Integrated Property

BUREAU OF TECHNOLOGY

Integrated Property

Key Stakeholders

Board of Review · County Clerk · Recorder of Deeds · Assessor · Treasurer · GIS
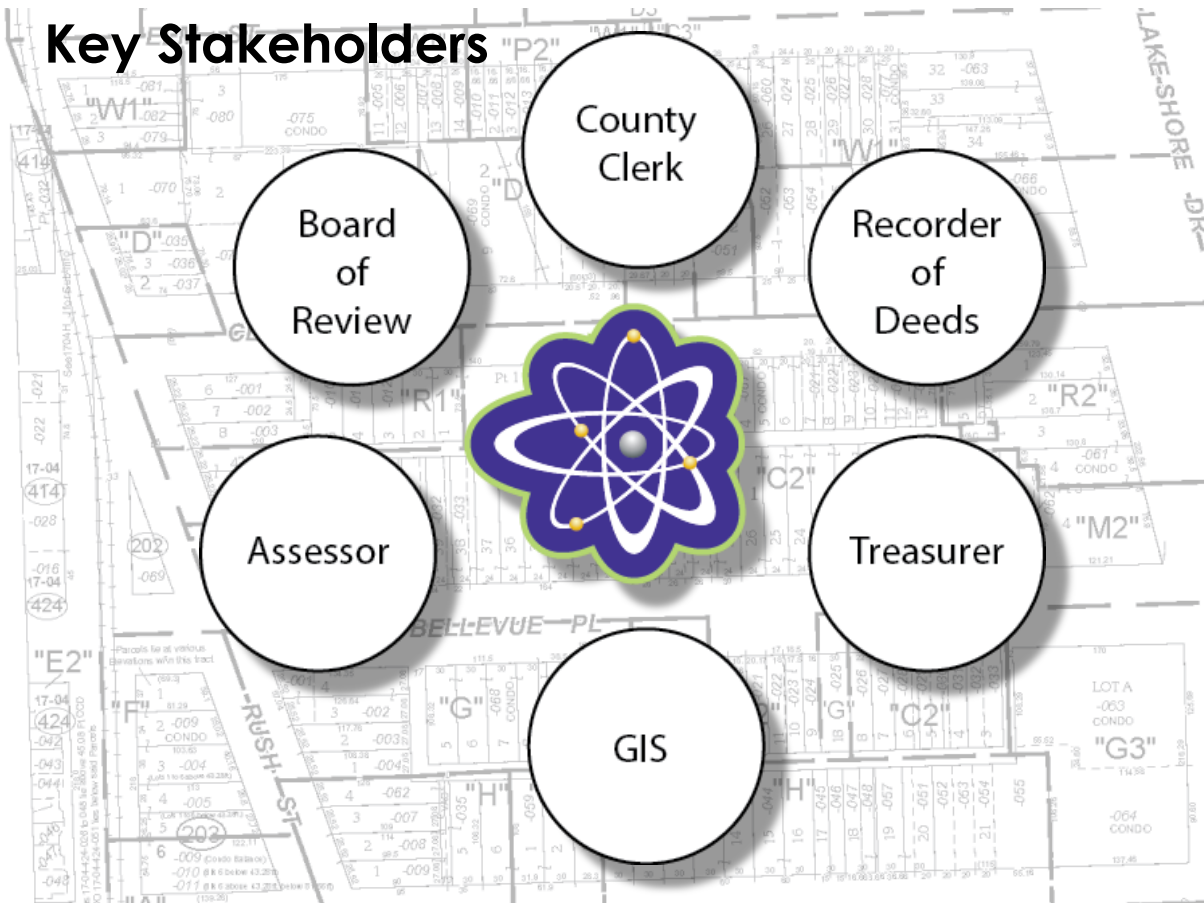
Project Sponsors:

- Cook County Board President Toni Preckwinkle
- County Clerk David Orr
- Assessor Joseph Berrios
- Treasurer Maria Pappas
- Board of Review Commissioner Larry Rogers, Jr.
- Board of Review Commissioner Dan Patlak
- Board of Review Commissioner Michael Cabonargi
- Recorder of Deeds Karen Yarbrough

Project Overview

The existing property tax system supported by mainframe has performed reliably for forty years, but it is at the end of its useful life. The replacement solution's financial impact is minimal due to the costs the county incurs to support the mainframe.

