

COVER PAGE



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Innovation Study Title **Adding Value by Surfacing Data from Closed Systems**
Improving Access to Information for the Alachua County Value Adjustment Board

Category Technology and Tools

Jurisdiction Name Alachua County, Florida

City/County Manager Randall H. Reed

Population 247,336 (U.S. Census 2010)

Submit Innovation Study for an Alliance Innovation Award Yes [X] No []

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SYNOPSIS

Background

Each year, the Alachua County Property Appraiser (“Appraiser”) sends out a *Truth in Millage* (“TRIM”) notice to every property owner in the county, giving an estimate of their property taxes based on the proposed millage rate and the assessed value of their property. Property owners have the opportunity to appeal the assessment of their property value, classification or exemption by filing a petition to the Value Adjustment Board (“VAB”) which considers and renders decisions on those petitions.

The VAB panel is made up of five members: two county commissioners, one county school board member, and two citizens. In addition, the VAB is required to appoint special magistrates, who are qualified real estate appraisers, personal property appraisers or attorneys, to act as impartial agents in conducting hearings and make recommendations to the VAB on all petitions.

The Problem

In order for each VAB member and magistrate to perform their function, they need to have access to the petitions submitted. All petitions received are stored in the Clerk of the Courts (“Clerk”) document management system. However, most VAB members are non-employees of the county and cannot directly access the Clerk’s system. So, in order for the VAB to perform their duties, the Clerk prints each petition, with their attachments, and then assembles the pages into a five-inch volume binder. Copies of the binder are made and delivered to the various VAB members for review.

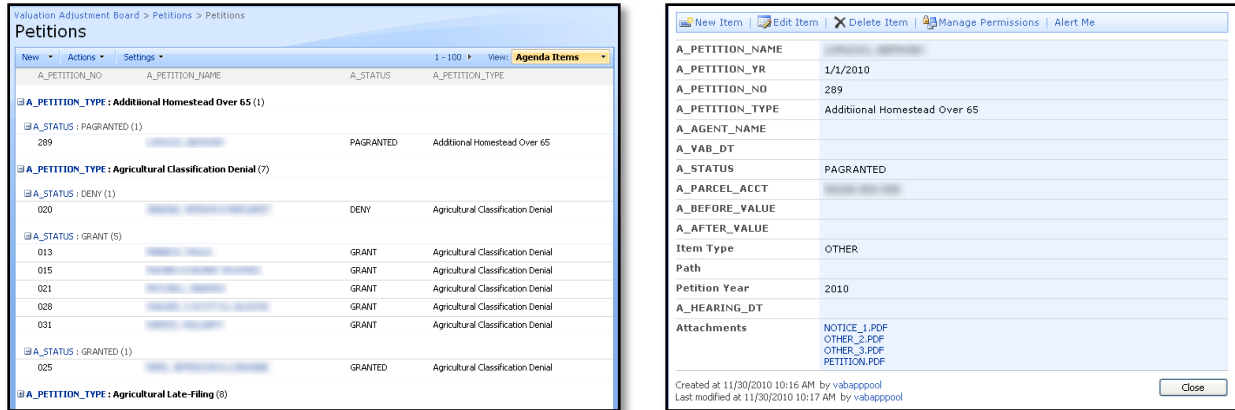
The Solution

In April 2010, the Clerk asked the Alachua County Board of County Commissioners Information and Telecommunications Services Department (“ITS”) if they could develop a solution to reduce the amount of paper and time used in preparing these petition binders. Specifically, the Clerk wanted a website which contained a copy of all the data from their document management system but was organized and accessible to every VAB member, including non-employee users. The Clerk requested a deadline of October 2010 (six months) to complete the solution before the first VAB review meeting of that year.

The Result

By the end of October 2010, ITS was able to deliver the solution to the Clerk in time for the first VAB meeting. The VAB members were able to use the website to open and review the petitions and attachments electronically. Only one VAB member requested a hard-copy of the petitions and attachments because they preferred that format to reading on the screen.

Innovation Study: Adding Value by Surfacing Data from Closed Systems (Alachua County, Florida)



The main shared petitions site

Costs and Savings

Since we used existing staff and technology, no new costs were incurred to implement the solution.



