



Office of the Cook County Assessor

FY2021 Mid-Year Budget Review

Cook County Assessor

Objective: Update on FY2021 Goals and Objectives, review FY2021 YTD budget, FY2020 year-end projections and operational lessons learned in the midst of the COVID-19 public health crisis.

I. Update on FY2021 Initiatives and Goals

- **FY2021 Initiative/Goal #1 Ensuring the full implementation of Tyler's iasWorld**

The CCAO went live with the first modules of Tyler's iasWorld in October of 2020. Throughout 2021 we have continued to roll out the assessment valuations modules of iasWorld. The full and successful implementation of Phase 1 of the IPTS project remains our highest priority.

- **FY2021 Initiative/Goal #2 Leveraging GIS technology in partnership with Cook County BOT**

In 2021 the CCAO launched two foundational GIS initiatives. First, the CCAO has incorporated change detection software into the reassessment process, which enables our office to pick up changes to properties that may not be fully captured in the permit data. Second, the CCAO has deployed GIS enabled mobile field tablets to all field inspectors and is on track to go completely paperless by the 2022 reassessment cycle. Both of these initiatives help our office to ensure that the assessment roll is as accurate as possible.

- **FY2021 Initiative/Goal #3 Continuing to improve data quality and integrity.**

The CCAO has advanced several data integrity initiatives in 2021. First, the CCAO has engaged vendors TrueRoll and Pushpin to centralize and enhance our exemption and change detection data, respectively. The CCAO continues to advance two transformative pieces of legislation – the Physical Description Bill and the Data Modernization Bill - which would equip our office with critical data on commercial properties. Currently, our office solicits commercial data from property owners through our RPIE online portal and mailed letters.

- **FY2021 Initiative/Goal #4 Continuing to educate the public about the work of our office through outreach, communications, and transparency initiatives, while keeping our staff and the public safe through the COVID-19 pandemic.**

The CCAO continued to serve the public and increase public education about the work of our office throughout the pandemic. In 2021 the CCAO conducted virtual and socially distanced outreach seminars; maintained accessibility to the public through phone, email, social media customer service while our offices were closed to the public; released an Annual Report; and held Market Analyst Day virtually.

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The CCAO was awarded the International Association of Assessing Officers' Public Information Program Award and the National Association of Counties' Achievement Award in recognition of these efforts.

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II. FY2021 Revenue (for revenue generating offices)

Comparison of YTD budget (as of 5/31/2021) vs YTD actual revenue with explanations for major variances and corrective action steps. Final unaudited actuals for May 31, 2021 will be reported in the upcoming monthly Revenue and Expense report.

Revenue	FY2021 YTD Budget	FY2021 YTD Actuals	\$ Variance	% Variance
County Assessor Fees	\$17,620	\$55	\$(17,566)	(32,207.3)%

- Explanation of variances greater than 1% and \$1 million
- What corrective action will be taken?

The CCAO's corporate revenue represents fees collected by our Freedom of Information Department. The figure provided as an estimate of FY21 revenues was based off of historical revenue collections, however in 2020 the CCAO transitioned to an online FOI request platform: GovQA.

This transition to GovQA enabled our office to continue service the public throughout the COVID-19 pandemic by allowing FOIA requestors to submit requests and receive response online.

This transition has also decreased the fees collected by FOI as most requestors opt to receive their responses electronically, where there is no fee for printing of materials. Going forward the CCAO will estimate its corporate revenues to reflect this transition to the GovQA platform.

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III. FY2021 Expenditure Projections

Comparison of YTD budget (as of 5/31/2021) vs YTD actual expenses with explanations for major variances and corrective action steps. Final unaudited actuals for May 31, 2021 will be reported in the upcoming monthly Revenue and Expense report.

