



Property Assessment System Replacement Project
Contract Amendment – Sapient Corporation

Presented to the Budget and Finance Committee
March 15, 2023

Program Summary

Joint effort between financial services Departments to replace two legacy information systems that together enable the assessment, billing, collection and apportionment of \$3.9 billion in annual property tax revenue.

- Treasurer and Tax Collector (TTX) / Controller (CON) - CICSP
 - Tax collection and billing
 - Apportion and allocate
- Assessor-Recorder (ASR) – EZ Access
 - Real and Personal Property tracking and assessment
 - Change in Ownership
 - Possessory Interest

Netshuttle - RUMBA Mainframe Display

SECURED PROPERTY TAX										03-01-2016		
IBSD	VOL	BLOCK	LOT	SEQ	YEAR	BILL	CHANGE	NUMBER	DATE	TYPE		
	18	2474	037	01	15-15	093069						
ASSESSEE											AV	
											ASSESSED VALUE	
											LAND	647,500
											STRUCTURE	277,500
											FIXTURE	
CORTAC	5211	0086076									PERS PROP	TAX RATE
											GROSS TAX	1.1826 %
											HO EXEMPT	
											OT EXEMPT	TAX AMOUNT
SEE SUPPLEMENTAL ROLL											NET TAXABLE	925,000
												10,339.04
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										89	SFUSD FACIL.	35.34
COST DUE										91	SFCCD TAX	79.00
NSF DUE										98	SF - TEACHER	230.94
TOTAL DUE	5,686.66				5,686.66							
TOTAL PAID	5,686.66				8.00							
BALANCE DUE	0.00				5,686.66						TOTAL TAX	11,373.32
DATE PAID	602100	12-04-2015										

TMS4 32: INQUIRY COMPLETED: TAX AND SPECIAL ASSESSMENT DATA DISPLAYED

Inpect - RUMBA AS/400 Display

Parcel	Block	Lot	Roll	Year	Roll Code	Status	Display Date						
087995			2014	2014	3	Secured	6/15/2014						
Vol	06	APN	0787	001	Year	2614	Ev+Date	2/29/1969	Seq	001	NSC	ENR	58
Location	CITY HILL												
Owner	CITY PROPERTY												
Care of	DIRECTOR OF PROPERTY												
Address	25 VAN NESS AVE												
City/Zip	SAN FRANCISCO CA 94102												
Date	2/29/1969												

01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16
Ownership History	Change of Ownership	Enrollment History	Sales History	Value Screen	Partial Interest	Valuation Methods	Notes Screen	New Construction	NewConstruction Sum	Appeals Tracking	Parcel Split/Combo	Class Code/Situs Cho	Chars. Summary	Land Characteristics	Office/Retail Chars

Program Objectives

❑ Increase Efficiency and Quality

Re-engineer assessment and tax business processes based on best practices to eliminate manual processes and workarounds.

❑ Improve Revenue Collection

Increase turnaround time for assessments and providing timely tax billing, revenue collection and certification to reduce potential property tax impact.

❑ Strengthen the Technology Infrastructure

Safeguard \$3.9 billion in revenue through modern technology platforms that are secure and resilient.

❑ Increase Access to Data

Improve information available to public and policymakers and enabling better revenue forecasting and data analysis.

❑ Improve Taxpayer Service and Transparency

Integrate property tax and assessment functions among the three departments for better customer service.

Project Highlights

- ❑ TTX/CON, system completed go-live in 2020
- ❑ ASR, System for Managing Assessment, Records & Transactions (SMART) completed Phase 1 go-live in January 2021
- ❑ ASR, SMART projected go-live for Phase 2 in December 2023 and February 2024

Contract Amendment

- ❑ Original Contract: \$21,414,700 over 12 years

- ❑ Amendment: \$27,158,702 over 9 years
 - More complex system implementation taking 5 years instead of 3 years
 - Additional time needed to maintain Phase 1 while we implement Phase 2
 - Increased cost of system maintenance
 - Decrease the maintenance duration from 10 years to 4 years to allow ASR to assess the vendor market sooner

Risk Mitigations

- ❑ Payment schedule includes retainage of \$1.5M until final deliverables are complete
- ❑ Maintenance payments tied to completion of implementation
- ❑ Project contingency for future unforeseen issues/delays
- ❑ Reducing maintenance term so that we can go back out to the market sooner to possibly find a better price if there are issues with support and maintenance

Thank You



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 able to see all the associated Properties below. You may also link...

Request a Replacement PIN

To request a replacement Entity ID and Access PIN to view information on customer service case with our office.

Accessing Additional Information

You can access additional information about your Accounts and Properties...

Filing Sta

To file BPP st... Accounts link

Ownership (3)
3 items • Sorted by End Date • Updated 2 min.

Ownership Num...	O
1 <input type="checkbox"/> OW-1297963	D
2 <input type="checkbox"/> OW-637285	Lt
3 <input type="checkbox"/> OW-782240	M

Property **0022 010 @ 475 BEACH ST SAN FRANCISCO, CA 94133-1127**

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 <input type="checkbox"/> PE-408456
2 <input type="checkbox"/> PE-408457
3 <input type="checkbox"/> PE-408458
4 <input type="checkbox"/> PE-408459
5 <input type="checkbox"/> PE-408460
6 <input type="checkbox"/> PE-408461
7 <input type="checkbox"/> PE-408462
8 <input type="checkbox"/> PE-408463
9 <input type="checkbox"/> PE-408464
10 <input type="checkbox"/> PE-408465

[View All](#)

Creating Document Nu...

2018K68357800
1983 D425073-77
1986 D824793-95

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 <input type="checkbox"/> PV-00557881	9/27/2021			\$0		New Construction
2 <input type="checkbox"/> PV-00744300	1/1/2021	9/26/2021	\$0	\$0	\$0	CIP
3 <input type="checkbox"/> PV-00684613	1/1/2020	12/31/2020	\$0	\$0	\$0	CIP
4 <input type="checkbox"/> PV-01151836	10/17/2018					Change in Ownership
5 <input type="checkbox"/> PV-00138756	1/1/2011	12/31/2011	\$0	\$0	\$0	Proposition 8
6 <input type="checkbox"/> PV-00963791	1/1/2010	12/31/2010	\$0	\$0	\$0	Proposition 8
7 <input type="checkbox"/> PV-00610841	1/1/2009	12/31/2009	\$0	\$0	\$0	Proposition 8
8 <input type="checkbox"/> PV-00355882	3/1/1993	10/17/2018				Conversion (Legacy)

[View All](#)