Project Goal	Tyler, in conjunction with County offices, will implement an Integrated Property Tax and Mass Appraisal System, re-engineer up to 66 County Processes, retire aging infrastructure, deliver a centralized platform for shared IT services and eliminate standalone databases.
Primary Products	IasWorld Software (Oracle backend)
Hardware Location	On-premise system in our new Tier 2 Data Center (hardware to be acquired by Cook County through County procurement contracts)
Vendor Selection via RFP	Tyler Technologies Inc.
Contract Period	FY2015 – FY2023
Funding Source ($29Million)	GIS Special Fund
WMBE Participation	Tyler has pledged 40% participation, which exceeds goals for this project

# Integrated Property Meets Enterprise IT Principles

Modernization

- **Lifecycle Management Policy**: Retire legacy assets based on pre-identified technology lifecycle, shared services opportunities, and cost/benefit analysis.

- **Business Continuity and Disaster Recovery Policy**: Modernize datacenters and infrastructure, where doing so improves service or mitigates risk.

- **County-Wide Technology Standards** & Information Governance

Collaboration & Shared Services

- **Multiyear County-wide IT Strategy**: Integrate IT Strategic Planning across the county to focus and improve County services.

- **Portfolio Management**: Implement robust IT project portfolio management process to ensure adequate return on investment.

- **CIO Roundtable**: Communicate clearly, openly and in a timely fashion with all stakeholders.
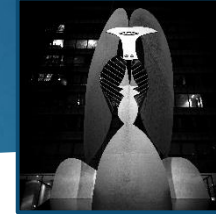
Innovation

- **Operating Model**: Use performance measurements to track and improve operational management, as well as assuring that systems align to County performance measurement goals and objectives.

- **Open Data and Transparency**: Provide transparency through innovative applications.

Project Goals and Objectives

Tyler's deliverables enable the County to meet key business goals and objectives:

Transition out of the aging mainframe and AS/400 systems

Reengineer processes and automate workflow around a common PIN-based system

Enhance customer service (property owners, attorneys, Taxing Districts)

Effectively manage and recover uncollected (delinquent) taxes

Eliminate stand-alone information/databases

Project Goals and Objectives (continued)

Timely and accurately:

- integrate with GIS to import PIN and Tax Code list required for taxation
- issue assessment notices to property owners
- validate Taxing District input and calculate tax rates per PIN
- produce tax bills for 2 million PINs
- collect and distribute taxes

Reduce:

- human error
- repetitive work
- cost of manual work and paper printing
- customers' physical visits by offering online self service

Increase:

- efficiency & productivity
- transparency to the public

Provide:

- a data warehouse for management reporting
- real-time information across all agencies

Current Cost and Stats

- 1,500 Taxing Districts

- $12 Billion revenue collected per year

- Over 2 Million unique Property Index Numbers

- 40+ year-old system

- ~$23 Million – mainframe support contract (70% is for property agencies)

- ~$5.8 Million – support cost per year

# Current State vs. Future State

- **40 year-old** end of life technology
- **Multiple Platforms** that don't always work well together
- **Siloed Processes** create unnecessary walls between agencies
- **Too many manual processes** where errors can be introduced
- **Paper Intensive**

- **State of the Art technology** on Modern Infrastructure
- **Consolidated Platform** less expensive to maintain
- **Integrated Processes** increasing productivity
- **Automation** reducing manual work
- **More online transactions** eliminating several tons of paper printing per year

