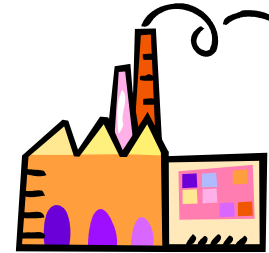Wisconsin Department of Revenue

# Integrated Property Assessment System (IPAS)

**Wisconsin Land Information Association**

March 3, 2006

# Integrated Property Assessment System (IPAS)

## Agenda

- What is IPAS?; Why now? & Long-term vision – Jean Gerstner

- Timeline & GIS plans – Dan Davis

- details, details…. – Jim Murphy

- You are welcome to ask questions at any time or hold them until the end of the presentation -

# What is IPAS?

A multi-year process improvement and computer system project that will eventually replace the State and Local Finance (SLF) Division's current processes and systems to:

- increase efficiency;
- provide easy access to data for customers and external stakeholders.

# What is IPAS? (continued)

**State and Local Finance (SLF) Division is responsible for:**

- establishing the state's **equalized values**;
- **assessing all manufacturing and telecommunication property** for property tax purposes;
- **assessing and collecting taxes on utilities, railroads, airlines, mining, & other special properties**;
- **providing financial management and technical assistance** to municipal and county governments;
- **state shared revenue**;
- **property tax relief payments** for municipal services and the lottery credit program;
- **tax incremental financing** programs;
- **property assessment administration** and certification of assessment personnel.

# Integrated Property Assessment System (IPAS)

# What is IPAS?    (continued)

- **Commercial off-the-shelf (COTS) software** (Tyler Technologies) - provides the platform;

- Tyler and DOR - **modify product** to meet SLF and customer needs;

- First: **manufacturing property assessment**;

- Next: **create a database that can be used to store state-wide property sales data**.  Stakeholders such as local assessors, municipal and county officials, and the public will be authorized to access data.  Will be able to import and export data using standard tools such as Microsoft Office, text files, and XML transmission.

- One component: **e-filing of Manufacturing Forms (M-Forms)**. E-filing of the M-P form was implemented in January 2006.

For more information:   http://www.dor.state.wi.us/slf/ipas/index.html

# Why IPAS now?

To meet State & Local Finance (SLF) Division's Operational needs

SLF is facing numerous challenges including:

- **Experienced staff retiring** – 50% to 60% of staff are expected to retire within the next three years;

- **Positions lost** – Fifty-eight positions (30%) have been eliminated in the last ten years while the number of programs administered has increased;

- **Automation issues** – SLF has approximately 40 computer systems that are not integrated and many are more than 20 years old.

- **Not meeting statutory requirements for field audits of manufacturing property**

# Integrated Property Assessment System (IPAS)

## Why IPAS now?

To Improve Customer Service and/or Benefit External Stakeholders

- Access to data and improved customer service
- Time savings for stakeholders
    - time savings in locating information.
    - 24/7 Internet accessible data
    - M-Forms (manufacturing) e-filing

Longer-term benefits:
 - Equalization Section
 - Local Government Services Section

# Integrated Property Assessment System (IPAS)

## Communication With Stakeholders

May 18, 2005 letter to Municipalities and Counties from SLF:

- Purpose of new system
- Plans
- Goals
- Communication

Second letter to Municipalities and Counties will be mailed in March with an update

Other WI state agencies – State Agency Resource Working Group (SARWG)

# Integrated Property Assessment System (IPAS)

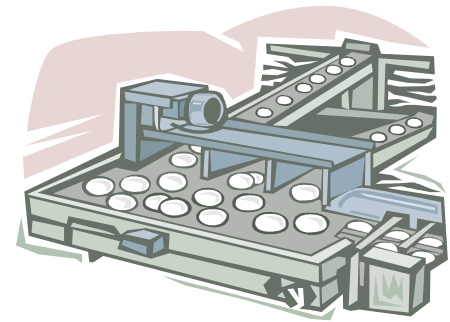## Project timeline thus far……

May 2005 – RFP released

July 2005 – Vendor responses due

August - November 2005
- Review proposals
- Site visits
- Select contractor – Tyler Technologies

December – February 2006
- Develop contract including Statement of Work & Work Plan
- Contact negotiation

# Integrated Property Assessment System (IPAS)

**The IPAS project has "pushed" us to tackle some issues:**

- achieving consistency in commercial and manufacturing fielded sales work;

- defining consistent manufacturing data capture rules for fields such as address;

- defining the best way to transition from (State Assessed Manufacturing (SAM) system to IPAS (what functions, timing, etc.);

- defining the sales database.

