property tax needs of the Offices of the Controller and the Treasurer & Tax Collector. Both systems will be expected to interface with each other to support the City’s property assessment and tax activities, and the selected Proposers of both RFPs will be responsible for ensuring the systems interface correctly.

1.3 California Property Assessment and Tax Landscape

Due to the distinct functionality required by California property assessment and tax activities under California’s Proposition 13 and other controlling legislation, most non-California property assessment software requires significant modification to meet the needs of California counties.

Over the past two decades, the track record of California counties attempting to replace legacy assessment and tax systems has been mixed, with many counties continuing to rely on outdated legacy systems that require increasing levels of cost and effort to maintain and keep up to date. Some custom, county-developed systems have additionally highlighted the opportunity for a proven Proposer to emerge and provide the professional software development focus necessary to meet the specific needs of the California property assessment and tax market.

1.4 Background

The primary Property Assessment System used by the City is EZ Access, which has been in place for more than 15 years. EZ Access is a COBOL, DB2 database AS400 system that is maintained by the original developer, Hamer, Inc., for ASR. EZ Access primarily functions as the system of record for the City’s property and assessment information. Although EZ Access provides some appraisal tools, the system generally lacks modern technology features. ASR has identified the need for more robust tools to support their business operations.

EZ Access supports batch interfaces for certain property assessment activities. Interfaces to and from EZ Access include the reception of recorded documents from the Recorder System (CRiis), building permit data and information from the Department of Building Inspections (Accela), and ASR’s document management system (AIMS). EZ Access also sends files to and receives files from a number of other Proposers and sources, most notably, the Office sends the assessment rolls and associated information to the Controller and Treasurer & Tax Collector offices.

ASR’s processing systems and reporting environments rely on EZ Access data to populate and update information for various appraisal and auditing functions, and end of year roll quality review and reporting. The Assessor also uses standalone systems, spreadsheets, and other tools to conduct, track, maintain, and report on various property assessment functions not available in EZ Access (e.g., Assessment Appeals activity tracking, commercial appraisals, workflow management, etc.). These systems and other tools are used to reconcile EZ Access data.

A comprehensive list of the City’s inbound interfaces, outbound interfaces, and list of departmental systems is provided in *Template H – Joint System Integration Plan*

The following tables present information about the City’s current EZ Access production environment:

Table 1: Number of approximate accounts by module

Real Property	Business Personal Property	Possessory Interest
210K	50K	2.6K

Note: There are approximately 6,000,000 master real property records in the system which annually cumulate and currently represent 25+ years.

Table 2: Assessable value by property type FY16/17

Secured Local Roll	State Board of Equalization (SBE) Roll	Unsecured Roll
\$202billion	\$3.1billion	\$14.6billion

More information regarding the City’s property assessment activities can be found by reviewing ASR’s Annual Report, available at the following website:

Note: *Numbers and values are approximate to provide a general understanding of the size and complexity of ASR's operations.*

1.5 Issues with Current Environment

ASR is facing issues with their current property tax technical environment which has led to the need for a new system. These issues include:

1. The gradual accrual of legacy technology and data sources over time has resulted in a complex multisystem, multi- data source environment with substantial opportunities to improve the usability, efficiency, and supportability of the operations.
2. Multiple source systems are required for staff to access, use, and maintain relevant information and data. In the current environment, employees must have multiple application windows open, access secondary electronic sources and locate paper files. This limits efficiency, particularly for those functions that are public-facing and where staff needs to quickly, properly service customers.
3. Reports and information are sometimes required to be aggregated and viewed at a lower-level of depth, or based on a different structure than what exists in the EZ Access system. Because of these needs, the staff must duplicate data entry between EZ Access and other tracking tools (requiring the maintenance and reconciliation of data between systems).
4. Interacting with external systems, requires a combination of manual and automated legacy workflow processes due to limitations of the current technical environment.
5. Limitations of the current system require workarounds and/or the intervention of administrative and technical staff to support business activities, especially the workflow and reporting needs of department management.

1.6 City Business Goals

The Property Assessment Solution selected will enable the City to meet its overall property assessment and tax business goals, including:

1. Improve efficiency and effectiveness of City Operations
2. Support and deliver high quality and consistent customer service seamlessly across all three property assessment and tax departments
3. Streamline processes, data, and information exchange between the property assessment and tax departments to meet annual property tax deadlines

1.7 Office of the Assessor-Recorder Goals

To support both the City business goals and the specific needs of the office, ASR has developed the following goals for the Property Assessment Solution:

1. **Efficient Business Processes:** Facilitation of the efficient and effective administration of all property assessment activities and other associated tasks
2. **Fair and Transparent Property Assessment:** Facilitate the fair and transparent determination of every assessed value in accordance with California property tax law, including the Revenue and Taxation Code
3. **Revenue Forecasting:** Ability to easily view and use historical statistics and current pending items to accurately forecast future revenue through timely access to high-quality data and comprehensive reporting capabilities

4. Quality Data Entry: The capture of data at the beginning of processes, including constituent self-service options, to automatically perform system reviews for correctness and completeness before acceptance by authorized users into the system's data records
5. Business Intelligence (BI): User-friendly, standard reporting and BI capabilities to support the decision-making needs of ASR's staff and management
6. Configurable Business Rules: A highly configurable and adaptable system that can adjust to specific and changing needs
7. Secure and Integrated Access: Provide authorized users with an integrated access to all modules, data, and services relevant to the user group. Correspondingly, it must allow system administrators to restrict data access and transaction execution based on user role
8. Scalable and Extensible: Scalable to accommodate additional users and extensible in expanding capabilities to meet future business needs and local and State mandates

1.8 Statement of Need

The purpose of this RFP is to identify and select a proposal that combines an assessment system and professional services into an overall Property Assessment Solution that supports the needs of ASR's property assessment function, including all services related to the managed configuration, implementation, and ongoing support of the System (see the specific details in *Section 2 – Scope of Work* below).

It is imperative that the proposed System be fully-compatible and integrated with the City's selected Controller and Treasurer & Tax Collector system, able to support multiple interfaces for different business application and technical environments, and compatible with the City's technical infrastructure.

ASR intends to award one or more contracts to a single prime contractor for a Property Assessment System plus any third party applications or software and/or equipment necessary for a fully functioning Solution, including all implementation and ongoing maintenance services.

