

COUNTY OF YORK

MEMORANDUM

DATE: September 12, 2019
TO: York County Board of Supervisors
FROM: Neil Morgan, County Administrator 
SUBJECT: Future Sister Cities Arrangements

As the Board is aware, I have initiated dialog with Sister Cities Yorktown for the purpose of exploring the possibility of combining our efforts with regard to Sister Cities' activities. A decision to proceed would require an arrangement in which our current level of involvement with Zweibrücken could be maintained while concurrently upgrading our Port Vendres relationship in a cost effective manner. The attached letter from Sister Cities advised me that they will be providing me a draft MOU for further analysis by the County later this fall. I will update the Board once the staff and I have had the opportunity to assess the proposal.

NAM:mes
Attachment



Fostering a Culture of Citizen Diplomacy

Neil Morgan
County Administrator
York County, Virginia
P.O. Box 532
Yorktown, VA 23690

Dear Neil,

A short note to thank you for taking the time to meet with Don Willis and Kate Helwig, to discuss Sister Cities in Yorktown. We are very encouraged by the County's interest in establishing a single more effective and robust Sister Cities Program. The information you provided was very helpful to our understanding of what the County is looking to achieve.

Following on the discussion you had with Don and Kate, we have set a plan in motion to bring together the current SCY Board of Directors and a broader list of stakeholders of the Port-Vendres Program, over the next couple of months, to provide input and feedback on what they would like to see in a consolidated program. The goal of this process is to provide you a formal Memorandum of Understanding (MOU) for the County's consideration, by 1 December, 2019.

In the meantime, please do not hesitate to contact me or Don Willis, if you or your staff have any questions, suggestions, or comments, regards the topic of Sister Cities.

Regards,

A handwritten signature in black ink, appearing to read "Larry Raithel", with a long horizontal line extending to the right.

Albert L. "Larry" Raithel
President
Sister Cities Yorktown

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COUNTY OF YORK

MEMORANDUM

DATE: September 4, 2019

TO: York County Board of Supervisors

FROM: Neil A. Morgan, County Administrator 

SUBJECT: Milestones Continue to be Reached for Two County Systems –
Munis (Financial System) & Vision (Real Estate Assessment System)
Update # 3

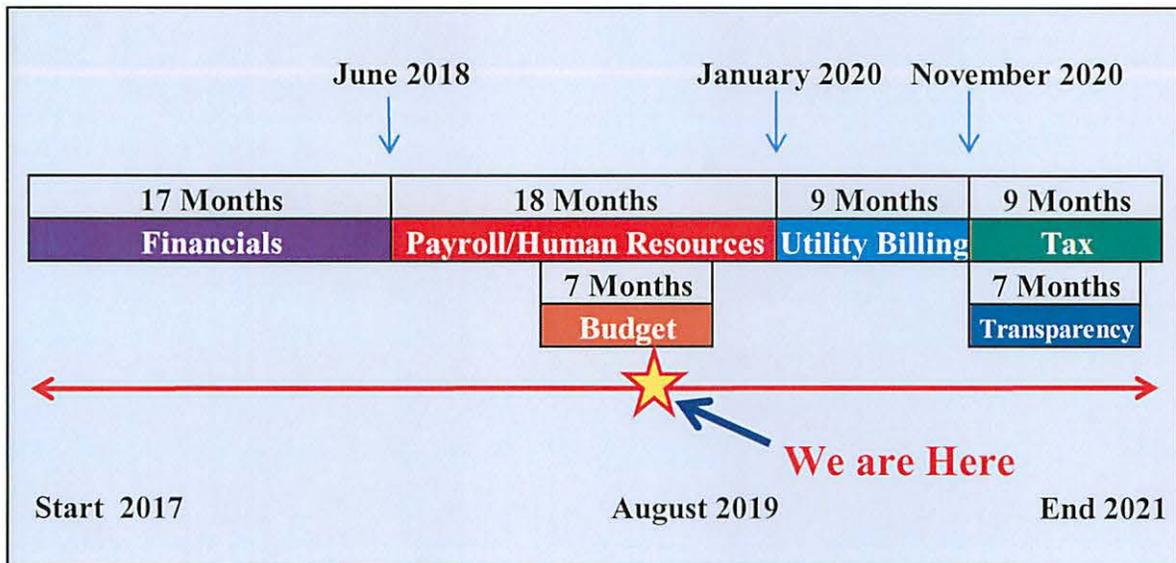
Since my last update memo a year ago, a tremendous amount of progress has been made toward implementation of two of our major system replacements, Munis and Vision Government Solutions (Vision). Munis is replacing the 30 year old financial management system and Vision is replacing the 20+ year old real estate assessment system which holds all of the County's individual real estate records. Substantial dedicated resources have been required to accomplish these on-going milestones. This past year has been extraordinarily busy for the Finance, Real Estate, Human Resources, Treasurer's Office, and Information Technology staff, as well as managers throughout the County and the School Division, who have been learning how to use the new systems. The following is a brief update on the two systems.