# Integrated Property Assessment System (IPAS)

## GIS

We are working closely with David Mockert and Jerry Sullivan – Department of Administration/Division of Enterprise Technology

*The GIO has the responsibility to <u>coordinate</u> Wisconsin's geospatial information activities, to <u>implement standards</u> to facilitate interoperability of information related to homeland security, to make recommendations on awarding grants to fund geospatial data, and to <u>create information sharing agreements</u> with state, local and tribal governments.*

We at DOR have similar goals with IPAS.

# GIS (continued)

Many state agencies use parcel data.  These include:

- Department of Transportation

- Department of Natural Resources

- Department of Administration

- Department of Military Affairs (Emergency Management)

- Department of Justice

- Department of Agriculture, Trade and Consumer Protection

Planning stage

- IPAS RFP and vendor evaluation <u>did</u> contain GIS elements;

- IPAS GIS implementation will be in 2007; current scope of work with Tyler Technologies does <u>not</u> include GIS

# Integrated Property Assessment System (IPAS)

## GIS (continued)

Issues to be worked on include:

- Parcel numbering (our goal to create an "inclusive system" that also has recommended standards);
- Defining an Enterprise Data Model for parcels;
- Data integrity (e.g., Positional accuracy);
- Need process for updating and maintenance

Jim Pahl-Washa, DOR, is the GIS lead for IPAS.

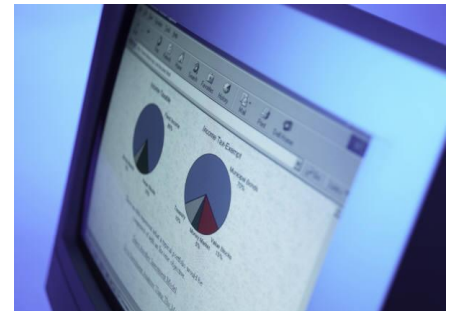# Integrated Property Assessment System (IPAS)

**IPAS Sales Data Base**

- Current Vision
  - Manufacturing Section's fielded sales entered
  - Commercial sales to be added
  - Load parcel attributes from local records
  - Allow access for assessors to search fielded sales
  - Encourage local fielded data to be loaded by assessors
  - Expand to unique residential properties
  - Add parcel data to all useable sales

# Integrated Property Assessment System (IPAS)

- Current Activity
  - Manufacturing, Equalization and Assessment Practices defining basic attributes
  - Soon to request involvement by WAAO Commercial Sales Ad-Hoc Committee
  - Will modify depending on IPAS contractor
  - Goal is to meet common needs of DOR and External Stakeholders

# Integrated Property Assessment System (IPAS)

## IPAS Future Opportunities

- Equalization
  - Field Review
    - Sample selection directly from assessment rolls
    - Local electronic parcel attribute files
    - Broader base of sales activity for value projections
    - Ability to project commercial values using larger comparable sales base
    - Opportunity to spend more time on inconsistent classification issues

# Integrated Property Assessment System (IPAS)

○ Sales Analysis System-Projecting Economics
- Easily adjust list of sales and generate complete set of new statistics
- Stratify local roll to greater detail within classes
- Potentially create earlier estimates while working with individual assessors

# Integrated Property Assessment System (IPAS)

○ STRAT-Assessor Final Reports (AFR)
  - Directly load electronic AFR's
  - Process and code reasons for change electronically; review/override
  - Accept/load/process revisions for 70.57's
  - Generate estimates based on historical records
  - Generate estimates of Equalized Values for current municipal projections
  - Cross-check values of TID's against municipal reporting

# Integrated Property Assessment System (IPAS)

- **Local Municipal Assessment Process**

  - All Leasing Companies electronically report all assets
    - Eventually expand the self-reports designed for Manufacturing
    - Identify location and whether asset is at a manufacturer
    - Allow access to system for every assessor
    - Eases leasing company burden
    - Minimizes double assessments
    - All leased equipment reported

# Integrated Property Assessment System (IPAS)

○ Expand manufacturing electronic M-P for local use

- Electronic filing benefits can be shared with municipalities
- Standardizes process for accounting firms

# Questions
# and
# Discussion