Operating Expenses	FY2021 YTD Budget	FY2021 YTD Actuals	\$ Variance	% Variance
Personnel	\$ 11,192,670	\$ 10,368,477	\$ 824,193	7.4%
Contractual Services	\$ 1,883,387	\$ 731,837	\$ 1,151,551	61.1%
Supplies and Materials	\$ 121,852	\$ 118,424	\$ 3,428	2.8%
Operations and Maintenance	\$ 507,731	\$ 457,072	\$ 50,659	10.0%
Capital Expenditures	-	-	-	-
Rental and Leasing	\$ 88,123	\$ 69,783	\$ 18,340	20.8%
Contingencies and Special Purposes	(\$ 162,750)	-	(\$ 162,750)	100.0%
Total	\$13,631,012	\$11,745,592	\$1,885,420	13.8%

- Explanation of variances greater than 1% and \$1 million
- What corrective action will be taken if required?

Personnel: The variance in personnel expenditures is due to slower than anticipated hiring. The CCAO has just hired a new Deputy Assessor of HR and is currently hiring for two additional Senior HR Generalists to increase the capacity of HR to meet the hiring needs of our office, among the many other responsibilities of HR and compliance.

Contractual Services: The CCAO pays for many professional services on an annual basis, with many of those expenses clustered in Q3 and Q4. Additionally, a large portion of the CCAO's contractual services consists of the printing, mailing, and publishing of reassessment notices. These expenses follow the assessment calendar, and are clustered in Q3 and Q4 as well. We anticipate meeting the target for contractual services expenditures by the end of the fiscal year.

Supplies and Materials: The small amount of variance here can be explained by the fluidity of our operations in transitioning from a nearly fully remote environment in Q1 to a hybrid environment at the end of Q2. The CCAO is constantly evaluating our supplies and materials inventory and needs in order to respond to these operational changes.

Operations and Maintenance: The variance in Operations and Maintenance is also due to the fluidity of our operations in transitioning from a nearly fully remote environment in Q1 to a hybrid environment at the end of Q2. We anticipate meeting the target for operations and maintenance expenditures by the end of the fiscal year.

Rental and Leasing: When forecasting for FY21, the CCAO planned for certain rental and leasing costs in the event that we would return to in-person operations and events in early 2021. Due to the COVID-19 protocols

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that have been in place during 2021, many of these costs were not necessary as we continued to operate remotely and hold only virtual events until very recently (July 2021).

Contingencies and Special Purposes: The CCAO's contingencies and special purposes include additional fees and special revenue that our office collects (Division Fees, Incentives Fees, Data Subscriptions). This revenue is transferred into the corporate fund at the end of the fiscal year.

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IV. Status of FY2021 Hiring

Please provide a status (as of 5/31/21) on the office's hiring efforts to date and planned through the end of the year. This section applies to only operating fund positions. For OUP, please provide responses at the Bureau-level. For all other elected/appointed offices, please provide responses at the office/department-level.

Bureau/Department*	# of FY2021 Appropriated FTE	# of Filled Positions	# of Vacant Positions
County Assessor	259	217	42

- If your office has vacant positions, please provide an indication of what percentage of vacancies are anticipated to be filled by fiscal year-end and what actions are currently in place to help achieve that goal.
 - In FY20 the CCAO hired 71 employees. In FY21 (as of 5/31/21) the CCAO has hired 24 employees and 13 employees departed the office. As of 7/12/21 the CCAO has eight hiring sequences that are currently in progress.
 - The CCAO is preparing to fill 26 vacancies, or 62% of total vacancies, by the end of FY21.
- To the extent your agency has positions vacant as of 5/31/21, please provide the Board information on what, if any, challenges your office has faced in filling the positions.
 - The CCAO, like many other entities across the country, is experiencing slower than anticipated hiring due to the impacts of the COVID-19 pandemic.