Current Property Tax System

Treasurer

Clerk

County Property Tax Systems

Assessor

Recorder of Deeds
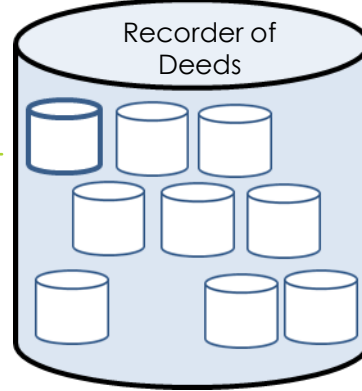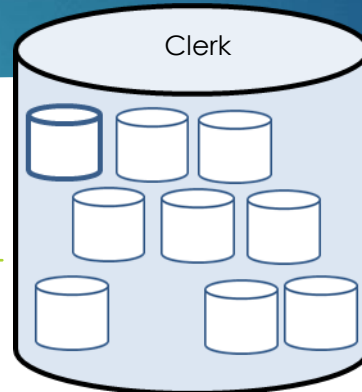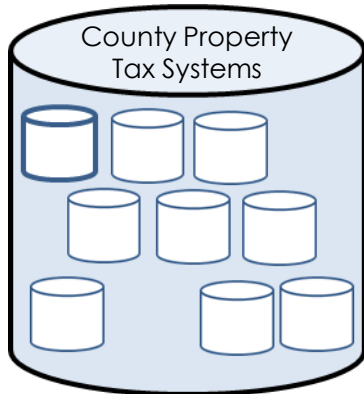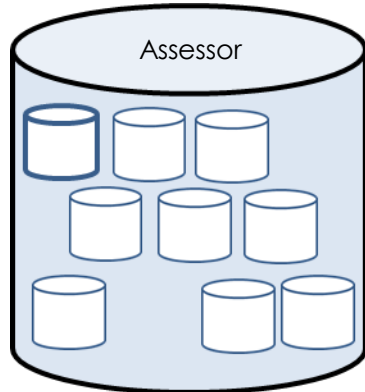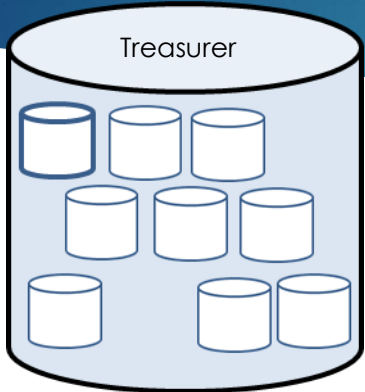
Mainframe database structure requires specialized knowledge for maintenance and new applications.

Most of the staff supporting property tax system is approaching retirement age.

Programming the old systems require skills not readily available in the workforce.

As staff retires, it is increasingly difficult to find qualified staff to support the system.

Organizational Inefficiencies

Multiple ancillary systems with manual processes

Accuracy issues associated with manual processes
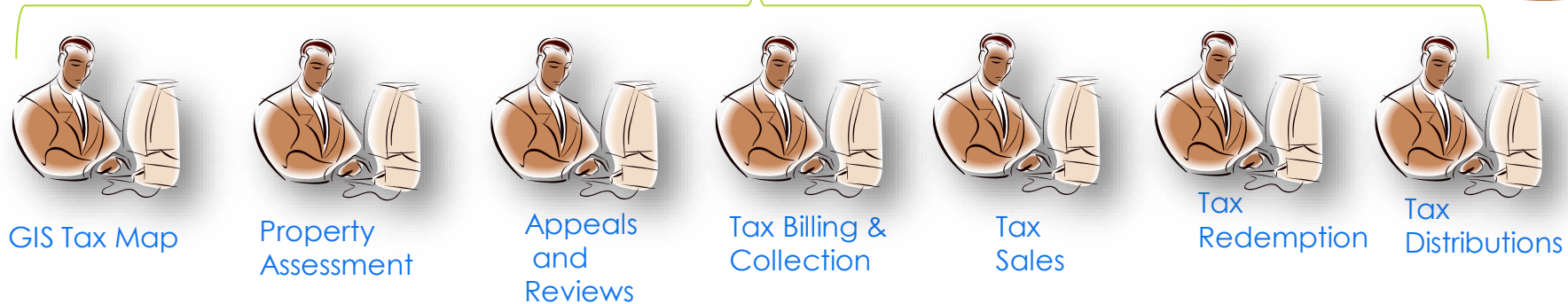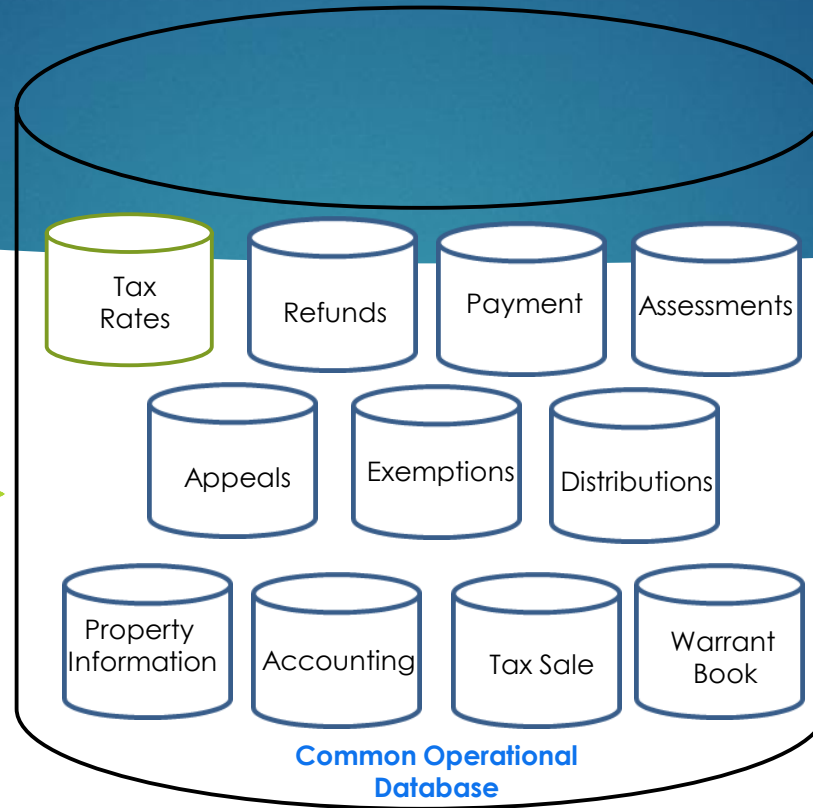
Schedule coordination between organizations

