

High Expectations from a Highly Efficient County

Orange County operated on a mainframe property tax and appraisal system that had, over decades, been fine-tuned to conform precisely to its needs. But Orange County had to face the fact that its 30-year-old system, like a beloved old Cadillac, could only go so far.

The End of an Era

Orange County Tax Office had a property tax and appraisal system that was 30 years old. It was written in dBase, ran on an AS-400 and featured the infamous green-screen terminals. And staff loved it.

"It was the old legacy system, and it was wonderful," said Jo Roberson, Tax Administrator, Orange County. "We had tweaked it to do everything we needed it to do. We had a superb programmer, Anne Presnell, who understood the point of the data, and the flow of the data, and what to connect where."

But there was no getting around it, the system was old, and so when Presnell began planning her retirement, she spread the word. "A 30-year-old system requires maintenance," said Linda Strickland, Collections Manager, Orange County. "When something goes wrong, someone has to be able to fix it. And we realized there wouldn't be anybody."

A new system would have big shoes to fill. The bar had already been set high. Orange County had long been squeezing every last ounce of capability out of its legacy system with sophisticated services such as daily mirroring of data on its public web site and tight integration with its Register of Deeds.

"We had no expectation that a new system was going to catapult our productivity or efficiency," said Roberson. "We already have one of the highest collection rates in

the state, and you can't have a 99% collection rate on real property or an overall collection rate like we have [98.72%] without having strong processes in place."

The Search

The first RFP contained over 1,200 requirements. It was scaled back, but the final was still extremely comprehensive. "We didn't want to back up," said Judy Ryan, Chief Appraiser and Deputy Assessor, Orange County. "The RFP addressed what we had and a little of what we wanted to have."

One challenge was the fact that the tax department is rooted in a PIN (Parcel Identification Number) ordinance unique to Orange County. "It's our system's core," said Roberson. "The lawyers love it. It makes title history a breeze."

Nine vendors responded to the RFP. Although the PIN app would need to be built, the County discounted the vendors who wanted to partner to build the land records & CAMA app or the Billings and Collections software from the ground up. "We didn't want to be a guinea pig county," said Strickland.

Orange County selected NCPTS as its billing and collecting system and FARRAGUT (formally called IIS) as its service provider. property tax and appraisal system.

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About Orange County

Located in the N.C. Piedmont, Orange County is situated between Research Triangle Park and the cities of Greensboro, Winston-Salem and High Point. With approx. 130,000 residents, the County includes Hillsborough, the county seat, Chapel Hill, home of UNC, and Carrboro and Mebane. The County encompasses 400 square miles of cosmopolitan urban centers, farms and forest, and small towns.

About NCPTS

NCPTS is a comprehensive property tax and appraisal system built by NC counties to harness their ideas, talents and best practices. NCPTS integrates the property tax work flow including valuation, assessment, billing and collections. Owned and managed by the North Carolina Association of County Commissioners (NCACC), NCPTS is offered without licensing fees. Currently, ten counties use NCPTS to manage day-to-day operations, improve collection rates, reduce operating costs and provide better service to taxpayers.

About FARRAGUT Systems, Inc.

NCPTS software implementation, support, and enhancement services are provided by the program's preferred vendor, FARRAGUT. NCACC manages the vendor's relationship and services. Founded in 1992, FARRAGUT helps local governments close the gap between the potential of technology and the reality of achieving measurable value—including more revenue, better service, and improved productivity.

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FOR MORE INFORMATION

At that point, NCPTS did not yet offer a SQL Server-based land records & CAMA product, and a different vendor was selected to implement a land records & CAMA system and develop the PIN app which would, in turn, feed into the billing & collections system.

Roberson knew NCPTS well. She had been an NCPTS steering committee member almost from the committee's inception in 2001. "I saw the inside of the sausage factory," she laughed. "NCPTS Version 2 is a very good product. It was whiz bang. Version 4 has come to be an even stronger product. And, I think that, with the help of the steering committee which is made up of representatives from every county running the software, NCPTS is well on its way to becoming the premium NC-based property tax and appraisal system."

Originally developed by FARRAGUT for Wake County, NCPTS today is owned and managed by the North Carolina Association of County Commissioners and is offered to NC counties without licensing fees. Participating counties collectively set the vision, determine the best capabilities, and share the maintenance cost.

"One of the primary reasons we chose NCPTS is that it was solely driven by NC law," said Roberson. "It was not a canned package that had been tweaked to meet the minimum. NCPTS was written to use technology to its maximum capacity to meet statutory requirements."

Getting Started

Implementation began during a nerve-racking time for the Orange County Tax office. It was 2009, the year of a reappraisal. Even though Orange County property value held steady compared to other parts of the country, appeals poured into the Tax Office along with some very upset and vocal citizens. "This County has never felt the direct effect of an economic crisis like this one," said Roberson.

At the same time, facing budget cuts, the government offered a retirement incentive, and the Tax Office lost 18 percent of its staff, including the County Assessor. Roberson took over leadership of both assessment and billing and collections, and the two groups, which previously had been separate, were merged.

"This team has been through the ringer," said Roberson. "But they have stepped up, been supportive and worked as a team. Failure is not an option to any of them, and I will go to my grave being forever indebted for their professionalism and support. They are phenomenal."