1.9 Software, Professional Services, Maintenance and Operations Services Sought

ASR seeks qualified proposals to provide the following products and services:

1. Software (Required)
2. Professional Services (Required)
 - a. Project Initiation and Planning
 - b. System, Interface and Data Conversion Design
 - c. System Development / Configuration
 - d. System Testing
 - e. Project Training
 - f. Deployment
 - g. Implementation Closeout
3. Ongoing Maintenance and Operations (Required)
4. Hardware or Hosting (Optional)

These services will be provided through one or more deliverable based contract(s) as negotiated between ASR and the selected Proposer. The statement of work and associated deliverables are outlined in *Section 2.2 – Statement of Work*, and the tasks and details are documented in *Attachment B – Detailed Statement of Work*.

2 Scope of Work

2.1 Scope

This scope of work is not intended to be all inclusive of the work the City expects to be performed, and is not a complete listing of all services that may be required or desired.

The City will negotiate the specific scope of services, budget, deliverables, and timeline with the Proposer selected for contract negotiations. There is no guarantee of a minimum amount of work or compensation for any Proposer(s) selected for contract negotiations.

2.1.1 Potential System Solution Options

ASR is willing to consider a number of system Solution types in response to this request. Proposed Solutions may include but are not limited to any of the following components:

1. **Commercial Off the Shelf (COTS)** – A fully developed, packaged software that only requires configuration to meet the City’s business needs.
2. **COTS + Custom Development** – A packaged system that requires both configuration and custom code development to fully meet the City’s business needs.
3. **Modular Tools + Custom Development** – Multiple, packaged software tools that require both configuration and some custom code development to be combined to form a whole Property Assessment System that meets the City’s business needs. (The Proposer should consider the best options available in identifying any modular tools proposed. ASR is will consider a Best-of-Breed approach.)
5. **Custom Developed System** – Custom developed software to meet the City’s business needs.

2.1.2 Potential Hosting Service Delivery Model Options

ASR will consider a variety of hosting service delivery models. The proposed solution may include the following hosting types:

1. **On-premise** – The Property Assessment System is hosted at a City data center.
2. **Hosted** – The Property Assessment System is provided by the Proposer, but proposed to be hosted by the Proposer or a third-party subcontractor.

2.1.3 Other Procurement Considerations including Fixed Bid Price

1. ASR will only accept fixed bid proposals for the software, professional services, ongoing maintenance and operations, and hosting. Payment for software implementation services will be deliverable based.
2. ASR will consider perpetual licenses and a Software-as-a-Service (SaaS) model.
3. ASR prefers a phased approach to building, testing and implementation of new functionality prior to the completion of the entire System.
4. Proposers must be prepared to commence Task 1 onsite within 30 days from the Controller’s Office certification of funds and go-live within a negotiated timeframe.

2.2 Statement of Work

A suggested detailed statement of work is attached as *Attachment B – Detailed Statement of Work*. This attachment outlines the tasks, subtasks, and deliverables that ASR expects the Proposer to complete for this Project.

Note: All tasks and deliverables described in this section may not apply equally to every possible variation of proposed system development (e.g. COTS, custom developed, etc.) or software delivery (e.g., hosted, SaaS, etc.).

2.2.1 Overview of Tasks

ASR has organized its detailed statement of work into seven (7) major implementation tasks. A summary of each task is provided below.

1. **Task 1 - Project Initiation and Planning:** ASR's expectations regarding the project kick-off and management.
2. **Task 2 – System, Interface and Data Conversion Design:** ASR's expectations regarding the developing and detailing of the plans for designing the System to meet the needs of ASR. This includes the design of the interfaces and data conversion.
3. **Task 3 - System Development / Configuration:** ASR's expectations regarding the development and/or configuration of the System to meet ASR's needs through execution of the designs created in Task 2. This includes the development of the interfaces and data conversion.
4. **Task 4 – System Testing:** ASR's expectations regarding the testing of the System developed/configured in Task 3 to ensure that it meets the needs of ASR.
5. **Task 5 – Project Training:** ASR's expectations regarding the training of Office of the Assessor-Recorder staff in using the new System.
6. **Task 6 – Deployment:** ASR's expectations regarding the deploying of the new System into production.
7. **Task 7 – Implementation Closeout:** ASR's expectations regarding the process of concluding implementation.

2.2.2 Sub-tasks

The preliminary sub-tasks associated with each task are as follows:

Tasks and Sub-Tasks	
Task	Sub-task
Task 1 - Project Initiation and Planning	Sub-task 1 - Project Initiation and Management Plan
	Sub-task 2 – Regular Project Status Reporting
	Sub-task 3 – System Design and Development Strategy
	Sub-task 4 – System Implementation Strategy
	Sub-task 5 – Master Testing Strategy
	Sub-task 6 – Requirements Traceability Plan
Task 2 – System, Interface and Data Conversion Design	Sub-task 7 – Functional Design Document
	Sub-task 8 – Develop Data Conversion Plan
	Sub-task 9 – Develop Interface Specifications and Design Document
	Sub-task 10 – System Architecture and Technical Design
Task 3 - System Development / Configuration	Sub-task 11 – System Implementation Plan
	Sub-task 12 – Data Conversion, Synchronization, and Reporting
	Sub-task 13 – System Maintenance, Support and Transition Plan
Task 4 – System Testing	Sub-task 14 – Detailed Test Plans
	Sub-task 15 – Test Scenarios, Test Cases, and Test Scripts
	Sub-task 16 – Documented System Test Results
Task 5 – Project Training	Sub-task 17 – Training Plan
	Sub-task 18 – Training Manuals, Guides, and Materials
	Sub-task 19 – Documented Evidence of Successful End-User Training
Task 6 - Deployment	Sub-task 20 – Release Readiness Evaluations and Reports

Tasks and Sub-Tasks	
Task	Sub-task
	Sub-task 21 – Deployment Plans
	Sub-task 22 – System Defect Resolution Reports
	Sub-task 23 – Complete Detailed Requirements, Design & Specifications
	Sub-task 24 – System Source Code and Documentation
Task 7 – Implementation Closeout	Sub-task 25 – Documented Implementation Project Closeout

2.3 Quality Assurance (QA) / Independent Verification and Validation (IV&V) Vendor Support

Quality Assurance (QA) Validation is the process of examining the complete program/Project to determine whether all stakeholders' requirements have been met. It uses iterative processes throughout the overall Project and SDLC to determine whether the plans, methods, and products delivered are internally complete, consistent, and sufficiently correct.