Operational overlap

Integrated Property Tax System

IPTS manages the entire property life cycle

Citizen and Taxing District Self Service

Common Operational Database

Tax Rates

Refunds

Payment

Assessments

Appeals

Exemptions

Distributions

Property Information

Accounting

Tax Sale

Warrant Book

Common Services
- Business Rules
- Workflow
- Content Management
- Notes
- Notices
- Reports
- Correspondence

GIS Tax Map

Property Assessment

Appeals and Reviews

Tax Billing & Collection

Tax Sales

Tax Redemption

Tax Distributions

Costs and Timeline

Year	Item	Cost
1	Software and Professional Services	$10,525,840
2	Professional Services	3,181,590
3	Support and Maintenance, Professional Services	5,090,011
4	Support and Maintenance, Professional Services	5,366,671
5	Support and Maintenance, Professional Services	2,241,584
6	Support and Maintenance	1,744,768
7	Support and Maintenance	1,801,271
	Grand Total:	$29,951,735

*Paid for through GIS Special Purpose Fund

Software Functionality/Services

Software modules to be implemented:

- ▶ Computer Assisted Mass Appraisal (CAMA)
- ▶ Exemptions
- ▶ Tax Billing and Collection
- ▶ Inquiry and Appeals
- ▶ Field Mobile
- ▶ eFile
- ▶ Public Access
- ▶ Cashiering
- ▶ Content Management
- ▶ Analyze
- ▶ Activity Center

Services to be provided:

- ▶ Discovery and Assessment
- ▶ Business Process Analysis & Reengineering
- ▶ Technology Implementation
- ▶ Application Development
- ▶ Reporting Capability
- ▶ Organizational Change Management Services
- ▶ Data Conversion Services
- ▶ Project Management
- ▶ Support and Maintenance
- ▶ Training and Knowledge Transfer

Project Organization/Reporting

Structural Oversight

Financial Oversight

IV&V
(Contract Deliverables Verifications)

