



# TAX & TREASURY SYSTEM BRIEFING

December 19, 2022

# THE JOURNEY...

YEAR	EVENTS
2001	Contract with Manatron for new mass appraisal system for real estate (PROVAL)
2002	Financial Application Integration Team (FAIT) formed
2003	Virtual IT engaged to document current business processes and systems; offer suggestions for future
2004	CGI Advantage implementation begins (Accounting, Purchasing)
2006	CGI Advantage Goes Live (2 <sup>nd</sup> attempt)
2007	Contract with Manatron for Government Revenue Management system (Tax Assessment, Miscellaneous Billings and Receivables, Collections and Cashiering)

# THE JOURNEY...

YEAR	EVENTS
2008	Manatron Phase I (Real Estate Billing and Cashiering) Implementation ongoing
2010	Manatron Phase I Goes Live without full functionality
2011	City cancels Manatron contract for remaining systems
2012	Virtual IT engaged to review progress and offer new recommendations; suggest better integration of 2 <sup>nd</sup> floor functions (one stop service)
2012	City opts to keep legacy systems by converting them from mainframe to modern platform
2013	Mainframe Modernization project underway, target completion for 2015
2013	Delinquent collections moved from Finance to Treasurer's Office

# THE JOURNEY...

YEAR	EVENTS
2015	Miscellaneous Receivables moved from mainframe to CGI Advantage System
2015	Modernization project completed; opportunity for enhancements limited
2015	Began developing plan for transferring local trust tax and miscellaneous receivables functions from Finance to the Commissioner and Treasurer Offices
2016	Began evaluating PCI System through Virginia Cooperative Procurement Process
2017	Transfer of local trust tax and miscellaneous receivables responsibilities completed; began developing system specifications for PCI contract
2018	Sign Contract with PCI March 1, 2018
2018	PCI Project Manager Promoted to Chief Operating Officer; New Project Manager Assigned to City Project

# THE JOURNEY

YEAR	EVENTS
2019	PCI completes Business Process Reviews and Base System Installation; PCI Provides Initial Project Plan with Projected Go Live Date in October 2020
2020	Global Pandemic Declared in March 2020, In-Person Work and Travel Restricted; PCI and Sturgis Absorbed by Government Brands
2021	PCI and City Push Toward December Go Live Falls Short; Retirements, Turnover and Restructuring on Both Sides Impact the Project
2022	New Commissioner of the Revenue Takes Office, Real Estate Billing Moved Out of CRO to Real Estate Valuation, PCI Restarts Work in March and Changes Project Manager
DEC 01	Legacy Systems Turned Off; Data Conversion Begins
DEC 12	PCI System Live, Treasurer and Commissioner Offices Begin Entering Backlog into PCI
DEC 14	Offices Open to Public; Customer Online Portal Available

# BENEFITS OF NEW SYSTEM

- Integrates Seven Separate Systems Into One
  - Eliminates Duplicate Entry
  - Staff Can View Delinquent Accounts for a Taxpayer Without Searching Multiple Systems
  - Taxpayers Can View All Taxes, Fees and Payments in One Place
- Replaces Legacy Systems with Stable, Supported System
- Large Virginia Users Group for Support and Best Practices
- Improves Data Accessibility and Reporting
- Enables Cross-Matching Data in ways Separate Systems Did Not
- Enhances Taxpayer Ability to Conduct Business with the City Online

# ONLINE SERVICES USING STURGIS PORTAL

- Apply for Business License
- File Monthly / Quarterly Trust Tax Returns
- File Annual Business License Returns
- Report Changes in Personal Property
- View Consolidated Account History (Taxes, Fees, Payments)
- Print Statements
- Make Payments

# STAFF HOURS (THRU 9/30/22)

Reported by:	Total Hours
Commissioner of the Revenue	10,807
City Treasurer	6,192
Department of Technology	6,875
Department of Finance	127
Real Estate Valuation	1,256
Municipal Auditing	11,430
<b>Total Hours:</b>	<b>36,687</b>

Original Projected Staff Hours Were ~ 33,100



# PENDING ITEMS AS OF 12/19/22

- Real Estate Preprocessor for Supplemental Assessments and Landbook
- State Income Tax
- Miscellaneous Accounts Receivable



QUESTIONS