QA is performed by an organization that is technically, managerially, and financially independent of the Proposer organization. ASR understands the importance and strongly endorses the use of QA to ensure a successful System implementation. ASR may contract for QA services to support the success of the System implementation. By providing a response to this RFP, the Proposer acknowledges their willingness to work collaboratively with any QA service provider under contract with ASR.

3 Evaluation and Selection Criteria

This section describes the process used for analyzing and evaluating the Proposals. It is the City's intent to select Proposer(s) for contract negotiations that will provide the best overall solution to the City, inclusive of fee considerations. Any Proposer selected for contract negotiations is not guaranteed a contract. This RFP does not in any way limit the City's right to solicit Proposals for similar or identical services if, in the City's sole and absolute discretion, it determines the Proposals are inadequate to satisfy its requirements.

3.1 Letter of Intent to Bid

A formal Letter of Intent to Bid is due **BEFORE** the Proposal due date. The timely submission of a letter of intent to bid is a mandatory prerequisite to the submission of a Proposal. The letter of intent must state the Proposers intent to submit a bid, and must identify the Proposer's name and all subcontractors, if known. LBE subcontractors need not be identified.

3.2 Minimum Qualifications and Contract Monitoring Division Requirements

Proposers must meet the following Minimum Qualifications in order to be evaluated in the staged evaluation process in *Section 3.3*. ASR staff will evaluate the Minimum Qualifications. Any Proposal that does not demonstrate the Proposer meets the Minimum Qualifications listed in this section at the time of Proposal submission will be considered non-responsive, and will not proceed to Stage 1 or be evaluated or eligible for award of any subsequent contract(s) for the requested System or services. The Proposer should provide their response according to *Template A – Minimum Qualifications*.

NOTE: For all Proposers that meet the Minimum Qualifications, the Contract Monitoring Division will verify the requirements of the Local Business Enterprise and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the San Francisco Administrative Code. See Section 6.14 Local Business Enterprise Goals and Outreach.

ASR has established the following Minimum Qualifications for any Proposer:

Organization and Stability

1. The Proposer has been in business continuously for at least five (5) years, and during this period provided software products and services similar to those requested in this RFP.
2. The Proposer has audited financials that indicate annual revenues of at least \$20 Million and at least twenty (20) permanent and full-time employees

Professional Services and Software Experience

3. The Proposer shall submit three (3) U.S. based references similar in size, complexity, and scope (minimum of 100,000 property and/or account records). All references must include and highlight experience in system design, development, data migration and conversion, or implementation services within the past 5 years.
 - a. At least one (1) reference must be from a government organization
 - b. At least one (1) reference must verify the Proposer implemented data migration and conversion services
 - c. At least one (1) reference must verify the Proposer has significant support and/or implementation experience with a property assessment and/or tax system, with at least one functional module in a production environment

- d. At least one (1) reference must verify the Proposer has implemented any of the Proposer's software products into a production environment, and the software has been in use for two (2) full fiscal year cycles.

3.3 Evaluation

Proposers that pass Section 3.2 Minimum Qualifications and Contract Monitoring Division Requirements, with signed forms for the Contract Monitoring Division Requirements (see Attachment K), will proceed to Section 3.3 Evaluation.

3.3.1 Staged Evaluation; Scoring

The evaluation will be conducted in two stages. The four (4) highest scoring Proposers in Stage 1 will be invited to Stage 2. Stage 1 will be scored on a basis of 1,000 points; Stage 2 will be scored on a basis of 500 points. For Proposers who are invited to Stage 2, Stage 1 scores will be added to the Stage 2 score to produce the final score (for a maximum of 1,500 points). In the event of a tie of highest scores, the Selection Committee shall request additional interviews and/or demonstrations of the highest scoring Proposers.

The highest scoring Proposer will be invited to enter contract negotiations with the City. If mutually agreed upon contract terms cannot be negotiated with the selected Proposer, then ASR, in their sole and absolute discretion, may terminate negotiations and begin contract negotiations with the next highest scoring Proposer.

3.3.2 Selection Committee

City representatives will serve as the Selection Committee. Specifically, the Selection Committee will be responsible for the evaluation and scoring of the Proposals and Proposer Demonstrations, and for conducting any interviews.

3.3.3 Stage 1 – Proposer Experience and Written Proposal Evaluation Criteria (1,000 Points)

The completed *Templates B - J* from the Proposers will be evaluated and scored in accordance with the criteria below:

1. **Proposer Company and Staff Experience (100 Points)**

The Proposer is required to provide information regarding the company, including basic background and employee resumes, as well as information regarding the key staff and the Project organization being proposed. Sub-criteria include:

 - a. **Template B - Proposer Experience (25 Points)**
 - b. **Template C - Staff Experience (75 Points)**
2. **Business Functionality (300 Points)**

The Proposer is required to respond to each set of Functional Requirements, and to describe its overall approach. Sub-criteria include:

 - a. **Template D – Requirements: Functional Requirements Tab (90 Points)**
 - b. **Template E - Functional Approach (210 Points)**
3. **Technical Functionality (150 Points)**

The Proposer is required to respond to each set of Technical Requirements, and to describe its overall approach. Sub-criteria include:

 - a. **Template D – Requirements: Technical Requirements Tab (45 Points)**

b. Template F – Technical Approach (105 Points)

4. Implementation (250 Points)

The Proposer is required to respond to describe their overall implementation approach. Sub-criteria includes:

a. Template G – Implementation Approach (125 Points)

b. Template H – Joint System Integration Plan (125 Points)

5. Maintenance and Operations (50 Points)

Proposers are required to respond to each set of Maintenance and Operations requirements, and to describe their overall approach. Sub-criteria includes:

a. Template D - Requirements: M&O Requirements (15 Points)

b. Template I – Maintenance and Operation Approach (35 Points)

6. Cost (150 Points)

Complete *Template J - Cost Workbook* by listing the fixed price bid for the System and implementation services being proposed. It is the responsibility of the Proposer to ensure spreadsheet calculations are correct. Sub-criteria includes:

a. Template J – Cost Workbook

3.3.4 Stage 2 – Demonstrations and Interviews Selection Process (500 Points)

The four (4) Proposers receiving the highest scores in Stage 1 will be invited to participate in the Proposer Demonstration and Interviews Selection Process (Stage 2). The Selection Committee will evaluate each Proposer based on their demonstration and interview responses.