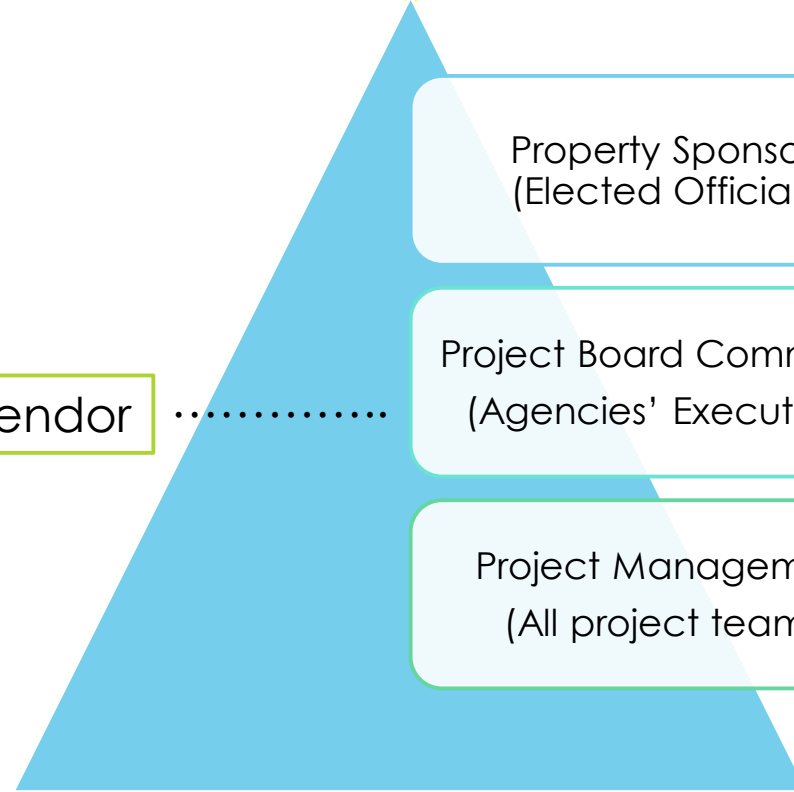**Legal Compliance**
(Statutes, Ordinances, etc…)

Success

…. Vendor ………………

Property Sponsors
(Elected Officials)

Project Board Committee
(Agencies' Executives)

Project Management
(All project teams)

Knowledge Transfer

Training

Change Management

Project Reporting

Ongoing Contract Support Details

Managed Services

- 800 hours per year of managed services

- Scheduled onsite reviews, operating system support, database support, software support, emergency support, site monitoring

- 80 hours of modifications each year for mandated legislative/statutory changes

Updates & Enhancements

- The County will receive all updates, enhancements and warranty fixes that are made available to all other Tyler clients for their licensed software.

- These releases and updates are included at no additional charge provided the County maintains a valid, ongoing maintenance agreement.

Protecting The Investment

Pricing
- Negotiated by an outside consultant
- Most favored customer clause

Performance Management
- Contract includes support and repair SLA's
- Comprehensive testing and error correction requirements

Ancillary Clauses
- IT Special Conditions afford protection around security, data confidentiality, and data breaches.
- Provisions protecting County Intellectual Property
- Software source code escrow

Independent Validation and Verification
- Independent 3rd Party
- Anticipated for 3rd Quarter FY2016

Recap

- Outdated legacy systems need replacement

- The RFP committee selected an industry leading vendor with subcontractors exceeding MWBE Goals

- Agency Stakeholders are unified in their support

- Project paid out of GIS Special Purpose Funds

- IV&V and special contract clauses built in to protect the investment

- Project will pay for itself through reduced costs, re-engineered processes and enhanced services.
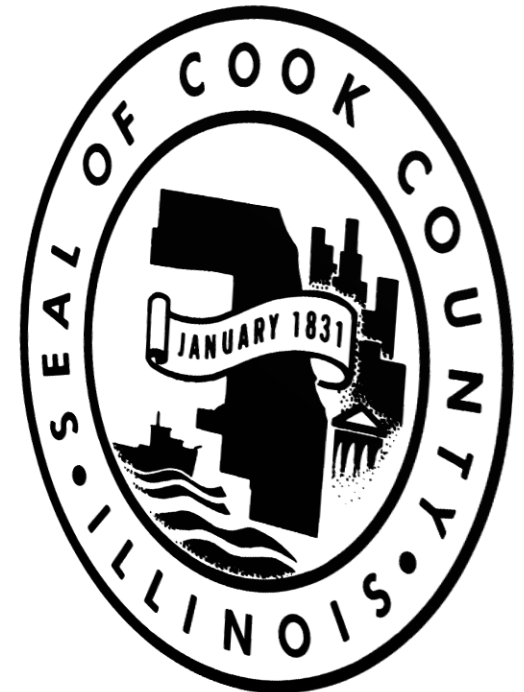
Questions

