



CITY COUNCIL ACTION REPORT

January 30, 2012

TO: John Szerlag, City Manager

FROM: Susan A. Leirstein, Purchasing Director
Gertrude Paraskevin, IT Director

SUBJECT: Sole Source - Upgrade BS&A Software

Background

The City has utilized BS&A software since 1999 for Assessing, Tax Administration, Delinquent Personal Property, Special Assessments, and the Building Department System (including Permitting, Inspections and Code Enforcement). Cemetery Management was added in 2006. These systems were built upon a proprietary Pervasive database. Since initially purchasing BS&A software the city has adopted a database standard of Microsoft SQL Server. After many years of pressure from communities and most recently Oakland County, BS&A has rewritten their software utilizing the Microsoft .Net development platform and Microsoft's SQL Server database.

The city has been very happy with BS&A as a software company offering great support and quality products at relatively low cost. The biggest issue we have had with this software is the difficulty accessing data for reporting and interfacing purposes. We have had to build and maintain redundant SQL Server databases which mirror some of the data in Pervasive as a workaround to gain access. In fact some of the data isn't even available to extract outside of their system. This becomes problematic when you want to offer real time access to data, and adds a level of complexity causing more potential points of failure.

Migration of their products to the Microsoft SQL Server database will bring it in line with our current database standard and will make data access much simpler. In addition, there are a number of other advantages to this newer version of the software as outlined in Attachment B. The City purchased and successfully implemented the .Net Utility Billing application in September of 2010 so we have experience with the new platform and have been very pleased with it. In addition, support during the implementation and conversion was excellent.

BS&A is phasing out the current Pervasive product. They are no longer marketing it, they will not be developing or implementing any new features in it, and eventually they will be discontinuing support.

Pricing for this upgrade can be found in Attachment A. Note there is no cost for additional hardware since we will be utilizing an existing SQL Server to house the database.

Recommendation

City management is requesting authorization to upgrade BS&A software as outlined in Attachment A for an estimated total cost of \$87,380 with a yearly software maintenance fee of \$15,960 that could change annually based on the Consumer Price Index (CPI) for the then current year when compared with the previous year.

Fund Availability

Funds are budgeted and available in the Information Technology Fund.

ATTACHMENT A

Costs

	One-time Fee	Recurring Cost
Software Module	Cost	Maintenance*
Equalizer Assessing.Net	\$ 20,580	\$ 4,575
Equalizer Tax.Net	17,415	3,575
Equalizer Special Assessment.Net	8,795	1,760
Equalizer Delinquent Personal Property.Net	5,275	1,055
Cemetery Management.Net	2,095	420
Building Department.Net	22,870	4,575
Training		
Assessing, Tax, Special Assessment, Delinquent PP and Cemetery Management		
5 days @ \$1,150/day	5,750	
Building Department		
4 days @ \$1,150/day	4,600	
Total	\$ 87,380	\$ 15,960

* Note: Annual maintenance will increase from \$8,940 on the current platform to \$15,960 on the .Net platform.

ATTACHMENT B

.Net Features

General

1. Industry and City standard Microsoft SQL database versus more proprietary Pervasive database.
2. Allows for much better query capabilities and the ability to utilize the SQL Server Reporting Services report writer tool.
3. Allow us to integrate this database into our SQL backup scheme resulting in more reliable and point in time backups.
4. Allows direct access to SQL tables eliminating the need to replicate and maintain separate tables.
5. Improved User Administration
 - a. A centralized Admin database is shared across all applications. Among other benefits, this eliminates the use of redundant user records in multiple applications, greatly improving user administration.
 - b. User Groups eliminate the need to set up individual user security by letting you set the same rights for a batch of users at once.
 - c. Windows Active Directory users can authenticate to BS&A applications using their Active Directory login credentials. Currently each module requires a separate login.
 - d. True network-aware Who's Logged In lets you view other users currently logged in, and send them messages.
6. All-New Reporting System
 - a. Much improve integrated report writing tool.
 - b. Export reports to a variety of formats (PDF, Excel, etc.).
 - c. Email reports from within the reporting system.
 - d. Report Profiles allow you to group your most often-run reports together for quick retrieval.
7. All applications are built on the same framework, making it easier for users to navigate.
8. Detailed audit trail tracks virtually all changes made.
9. Reminders help you keep track of important events, tasks, deadlines, etc., and can be assigned to specific parcels. An Item Display Filter gives you the option to view All, Expired, or Future reminders, and a Snooze feature temporarily dismisses the reminder so you can continue with your work.

Assessing

1. New Land Table tool lets you increase/decrease rates en-masse.
2. New Charts item in the Tasks menu provides a snapshot of items by Property Class (SEV, Parcel Count, or Taxable Value). Charts may be printed or saved as an image to be included on reports, making them more presentable.
3. Selection-based filters give you better control over items to include in a task. For example, previously the Sales Search & Analysis feature only let you select a range of neighborhoods. Assessing .Net lets you pick and choose.
4. Built in Comparable Sale Analysis tool.
5. Data can be viewed in a larger variety of tables.
6. View unlimited previous year values (SEV, Assessed, Taxable, Headlee, etc.).
7. The Edit Parcel screen provides tabs to view thumbnails of Attachments and Sketches.