1. **Proposer Software Demonstrations (300 points)** – Demonstrations of the software that is proposed by the Proposer to assess the extent the software meets the business needs of the organization. The Proposer will be provided demonstration scripts of unique business requirements for the City and County of San Francisco and Office of the Assessor-Recorder data approximately three (3) weeks prior to the scheduled demonstration. The demonstration for each Proposer will take place over one (1) or two (2) days as requested by ASR, and will be held on-site at City facilities. Software demonstrations are an integral part of the selection process in understanding the System and may require use of data provided by ASR. Proposers that cannot demonstrate their software during the dates prescribed by ASR will be eliminated from further consideration.
2. **Proposer Interviews (200 points)** – The Selection Committee will ask questions regarding the team and their ability to deliver the proposed solution. The Selection Committee will ask standard questions of each Proposer and may ask clarifying questions of specific Proposers.
3. **City Contract Templates and Statement of Work Redline (Not Scored)** – Each Proposer that proceeds to Stage 2 will also be asked to provide a comprehensive redline of the City’s Contract Template(s). If the proposed Solution is non-hosted, the Proposer should redline the P-600 (see Attachment H). If the proposed Solution is hosted, the Proposer should redline the P-648 (see Attachment I). The Contract redline is not scored and is submitted for informational purposes, only. **Each Proposer’s Contract Template redline will be due 30 days after the commencement of Stage 2.**

3.4 Intent to Award and Contract Negotiations; Other Terms and Conditions

The Selection Committee will select a Proposer with whom Office of the Assessor-Recorder staff shall commence contract negotiations. The selection of any proposal shall not imply acceptance by the City of

all terms of the proposal, which may be subject to further negotiations and approvals before the City may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time ASR, in its sole discretion, may terminate negotiations with the highest ranked Proposer and begin contract negotiations with the next highest ranked Proposer.

The successful Proposer will be required to enter into a contract substantially in the form of the Agreement for Professional Services, attached hereto as *Attachment H - Professional Services Sample Template (Form P-600)*, or *Attachment I – SaaS Sample Template (Form P-648)*.

4 Proposer Response Information

This section provides Proposers with the information that must be included in the proposal, as well as additional information to inform the Proposers submission of bids.

4.1 Use of Subcontractor

ASR will not consider joint or collaborative proposals that require it to contract with more than one Proposer. Any proposal involving more than one organization must have a single Prime Contractor/Proposer who is fully accountable to ASR for the delivery of all products and services, is responsible for adhering to all contractual terms, and will receive all payments by ASR for said services. If the Proposal includes the use of Subcontractor(s), the Proposer shall provide information regarding the profile of each Subcontractor.

4.2 Letter of Intent to Bid

A formal Letter of Intent to Bid is due **BEFORE** the Proposal due date. The timely submission of a letter of intent to bid is a mandatory prerequisite to the submission of a Proposal. The letter of intent must state the Proposers intent to submit a bid, and must identify the Proposer's name and all subcontractors, if known. LBE subcontractors need not be identified.

4.3 Time and Place for Submission of Proposals

Proposals and all related materials must be received by **3:00 pm PT on Monday, January 12, 2018.**

Ten (10) hard copy sets of the proposals (excluding Contract Monitoring Division Compliance Forms) with an electronic version of the proposal and the Contract Monitoring Division Compliance Forms on a USB stick, must be submitted by mail or in person at:

Attn: Steve Kim
Office of Assessor-Recorder
City Hall, Room 190
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

*** Proposals will be timestamped as proof of receipt by the desk clerk.**

Place proposals in three-ring binders for the review panel. Please use three-hole recycled paper, print double-sided to the maximum extent practical, use recycled paper that is comprised of a minimum of 30% post-consumer materials, and bind the proposal with a binder clip, rubber band, or single staple, or submit it in a three-ring binder. Please do not bind your proposal with a spiral binding, glued binding, or anything similar. Proposals must be tabbed for ease of review by the Selection Committee.

Contract Monitoring Division Compliance Forms must be bound separately. Proposers must submit only one (1) original, signed copy of the following forms:

- (1) Form 2A-CMD Contract Participation Form
- (2) Form 2B- CMD "Good Faith Outreach" Requirements Form
- (3) Form 3- CMD Non-Discrimination Affidavit
- (4) Form 4- CMD Joint Venture Form (if applicable), and
- (5) Form 5- CMD Employment Form

Note: *Late submissions will not be considered.*

4.4 References

ASR may conduct reference checks of the information submitted in *Template A - Minimum Qualifications* and/or *Template B - Proposer Experience* in order to confirm the information submitted in a Proposer's Proposal.

5 Significant RFP Due Dates and Instructions

5.1 RFP Schedule*

RFP Schedule	
RFP issued	October, 27 2017
Deadline for Initial RFP questions	3:00 pm, Nov. 13, 2017
Answers to Initial RFP questions posted online	November 29, 2017
Deadline for Final RFP questions	3:00 pm, Dec. 8, 2017
Answers to Final RFP questions posted online	December 22, 2017
Letter of Intent to Bid	3:00 pm, Dec. 13, 2017
Deadline for Proposals	3:00 pm, Jan. 12, 2018
Stage 1 Notification	Week of Feb. 9, 2018
Proposer Software Demonstrations and Selection Interviews	Week of Mar. 12, 2018
Stage 2 Notification	Week of Mar. 30, 2018

* RFP Schedule subject to change. For the latest information pertaining to this RFP and the schedule, please refer to the City's Office of Contract Administration (OCA) website bidding system website at <http://mission.sfgov.org/OCABidPublication>

5.2 Issuing Agent

ASR is issuing this RFP on behalf of the City and County of San Francisco.