I. Financial Management System (Munis):

The replacement of the County's financial management system with the Tyler Munis Enterprise Resource Planning (ERP) Software System has been on a fast track for the past three years. The core function of the new system is to manage our Finance, Payroll, Human Resources, Budget, Utility Billing, and Tax systems. We have now completed one full year using Munis' Financial Module (Phase I) with a second year-end closeout currently underway. Shortly after Phase I went live in July 2018, the Payroll/Human Resources (Phase II) Module kicked off in the fall of 2018 and is progressing well toward the January 2020 implementation. Phase II will impact every employee as the employee self service module is an important enhancement of the new system. In addition, changes to employee pay will become streamlined as global pay increases can be made automatically in the system rather than our current process of calculating, inputting and verifying each employees' annual pay change in two systems. This feature alone will substantially improve efficiencies while reducing the risk of errors.

As you can see from our visual below, the "We are Here" yellow star has now progressed past the halfway point for the entire project. You may notice that we have added two new modules to our visual. The Budget staff have been so pleased with the functionality of the Financial Module that they requested adding a phase to integrate budget into the total project. In addition, once the Finance and Budget Modules are fully functioning, we will

be implementing a Transparency Module to provide citizens with better access to financial and budget information.



Phase I	=	Financials	July 2018 (Live)
Phase II	=	Payroll/Human Resources	January 1, 2020 (Underway)
Phase III	=	Budget	October 2019 (Underway)
Phase IV	=	Utility Billing	November 2020
Phase V	=	Transparency	July 2021
Phase VI	=	Tax	July 2021

With the addition of the Budget Module, the goal will be to completely prepare the FY2021 budget utilizing Munis. This is a significant efficiency and performance enhancement as the County will, for the first time, have an integrated budget and financial system. For many years the budget was developed in Word and Excel, and in recent years a separate budget system has been utilized. Both approaches required that the budget be prepared outside of the financial system and uploaded into the financial system once the adopted budget was finalized resulting in duplications of work and a higher risk for human errors. Budget staff spent the last few months preparing for its implementation by developing the processes and instructions for the numerous departmental staff that create the budget submissions and manage the budget expenditures throughout the year. Budget staff will be previewing the features with County-wide staff in the budget commencement meeting in a few weeks.

Phase IV, Utility Billing

This phase is on the horizon with planning to begin late this fall. This will be the shortest of all the phases, impacting the smallest number of employees, and is expected to go-live in November 2020.

Phase V, Transparency

Once the Budget Module has been fully implemented, staff will begin the process to evaluate the transparency initiative. This will involve reviewing Munis' capabilities and more importantly reviewing other Munis users' websites. In doing so, staff will gain knowledge of how the system information is displayed, as well as, how to test the interactive features as we design our citizen portal.

Exploring Phase VI, Tax Module, Options

As I have reported previously, the Tax Module is potentially the most complicated and risky module involved in the system conversion. This is due to the unique and complex tax requirements which vary from state to state preventing standardization. Commissioner of Revenue, Ann Thomas has taken the lead in exploring the options for the Tax Module, as well as meeting three years ago with Munis programmers to provide detailed requirements as the team continues to evaluate the Tax Module. Treasurer, Candice Kelley has now joined the evaluation team and has offered critical insights into requirements for Virginia Treasurer's Offices. While the Tax Module is the least developed of Munis' products, the number of Virginia users continues to grow. Over the past three years, 10 new Virginia clients have been added, resulting in a total of 58 Virginia County and City clients, as well as 37 Virginia School Division clients. My understanding is that the firm has been making investments toward understanding and providing the required features, and that Munis plans to address many of these requirements in a soon-to-be released upgrade. The evaluation team is anticipating meeting with Munis staff to preview the new features in the late fall of 2019 and will continue to evaluate options based on the results of that meeting. The initial timetable remains unchanged.

I continue to believe that after everyone has an opportunity to study this question, we will conclude that it is in the County's best interest to implement the Taxation Model as well.

II. Real Estate Assessment System (Vision):

The County has been utilizing the Equity real estate assessment system for over 20 years. This system is used to manage the individual real estate property records and to calculate their assessments. Due to the complexity of the real estate assessment process and to provide modern tools to the staff, a new system which provides for Computer Assisted Mass Appraisal (CAMA) was purchased.

Over the past two years, staff from the Real Estate Office and Information Technology Department have worked diligently to convert over 26,000 property records into the new Vision Government Solutions System which will be used for the next reassessment. Currently, the County is running dual systems maintaining data and record changes in both the former system and the new system. Doing so guarantees that no software related processes have value impacts that might distort the assessed values for the individual properties during the critical time when records are updated as part of the reassessment

process. Dual processing will continue through the reassessment season until the final January 2020 assessed values are completed. Once the reassessment is finalized, assuming there are no concerns with Vision's processing, updates to the former system, Equity, will be discontinued and the records will be archived.

The data conversion is just the first step in a successful implementation. Once the 2020 reassessment is finalized, the complex work begins which will take at least two years to model assessment values to reflect York County's real estate market in preparation for the 2022 reassessment.

III. Conclusion:

I continue to be very pleased with the progress the County is making in its technology investments. The progress made over the past year has moved the County forward providing much needed tools to the employees to improve their efficiency, while offering them easier access to higher quality information to perform their jobs. I greatly appreciate the staff's initiative and positive attitude toward change. We look forward to sharing future updates as these projects continue.

McGettigan/3737

Copy to: Vivian A. McGettigan, Deputy County Administrator
Mark L. Bellamy, Deputy County Administrator
Adam Frisch, Director of Information Technology
Theresa Owens, Director of Finance
Dave Gorwitz, Director of Human Resources
Ann Thomas, Commissioner of Revenue
Candice Kelley, Treasurer
Maria Kattmann, Real Estate Assessor