

Oakland County Department of Information Technology Project Scope and Approach

Project Name: AAT Mandate Program Budget 2021-2022

Project ID: D91125MB

Leadership Group: Land			
Department: Management & Budget/Treasurer		Division: Equalization/Administration	
Project Sponsor: Dave Hieber & Jody Defoe	Date Requested: 3/9/2020	PM Customer No. 125/711	
Request Type:	<i>New Development X</i>	<i>Enhancement</i>	<i>Customer Support</i>
<i>Planned System Maintenance or Upgrade</i>			
IT Team Name: Assessing and Taxation		IT Team No: 9	
Project Manager/Leader: Wendy Conklin			
Account Number: 36600	Account Description: Land System Enhancements	Customer Name: Equalization & Treasurer	
Grant Funded? Yes No X	Mandate? Yes X No	Mandate Source: State and/or County	

Project Goal

To update the Equalization and Treasurer applications with State or County mandated legislative changes, so that State and County reporting deadlines are met.

Business Objective

To improve and expand functionality within all Assessing and Tax applications relating to mandates from the State and County, such as:

Major Deliverables

- County Apportionment Reporting
- Personal Property Equalization Reporting
- Real Property Equalization Reporting
- Michigan Tax Tribunal and Litigation
- Assessment Roll
- Tax Roll
- Warrant and Settlement Reporting
- Assessment and Tax Procedural Changes

Approach

- Request for enhancements will come from Assessing and Tax Source System Experts and submitted to OCIT for estimate
- OCIT develops estimate and returns to Equalization and Treasurer for Approval
- Equalization and Treasurer submits the approved request to OCIT
- Review Current Business Processes

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- Document Business Requirements
- Update Application Functionality
- Develop Implementation Plans
- Develop New Systems/Data
- Develop User Acceptance Test Plans
- Test new or updated System/Application Functionality
- Develop User Training
- Develop User Documentation, SLA, Disaster Recovery Toolkit, Service Center Knowledge Documents
- Train/Notify Users of new or updated System/Application Functionality
- Conduct Change Control
- Implement new or updated System/Application Functionality into Production

Research & Analysis

Gartner Research Recommendation

Research Conducted – Nothing found

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users >500

Divisions Oakland County Equalization
Oakland County Treasurer

Leadership Groups Land

Risk

Business Environment Medium – Project will require some changes to existing business processes.

Technical Environment Medium – Project will require some changes to existing business processes.

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Assumptions

Staffing IT Staffing: resources will be available for the hours indicated per the attached project plan. Equalization staff will be available as needed throughout the duration of the approved projects.

<u>Role:</u>	<u>Name</u>	<u>Hours per Day</u>
Project Sponsor:	Dave Hieber	As Needed
	Jody DeFoe	As Needed

Facilities

- None

Technical

- None

Funding

- Mandated

Other

- Known mandate: In the 2021 calendar year Equalization will be mandated to use CAMA Data Standards for the State of Michigan.
- Treasurer mandate: Still waiting on supreme court case decision.

Priority

- TBD

Constraints

- State Tax Commission may not have all legislative mandates in place before deadline dates for reporting

Exclusions

- None

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PROJECT PHASE AUTHORIZATION

Phase(s): All	
Total Estimated Application Services	Hours: 3,283
Total Estimated Technical Systems	Hours: 55
Total Estimated CLEMIS	Hours:
Total Estimated Internal Services	Hours:
IT Application Services Division Manager Approval:	Date:
IT Technical Systems Division Manager Approval:	Date:
IT CLEMIS Division Manager Approval:	Date:
IT Internal Services Division Manager Approval:	Date:
IT Management Approval:	
Approved: Yes No	Date:
Reason:	
Project Sponsor Approval:	
Title:	Date:

PROJECT SUMMARY

Authorized Development (see above)	Hours: 3,338	
Preliminary Estimated Development for Future Phases	Hours:	
Grand Total Estimated Development	Hours: 3,338	Cost: 550,770

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PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

AAT Mandate Program Budget 2021-2022 - Size Estimate (+/- 10% to 50%)

1	Type	ID	Task Name	Estimated
2				Hours
3		000000	AAT MANDATE PROGRAM BUDGET	770
4	Phase	300000	CAMA DATA STANDARDS MANDATE REQUIREMENTS	523
5	Phase	300005	CAMA DATA STANDARDS MANDATE DEVELOPMENT	1,777
6	Phase	300600	CAMA DATA STANDARDS MANDATE IMPLEMENTATION	268
7				3,338