5.3 Addenda to the RFP

ASR may make modifications to the RFP by issuing an addendum or addenda on the City's Office of Contract Administration (OCA) website bidding system website at <http://mission.sfgov.org/OCABidPublication>

6 Terms and Conditions for Receipt of Proposals

6.1 Errors and Omissions in RFP

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify the Department, in writing, if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to the Department promptly after discovery, but in no event later than 5 working days prior to the date that proposals are due. Modifications and clarifications will be made by addenda as provided below.

6.2 Inquiries Regarding RFP

Proposers shall submit all questions concerning this RFP, scope of services or requirements in writing by email only during the Question and Answer Period, ending **December 8, 2017** no later than **3pm** PT and directed to: ASRcontracts@sfgov.org. All Proposer questions concerning the bid process shall be submitted no later than 72 hours prior to the bid deadline **January 9, 2017** no later than **3pm** PT. Proposers who fail to do so will waive all further rights to protest, based on these specifications and conditions.

6.3 Objections to RFP Terms

Should a Proposer object on any ground to any provision or legal requirement set forth in this RFP, the Proposer must, not less than 5 working days prior to the RFP deadline, provide written notice to the Department setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

6.4 Change Notices

The Department may modify the RFP, prior to the proposal due date, by issuing an Addendum to the RFP, which will be posted on the website. The Proposer shall be responsible for ensuring that its proposal reflects any and all Bid Addendum(s) issued by the Department prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the proposal due date, to determine if the Proposer has downloaded all Bid Addendum(s). It is the responsibility of the Proposer to check for any Addendum, Questions and Answers, and updates, which will be posted on the City's Office of Contract Administration (OCA) website bidding system at <http://mission.sfgov.org/OCABidPublication>

6.5 Term of Proposal

Submission of a proposal signifies that the proposed services and prices are valid for 360 calendar days from the proposal due date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the proposal may remain valid beyond the 360 day period in the circumstance of extended negotiations.

6.6 Revision of Proposal

A Proposer may revise a proposal on the Proposer's own initiative at any time before the deadline for submission of proposals. The Proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before, but no later than the proposal due date and time.

In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any Proposer.

At any time during the proposal evaluation process, the Department may require a Proposer to provide oral or written clarification of its proposal. The Department reserves the right to make an award without further clarifications of proposals received.

6.7 Errors and Omissions in Proposal

Failure by the Department to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the Proposer from full compliance with the specifications of the RFP or any contract awarded pursuant to the RFP.

6.8 Financial Responsibility

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFP. Submissions of the RFP will become the property of the City and may be used by the City in any way deemed appropriate.

6.9 Proposer's Obligations under the Campaign Reform Ordinance

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the contract is approved by the City elective officer or the board on which that City elective officer serves.

If a Proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the Proposer is prohibited from making contributions to:

1. The officer's re-election campaign
2. A candidate for that officer's office
3. A committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any city officer or employee about a particular contract, or a city officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a Proposer contacts a city officer or employee to promote himself or herself as a candidate for a contract; and (2) a city officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

1. Criminal. Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
2. Civil. Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
3. Administrative. Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.

For further information, Proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

6.10 Sunshine Ordinance (Public Records)

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the

contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

6.11 Public Access to Meetings and Records (Non-Profits)

If a Proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the Proposer must comply with Chapter 12L. The Proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to Proposer's meetings and records, and (2) a summary of all complaints concerning the Proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint. If no such complaints were filed, the Proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in Proposer's Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

6.12 Reservations of Rights by the City

The issuance of this RFP does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
2. Reject any or all proposals;
3. Reissue a Request for Proposals;
4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
5. Procure any materials, equipment or services specified in this RFP by any other means; or
6. Determine that no project will be pursued.

6.13 No Waiver

No waiver by the City of any provision of this RFP shall be implied from any failure by the City to recognize or take action on account of any failure by a Proposer to observe any provision of this RFP.

6.14 Local Business Enterprise Goals and Outreach

The requirements of the Local Business Enterprise and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the San Francisco Administrative Code as it now exists or as it may be amended in the future (collectively the "LBE Ordinance") shall apply to this RFP.

Each solicitation process requires a **new submittal of CMD Attachment 2 forms** at the following link, located under the heading "Attachment 2: Requirements for Architecture, Engineering, & Professional Services Contracts":

<http://www.sfgsa.org/index.aspx?page=6135>

- (1) Form 2A-CMD Contract Participation Form
- (2) Form 2B- CMD "Good Faith Outreach" Requirements Form
- (3) Form 3- CMD Non-Discrimination Affidavit
- (4) Form 4- CMD Joint Venture Form (if applicable), and
- (5) Form 5- CMD Employment Form

Please submit Forms 2A, 2B, 3 and 5 (and Form 4 if Joint Venture response) with your Response Package. The forms should be part of the "Original" of your response. The forms should have original signatures.

If these forms are not returned with the response, the response may be determined to be non-responsive and may be rejected.

1. Local Business Enterprise Goals and Outreach

The requirements of the Local Business Enterprise (LBE) and Non-Discrimination in Contracting Ordinance set forth in Chapter 14B of the S.F. Administrative Code as it now exists or as it may be amended in the future (collectively the “LBE Ordinance”) shall apply to this solicitation. More information regarding these requirements can be found at:

<http://www.sfgov.org/cmd>

2. LBE Sub-consultant Participation Requirement

Please refer to San Francisco Administrative Code Chapter 14B and *CMD Attachment 2* for information concerning the City's LBE program.

The LBE sub-consulting goal is **4%** of the total value of the goods and/or services to be procured. Sub-consulting goals can only be met with CMD-certified Small or Micro-LBEs located in San Francisco.

3. Link to LBE Sub-consultant Directory

This link takes you to a directory of current Local Business Enterprises.

http://mission.sfgov.org/hrc_certification

4. Good Faith Outreach to Select LBE Sub-consultants

Each firm responding to this solicitation shall demonstrate in its response that it has used good-faith outreach to select LBE sub-consultants as set forth in S.F. Administrative Code §§14B.8 and 14B.9, and shall identify the particular LBE sub-consultants solicited and selected to be used in performing the contract. For each LBE identified as a subcontractor, the response must specify the value of the participation as a percentage of the total value of the goods and/or services to be procured, the type of work to be performed, and such information as may reasonably be required to determine the responsiveness of the response. LBEs identified as sub-consultants must be certified with the Contract Monitoring Division at the time the response is due, and must have been contacted by the (prime contractor) prior to listing them as subcontractors in the response. Any response that does not meet the requirements of this paragraph will be non-responsive.

