



Standby Tax Application Reporting System

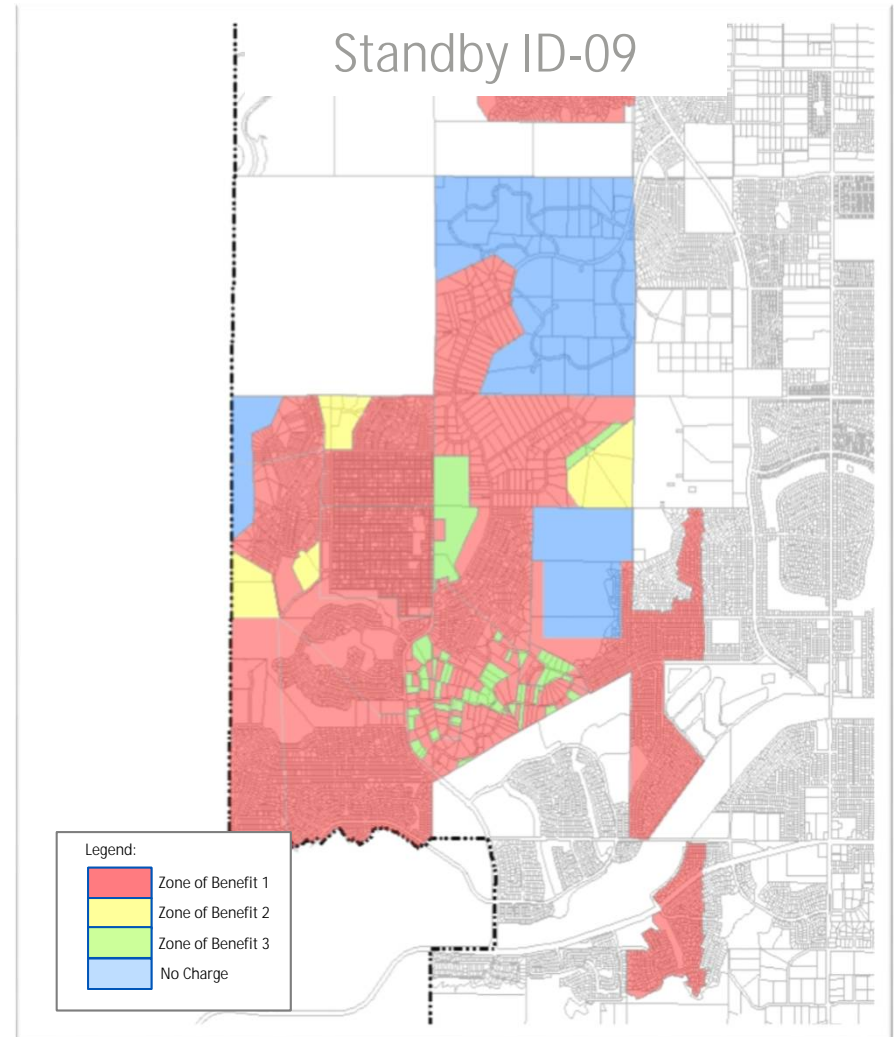
Mark Salcido
Mike Wayment
October 15, 2020

Background

The Standby Tax Assessment Program is a process that EMWD uses to assess water “availability” and sewer standby charges to properties within the District’s Service Area based on:

- Taxability
- Proximity to pipelines
- Property size
- Applicable rate

The charges are added to the Property Tax bills annually and processed via the County’s tax collection process.



What are the “Standby” fees used for?