8. Gross Rent Multiplier Valuation Method has been added to the Neighborhood ECF and Analysis area.
9. Discounted Cash Flow Valuation Method has been added to Income Capitalization.
10. ECF Analysis opens in a separate window, letting you go to the parcels found without closing the Analysis.
11. When linked with Equalizer Tax .Net, view real-time tax bill history from within Assessing.
12. Sketch Integration
 - a. Sketch Integration lets Assessing .Net figure the pricing of a Residential building for you: draw the sketch, and the Basic Building Area is calculated by the program - no need for you to manually enter the data.
 - b. Existing sketches from the Pervasive version of Assessing can also price your Residential buildings. You can view the data calculated by the program and compare it to the existing values before updating the buildings.

Tax

1. Edit Parcel/Tabbed Seasons
 - a. The Edit Parcel screen offers quicker access to parcel information in a new tabbed format.
 - b. Tabbed seasons enable you to locate season-specific information with one click.
2. Adjustment Types
 - a. Expanded adjustment types, including School District and Property Class.
 - b. Multiple adjustments can be entered for each type (edit or add new ones).
3. Parcel Summary Pane
 - a. Provides seasonal figures.
 - b. If set up, provides Image and GIS information at a glance.
4. Committing Taxes
 - a. New Commit Taxes utility displays which taxes have and have not been committed.
 - b. Commit only the season you want, regardless of the season in which you are currently working.
5. Assessing/Tax Parcel Differences
 - a. When linked with Equalizer Assessing .Net, easily compare Tax's database information with Assessing in real time.
 - b. Parcels with conflicting information are highlighted, making them easier to locate so you can quickly resolve differences with your Assessor.
6. Adjustments Imported Directly from Assessing.NET
 - a. Board of Review and Tribunal adjustments are imported directly from Assessing.NET with the touch of a button. There is no need to first export Adjusted Values out of your Assessing database and then import them into Tax .NET.
7. Apply Payments
 - a. Pay Balance (Across All Seasons) lets you quickly pay the total amount due across all seasons for a particular parcel.
 - b. The View Batch Totals command pops up an information dialog with total number of transactions and total transaction amount for that batch number.
 - c. Clicking the Details button opens a screen providing essential tax payment information and payment spread, and offering more detail with the click of a button.
8. Receipts
 - a. The Receipt Summary Table lets you view all payments for all seasons, and can now be indexed by Season / Receipt Number.
 - b. Receipt reports, such as Quick Tax Disbursement, can now be run on current or multiple seasons.

9. Millage Table
 - a. Setting up Tax Names and Millage Rates has been streamlined to accommodate School Districts that have the same taxing authority across multiple units.
 - b. Will allow for automated export for easier updates to the website. Currently a manual process.
10. New Tax Year Database Wizard
 - a. The New Tax Year Database Wizard walks you through the process of setting up a new tax year. The Wizard allows you to copy application settings, mortgage companies, DDA information, special assessments, millage rates, and more from your previous year tax database.
11. MTT Refund Interest Calculator
 - a. The MTT Interest Refund Calculator pre-fills all values to calculate the interest portion to be refunded per parcel.

Building System

1. "Various Charts", located in the Task Menu, gives a quick snapshot of the values in your database and provides a nice presentation for budget reports and basic municipality value statistics.
2. Building images, letters and other attachments, are shown for each parcel as you arrow down through the List View.
3. Scheduling for non-inspection related events; like vacations or other appointments, much like Outlook scheduling, is now available. Many new special features have been added to enhance the scheduling process.
4. Work Flow
 - a. Allows users to program actions to occur based on specific events. For example, when an inspection is completed, the program may prompt you for another inspection, and/or letter, fee, reminders, email delivery, etc., or these actions can be programmed to be automatic. Office efficiency is greatly enhanced because such detailed tasks can be assigned to the program and not take up staff time to complete.
5. Integrated Field Inspection Software
 - a. Tablet PC, touch-screen optimized software designed to streamline the inspection process. Checklists, workflows, quick text, handwriting recognition, and quick entry pop-up windows combine together to optimize your inspector's time. Through our synchronization process, your inspectors will have the entire property's history at their fingertips, including letters, images, and any other previously attached external documents giving them all the information they need, at the time and place they need it.
6. Integrated GIS capabilities built into Community Development.Net include:
 - a. GIS integration, accomplished by pointing your Building Department database to the Shape Files you create in your GIS application. The integration allows for a direct link of Building Department data to the GIS maps; no exports are required.
 - b. Seamless integration with your Table Views (i.e., Permit Records, Code Enforcement Records) that allows you to highlight blocked or marked records on the map.
 - c. Marking and unmarking of records in your Table Views from the Map.
7. Required to utilize the new Inspector/Contractor web interface which will allow application submission and on-line payment processing.