5. Documentation of Good Faith Outreach Efforts

In addition to demonstrating that it will achieve the level of sub-consulting participation required by the contract, a Respondent shall also undertake and document in its submittal the good faith efforts required by Chapter 14B.8(C) & (D) and CMD Attachment 2, Requirements for Architecture, Engineering and Professional Services Contracts.

Responses which fail to comply with the material requirements of S.F. Administrative Code §§14B.8 and 14B.9, CMD Attachment 2 and this solicitation will be deemed non-responsive and will be rejected. During the term of the contract, any failure to comply with the level of LBE sub-consultant participation specified in the contract shall be deemed a material breach of contract.

Note: *If Respondent meets/exceeds LBE participation by 35% (i.e. 5.4% LBE participation for this contract), Good Faith Outreach documentation is not required.*

6. LBE Participation and Rating Bonuses

The City strongly encourages responses from qualified LBEs. Pursuant to Chapter 14B, the following rating bonuses will be in effect for the award of this project for any Respondents who are certified as a Small or Micro-LBE, or joint ventures where the joint venture partners are in the same discipline and have the specific levels of participation as identified below. Certification applications may be obtained by calling (415) 581-2310. The rating bonus applies at each phase of the selection process. The application of the rating bonus is as follows:

- a) A 10% bonus to a Small or Micro LBE—including Non-Profit; or a joint venture between or among LBEs; or
- b) A 5% bonus to a joint venture with LBE participation that equals or exceeds 35%, but is under 40%;
- c) A 7.5% bonus to a joint venture with LBE participation that equals or exceeds 40%;

Joint Venture Rating Bonus If applying for a rating bonus as a joint venture, the LBE must be an active partner in the joint venture and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the response, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the joint venture. The portion of the LBE joint venture's work shall be set forth in detail separately from the work to be performed by the non-LBE joint venture partner. The LBE joint venture's portion of the contract must be assigned a commercially useful function.

7. Application of the Rating bonus:

The following rating bonus shall apply at each stage of the selection process, i.e., qualifications, proposals, and interviews:

- a) Contracts with an Estimated Cost in Excess of \$10,000 and Less Than or Equal To \$400,000. A 10% rating bonus will apply to any proposal submitted by a CMD certified Small or Micro LBE. Proposals submitted by SBA-LBEs are not eligible for a rating bonus.
- b) Contracts with an Estimated Cost in Excess of \$400,000 and Less Than or Equal To \$10,000,000. A 10% rating bonus will apply to any proposal submitted by a CMD certified Small or Micro-LBE. Pursuant to Section 14B.7(E), a 5% rating bonus will be applied to any proposal from an SBA-LBE, except that the 5% rating bonus shall not be applied at any stage if it would adversely affect a Small or Micro-LBE Proposer or a JV with LBE participation.
- c) Contracts with an Estimated Cost In Excess of \$10,000,000 and Less Than or Equal To \$20,000,000. A 2% rating bonus will apply to any proposal submitted by a Small LBE, Micro LBE and SBA-LBE.
- d) The rating bonus for a Joint Venture ("JV") with LBE participation that meets the requirements of Section 2.02 below is as follows for contracts with an estimated cost of in excess of \$10,000 and Less Than or Equal to \$10,000,000:
 - i. 10% for each JV among Small and/or Micro LBE prime Proposers.
 - ii. 5% for each JV which includes at least 35% (but less than 40%) participation by Small and/or Micro-LBE prime Proposers.
 - iii. 7.5% for each JV that includes 40% or more in participation by Small and/or Micro-LBE prime Proposers.
 - iv. The rating bonus will be applied by adding 5%, 7.5%, or 10% (as applicable) to the score of each firm eligible for a bonus for purposes of determining the highest ranked firm. Pursuant to Chapter 14B.7(F), SBA-LBEs are not eligible for the rating bonus when joint venturing with a non LBE firm. However, if the SBA-LBE joint ventures with a Micro-LBE or a Small-LBE, the joint venture will be entitled to the joint venture rating bonus only to the extent of the Micro-LBE or Small-LBE participation described in Section 2.01B.4b. and c. above.
- e) The rating bonus does not apply for contracts estimated by the Contract Awarding Authority to exceed \$20 million.

The rating bonus/bid discount does not apply for contracts estimated by the Contract Awarding Authority to exceed \$20 million.

8. CMD Contact

If you have any questions concerning the CMD Forms and to ensure that your response is not rejected for failing to comply with S.F. Administrative Code Chapter 14B requirements, please call **Ryan Young, the CMD Contract Compliance Officer for this solicitation at 415-581-2301 or ryan.b.young@sfgov.org**. Please see **Attachment K for additional details**. The CMD forms will be reviewed prior to the evaluation process.

7 Contract Requirements

7.1 Standard Contract Provisions

The successful Proposer will be required to enter into a contract substantially in the form of the Agreement for Professional Services, attached hereto as Attachment H - Professional Services Sample Template (Form P-600), or Attachment I – SaaS Sample Template (Form P-648). Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages.

7.2 Nondiscrimination in Contracts and Benefits

The successful Proposer will be required to agree to comply fully with and be bound by the provisions of Chapters 12B and 12C of the San Francisco Administrative Code. Generally, Chapter 12B prohibits the City and County of San Francisco from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. The Chapter 12C requires nondiscrimination in contracts in public accommodation. Additional information on Chapters 12B and 12C is available on the CMD's website at <http://sfgov.org/cmd>

7.3 Minimum Compensation Ordinance (MCO)

The successful Proposer will be required to agree to comply fully with and be bound by the provisions of the Minimum Compensation Ordinance (MCO), as set forth in S.F. Administrative Code Chapter 12P. Generally, this Ordinance requires contractors to provide employees covered by the Ordinance who do work funded under the contract with hourly gross compensation and paid and unpaid time off that meet certain minimum requirements. For the amount of hourly gross compensation currently required under the MCO, see www.sfgov.org/olse/mco. Note that this hourly rate may increase on January 1 of each year and that contractors will be required to pay any such increases to covered employees during the term of the contract.