Fees are used to:

- Construct, expand, or improve Capital Improvement Projects
- Operate and maintain water and sewer facilities

Fees Total

- \$5.8 Million Annually (FY 2019-2020)



Standby Tax Application Data

- Current Standby Application has been in place since before 2000
- Current system requires manual data management and analysis
- EMWD relies on County parcel data to track changes in:
 - Property Ownership
 - Taxability (e.g. Exemptions, Conservation easements)
 - Property Size

Example of 10.5-acre parcel showing 3 applicable charges in current system

STANDBY - View - 31 rows displayed

File Updater

Tax Year: **oltprod**
2019-2020

Search Options
APN: 429-050-047-
Row#:

APN Range: 1 APN(s)
429-050-047-1 thru 429-050-047-1

View Files

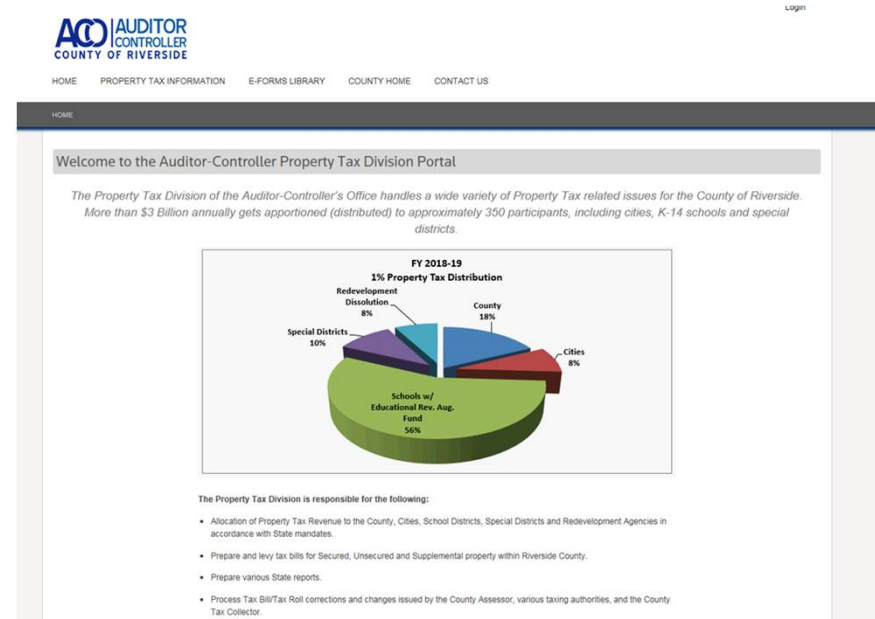
ROW_NBR	APN_NBR	FUND	ACRES	AMOUNT	ZONE	FLAGS	(asn, csn, fzs, fsn)
96157	429-050-047-1	685401	10.51	42.04	1	NO----	117071573,122279373,119002398,118000317
96157	429-050-047-1	685449	10.51	21.02	1	NO----	117071573,122279374,119002471,118000326
96157	429-050-047-1	685928	10.51	63.06	1	NO----	117071573,122279375,119002639,118000347

New County Assessor Data Format

The County of Riverside recently changed its Assessor data formats used by EMWD's Standby Tax Application.

Impacts include:

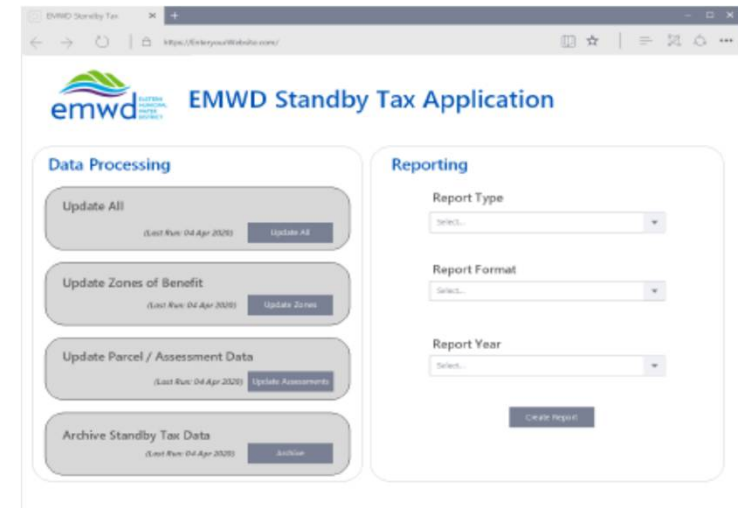
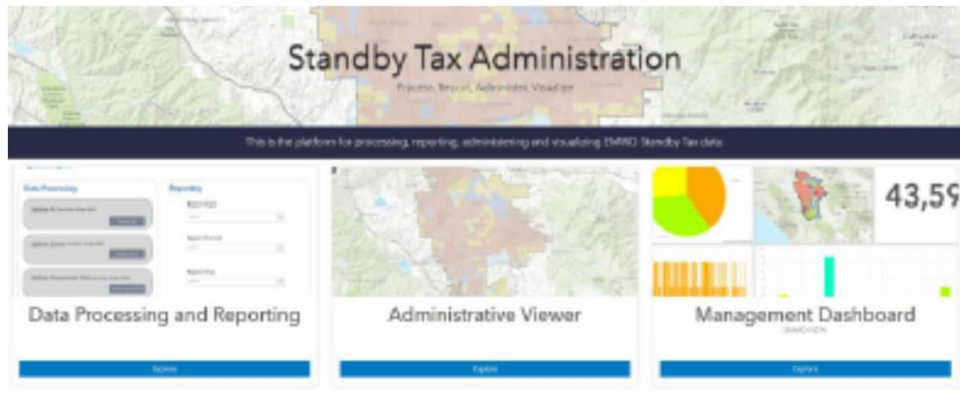
- Incompatibility between County data and existing system
- Changes in Data submittal process (Online Web Portal vs. email)
- Standby Application cannot be used to process assessments and reports submitted to County



Proposed Standby Tax Application Replacement

An evaluation of the Standby Tax process resulted in the following:

- Identified need to utilize a GIS-centric component for processing standby tax assessments based on EMWD standby criteria
- Opportunities to streamline existing workflows for improved efficiencies
- Identified integrated technologies that will leverage our current investments in GIS and other IT solutions



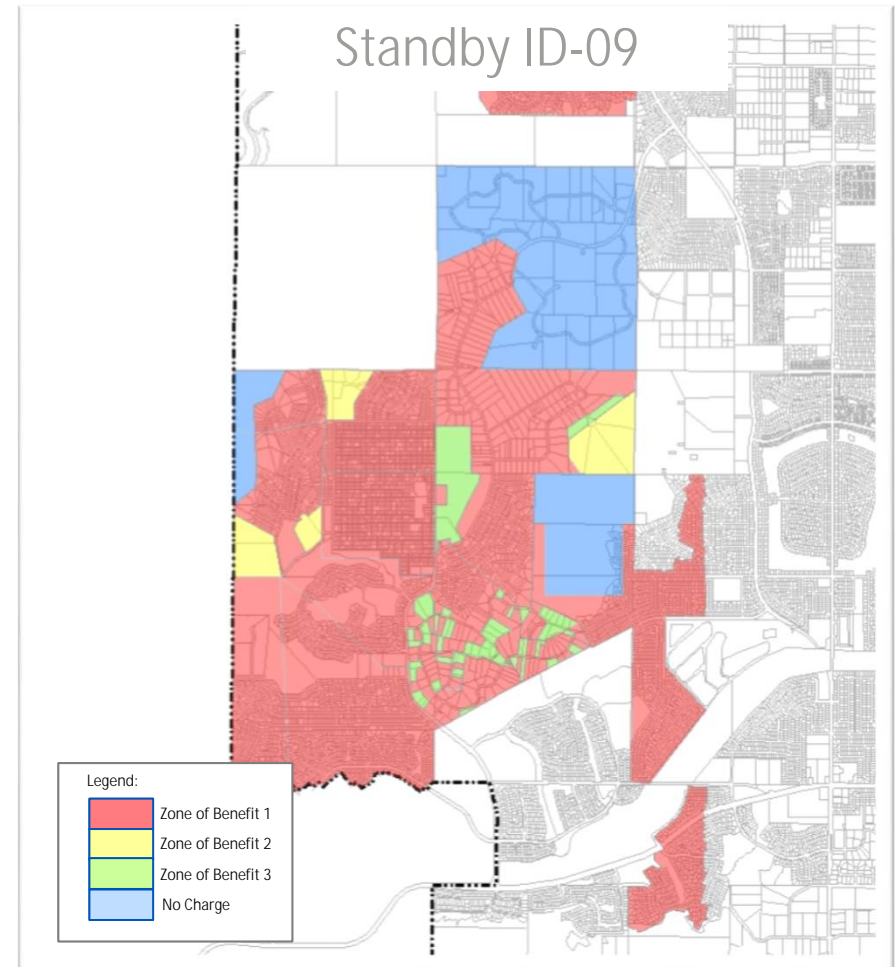
Proposed Standby Tax Application Reporting System (STARS)

