

COUNTY OF YORK

MEMORANDUM

DATE: October 22, 2021

TO: York County Board of Supervisors

FROM: Neil A. Morgan, County Administrator



SUBJECT: Technology Systems Update

Introduction

Since my last update memo in March 2021, progress has continued with the Enterprise Resource Planning (ERP) solution. At that time we were in the process of implementing the Transparency module and preparing to address the remaining modules of Social Services, Utility Billing, and Tax. Below you will find updates to each of these modules and the County's overall status.

Transparency

York County has launched the new interactive budget reporting tool which allows citizens to access County financial data online. Website visitors can view revenue estimates and actual expenditures for the County General Fund and for other major County funds for the current fiscal year and actual totals for previous years. These funds can be broken down by various categories for more detail and the information is updated weekly. The homepage of the Transparency Portal contains quick links to common citizen questions as well as links to archives of current and past adopted Budget Documents, Capital Improvement Programs and the Annual Report. Citizens may reach the portal from the "What's Happening" section at the bottom of the York County homepage, the "How Do I..." page and the "Accounting and Financial Reporting" page.

Social Services

County staff, which included Social Services, Information Technology, and Finance Departments, investigated potential duplication between Social Service's software package known as "Thomas Brothers" and the Tyler Munis ERP system. The committee reviewed the current setup and identified a few key processes that were then enhanced. All other services are unique between these systems allowing each program to leverage its specific strengths. This project was completed several months ahead of schedule.

Utility Billing

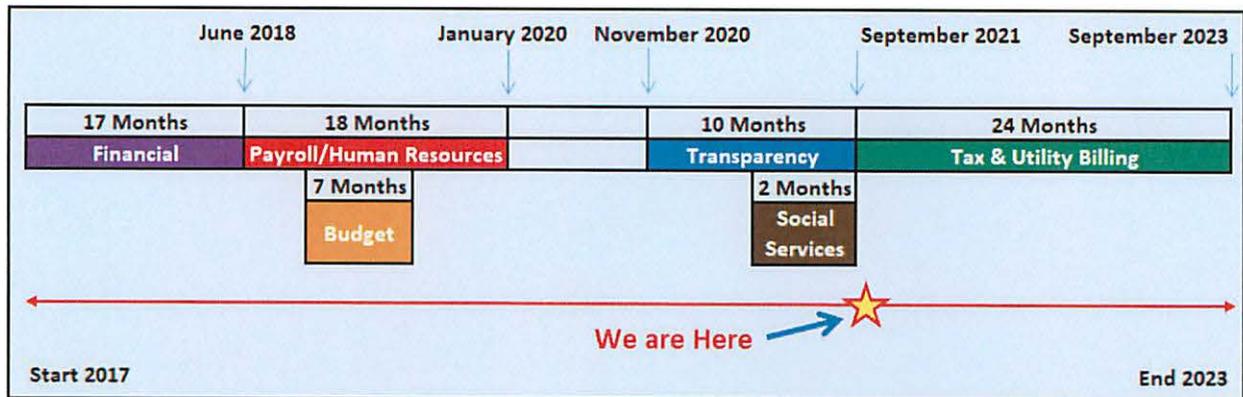
The workflow of Utility Billing is highly integrated into the business processes of the tax module. For this reason, it became apparent that this process should be fully integrated into the chosen Tax Module.

Tax Module

A workgroup, consisting of the Commissioner of the Revenue, Treasurer, Finance, and IT began by reviewing the changes Tyler had implemented with its tax solution. Little progress has been made in the past 3 years since our staff first identified the major gaps Tyler had specifically with Virginia tax law. This led to the workgroup reaching out to several jurisdictions about their experience with alternative tax software. Avenity's CountyOne product quickly rose to the top of the contenders. Some of Avenity's customers include Prince William County, Hanover County, and Spotsylvania County. Avenity has an extremely mature Virginia tax program, have been in business since 2003, and have positive reviews from their customers. In July, Avenity's owner and one of their implementers did a two-day in-depth software demonstration for County staff. In September, our workgroup spent a day with their counterparts at Hanover County as they dug into the details of Avenity's products, implementation experiences, and lessons learned. Following that site visit, Avenity was the unanimous choice among all workgroup members. However, Avenity does not currently have a State Income Tax or Utility Billing module. Fortunately Avenity wants to add these products into its core software for all current and future clients and is willing to work with County staff to design these modules from the ground-up. This will reduce the cost to the County and ensure that the product meets York's specific needs. Staff is currently working with the vendor to create a detailed scope of work and cost proposal. We anticipate the specific cost and scope being presented to the Board for contract approval this winter.

Conclusion

The Transparency & Social Services module are now both completed. The last remaining phase is proceeding with Avenity's CountyOne product with an estimated completion date of the summer/fall of 2023.



Phase I	=	Financials	July 2018 (Live)
Phase II	=	Payroll/Human Resources	January 2020 (Live)
Phase III	=	Budget	October 2019 (Live)
Phase IV	=	Transparency	July 2021 (Live)
Phase V	=	Social Services	June 2022 (Completed)
Phase VI	=	Tax & Utility Billing	June 2023 (Underway)

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Copy to: Mark L Bellamy, Deputy County Administrator
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 Theresa Owens, Director of Finance
 Amy Etheridge, Director of Human Resources
 Ann Thomas, Commissioner of Revenue
 Candice Kelley, Treasurer