Layered on top of all these changes and challenges was the software implementation. "It could have been very daunting," said Roberson. "But I have to say this: we all have different personalities, but even our nesters said, 'I really don't want to change, but I know it's coming so ... okay, lead on,'" Roberson laughed. "They really worked as a strong team. And FARRAGUT was a strong member of the team. Their processes, already honed in other county conversions, were a good basis."

NCPTS Ownership & Participation

NCPTS Participants	Population	Production Year
Wake County	897,214	1999
Wayne County	113,811	2002
Henderson County	103,669	2003
Catawba County	159,125	2004
Harnett County	115,761	2004
Pitt County	159,057	2006
Mecklenburg County	913,639	2008
Randolph County	142,151	2009
Guilford County	480,362	2009
Orange County	129,083	2009

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Currently, ten counties (comprising 33% of the state's population) use NCPTS.

Following its kick-off process and the data migration, FARRAGUT initiated the business mapping portion of its implementation, a structured methodology, conducted in an NCPTS testing environment, designed to walk staff through the business processes that pertained to each individual's day-to-day tasks.

In addition to training staff, the business mapping processes uncovered gaps between Orange County's processes and procedures and those built into NCPTS.

Orange County worked closely with their FARRAGUT project managers, Sanjay Chouhan and Brandon O'Daniel, to determine how best to address these gaps. In some cases, the changes were determined to be an adjustment that staff would have to make, in other cases, enhancements bridged the gap.

"Sanjay was just awesome," said Ryan. "Every time you ask him a question, he would say: That can be handled three ways: this is one way for no cost, this is another way for minimal cost, and this is a programming cost. **He would always make sure you understand the options. He was very good at getting us where we needed to be, and I think he was also concerned with our budget.**"

For his part, Chouhan learned a lot during the Orange County implementation as well.

"The Orange County staff loves to teach," he said. "I was able to dig down below the surface of their issues to understand not only what was important to them but why it was important."

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And from there, the FARRAGUT team would craft a solution. "They were reactive when needed, but they took it a step further. They didn't just figure out the problem, they figured out what caused the problem and then proactively ensured it wouldn't happen again," said Roberson.

"Once this project started, we were like a freight train, there was no slowing down, and when we hit a rut, FARRAGUT didn't become flustered. They would back up, re-group and fix it."

As Orange County staff and FARRAGUT staff overcame challenges together, a true sense of teamwork developed. "Sanjay won the respect of our team," said Roberson. "He is very calm, very methodical, and he also listens, really listens. And then Brandon is just off-the-chart smart, he really is."

Training

Orange County's staff of long timers were familiar with data entry, but many were not familiar with web-based systems. These personnel faced a steep learning curve. Much of the training was conducted by FARRAGUT's Sanjay Chouhan.

"I'm going to have to bow down to Sanjay," said Ryan. "Not only did we get to know him, but he got to know us and our limitations. None of us are computer people, but Sanjay never rolled his eyes or had an "I can't believe you don't know this" attitude."

At each training session, participants were given a sheet detailing the specific processes to cover that day and were pointed to documentation on the web site.

"From the very beginning, NCPTS had an agenda," said Ryan. "There was a clear set of expectations and it really helped us plan."

"[The land records & CAMA vendor] had a great deal of expertise, but they were not as regimented or as procedurally organized as FARRAGUT," said Roberson.

"This was difficult for our team. On one side [NCPTS], everything was very systematic and on the other side, it was just fly by the seat of your pants. In the end, the Property Information Number system & CAMA is up and highly operational, but along the way there was a lack of organization in the approach taken to get us there. That did create a higher level of stress and uncertainty."

Going Live

Of course, no major software overhaul is without stress. The weekend before NCPTS went live, staff members test drove the system. "We all ran around patting ourselves and everyone else on the back saying 'Look what they did!'" said Roberson.

Then came Monday. This was October 4, 2010, an extremely busy time in the tax collection cycle. There was no breathing room for staff to familiarize themselves with the new system.

"The training helped, but until you get in and start working on a new system yourself, it can't hold a candle to what you have to do," said Jackie Morrow, Revenue Technician with Registered Motor Vehicles.

Morrow had been with the County for over 10 years. She was accustomed to working primarily from printouts. A web-based system

was a completely new experience for her. "Still, that first day wasn't too bad because we had Sanjay. We would just grab him when we had an issue," she said.

Over the next weeks and months, there were numerous growing pains, no surprise to Roberson.

"We went into this with our eyes wide open," said Roberson. We knew there would be give and take. Some processes would get a whole lot better. This was new state-of-the-art technology, after all. And some processes just weren't going to be as slick as the ones before. But the good far outweighs the not-so-good. There was no bad."

In addition to gaining some new efficiencies in tandem with a more tightly integrated work flow, Orange County has also seen some unexpected benefits. For example, because they instituted cross training, staff had the opportunity to learn about other jobs in the Tax Office.

"This is really important," said Roberson. "Not because you want them to do other's jobs, but because it makes their own job make more sense. The software implementation has helped make the Tax Office team even stronger. We had good working relations between the collections and the LR side, but we were not one. This process has helped make that line even more invisible."

NCPTS KEY BENEFITS

- NCPTS, a comprehensive property tax system, is specifically developed for NC Counties.
- Conforms to NC regulations
- Maximizes collections rates
- Eases resolution of taxpayer issues
- Offers taxpayers accurate, complete and timely information
- Integrates end-to-end work flow
- Adds business intelligence that touch nearly every process
- Integrates end-to-end work flow
- Eliminates redundant data entry (leads to fewer errors)
- Leverages advanced, web-based technology