Key elements of proposed replacement project:

- No commercial Off-The-Shelf solution or professional services exist to replace system
- Competitive Request for Proposal resulted in selection of qualified vendor
- Needs Assessment and Preliminary Design completed for new STARS application
- Application requirements include licensing upgrade and training on new tools and application

Elements of Proposed STARS

- Licensing and server upgrades
- Integration with new tools and user interface
- Improved workflow efficiencies
- Improved data processing and reporting
- Following Implementation testing, Public Portal to be activated for increased transparency



Standby Tax Application Reporting System Project Cost

Project Cost Estimate	
Needs Assessment, Process Review and Preliminary Design Complete	\$95,000
Final Design, Testing and Implementation	\$295,575
Post Implementation Support	\$34,000
Software Licensing	\$14,000
Total Project Cost:	\$438,575
Funds Requested at this time:	\$343,575



Consultant Selection

- RFP issued on September 26, 2019 to four consultants
- District received two proposals on October 30, 2019
- A selection committee comprised of Information Systems and Engineering Services performed a ranking of proposals using the following criteria:
 - Firm Qualifications and Experience (15%)
 - Personnel Experience and qualifications (20%)
 - Approach and Understanding of Requirements (15%)
 - Proposed Software/Solutions (20%)
 - Price/Payment Terms (15%)
 - Exceptions Taken to RFP, Quality of Proposal, Local Office (15%)



REQUEST FOR PROPOSALS
STANDBY TAX SYSTEM RECOMMENDATION AND REPLACEMENT SERVICES

RFP No. 3227

RFP SUBMITTAL DUE DATE: **October 30th, 2019, by 4:00 p.m.**

SUBMIT TO/CONTACT: Mr. Chris Teague, CPSM, Purchasing and
Contracts Department

Via: EMWD e-Procurement on-line electronic submission

Phone / Fax: (951) 928-3777, Ext. 4243 Fax: (951) 928-6190

E-mail: teaguech@emwd.org

Consultant Selection Matrix

Consultant	Technical Proposal Rating	Proposed Fee
NorthSouth GIS, LLC	3.4	\$320,000
West Advanced Technologies, Inc	2.88	\$169,480

Selection Criteria:

1. Firm Qualifications and Experience (15%)
2. Experience and qualifications (20%)
3. Approach and Understanding of Requirements (15%)
4. Proposed Software/Solutions (20%)
5. Price/Payment Terms (15%)
6. Exceptions Taken to RFP, Quality of Proposal, Local Office (15%)

Review Panel:

1. Mark Salcido, Mapping Manager
2. Mike Wayment, Information Technology Manager
3. Juan Gonzalez, Mapping Administrator
4. Andy Regalado, Business Systems Analyst II



Schedule

The project timeline to complete the STARS project is as follows:

- **June 2020** Finalized STARS Implementation Plan
- **October 2020** Build STARS Internal Application
- **February 2021** Build STARS Management Dashboard and Public Viewer
- **March 2021** Test STARS Application
- **April 2021** Test STARS Dashboard and Public Viewer
- **April 2021** Deploy STARS Application
- **May 2021** “Go-Live” for STARS application

Recommendation

Authorize the General Manager or Designee to approve and authorize the Standby Tax Application Replacement Project including Agreements with Safe Software for software licenses and with NorthSouth GIS, LLC (NSGIS) for professional services; and an additional appropriation in the amount of \$343,575.



Contact Information

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