

**REPORT/RECOMMENDATION TO THE BOARD OF SUPERVISORS
OF SAN BERNARDINO COUNTY
AND RECORD OF ACTION**

September 23, 2025

FROM

ENSEN MASON, Auditor-Controller/Treasurer/Tax Collector

SUBJECT

Amendment to Contract with Grant Street Group to Defer Specified Requirements and Payments for the Property Tax Legacy Systems Replacement Project

RECOMMENDATION(S)

Approve **Amendment No. 1 to Contract No. 22-359** with Grant Street Group, Inc. to revise the Statement of Work, defer specified requirements and related payments, and replace the Fee Schedule, reducing the total contract amount by \$400,056 from \$58,013,819 to \$57,613,763 with no change to the contract term of May 24, 2022, through June 30, 2032.

(Presenter: Ensen Mason, Auditor-Controller/Treasurer/Tax Collector, 382-7000)

COUNTY AND CHIEF EXECUTIVE OFFICER GOALS & OBJECTIVES

Improve County Government Operations.

Operate in a Fiscally Responsible and Business-Like Manner.

FINANCIAL IMPACT

Approval of this item will not result in the use of additional Discretionary General Funding (Net County Cost). The amendment reduces the contract by \$400,056 through credits for the public Geographic Information System (GIS) Dashboard and Tableau licensing, as the County will develop its own dashboard and purchase Tableau licenses directly and defers \$5,000,000 in payments to December 2025 and July 2026 to align with future milestones. Sufficient appropriation has been included in the Auditor-Controller/Treasurer/Tax Collector's (ATC) 2025-26 budget and will be included in the 2026-27 recommended budget.

BACKGROUND INFORMATION

On May 24, 2022 (Item No. 25), the Board of Supervisors approved Contract No. 22-359 with Grant Street Group (GSG) as part of the Property Tax Legacy Systems Replacement (PTLSR) Project for a modernized County property tax system (TaxSys) in the amount of \$58,013,819 for the total contract period of May 24, 2022, through June 30, 2032.

On July 14, 2025, ATC successfully completed Milestone 14 with the go-live of the PTLSR Project, implementing the TaxSys platform. Milestones 1 through 14 were completed on time and within budget, leading to the full transition from legacy systems to TaxSys.

During the implementation phase, ATC and GSG strategically identified 98 contractual requirements within Milestones 9 through 14 that would deliver significantly greater business value and operational efficiency if designed and developed after the core system implementation. Rather than designing these enhanced features based solely on original

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Request for Proposal specifications or legacy business processes, this strategic deferral allows GSG to leverage real-world system performance data, user feedback, and actual operational workflows to create superior solutions that maximize return on investment.

This approach represents a win-win scenario for both GSG and the County's best interests. By allowing the project team to concentrate initial development efforts on delivering California's first fully integrated TaxSys solution, with emphasis on complex Auditor-Controller functions – including roll loading, the administration of direct charges by Affected Taxing Entities, apportionment, and distribution – the County achieved a successful and on-time go-live while preserving the opportunity for enhanced feature development. GSG has worked in close collaboration with ATC's Property Tax team subject matter experts to support the successful design and delivery of these core components, demonstrating the depth of expertise and dedication of the Property Tax team and their critical role in shaping the system's foundational functionality.

Amendment No. 1 to Contract No. 22-359 formally replaces Milestones 9 through 14, establishes new Milestones 15 through 17, and documents the strategically deferred 98 requirements as enhanced features. These revised milestones reflect a jointly developed prioritization and delivery schedule between ATC and GSG that capitalizes on post-implementation insights to deliver superior functionality. The amendment also defers \$5,000,000 in payments, approximately 16% of the total \$30,941,641 three-year implementation cost, across new payment Milestones 15 and 16, due in December 2025 and July 2026, respectively. Milestone 17, which includes the remaining deferred enhanced features, is scheduled for completion by July 2028, with no associated deferred payment.

This amendment also reflects a total contract reduction of \$400,056. The reduction includes a one-time credit of \$209,400 related to the public GIS Dashboard, annual credits of \$24,000 for four years (\$96,000 total) for ongoing GIS Dashboard support, and annual credits of \$11,832 from Year 3 through the end of the contract (eight years total = \$94,656) to offset Tableau licensing costs. For the public GIS Dashboard, the County elected to develop and own the dashboard, using tools and technologies that are compatible with and integrated into the County's larger Open Data initiative. For the Tableau licensing credit, since GSG is not an authorized reseller, this credit enables the County to purchase Tableau licenses directly.

This amendment ensures continued alignment with project goals and optimizes the delivery of enhanced functionality that will provide maximum business value and operational efficiency based on real-world system performance and user experience insights.

PROCUREMENT

Not applicable.

REVIEW BY OTHERS

This item has been reviewed by County Counsel (Bonnie Uphold, Supervising Deputy County Counsel, 387-5455) on September 3, 2025; Purchasing (Jessica Barajas, Supervising Buyer, 387-2065) on September 5, 2025; and County Finance and Administration (Jenny Yang, Administrative Analyst, 387-4884) on September 4, 2025.

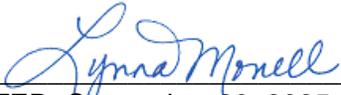
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Record of Action of the Board of Supervisors
San Bernardino County

APPROVED (CONSENT CALENDAR)

Moved: Joe Baca, Jr. Seconded: Curt Hagman
Ayes: Col. Paul Cook (Ret.), Jesse Armendarez, Dawn Rowe, Curt Hagman, Joe Baca, Jr.

Lynna Monell, CLERK OF THE BOARD

BY 
DATED: September 23, 2025



cc: ATC - Le w/agree
Contractor - c/o ARMC w/agree
File - w/agree
CCM 09/30/2025