

# ASSESSOR PROPERTY TAX SYSTEM UPDATE

---

**Clerk-Recorder-Assessor**

Budget Revision Request  
FYE 6/30/17

# Mainframe Property Tax Systems built in 1970s and 1980s

- Secured Mainframe System – LIX – 1970s
- Unsecured Mainframe System – UNX – 1970s
- Supplemental Billing Mainframe System – SB00 – 1980s

# Assessor Property System Timeline: FY1996-97 - FY2016-17

# Assessor Property System (APS) Timeline

## ➤ Legacy Assessor Property System

- February 1997: Legacy APS project begins
- December 1999: Legacy APS went live
- 2000-2004: Serious flaws fixed

**Funding Source: Restricted FB 9767 – Assessor AB818 (Property Tax Administration Program)**

## ➤ Assessor Unsecured Assessment System – Replaced Assessor UNX Mainframe

- March 2003: Development for Unsecured Assessment project begins
- July 2005: Unsecured Assessment System went live

# Assessor Property System (APS) Timeline

## ➤ **Third-Party Vendor – Colorado CustomWare Inc. (CCI)**

- November 2009: Request for Information received from seven firms. CCI chosen as the lowest cost vendor providing a complete Property Assessment system
- May 2010: Contract with CCI executed
- June 2010: CCI project kickoff
- September 2010: Delivery of Best Fit Analysis
- October 2010: Base System Installed
- March 2011: First sample data conversion delivered
- March 2011: System customization for CA Proposition 13 initiated
- June 2011: Matix GIS System Installed
- July 2013: CCI files for bankruptcy

**Per contract, Department does have CCI source code for utilization in new system**

**Funding Source:                      Restricted FB 9767 – Assessor AB818 and Departmental Budget Savings**

**Total Incremental Cost:        \$1.377 Million**

# Assessor Property System (APS) Timeline

## ➤ 2014 – Option Exploration and Decision to Develop In-House

### Contributing Factors:

- Lack of suitable third-party options
- Negative and costly experiences of other Counties
  - Riverside
  - Los Angeles
  - Ventura

# Assessor Property System (APS) Timeline

## ➤ In-House Development

- November 2014: Service Contract with Mesa Systems for IT Consulting executed
- December 2014: Product Owner Manager (POM) position created
- January 2016: Initiated redesign of Prototype
- August 2016: Begin scoping Title Transfer Module requirements
- October 2016: Security Layer in place
- February 2017: Design and implementation of user interface standards
- April 2017: Begin scoping Maps Module requirements
- Summer 2017: Develop and begin testing Title Transfer Module

**Funding Source: Departmental Budget savings**

**Total Incremental Cost: \$319K - Currently 124K UNDER Budget (\$443K)  
(Through FY 16/17)**

# System Discussion

# APS Update is Critical Maintenance

- **Current system was built on 20 year old technology**
  - Legacy APS depends on third-party tools that are no longer supported
  - Programmers with skills using obsolete technology are hard to find
  - Legacy APS is expected to fail with a future Microsoft Windows release
  - Legacy APS lacks necessary security measures
  
- **New APS is being built with modern web techniques**
  - Features are being incorporated or enhanced to increase efficiency and productivity of Assessor staff
  
- **New APS will be more transparent, secure, and much easier to administer**
  - Improved Security layer, Business layer, and enhanced Auditing capabilities

# Legacy APS Modules & Function

## ➤ **Title Transfer**

- Change of Ownership
- Proposition 13 base history maintenance

## ➤ **Maps**

- Property Legal Description verification and update
- Property splits, mergers, and subdivisions

## ➤ **Value Update**

- Valuation (Changes in Ownership & New Construction)
- Proposition 13 base value maintenance
- Roll Corrections

## ➤ **Operations**

- Penalties, Exemptions and Exclusions

## ➤ **General Inquiry (replaced by Property.Assessor)**

- Assessment roll information (regular and supplemental roll)
- Form Tracking and Reports

## ➤ **Workflow**

- Administration
- Cancellation

# New APS Accomplishments

## ➤ Design and implement System Architecture

- Identify and select technologies for how data is stored, accessed, created and updated (MVC Web API and Entity frameworks).
- Design the user interface (Angular JS and Bootstrap frameworks used with HTML, CSS, and JS).
- Formalize plan for Agile development, not waterfall.

## ➤ Develop new database

- Data storage and migration to new server.
- Database tables rewritten in SQL Server 2016 (from SQL 2008).

## ➤ Integration with RIIMs Recorded Documents System

## ➤ Design and implement security sub-system appropriate for web-based application

- Integrated with Windows Active Directory

## ➤ Document and develop Title Transfer Module

- On target to begin testing at the end of Summer 2017

# New APS Next Phases

## ➤ **Fiscal Year 2017/2018**

- Complete development, test, and integrate New APS Title Transfer Module
- Document and begin development of Maps Module

## ➤ **Fiscal Year 2018/2019**

- Complete development, test, and integration of Maps Module
- Complete remaining minor development of General Inquiry (in Property.Assessor)

## ➤ **Fiscal Year 2019/2020**

- Begin documentation and development of Value Update Module
- Complete remaining development, test, and integration of Operations Module

## ➤ **Fiscal Year 2020/2021**

- Complete development, test, and integration of Value Update Module
- Development, test, and integration of Workflow

## ➤ **Fiscal Year 2021/2022**

- Integrate or redesign exemption database
- Development, test, and integration of computer or GIS assisted mass appraisal

# Fiscal Analysis

# Five Year Development Budget

	Requested	Proposed	Forecast	Forecast	Forecast	
	2017-18	2018-19	2019-20	2020-21	2021-22	TOTAL
Labor - Project Manager	175,725	182,369	187,500	194,200	200,300	940,094
Contractor - Project Development	99,000	99,000	99,000	99,000	99,000	495,000
Cost Over-runs / Software etc. Total					200,000	200,000
<b>Total</b>	<b>274,725</b>	<b>281,369</b>	<b>286,500</b>	<b>293,200</b>	<b>499,300</b>	<b>1,635,094</b>

# Funding Sources

## ➤ **Restricted FB 9767 – AB818**

- Current balance - \$500,000

## ➤ **Committed FB 9867 – Assr Prop Sys Maint/Develop**

- BJE 5000 sets aside Departmental budget savings of \$1,135,000
  - Unanticipated Revenue - \$900,000
  - Unrealized Expenditures - \$235,000

## ➤ **Additional FY 2016-17 Departmental Budget Savings of \$515,000 was returned to the General Fund**

## ➤ **Approval of the Budget Revision Request will allow the Department to fully fund the project with existing fund balance and departmental savings. No additional General Fund contribution is necessary.**