The Clerk's VAB Process (Before)



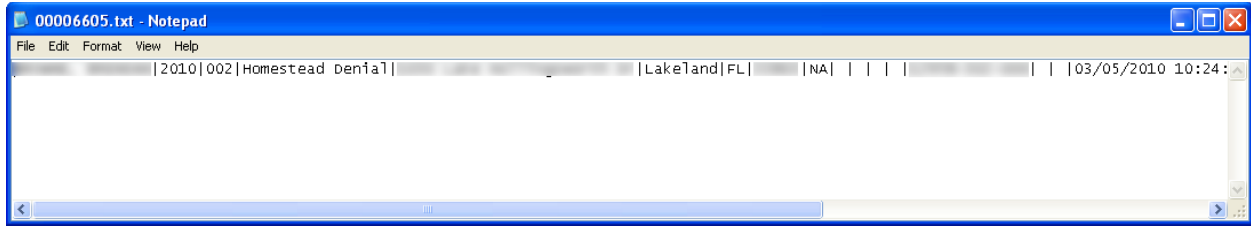
The Clerk's VAB Process (After)

Savings were gained from not having to print, assemble and deliver the petition binders.

Innovative Characteristics

The initial solution design had two innovative pieces to it. The first piece was the decision to use the county's existing deployment of Microsoft SharePoint as the framework to build the shared petitions site. Using SharePoint saved ITS a lot of time from having to develop a web site which could: (a) store and organize documents; (b) enable authenticated users access; and (c) provide search capabilities. These features are out-of-the-box with SharePoint and took about a day to set up.

The second innovative piece was the custom import application developed to take the data from the Clerk's system and import it into the shared petitions site. This was the most difficult piece of the entire project due to the structure of the data exported from Clerk's system. First, each petition was exported as an individual text file containing all the fields from the original petition form. What made this challenging was the fact that no column headings from the Clerk's system were included in the files. This meant that we had to develop a map which would apply a column heading based on the ordinal position of the data in the file. Getting the data map just right took a lot of trial-and-error.



Sample data exported from Clerk’s system. (Look mom, no column headings!)

Further, any attachments that related to a petition would be exported as a separate file. In some cases, there could be as many as 10 attachments to a single petition. The import application had to match these attachments to their respective petition and staple the information back together in the shared petitions site. This also proved challenging when updates to the attachments were made in the Clerk’s system and needed to replace existing attachments to petitions in the shared site.

Unexpected Issues

Beyond the known challenges of translating the exported data from the Clerk’s system, we also ran into some unexpected issues. The first issue dealt with the file size of the petition attachments. Because we had decided to use SharePoint, we had to use an HTTP protocol to transfer the files over the web. SharePoint limits the file size that can be transferred to 50 MB. While it is possible to change this setting, we opted not to do so for security and service quality reasons. Instead, we worked with the Clerk’s technology team to compress the file sizes during their export process. Having a knowledgeable and cooperative technical team on the Clerk’s side really helped to overcome this issue.

Another unexpected issue came when staff from both the Clerk’s office and Appraiser’s office could not access the shared petitions site. This became a very complicated issue to diagnose because it was not clear if the problem was related to the networking infrastructure connecting the three offices, or a security device blocking traffic between each identity management system, or both. Unfortunately, we were not able to resolve this issue by the October deadline. As an alternate plan, we quickly developed a second web site outside the county’s firewall which mirrored content from the shared petitions site.

Name	Year	Number	Petition Type	VAB Date	Status	Attachments
[REDACTED]	2010	028	Agricultural Classification Denial	2010-12-06	GRANT	EVIDENCE_3.PDF EVIDENCE_4.PDF FINDINGS_5.PDF PETITION.PDF
[REDACTED]	2010	035	VALUE	2010-12-06	DENY	EVIDENCE_2.PDF EVIDENCE_3.PDF FINDINGS_5.PDF PETITION.PDF

Plan B: An alternate-access version of the petition site

Eventually, well after the VAB meetings were complete, the issue was resolved and all three groups were able to access the shared petitions site. While it is still not clear exactly what the problem was, the lesson learned from this experience is to test end-user access early in all future projects.

