Budget Change Request

Form ID #:

Priority #: 3

Date: 2015-08-10

Requester: Nicole Williams

Phone: 867-2205

Dept Name: Assessor

Dept Number: 01

Fund Name: FUND TO BE DECIDED

Fund Number: 0000

Revenue Request Type:	Total Revenue Change (+/-):	Expenditure Request Type:	Total Expenditure Change (+/-):	Net FTE Change (+/-):
Increase ☐		Increase ☐	$200,000	0.00
Decrease ☐		Decrease ☐		

What do you need and why?

Note: Unlike our top priorities which address our operational needs in fiscal year 2016, this request addresses the need for fifth year funding to replace mass appraisal and tax administration software, necessary in the Treasurer and Assessors role in property tax collection. to . . A replacement fund needs to be established capable of funding all aspects of this project by 2020 through deposits of $200,000/year. Ascend and Sigma together with upgrades have outlived their intended lives. These programs are vital to the county in valuing property and for administering property tax collection in Thurston County. The software utilized by the Treasurer and Assessor must be fully integrated in order to maximize efficiency and assure accuracy. By way of background, Thurston County was one of the first counties to utilize mass appraisal and as a result, our software is one of the oldest in the state (1997). Many counties, both larger and smaller, have already upgraded to more current systems.

What else might work? Why is it not your first choice?

See attached

How will this affect other offices and departments? Other impacts?

See attached

How will this change the performance of your office or department?

(Slower customer service, improved efficiency, etc.)?

See attached, This request was reviewed by the IT Committee on Monday August 10th. This is a joint request for a total of $200,000.00 in each of the next five years.

Personnel Information

FTE	Position #	Title	Current End Date	New End Date	Grant Funded?
					☐
0.00	**< Total**				

Enter Revenue and Expenditure information below.
Or, click to the right to attach a spreadsheet instead.

Supporting Documents.pdf
PDF File
1.18 MB

Does this change in Revenue/Expenditure affect another fund? ☐ **Yes** ☐ **No**

Revenue Line Items

Org Code	Object Code	Object Description	Project Code	Amount
			Total:	$0

Expenditure Line Items

Org Code	Object Code	Object Description	Project Code	Amount
99999999	599999	TO BE DETERMINED		$100,000
99999999	599999	TO BE DETERMINED		$100,000
			Total:	$200,000

ITC Project Review Form

Date of Request: July 31 2015

Project Title: Property valuation and Tax administration software replacement

Description: A replacement fund needs to be established capable of funding all aspects of this project by 2020. Ascend and Sigma together with upgrades have outlived their intended lives. These programs are vital to the county in valuing property and for administering property tax collection in Thurston County. The software utilized by the Treasurer and Assessor must be fully integrated in order to maximize efficiency and assure accuracy.
By way of background, Thurston County was one of the first counties to utilize mass appraisal and as a result, our software is one of the oldest in the state (1997). Many counties, both larger and smaller, have already upgraded to more current systems.

Mission/Goals: To fund replacement during the period 6/2020 and 6/2021, including vendor costs, Assessor and Treasurer staff costs, central services costs. In addition this fund will cover a contracted needs assessment and RFP process between 6/2019 and 6/2020.

Stakeholders: Treasurer, Assessor, county government, all taxing districts, taxpayers.

Cost/Benefits: $1,000,000 by year end 2020
Both Ascend and Sigma have been acquired by Thompson Reuters who has advised that upgrading to their product **Aumentum Valuation and Tax,** would occur with no purchase cost for the software. Thompson Reuters has tendered a rough estimate for implementation services of between $650,000 and $870,000 depending on scope. Annual fees for Software maintenance and support would remain at roughly $200,000. These cost estimates were based upon an upgrade in 3-5+ years.

To be clear, neither the Assessor nor Treasurer have a preference as to vendor. It is a fact, however, that by waving software acquisition costs, Thomson Reuters will be hard for others to compete with, by a factor of $500,000 or more.

Impacts on existing Infrastructure: This would allow critical software to move from old servers. By 2020 we expect much of this software and data could be cloud based, but any large vendor is going to have solutions for a wide range of available infrastructure.

Impacts on other offices/departments:
The Assessor's office would require a training room with 5-10 work stations equipped with new hardware as part of the normal replacement cycle. The Treasurer would also utilize this training setup. This could be needed for a period of 3-4 months, as all staff are trained.