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V. FY2021 Contracts

Please provide a list of your office's existing and anticipated contracts for FY2021 in the format provided below. (Feel free to attach this list separately if more room is needed)

Vendor Name	Department	Contract Purpose	Contract Amount	Contract Start Date	Contract End Date	Contract Status*

- *For any contract that is expiring this year, please indicate:
 - Whether the contract will be renewed, extended or re-bid.
 - If re-bid, the status of the procurement.

Please see attached Excel document.

VI. Capital Equipment Updates

Please provide a list of your office's FY2021 capital equipment projects and the status of projects in the format provided below. (Feel free to attach this list separately if more room is needed)

Capital Equipment Project	Project Status (Not Started/Started/ Delayed/Completed)	Please provide an update on the project, reasons for any delays and the expected completion date of the project
"154 Backup Software System"	Project Delayed	The CCAO expects to kickoff this project in September of 2021 with an estimated completion date in Q1 of 2022. Delays to this project were caused by increased demand for staff resources throughout the COVID-19 pandemic and the transition to remote work for many employees, as well as delays in the ongoing migration to O365.

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VII. Grant Funding

Grant Name	Department	Award Amount	Award State Date	Award End Date	Grant Set Up Status
N/A					

- Please detail your office's efforts this year to seek out new sources of grant funding.
- How many full-time or part-time staff members in your office are responsible for the administration of grants? *(Indicate how many are full-time and how many are part-time)*

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VIII. COVID-19 Operational Impacts

Please respond to each question below and provide details and take-aways about your operations as it relates to the COVID-19 public health crisis.

- Describe any initiatives you have implemented that have resulted in greater efficiencies within your operations and how such initiatives can or will be carried forward into your operations as we transition back to full operation.

The COVID-19 pandemic and subsequent closures of our office to the public required the CCAO to respond creatively and efficiently in 2020 and 2021. The following initiatives were instrumental to our office's success in maintaining continuity of services and reaching property owners throughout the pandemic:

- Online applications for homestead exemptions through DocuSign (launched in 2020 and expanded in 2021).
- Online appeals portal through Tyler's SmartFile (launched in 2020 and enhanced in 2021).
- Online appointment scheduling for in-person customer service.
- Virtual outreach seminars through Zoom and Facebook Live.
- "Pop-up" offices with County Commissioners, community organizations, and other partners to deliver in-person outreach to property owners who may not have access to our online services.
- Continued use of email and social media as effective tools for customer service.
- Continued use of our virtual call center.
- Launching of our Learning Management System using the countywide Adobe contract, which has allowed our office to continue training staff virtually and asynchronously.

In recognition of these public facing initiatives, and their success in reaching property owners across Cook County through the pandemic, the CCAO was awarded the International Association of Assessing Officer's Public Information Program Award and the National Association of Counties Achievement Award.

- Are there additional cost-saving or efficiency-saving measures you envision incorporating into your operations as a result of lessons learned during the pandemic?

The CCAO will continue using the online appointment system to schedule property owners for in-person customer service appointments at our downtown and branch offices. During the COVID-19 pandemic, our staff learned that this tool can increase our efficiency and effectiveness in serving the public as staggered, planned appointments allow us to manage crowds and traffic flow during high volume periods, prepare in advance for a property owner's appointment, and provide us with an effective means of contacting the property owner for follow ups. This system has also benefited the public by reducing wait times during high volume periods such as Tax Bill season.

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Additionally, the CCAO plans to continue our training and performance management initiatives. The Assessor's Office conducted performance management during the COVID-19 pandemic for the first time in over a decade.

- How did you incorporate technology and digital access into your processes in the midst of COVID-19?

The CCAO is in the midst of several long term technology and digital access initiatives, including the countywide IPTS project which continued successfully through the COVID-19 pandemic. In addition to the public facing technology and digital access initiatives listed above, the CCAO went live with Tyler's iasWorld in 2020 and we continue to make Phase 1 of the IPTS project our highest priority.

- Are you contemplating implementing more innovative/transformational technological initiatives to systematically transform operations within your office and improve public accessibility?
 - How can your office accelerate these improvements and what impact would that have on your budgets?