Additional information regarding the MCO is available on the web at www.sfgov.org/olse/mco

7.4 Health Care Accountability Ordinance (HCAO)

The successful Proposer will be required to agree to comply fully with and be bound by the provisions of the Health Care Accountability Ordinance (HCAO), as set forth in S.F. Administrative Code Chapter 12Q. Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the HCAO is available on the web at www.sfgov.org/olse/hcao

7.5 First Source Hiring Program (FSHP)

If the contract is for more than \$50,000, then the First Source Hiring Program (Admin. Code Chapter 83) may apply. Generally, this ordinance requires contractors to notify the First Source Hiring Program of available entry-level jobs and provide the Workforce Development System with the first opportunity to refer qualified individuals for employment.

Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the FSHP is available on the web at <http://oewd.org/first-source> and from the First Source Hiring Administrator, (415) 701-4848.

7.6 Conflicts of Interest

The successful Proposer will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III, Chapter 2 of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. The successful Proposer will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such fact during the term of the Agreement.

Individuals who will perform work for the City on behalf of the successful Proposer might be deemed consultants under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful Proposer that the City has selected the Proposer.

8 Protest Procedures

8.1 Protest of Minimum Qualifications and Contract Monitoring Division Requirements Determination

Within five working days of the City's issuance of a notice of non-responsiveness, any firm that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

8.2 Protest of Non-Responsible Determination

Within five working days of the City's issuance of a notice of a determination of non-responsibility, a Proposer that would otherwise be the lowest responsive Proposer may submit a written notice of protest. The Proposer will be notified of any evidence reflecting upon their responsibility received from others or adduced as a result of independent investigation. The Proposer will be afforded an opportunity to rebut such adverse evidence, and will be permitted to present evidence that they are qualified to perform the contract. Such notice of protest must be received by the City on or before the fifth working day following the City's issuance of the notice of non-responsibility. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

8.3 Protest of Notice of Intent to Award

Within five working days of the City's issuance of a notice of intent to award the contract, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another Proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth working day after the City's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

8.4 Delivery of Protests

All protests must be received by the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) will not be considered. Protests must be delivered to:

Rachel Cukierman
Deputy Director of Administration and Finance
Office of the Assessor-Recorder
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, City Hall, Room 190
San Francisco, CA 94102-4698



Background Memo: File No. 260191

Resolution authorizing the Office of the Assessor-Recorder (ASR) to execute Amendment No. 2 to Contract 1000010122 with Sapient Corporation for the implementation and maintenance of the Property Assessment System Replacement Project; increasing the contract by \$6,754,000 for a total not to exceed amount of \$33,912,702 and extending the contract duration from nine years and two months to thirteen years and eight months from December 31, 2027 to June 30, 2032.

The Office of the Assessor-Recorder (ASR) requests that the Board of Supervisors approve Amendment 2 to the Agreement for the Implementation and Maintenance Services of the Property Assessment System Replacement with Sapient Corporation (Contract ID #10000010122).

This amendment would:

- Exercise the existing five-year extension option, to extend the contract duration to approximately fourteen (14) years through June 2032, and
- Add \$6,754,000 to fund ongoing support and maintenance following system go-live, increasing the not-to-exceed amount from \$27,158,702 to \$33,912,702.

This request does not expand the scope of work or appropriate funding and only authorizes continued operational support for the Assessor-Recorder's property assessment information system. The newly implemented system is already live in production and is mission-critical to the City's administration of property tax appraisal and assessment.

The Department will continue to request funds to pay for ongoing maintenance through the annual budget process. The FY 25-26 and FY 26-27 budgets previously authorized ~\$1.2M in each year of the budget for this purpose.

Program Overview

On November 13, 2018, the Board of Supervisors adopted Resolution No. 404-18 (File 181037), awarding two contracts for the property assessment and tax system (PATS) replacement effort. PATS is a joint, multi-phase endeavor between the Office of the Assessor-Recorder (ASR), the Treasurer & Tax Collector (TTX), and Office of the Controller (CON) to secure and modernize the City's property tax functions. The program replaces two legacy systems that support:

- The assessment management of 211,547 parcels on the assessment roll, valued at \$354B (\$337B net of exemptions) as of 2025, and
- The billing, collection and allocation of approximately \$4.2 billion in annual property tax revenues generated by the assessment roll.

These systems are foundational to the City's fiscal operations and revenue integrity.

Program Objectives

The PATS program was approved as a Major Project in the Committee on Information Technology (COIT) ICT plan beginning in FY 2015-16. Core objectives include:

- **Increasing Efficiency and Quality:** Re-engineering assessment and tax business processes to eliminate manual processes and workarounds.
- **Improving Revenue Collection:** Reducing revenue-at-risk through timely assessments, tax billing, revenue collection, and certification.
- **Strengthening the Technology Infrastructure:** Securing \$4.2 billion in revenue through secure, resilient, and modern platforms.
- **Increasing Access to Data:** Improving data availability for the public, policymakers, and revenue forecasters.
- **Improving Taxpayer Service and Transparency:** Integrating property tax and assessment functions across the three departments to enhance customer service.

Project Status and Background

ASR and Sapient kicked off the project in January 2019 with an anticipated go-live date of November 2021. While Phase 1 successfully went live in January 2021, Phase 2 experienced significant delays. These delays were primarily driven by misalignment between vendor delivery assumptions and an underestimation of overall project complexity.

Despite several delays and change orders, Phase 2 went live in September 2025, transitioning the system into an ongoing operations and maintenance phase. Maintenance services are currently funded under the existing contract through FY 2026-27.

Contract History

Original Contract (2018)

In November 2018, the Board approved the Sapient Corporation Implementation and Maintenance Agreement Not-to-Exceed amount of \$21,414,700 over a 12-year term (Resolution 404-18, File 181037). The contract assumed a three-year implementation schedule with Sapient providing ongoing maintenance and support for ten years from 2021 through 2030 at an annual cost of \$587,000.