Alternatives: None.
Even this timeline for replacement in 2020 has medium to high risks ranging from server failure to discontinued product support. In addition, we may be unable to make use of new technology and to realize meaningful efficiencies until this migration has been completed. Reduced reliability is a huge issue for both the Assessor and Treasurer in that our work is riddled with rigid statutory and operational deadlines.

Enclosures:
1. Thomson Reuters email of March 18 2015
2. DOR 2014 listing of software comparison by county

THINGS TO CONSIDER WHEN COMPLETING THIS FORM:

Fit to County's overall mission and goals

- To what extent are user business requirements achieved by implementing the new system?
- If all user business requirements are not met by implementing the new system, what alternative approaches will be used to compensate?
- What changes in business practices occur as a result of implementing the initiative?
- Does the initiative provide expanded access to data and/or improved data exchange?
- Does the public have more and/or better access to information?
- Is the new system scalable? Can incremental capacity be added without replacing the system?
- Is this a onetime cost or on-going?

Cost/Benefit

- What is the cost of the new system or system modifications?
- What is the cost in dollars and/or resources to achieve requirements not addressed by the new system?
- What is the annual maintenance cost?
- Are there any long-term cost savings associated with project implementation
- Is less staff time required once the new system is implemented?
- Will service quality be enhanced by the implementation of the new system?
- Are decision-making capabilities improved?
- Is redundant data entry reduced or eliminated?

Impact on the existing infrastructure

- What Central Services resources will be required to implement and support this system?
- Are current infrastructure standards being adhered to?
- How are current infrastructure capacities affected?
- Are data security and integrity technologies utilized so data sharing can be accomplished in a secure environment as necessary?
- Is more information available electronically?
- Has the impact of infrastructure changes of one agency on the other agencies been considered and analyzed?

Impact on other offices/departments

- How are users of the old system affected?
- Can this system potentially be used by other County agencies? Which agencies?
- Are other agencies involved in the support of the new system?
- Is the success of this implementation contingent upon the successful implementation of other investments or completion of ongoing project(s)?

For more information go to ITC Guideline ITCG-200.

THURSTON COUNTY
WASHINGTON
SINCE 1852

STEVEN J. DREW
Assessor

OFFICE OF THE ASSESSOR
Service, Integrity, Fairness,
Internationally Recognized for Excellence

CEAA
IAAO
CERTIFICATE OF EXCELLENCE IN ASSESSMENT ADMINISTRATION

Central Services IT committee
Attn: Martin Casey

July 31, 2015

Subject: ITC Project Review

I have been requested to present this future project to the ITC in order to set up a replacement fund with dedicated annual contributions in order to assure that funding is in place for a 6/2020-6/2021 total upgrade of the counties property valuation and tax administration software.

With an estimated cost of one million dollars, this will require creation of a dedicated fund and annual contributions of $200,000. After further review by your staff, it is possible our cost estimate may need to be revised to reflect staff time and creation of a training center for the period indicated. It is assumed however that existing capital and IT planning will take care of core system needs and that out hardware replacement fund will take care of our hardware needs such as wireless laptops for field personnel.

We are aiming at the 6/2020 to 6/2021 appraisal year intentionally as this is the year with the least field work and this migration will have a heavy impact on productivity as it is implemented.

Please let me know if I may answer any further questions.
Regards,

Steven J. Drew
Assessor

2000 Lakeridge Drive SW, Olympia, WA 98502-6001
(360) 867-2200 FAX (360) 867-2201 TDD (360) 754-2933

THURSTON COUNTY
WASHINGTON
SINCE 1852

SHAWN D. MYERS
TREASURER

2000 Lakeridge Drive SW, Olympia, Washington 98502-6080 • 360-786-5550 • FAX 360-754-4683

July 31, 2015

To: Martin Casey, Central Services ITC

From: Shawn Myers, County Treasurer

RE: ITC Project Review request

As discussed recently with the BOCC, I am requesting that a reserve fund be established and funded over the next five years in order to replace the counties property valuation and tax administration software. The cost has been estimated at $1mm which would require an annual $200k contribution each year.

As you are aware, our current system, Ascend was implemented in 1997 and recently has been acquired by Thomson Reuters. It concerns me that since Thomson Reuters has their own valuation and tax administration product solution, we might be forced to replace Ascend or risk having no support or maintenance.

Let me know if you need further information.

Thank you.

COUNTY SOFTWARE SYSTEMS

COUNTY	Assessment Administration Software			Appraisal Functions Software		
	Vendor Name	Application Name	Year Installed	Vendor Name	Application Name	Year Installed
ADAMS	TS/Thomson Reuters	T2	2013	TS/Thompson Reuters	T2	2013
ASOTIN	In house	Assessment/Tax Collection	1978	NEMRC	Microsolve	2013
BENTON	Thomson Reuters	Proval	1999	Thomson Reuters	ProVal	1999
CHELAN	True Automation	PACS	2008	True Automation	PACS	2008
CLALLAM	True Automation	PACS	2009	True Automation	PACS	2009
CLARK	True Automation	PACS	2008	True Automation	PACS	2008
COLUMBIA	True Automation	PACS 9.0	2010	True Automation	PACS 9.0	2010
COWLITZ	Eagle Software	Tyler Technologies	2004	Eagle Software	Tyler Technologies	2004
DOUGLAS	Manatron - Terra Scan	T2	2014	TS/Thompson Reuters	T2	2014
FERRY	TS/Thomson Reuters	T2	2012	TS/Thompson Reuters	T2	2012
FRANKLIN	TS/Thomson Reuters	T2	1995	TS/Thompson Reuters	T2	1995
GARFIELD	RC Technology	ATS Custom Software	Unk	Marshall and Swift	Marshall & Swift Residential Estimator	2007
GRANT	TS/Thomson Reuters	T2	2010	TS/Thompson Reuters	T2	2010
GRAYS HARBOR	In house	Delphi Front-end, in house	1990	SQL Server	Delphi Front-end, in-house	1990
ISLAND	True Automation	PACS	2010	True Automation	PACS	2010
JEFFERSON	True Automation	PACS	2013	True Automation	PACS	2013
KING	In house	Various	1994	In house	Various	1994
KITSAP	In house	Land Information System	2003	Thomson Reuters	ProVal	2003
KITTITAS	TS/Thomson Reuters	T2	2005	TS/Thompson Reuters	T2	2005
KLICKITAT	Thomson Reuters	Ascend	1999	Thomson Reuters	Proval	1997
LEWIS	Thomson Reuters	Ascend	1998	Thomson Reuters	Sigma	1998

Notes:

Codes: TA-True Automation, TS-Terra Scan, M&S- Marshall & Swift Estimator

COUNTY SOFTWARE SYSTEMS

COUNTY	Assessment Administration Software			Appraisal Functions Software		
	Vendor Name	Application Name	Year Installed	Vendor Name	Application Name	Year Installed
LINCOLN	TS/Thomson Reuters	T2	2010	TS/Thompson Reuters/M&S	T2	2010
MASON	Thomson Reuters	T2	2008	TS/Thompson Reuters	T2	2010
OKANOGAN	TS/Thomson Reuters	T2	2011	TS/Thompson Reuters	T2	2011
PACIFIC	TS/Thomson Reuters	T2	2014	TS/Thompson Reuters	T2	2014
PEND OREILLE	True Automation	PACS 9.0	2009	True Automation	PACS 9.0	2009
PIERCE	Thomson Reuters	Ascend	2003	Harris	Realware	2003
SAN JUAN	True Automation	PACS 9.0	2009	True Automation	PACS 9.0	2009
SKAGIT	True Automation	PACS	2009	True Automation	PACS	2009
SKAMANIA	Thomson Reuters	T2	2005	Thomson Reuters	T2	2005
SNOHOMISH	Thomson Reuters	Ascend	1999	Thomson Reuters	ProVal	1999
SPOKANE	Thomson Reuters	Ascend	1998	Thomson Reuters	ProVal	2000
STEVENS	True Automation	PACS	2013	True Automation	PACS	2013
THURSTON	Thomson Reuters	Ascend	1997	Thomson Reuters	Sigma	1997
WAHKIAKUM	True Automation	PACS 9.0	2009	True Automation	PACS 9.0	2009
WALLA WALLA	True Automation	PACS	2014	True Automation	PACS	2014
WHATCOM	True Automation	PACS 9.0	2009	True Automation	PACS 9.0	2009
WHITMAN	TS/Thomson Reuters	T2	2010	TS/Thompson Reuters	T2	2010
YAKIMA	Thomson Reuters	Ascend	1994	Thomson Reuters	Sigma	1992

Notes:

Codes: TA-True Automation, TS-Terra Scan, M&S- Marshall & Swift Estimator

Budget Change Request

Form ID #:

Priority #: 1

Date: 2015-08-06

Requester: Nicole Williams

Phone: 867-2205

Dept Name: Assessor

Dept Number: 01

Fund Name: GENERAL FUND

Fund Number: 0010

Revenue Request Type:	Total Revenue Change (+/-):	Expenditure Request Type:	Total Expenditure Change (+/-):	Net FTE Change (+/-):
Increase ☐		Increase ☐	$65,000	0.00
Decrease ☐		Decrease ☐		

What do you need and why?

