



COUNTY OF EL DORADO

PTARP

330 FAIR LANE PLACERVILLE, CA 95667

DATE: March 28, 21017
FROM: Karl Weiland, Assessor
TO: Don Ashton, Chief Administrative Officer
SUBJ: Property Tax Administration System Project Update

Since the approval of the agreement between the County and Megabyte Property Tax Systems (MPTS) on January 3rd, 2017 the following actions have been completed or are in progress:

1. All administrative aspects of contract management have been completed and are current.
2. A kickoff meeting lasting about five hours took place on January 24th, 2017.
 - a. There were several representatives from MPTS, staff from the offices of the Tax Collector, the Auditor, the Assessor and Information Technologies.
 - b. Key project staffs from each department and MPTS were identified and introduced.
 - c. The project documents, including the implementation plan and project charter, were reviewed and discussed.
 - d. Communication protocols were established.
 - e. The role of the project manager was discussed.
 - f. There was a good back and forth discussion to clarify various program and project issues. After lunch, there was a technical discussion to go over the data conversion.
3. Project Manager Contract
 - a. The RFP for the Project Manager was released on January 4th, 2017. Seven responses were received by the deadline of February 9th.
 - b. A selection committee including representatives from the three property tax departments, IT, Purchasing and Tom Dillon, an IT savvy member from the community each independently reviewed and ranked the proposals.
 - c. The committee met on February 28th and compared rankings. Based on the rankings, the group selected three candidates to interview on March 6th.
 - d. The interviews resulted in the recommendation before you today to award the RFP to C. Toeller Consulting of El Dorado Hills, California.
4. There have been discussions about the pending FENIX and P3 -Track It system projects regarding integration with the new property system. The Recorder's conversion to ATPAC is also being integrated into the project planning.
5. Arrangements to electronically transmit validated copies of the current property tax administration data to MPTS are established and the File Transfer Protocols (FTP) is in place on both the County and MPTS sites.

6. County IT developed hardware configuration options based on requirements provided by MPTS. They are moving forward to implement the preferred solution that optimizes speed, redundancy, storage and will cost less than the \$75,000 budgeted.
7. County IT staff continues to run validation scripts against the existing data and ensure that the transferred data conforms to standards and is clean and free of garbage.
8. Several options for the management, access and storage of historical property tax data are being reviewed. The goal will be to determine the best cost/benefit solution considering access needs and MPTS data conversion costs.
9. Key staffs from the departments have been granted access to the MPTS website "members only" resources and are developing familiarity with the layout, procedures and other on line resources provided to users.
10. In mid-February, Assistant Assessors Todd Gravatt and Cathi Spear attended the MPTS Assessor's technical user group meeting at MPTS offices in Roseville as observers.
11. Sally Zutter, Property Tax Supervisor from the Auditor's office and one staff member attended the Auditors technical user group meeting at MPTS offices in Roseville on March 8th as observers.
12. The Tax Collector is moving ahead on identifying vendors with MPTS compatible remittance processing and credit card payment systems.
13. In early March, the Assessor attended the Northern California Assessor's Association (NCAA) annual business meeting. 18 of the 23 counties in the NCAA use the MPTS system. All offered support and assistance through the project.
14. The Assessor, Auditor and Tax Collector are recruiting to fill positions approved on January 3rd to insure that there are adequate staff resources for successful implementation.
15. Once the contract with the project manager has occurred, the Business Process and GAP Analysis will commence almost immediately.
16. A key staff working group is being developed and appropriate staffs are being identified.
17. Monthly update meetings to include executive sponsors are anticipated. Tom Dillon has agreed to participate in the update meetings.
18. Based on the property tax administration business cycle, a Go Live date of July 1, 2018 provides the smoothest transition from the existing system to the MPTS system. When the project manager is on board, a detailed timeline in support of that schedule will be developed and reported on at the next update.