Amendment 1 (2023)

In March 2023, the Board approved Amendment 1 (Resolution 136-23, File 230233), which reduced the duration and budget for ongoing maintenance and support in order to fund project implementation cost increases. This amendment increased the contract by \$5,744,002, from \$21,414,700 to \$27,158,702 to facilitate a five-year implementation schedule with Sapient providing ongoing maintenance and support for four years through June 2027.

This amendment prioritized successful system delivery but deferred longer-term maintenance funding until system stabilization.

Purpose for Amendment 2

Amendment 2 would exercise the existing five-year option to extend operations and maintenance services from July 2027 through June 2032, at a cost of \$6,754,000.

This extension is necessary to:

- Ensure the system can be maintained following go-live,
- Support post-go-live issue resolution, including correcting system errors and bugs, and resolving any production issues identified during live operations,
- Support upgrades and security patches, and
- Preserve and transfer the know-how needed to operate, maintain, and troubleshoot the system during the post-implementation period.

ASR will negotiate maintenance needs annually. The extension option is exercised now to preserve access to the existing Sapient project management team and provide a stable and continuous post-implementation support plan.

Within these five years, ASR intends to systematically increase staff skills and capacity needed to transition knowledge, skills, and responsibilities to internal staff, reducing long-term reliance on external consultants and positioning the City to perform more work in-house.

In summary, Amendment 2 ensures the City will have the resources necessary to securely operate, maintain, and support a newly implemented tax assessment system while transitioning responsibility to City staff over time.

Summary of Contract Change

Description	Amount
Current not-to-exceed	27,158,702
FY 27-28 maintenance	1,234,000
FY 28-29 maintenance	1,290,000
FY 29-30 maintenance	1,348,000
FY 30-31 maintenance	1,409,000
FY 31-32 maintenance	1,473,000
Revised not-to-exceed	33,912,702

Consequences of Non-Approval

If the Board does not approve this amendment, ASR would lack contractual authority for vendor maintenance support beyond FY 2026-27, increasing operational risk to:

- Assessment roll production;
- Enrollment of property value between the Assessor and Treasurer and Tax-Collector;
- Property tax billing and revenue certification; and
- System security, compliance, and continuity.

Given the system's foundational role in generating \$4.2 billion in annual revenue, any disruption would pose significant fiscal and operational risk to the City.



San Francisco Ethics Commission

25 Van Ness Avenue, Suite 220, San Francisco, CA 94102

Phone: 415.252.3100 · Fax: 415.252.3112

Filing Information

Record Number

SFEC126F0001130

Status

BOS Legislative Clerk Acceptance

SFEC126f Form Type

126f4 BOS

File Number (BOS)

260191

Type of Filing

Original

Contractor Information

Contractor Name

Sapient Corporation

Contractor Email

andrew.brawer@publicissapient.com

Contractor Phone #

(703) 585-9849

International Address?

No

Contractor Address (US)

131 Dartmouth St., 3rd Floor

Contractor City and State

Boston - MA

Contractor Zip Code

02116

Country

United States of America

Contract Information

Contract Amount

\$33,912,702.00

Bid/RFP#

ASR2017-01

Description of Amount of Contract

\$33,912,702

Contract Description

Amendment to contract 1000010122 to add \$6,754,000 (from \$27,158,702 to \$33,912,702) to the contract not to exceed amount, and to extend the end date by 4 years and 6 months (from December 31, 2027 to June 30, 2032), by exercising the option to extend, for maintenance and support services for our new System for Managing Assessments, Records and Transactions (SMART) that went live in September 2025.

City Agency - Departmental Contact Information

Departmental Contact

Eric Chan

Departmental Contact Phone #

+16286528220

Full Department Name

ASR - Assessor

Contract Approval

Mayoral Approval Not Required

false

Affiliates and subcontractors

Entity Type	First Name	Last Name	Entity or Sub/Contractor Name
Board of Directors	Maurice	Levy	Sapient Corporation
Board of Directors	Elisabeth	Badinter	Sapient Corporation
Board of Directors	Simon	Badlinter	Sapient Corporation
Board of Directors	Jean	Charest	Sapient Corporation
Board of Directors	Sophie	Dulac	Sapient Corporation
Board of Directors	Tom H.	Glocer	Sapient Corporation
Board of Directors	Marie-Josée	Kravis	Sapient Corporation
Board of Directors	Andre	Kudelski	Sapient Corporation
Board of Directors	Susan	LeVine	Sapient Corporation
Board of Directors	Antonella	Mei-Pochtler	Sapient Corporation
Board of Directors	Pierre	Penicaud	Sapient Corporation
Board of Directors	Tidjane	Thiam	Sapient Corporation
Board of Directors	Patricia	Velay-Borrini	Sapient Corporation
CEO	Nigel	Vaz	Sapient Corporation
Other Principal Officer	Teresa	Barreira	Sapient Corporation
Other Principal Officer	Arthur	Filip	Sapient Corporation
CFO	Nathalie	Le Bos	Sapient Corporation
Other Principal Officer	Kameshwari	Rao	Sapient Corporation
Subcontractor			Five Paths LLC
Board of Directors	Arthur	Sadoun	Sapient Corporation

Introduction Form

(by a Member of the Board of Supervisors or the Mayor)



I hereby submit the following item for introduction (select only one):

- 1. For reference to Committee (Ordinance, Resolution, Motion or Charter Amendment)
- 2. Request for next printed agenda (For Adoption Without Committee Reference)
(Routine, non-controversial and/or commendatory matters only)
- 3. Request for Hearing on a subject matter at Committee
- 4. Request for Letter beginning with "Supervisor inquires..."
- 5. City Attorney Request
- 6. Call File No. from Committee.
- 7. Budget and Legislative Analyst Request (attached written Motion)
- 8. Substitute Legislation File No.
- 9. Reactivate File No.
- 10. Topic submitted for Mayoral Appearance before the Board on

The proposed legislation should be forwarded to the following (please check all appropriate boxes):

- Small Business Commission Youth Commission Ethics Commission
- Planning Commission Building Inspection Commission Human Resources Department

General Plan Referral sent to the Planning Department (proposed legislation subject to Charter 4.105 & Admin 2A.53):

- Yes No

(Note: For Imperative Agenda items (a Resolution not on the printed agenda), use the Imperative Agenda Form.)

Sponsor(s):

Subject:

Long Title or text listed:

Signature of Sponsoring Supervisor:

