



CREST
County of Riverside Enterprise Solutions for Property Taxation

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THE RIVERSIDE COUNTY CREST PROJECT

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2.0



CREST
County of Riverside Enterprise Solutions for Property Taxation

Overview

CREST Project Direction

- ◆ **Clear Mission**
 - Three Property Tax Departments with Unified Purpose
- ◆ **Significant Organizational Needs**
 - Well-defined Requirements
- ◆ **Key Work**
 - Detailed Organizational Plans
- ◆ **Key Initiatives**
 - Itemized Work Breakdown Structure
- ◆ **Summary**
 - Property Tax System Status



Mission

CREST Project Mission Statement

The screenshot shows the CRESTPORTAL website interface. At the top, there is a navigation bar with links for ACO, ACR, TTC, Managers, Sierra Systems, Document Center, Search, and TestSite. A search box on the right contains 'All Sites' and has an 'Advanced Search' button. On the left, a sidebar menu lists various site features like 'View All Site Content', 'Discussions', 'Virtual Meetings', 'Parking Lot', and 'ACR'. The main content area features the CREST logo and a 'Welcome!' message. Below this is the 'Mission Statement' which reads: 'Unite in a cooperative venture to create effective and efficient property tax solutions for the County of Riverside'. A large, hollow arrow points from the right towards this mission statement. Underneath is an 'Announcements' section with a post titled 'IE TECH WEEK TECHNOLOGY EXPO' by Brian Kovalsky, dated 5/12/2008 8:17 AM. The announcement text states: 'Inland Empire Tech Week will kick off on May 12th with a Technology Expo hosted by both SmartRiverside and the County of Riverside's IT Department (Dates: May 12-13th, 2008). The Expo will bring together over 300 technology professionals in education...'. At the bottom of the announcement section is a link to 'Add new announcement'.

Unite in a cooperative venture to create effective and efficient property tax solutions for the County of Riverside



Organizational Needs

CREST Executive Expectations

LEGAL MANDATES

Meet all legal mandates for property taxation, assessment, collections, auditing, and other details as defined by California Revenue and Taxation Code and other legal statutes applicable to Riverside County, California.

PUBLIC SERVICE

Provide effective features and functionality to improve property tax related public services.

INFORMATION ACCESSIBILITY

Provide efficient interfaces to facilitate effective access of property tax information by internal stakeholders and ancillary information consumers.

TECHNOLOGY

Implement consistent technology platforms with open interfaces to integrate emerging technology applications to meet the present and future needs of the stakeholder offices.



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Organizational Needs

CREST Executive Expectations

EFFICIENCY

Optimize and improve the efficiency and effectiveness of property tax related business processes, interfaces, reporting, and other functions to streamline property tax operations and administration within and across the stakeholder offices.

QUALITY

Assure quality compliance with best-practices, industry standards, and requirements adherence in all aspects of property tax system technology, administration, and service.

PERFORMANCE

Ensure timely delivery and execution of property tax related services to meet legal obligations and operational guidelines.

KNOWLEDGE TRANSFER

Provide detailed documentation, training, and information to facilitate effective conveyance of knowledge pertaining to property tax system design, implementation, policies, procedures, and related details.



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Organizational Needs

CREST Executive Expectations

SECURITY

Implement effective security methodologies compliant with legal mandates and best-practices for threat-resistance to protect sensitive data and property tax system integrity.

TRANSITION

Provide a seamless, complete, and effective transition to migrate from the current Property Tax System to the new Integrated Property Tax Management System.

SUPPORT

Continue sharing ongoing maintenance and support between the 3 stakeholder offices.



Organizational Needs

Contract #PUARC-91821-001-007-06/09

Phase 0 – Project Inception

- Confirm project scope, goals, objectives, structure, processes

Phase I – As-Is Analysis and Assessment

- Document the current technical, functional and organizational baseline

Phase II – To-Be Business Processes

- Document the revised To-Be Business Processes

Phase III – System Functional Specification

- Document the detailed system requirements for each functional component

Phase IV – RFP Development

- Develop the RFP for the subsequent phases of the project

Phase V – Executive Embracement

- Gain County Executive concurrence and support for the results / strategic plan



CREST Project Plan

Integrated Property Tax Management System

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Key Work

CREST Project Control Document



The County of Riverside

County of Riverside Enterprise Solutions
for Property Taxation (CREST) Project

Project Control Document 

Contract #: PUARC-91821-001-007-06/09

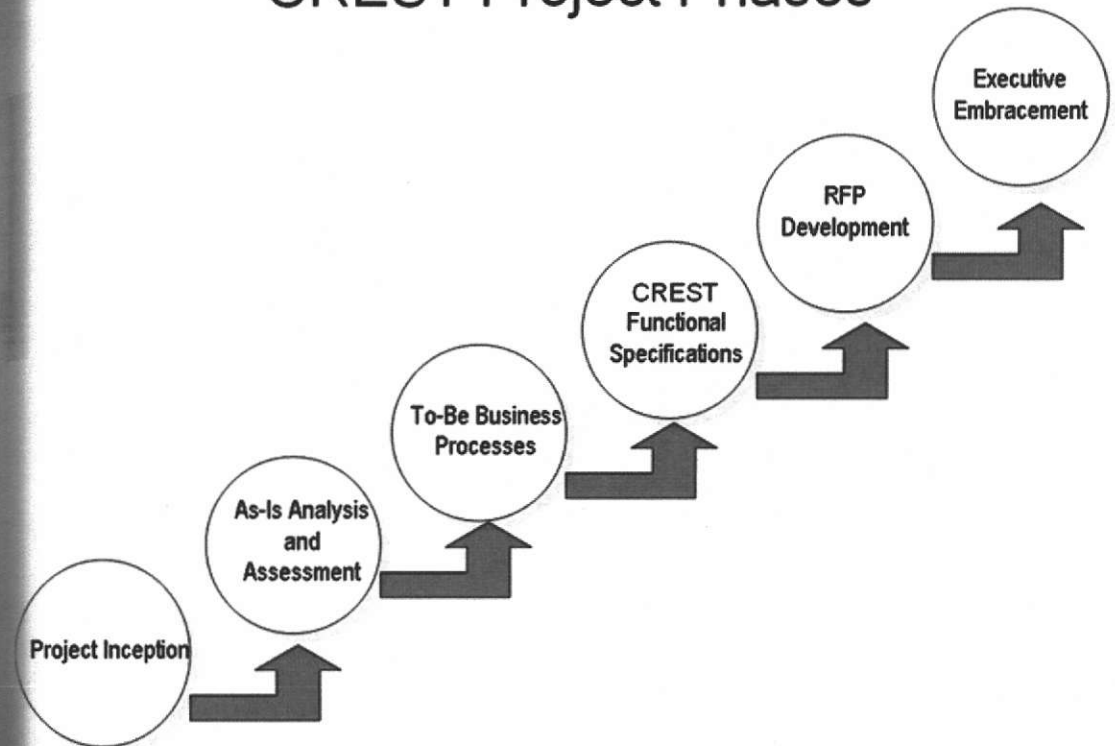
systems



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CREST Project Phases

CREST
Time-Phased
Deliverables
Analysis Target
March 2009

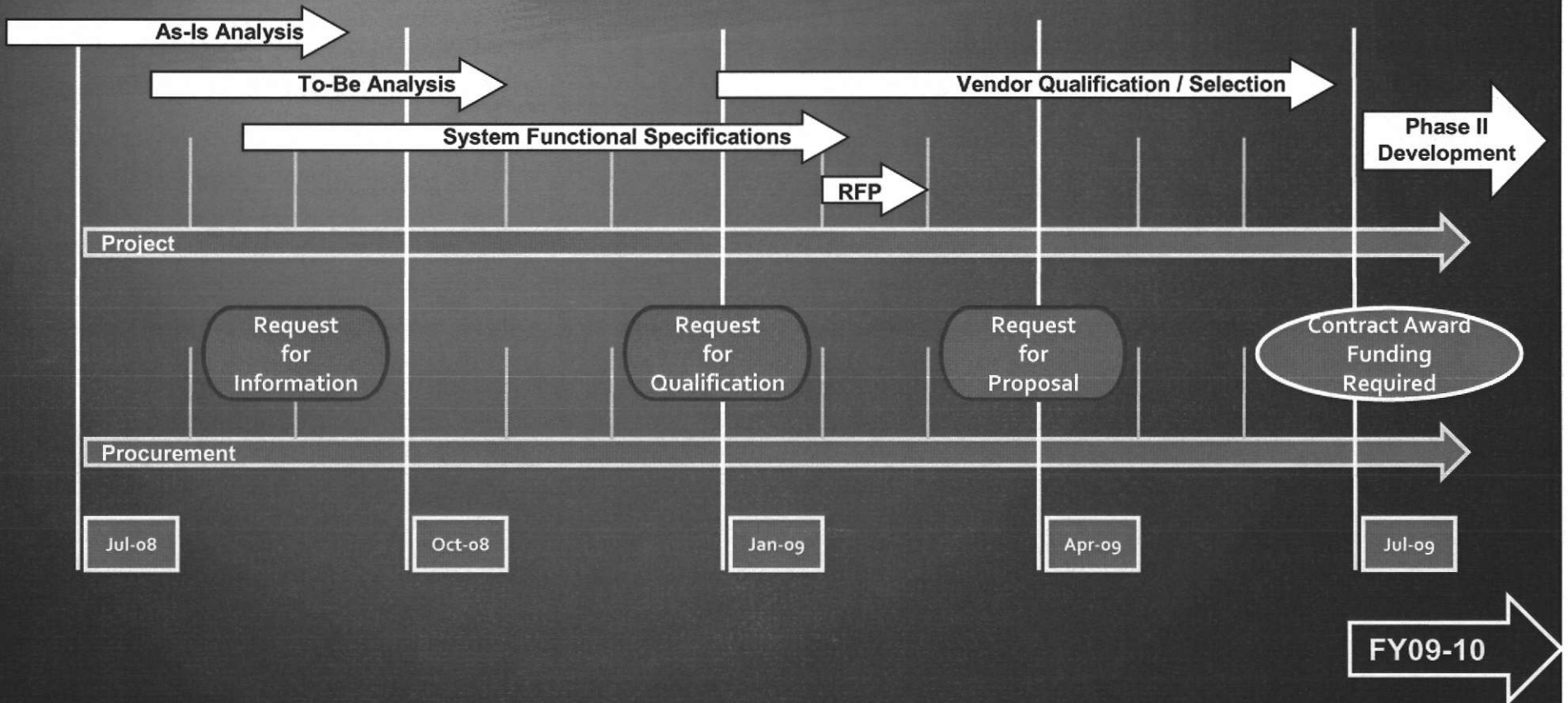


Task Name	Duration	Start	Finish	Jul '07	Sep '07	Nov '07	Jan '08	Mar '08	May '08	Jul '08	Sep '08	Nov '08	Jan '09			
☐ County of Riverside Enterprise Solutions for Property Taxation	409 days	Jul 16 '07	Feb 27 '09	[Gantt bar spanning from Jul '07 to Feb '09]												
☑ Project Management	392 days	Jul 16 '07	Feb 4 '09	[Gantt bar spanning from Jul '07 to Feb '09]												
☑ Phase 0 - Project Inception	140.5 days	Jul 16 '07	Feb 19 '08	[Gantt bar spanning from Jul '07 to Feb '08]												
☑ Phase I - As-Is Analysis and Assessment	202 days	Nov 1 '07	Aug 29 '08	[Gantt bar spanning from Nov '07 to Aug '08]												
☑ Phase II - Development of To-Be Processes	73 days	Jul 21 '08	Oct 29 '08	[Gantt bar spanning from Jul '08 to Oct '08]												
☑ Phase III - System Functional Specification	131 days	Aug 13 '08	Feb 11 '09	[Gantt bar spanning from Aug '08 to Feb '09]												
☑ Phase IV - RFP for New Property Tax Management System	12 days	Feb 12 '09	Feb 27 '09	[Gantt bar spanning from Feb '09 to Feb '09]												
☑ Phase V - Executive Embracement	6 days	Feb 12 '09	Feb 19 '09	[Gantt bar spanning from Feb '09 to Feb '09]												



Key Work

CREST Project and Procurement Timeline





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Key Work

High Level Functional Decomposition

Maintain Property Data – Mapping	A. Assessor Maps B. Legal Descriptions C. TRA/District Boundaries (per BOE) D. APN Generation E. LAFCO F. GIS	3
Real Property Valuation—Event Driven Changes	A. Change of Ownership B. New Construction C. Map Changes D. Calamities E. Appeals F. Field Work/Discovery G. Developer's Exemption	13