$65,000 in additional extra help funding. Two seasoned residential appraisers retired in 2015. Given the fixed annual assessment deadline of May 31st we require additional field staff hours to make up for lost appraiser productivity as our two new appraisers are fully trained. In addition, we would restore our 20hr/week front counter services position in order to allow our more senior staff, time to preform Senior audits, Current Use audits, and outreach required by legislative changes in the Senior exemption thresholds. Restoring flexible staff funding will also allow us to redirect more senior staff to keep up with the increase in mapping of new parcels and subdivisions.

What else might work? Why is it not your first choice?

What we really need is restoration of 1.5 FTE and about $15,000 of extra help, but we have little hope of this being approved. The above request should provide us similar results at about half the cost.

How will this affect other offices and departments? Other impacts?

Completing current use audits and senior audits generates revenue. In addition, having the staff needed to capture all new construction also generates revenue. Should a backlog grow in mapping, this could impact revenue, elections, public works and new construction

How will this change the performance of your office or department?

(Slower customer service, improved efficiency, etc.)?

By allowing us to finish annual appraisals and allowing our office to send out re-valuation notices on time while new appraisers are fully trained. By allowing out technical staff to focus more of their time on compliance audits and mapping, while maintaining an acceptable level of customer service.

Personnel Information

FTE	Position #	Title	Current End Date	New End Date	Grant Funded?
					☐
0.00	**< Total**				

Enter Revenue and Expenditure information below.
Or, click to the right to attach a spreadsheet instead.

File Attachment

Does this change in Revenue/Expenditure affect another fund? ☐ **Yes** ☐ **No**

Revenue Line Items

Org Code	Object Code	Object Description	Project Code	Amount
			Total:	$0

Expenditure Line Items

Org Code	Object Code	Object Description	Project Code	Amount

0101A100	516000	EXTRA HELP		$65,000
			Total:	$65,000

Budget Change Request

Form ID #:

Priority #: 1

Date: 2015-08-06

Requester: Nicole Williams

Phone: 867-2205

Dept Name: Assessor

Dept Number: 01

Fund Name: GENERAL FUND

Fund Number: 0010

Revenue Request Type:	Total Revenue Change (+/-):	Expenditure Request Type:	Total Expenditure Change (+/-):	Net FTE Change (+/-):
Increase ☐		Increase ☐	$65,000	0.00
Decrease ☐		Decrease ☐		

What do you need and why?

$65,000 in additional extra help funding. Two seasoned residential appraisers retired in 2015. Given the fixed annual assessment deadline of May 31st we require additional field staff hours to make up for lost appraiser productivity as our two new appraisers are fully trained. In addition, we would restore our 20hr/week front counter services position in order to allow our more senior staff, time to preform Senior audits, Current Use audits, and outreach required by legislative changes in the Senior exemption thresholds. Restoring flexible staff funding will also allow us to redirect more senior staff to keep up with the increase in mapping of new parcels and subdivisions.

What else might work? Why is it not your first choice?

What we really need is restoration of 1.5 FTE and about $15,000 of extra help, but we have little hope of this being approved. The above request should provide us similar results at about half the cost.

How will this affect other offices and departments? Other impacts?

Completing current use audits and senior audits generates revenue. In addition, having the staff needed to capture all new construction also generates revenue. Should a backlog grow in mapping, this could impact revenue, elections, public works and new construction

How will this change the performance of your office or department?

(Slower customer service, improved efficiency, etc.)?

By allowing us to finish annual appraisals and allowing our office to send out re-valuation notices on time while new appraisers are fully trained. By allowing out technical staff to focus more of their time on compliance audits and mapping, while maintaining an acceptable level of customer service.

Personnel Information

FTE	Position #	Title	Current End Date	New End Date	Grant Funded?
					☐
0.00	**< Total**				

Enter Revenue and Expenditure information below.
Or, click to the right to attach a spreadsheet instead.

File Attachment

Does this change in Revenue/Expenditure affect another fund? ☐ **Yes** ☐ **No**

Revenue Line Items

Org Code	Object Code	Object Description	Project Code	Amount
			Total:	$0

Expenditure Line Items

Org Code	Object Code	Object Description	Project Code	Amount

0101A100	516000	EXTRA HELP		$65,000
			Total:	$65,000