Appendix: MWBE Partners

MWBE PARTNERS

- Diversified Technology, Inc. 31%
- The William Everett Group 9%
- Tyler (Non-MWBE)
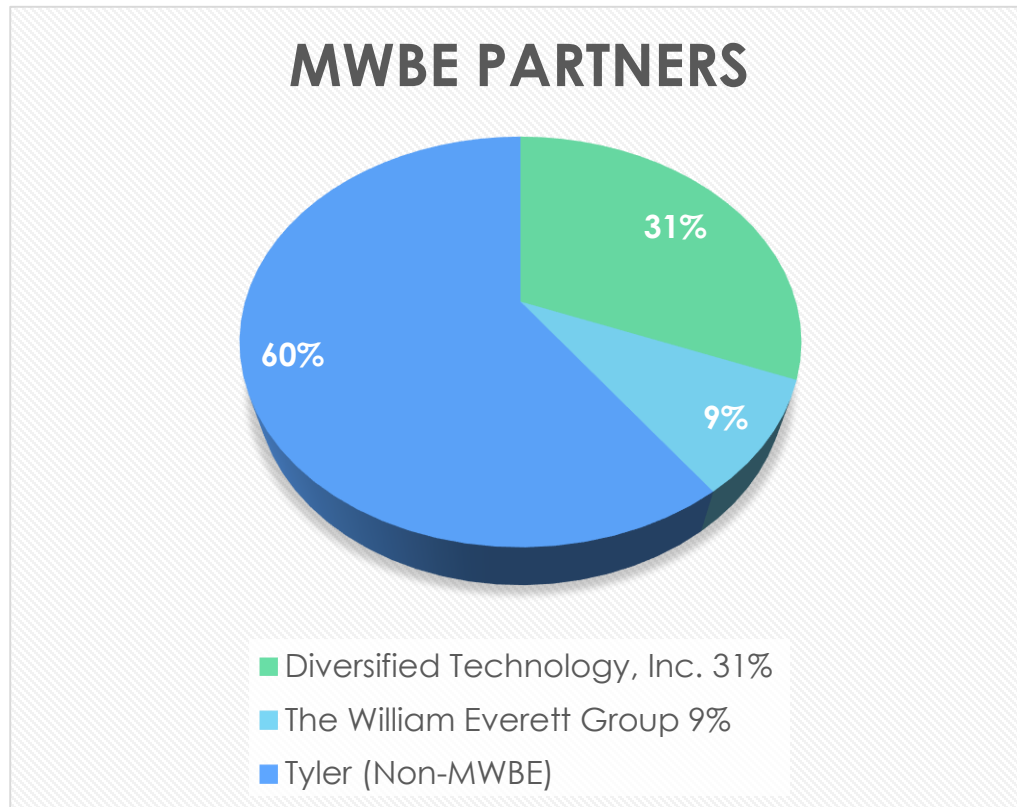
- **Diversified Technologies**:
  - IT Consulting
  - Data Conversion
  - Integrations
  - DBA
  - Reporting
- **William Everett Group**:
  - Training Services
  - Change Management

Appendix: iasWorld Security

- Hardened servers to reduce attack surface
- Industry standard encryption for data in transit
- Military grade encryption for data at rest
- Require user authentication
- Hash account passwords

- Detect and resist account hacking
- Restrict feature access based on user roles
- Full audit trail for resource access
- Full audit trail for all data changes

Appendix: Tyler Technologies

Company Background

- Founded in 1966 and regarded as the nation's largest software company solely focused on the public sector

- Offers complete portfolio of local government and K-12 software solutions

- Installed based of 13,000+ local government offices in all 50 states, Canada, the Caribbean, the United Kingdom and other international locations

Financial Strength & Stability

- Company has reported consistent revenue growth over the past 14 years

- Consistently has a strong balance sheet and cash flow

- Long-standing, strong client relationships with 98% client retention rate

- Staff across every product group with decades of deep-rooted, proven industry expertise – many having worked in the public sector prior to joining Tyler

Appendix: Tyler Technologies (continued)

Leading Edge Technology

- With nearly 600 developers, engineers and others directly involved in product development
- Through its EverGuide initiative, Tyler helps clients protect and get the most from their investment
- Leverages HTML5 technology and .NET applications
- Windows 8 multi-touch technology developed in partnership with Microsoft
- Microsoft workflow-enabled digital dashboards
- GIS-enabled applications, powered by Esri

Client List

- Tennessee
- West Virginia
- Fulton County, GA
- St. Louis County, MO
- Dakota and Olmsted County, MN
- New York City (currently in implementation)