35 Major Functional Domains / 134 Joint Application Review sessions

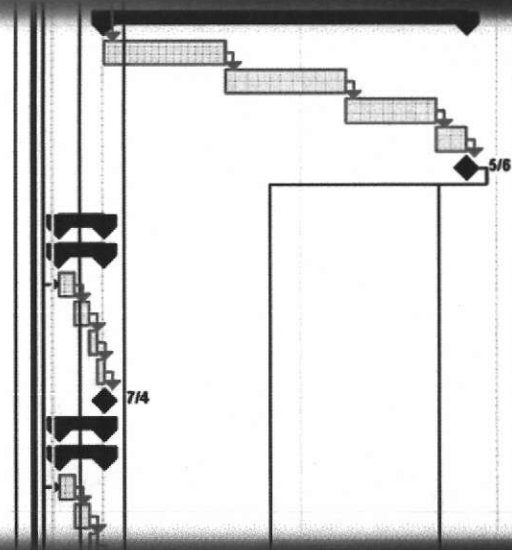


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Key Initiatives

Detailed Work Breakdown Structure

66	Vendor Project Stage I	480 days	7/5/07	5/6/09	NA	0%
67	Phase I (AS-IS)	8 mons	7/5/07	2/13/08	NA	0% 33
68	Phase II (TO-BE)	8 mons	2/14/08	9/24/08	NA	0% 67
69	Phase III (Functional Specifications)	6 mons	9/25/08	3/11/09	NA	0% 68
70	Phase IV (RFP for Stage II)	2 mons	3/12/09	5/6/09	NA	0% 69
71	Stage I Complete	0 mons	5/6/09	5/6/09	NA	0% 70
72						
73	Standards and Procedures	60 days	4/12/07	7/4/07	NA	0%
74	BPM Standards	60 days	4/12/07	7/4/07	NA	0%
75	Collect samples	20 days	4/12/07	5/9/07	NA	0% 34FS-60 days
76	Create IPTMS Baseline	20 days	5/10/07	6/6/07	NA	0% 75
77	Review with IPTMS managers	10 days	6/7/07	6/20/07	NA	0% 76
78	Adjust	10 days	6/21/07	7/4/07	NA	0% 77
79	Standards Complete	0 days	7/4/07	7/4/07	NA	0% 78
80	SDLC Standards	60 days	4/12/07	7/4/07	NA	0%
81	Documentation Standards	60 days	4/12/07	7/4/07	NA	0%
82	Collect samples	20 days	4/12/07	5/9/07	NA	0% 34FS-60 days
83	Create IPTMS Baseline	20 days	5/10/07	6/6/07	NA	0% 82
84	Review with IPTMS managers	10 days	6/7/07	6/20/07	NA	0% 83



Over 880 detailed task items reviewed weekly



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Summary

Neighboring Counties

- ◆ **Los Angeles County**
 - ◆ Jun-08: Cancelled Assessor AIMS System Procurement
- ◆ **Orange County**
 - ◆ Jul-07: Sierra Systems Inc. completed Needs Analysis
 - ◆ Jul-08: Treasurer + Auditor \$8M award to Tata America International Co.
- ◆ **San Diego County**
 - ◆ Apr-05: Fixed price contract with Bearing Point (\$37m) / Behind schedule
- ◆ **San Bernardino County**
 - ◆ Apr-07: Analysis complete / Vendor selected / No agreement / On-hold
- ◆ **Santa Clara County**
 - ◆ Aug-08: Tax Collection and Apportionment System (TCAS) / Licensing Interest
- ◆ **Santa Cruz County**
 - ◆ Aug-08: Award to Manatron



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Summary

Riverside County CREST Project

- **Beneficial Insights from Neighboring County Experiences**
 - CREST Ambassador Initiative
- **Only County with Three Tax Departments Cooperating**
 - United cooperation for Enterprise Solution
- **Near On-schedule / Within Budget**
 - 3 week variance from original Project Control Document
 - Root cause: Subcontractor staffing issues
 - Weekly monitoring and adjustment
- **Analysis completion: March 2009**
 - Well-defined requirements help ensure effective implementation
- **Next Phase: Development**
 - Request for Proposal April 2009
 - Contract Award FY09-10: Budgetary implications for the County



Summary

CREST Development Estimates

- Target timing for contract award to begin development:
 - FY09-10
- Estimated Cost:
 - \$10M to \$30M
- Estimated Timeframe:
 - 3 years

Actual costs and timeframes are subject to details
in vendor responses
to upcoming Request for Proposal