PRESENTATION COMPONENTS

1. Innovation/Creativity

How did the idea/program/project/service improve the organization?

The project created a solution which took information from a closed system, inaccessible to external partners, and made it available in a collaborative web environment. This reduced the time to prepare the agenda and related materials for the board members. It also created a paperless option since all the materials were available for viewing online.

Were new technologies used? If yes, what methods and/or applications were implemented?

No, but existing technologies were used in new ways. While we did use Microsoft SharePoint to host the shared petitions site, this was not a requirement to the overall solution design and could be replaced with a database-driven web application and server-side programming.

Was a consultant used? If yes, describe their involvement and identify the consultant and/or firm, including contact information.

No consultants of any kind were used. The entire solution was designed, using the county's internal team of application developers, with the cooperation of our networking and security administrators, as well as the support of the technical team from the Clerk's office.

2. Outcomes Achieved

What customer/community needs and expectations were identified and fulfilled?

The Clerk's office needed a web-based application to assemble together a listing of all VAB petitions submitted to them by citizens, along with the PDF file attachments that accompanied those petitions. The Clerk's office already had a process to collect and store these petitions, but ITS needed to construct a solution to easily roll the submissions together and create an agenda document for each time the board met.

We were able to successfully take the data exported from the Clerk's closed system and import the information into our shared collaboration environment. Once the data was in our shared environment, we developed various views of the data to build an agenda for the board meetings.

Has service delivery been enhanced?

Having both the agenda and all supporting materials organized and available online has helped the board members in preparation for their review meetings. As a result, the board members had all the materials they needed in order to deliver decisions to the applicants.

Did the initiative improve access to your government? If yes, how?

Yes. While the initial design of the shared petitions site limited access to VAB members and constitutional users, opportunities now exist to open the site to applicants as a new service. This opportunity would not have been possible if the data was still trapped inside the original closed system.

Further, the experience and techniques we learned from this initiative could be applied to other areas of government such as:

- Meetings and agendas for the county commission and functional groups
- Zoning and other planning meetings
- Contracts, purchasing and other financial information

Moving forward, we will take these lessons learned and apply them as we continue to surface data buried under other closed systems.

Has the health of the community improved as a result? If yes, how?

Through our success, we are discovering opportunities (such as those described in the previous question) which can bring more information to the community. As we continue to explore and implement these opportunities, we hope to find that we are making government more transparent to our community. By increasing our transparency we keep our citizens informed which we believe is necessary to improving the health of our community.

3. Applicable Results and Real World Practicality

What practical applications will be shared?

The practical application of this case study is in the efforts to draw out data from closed systems and make them available to other functions of government. While this case has direct applicability to groups inside government, this endeavor also has potential for use in the public domain through cloud-based information services.

How applicable is the idea/program/project/service to other local governments?

If the organization has access to a skilled programmer, either internally or through a consultant, they could explore the opportunities to surface data from otherwise closed systems. For those organizations using Microsoft SharePoint in their environment, they will be particularly interested in how we programmatically imported data to our shared petitions site, including how we got around some of the challenges with updating data.

What results/outcomes will you share?

We will share sample data from the system in a before-and-after style. We will also share a high-level diagram of how the various components of the solution fit together and how they work.

4. Innovation Study Presentation

Describe your innovation study presentation. For example: PowerPoint, video, interactive group activity, handout materials, live demonstration(s)

The initial presentation will include a slide deck highlighting the major points from the innovation study. If an internet connection is available, we can perform a live demonstrate of the shared petitions site. Otherwise, we can prepare a prerecorded screen-captured video of the site.

Beyond the initial presentation, we will also discuss the following topics with the group:

- Opportunities in government where these techniques can be applied
- Using Microsoft SharePoint as a shared document management and collaboration platform
- Other techniques and ways to surface data from closed systems
- Experiences working with constitutional offices and external technology teams
- Going beyond the surface and raising data to cloud-based services

Our hope is to keep the discussions at a high level and as non-technical as possible in order to encourage audience participation regardless of their position or role in government. We will ask the audience to share their stories, experiences, successes and roadblocks. Ultimately, our goal is for the audience to take home two to three practical ideas to share with their colleagues and continue the conversation.