Yes, 2021 and 2022 will mark another period of transformational change for the CCAO. In addition to the launch of iasWorld, the CCAO is embarking on a twelve-month organizational change management initiative to fully realize the potential of this new technology. While the initial go-live of iasWorld marked a significant step forward in our efforts to modernize the office, we know that more work needs to be done to change the culture and workflow of this office and allow staff and the public to use the tools of iasWorld to their full potential.

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IX. FY2022 Preliminary Forecast

FY2022 Budget Target	\$29,468,480
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- Please provide preliminary ideas of how your office is planning to meet your budget target for FY2022.

The CCAO anticipates meeting the FY22 target in our personnel budget and we are continuing to evaluate our non-personnel needs through 2022 to ensure that we have the tools, technologies, and other resources needed to fulfill the duties of this office and provide exemplary service to the public.

Assessor 2021 Contracts

Vendor	Department	Contract Purpose	Total Contract Amount	Contract/Amendment Begin Date	Contract/Amendment End Date	Contract Status
EKI	All departments	Professional services (Organizational Change Management in conjunction with the transition to Tyler's iasWorld and the county's IPTS project	\$2,925,000.00	TBD	TBD	CCAO is working with OCPO to finalize this 12-month contract in July of 2021
Gartner	IT, Data, Special Projects	Professional services (IT)	\$149,000 (Assessor's amendment)	TBD	TBD	CCAO is working with OCPO to amend the county's contract with Gartner, Inc. and add the CCAO as a using agency with a 12-month SOW
Trepp	Valuations	Data subscription	\$147,600.00	7/15/2019	7/14/2021	CCAO is currently working with OCPO to exercise the two 12-month renewal options to extend the contract until 7/14/2023
Neopost, Inc.	Administration	Mail machine leases and maintenance	\$90,293.86	TBD	TBD	CCAO is currently working with OCPO to finalize this 36-month contract in July of 2021
RMM Consulting	IT	Professional services (IT)	\$149,600.00	5/15/2020	05/14/2022	The CCAO is evaluating the need to extend or replace this contract in 2022.
Accredited Chicago Newspapers	Administration, Valuations, IT	Mandated publication of reassessment notices	\$1,075,788.38	12/1/2020	11/30/2021	CCAO is currently working with OCPO to exercise a 12-month renewal option and extend the contract until 11/30/2022
Cook County Suburban Publishers	Administration, Valuations, IT	Mandated publication of reassessment notices	\$195,552.00	12/1/2020	11/30/2021	CCAO is currently working with OCPO to exercise a 12-month renewal option and extend the contract until 11/30/2022
Adlexx Corporation	Administration, Valuations, IT	Printing/Processing/Mailing of reassessment notices and homestead exemptions	\$232,930.94	6/7/2021	12/31/2021	This is an emergency contract and will be replaced by a formal bid, which is currently in progress
TBD	Administration, Valuations, IT	Printing/Processing/Mailing of reassessment notices and homestead exemptions	TBD	TBD	TBD	This contract will replace the current 2021 contract with Adlexx, and has an anticipated start date of 1/1/2022. This is a formal bid
CoStar Realty Information	Valuations	Data subscription	\$123,396.00	1/1/2021	12/31/2021	CCAO is working with OCPO and other using agencies to submit a new contract with an anticipated start date of 1/1/2022
Michael Kreloff	Policy	Professional services (Policy)	\$74,812.50	8/17/2020	02/16/2022	The CCAO is evaluating the need to extend or replace this contract in 2022
REIS/Moody's	IT	Data subscription	\$102,243.00	7/1/2020	6/29/2022	The CCAO is evaluating the need to extend or replace this contract in 2022
Jeanne Connelly	Valuations	Professional services (Valuations)	\$25,500.00	TBD	TBD	The CCAO is currently working with OCPO to finalize this contract with a start date TBD