Notes from Statewide Listening Sessions
Integrated Property Tax Management System
April 2019

Report by Jill Remick, Director of Property Valuation and Review

The Vermont Department of Taxes held listening sessions during the month of April 2019 to gather input from municipalities in what features officials would like to see in a new, modern Integrated Property Tax Management System. The summary of the sessions are the substance of this report.

The dates and locations of listening sessions appear on the following page.

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Integrated Property Tax Management System
Listening Sessions

The Vermont Department of Taxes is holding listening sessions during the month of April to gather input from municipalities in what features officials would like to see in a new, modern Integrated Property Tax Management System. The dates and locations of listening sessions appear in the table below.

DATE	TOWN/CITY	EVENT LOCATION	TIME
April 3	Middlebury	Town Hall—1st Fl., 77 Main St., Middlebury	1:30—3:00 p.m.
April 3	Rutland Town	Town Office—Main Fl., 181 Business Rte. 4, Rutland	6:30—8:00 p.m.
April 8	Hartford	Town Offices—1st Fl., 171 Bridge St., White River Junction	4:00—5:30 p.m.
April 17	Moretown	Town Office—79 School St., Moretown	9:30—11:00 a.m.
April 18	St. Albans	St. Albans City Council Chambers— 100 North Main St., St. Albans City	11:00 a.m.—12:30 p.m.
April 18	Burlington	Fletcher Free Library—Community Rm., 235 College St., Burlington	2:00—3:30 p.m.
April 24	St. Johnsbury	St. Johnsbury Gallery Building— NVDA Conference Rm., 36 Eastern Ave., St. Johnsbury	2:00—3:30 p.m.
April 24	Newport	Goodrich Memorial Library—202 Main St., Newport	4:30—6:00 p.m.
April 25	Morristown	Town Offices—Community Meeting Rm., 43 Portland St., Morristown	2:00—3:30 p.m.
April 26	Brattleboro	Town Offices—2nd Fl., Selectboard Conference Rm., 230 Main St., Brattleboro	10:00—11:30 a.m.
April 26	Manchester	Town Office—40 Jeff Williams Way, Manchester	2:00—3:30 p.m.

For questions or feedback about the Integrated Property Tax Management System, call at (802) 828-5860 Monday—Friday, 7:45 a.m.—4:30 p.m.
or complete the contact form at
tax.vermont.gov/municipal-officials/contact

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What do you think is working well with the existing system and what is not working well?

What are some concerns about moving/upgrading to a new system?

Comments and concerns on the current system and program):

Current System Customer Support is responsive and accessible; the hope is that the same level of support would continue. Current vendor works well with people of all different levels of ability unlike some help desks. Integration with state downloads is working. An attendee in Burlington commented on the positive service that the current vendor provides in person. Clerks from several towns noted that current vendor and CAMA work well. One of the towns uses all the modules and is very happy. Additionally, the overall experiences with current vendor from Brattleboro, Rutland, and St. Johnsbury-area listers have been mostly positive.

Public access to the new system. There should be a public-facing view. Why is this currently not "public" information? Information is money, so what information is going to be available? (People should not be able to get everything online, as a privacy issue.) Running public reports may be something that will become available. Will towns be able to view other towns' data, and will property owners be able to look up other property owners' data? Towns would want a say in what is made public via an online search terminal.

Will this new system be similar to what other states are using? What is working out in the real world? It was mentioned that both Maine and New Hampshire's systems seem to work well. Why not go to county-wide assessments like other states are doing? Has there been a lot of vendor response? What states are the vendors from? Will towns, clerks, and/or listers/assessors be involved in the selection process? Jill noted that there has been correspondence with 11 other states along the east coast regarding the vendors.

The Current Vendor website is dated and not very helpful. The current vendor support needs to be available during "non-business" hours for listers that often work evenings and weekends. A 12-hour daily window of support would be much more beneficial.

Merging New Programs: Concern over the loss of flexibility of using a variety of software programs with the current system and being able to import/export data. Will a new system merge well with the current tax system and adapt to other vendor requirements? The current system lacks flexibility in adapting to different assessment situations, partially due to it being dated; other programs are better/more robust in adapting. The current system isn't always compatible with Windows 10; the systems are frequently down.

What works well now: The data exchange between the current system and CAMA is working. The current vendor has provided consistency in the GL software and generally gets the job done. Apex is working well as a stand-alone program and the town can interact with the company directly.

The "Cloud": New software needs to be in the cloud. One Addison County town, for example, does all their work with remote access capability. However, cloud-based software may present connectivity issues for towns with inadequate broadband. Some towns are unable to install on laptops due to the town IT setup. It was noted that the current vendor backs up to a cloud in Minnesota and not locally.

The current system is working, but ancient; needs better flow, modern screens, ease of use. It does not allow the use of color. It is based on Fox Pro, which is very antiquated.

There is a concern in more than one region with the current vendor having a monopoly over assessments in Vermont. Also, the current vendor is in the reappraisal/assessment business -- how would that play out?

The current system has security/firewall issues. Security should be encryption-enabled.

The current vendor has branched into many areas so support seems spread thin.

Comments and concerns on the Grand List:

What works well now: Multiple modules work well. Restore point is a great feature. Sales study being processed as we go is a big help. The link between the grand list and MicroSolve works well currently - how would that work if the current vendor was replaced?

Costs: What will be the costs to the towns in terms of upgrades? The current system has been provided at very low costs to towns. Transitions/new protocols cause towns to get fees from vendors, so will this be covered in the budget to not impact town costs? Is there a spending cap? (Jill answered -- $10 mill over 5 years.)

Timing of Upgrade and Transition: A major Grand List upgrade could disrupt the flow of information that is working well regarding changes and adjustments. Implementing a new system during a reappraisal year could be problematic. Biggest concern is chaos – this needs to be done in a manner that is consistent. The learning curve for the new system will be huge, especially with new listers, etc. Transition and learning curve while still getting the product out are a concern. Will the new vendor be responsible for helping the towns transition and the conversion of data?

April 1 -- ownership causes problems -- how can this be changed? A way is needed to track new owners and a way to hold transfer data after April 1. The April 1st date doesn't allow for real-time assessment.

More user friendliness would be appreciated; some listers are not as technologically capable as others. To help, the current system and CAMA should both have a manual. A written manual should be part of the contract.

Consistency is needed; not different entries in CAMA vs. the current vendor for the parcel ID scheme. CU interfacing with grand list needs to be improved. Address corrections in multiple places don't make sense -- How do the different vendors handle this?

Bill revisions are done by hand and cash receipts use other software vendors. Tax billing should be able to be done online.

Splitting parcels is very complicated and should be easier. In addition, there should be an easier way to combine or refigure contiguous parcels. Sorting out HS-122 declarations for business use is confusing and does not give all the needed info.

The current program hides a lot of valid sales prices during an export. Having a way to export the last "valid" sale needs to happen.

A combined tax district could help with setting the CLA; this would be completely voluntary and require a town vote with all the towns in the district opting in.

LUC Valuations in VTax are better than they were in the current system.

Funding formula for GL maintenance and reappraisals needs to be adjusted to provide more support of the smaller towns.

The SPAN number is going to become more and more relevant so it should become prominent on both the GL and CAMA programs.

Concern that in the RFP, it sounds as if PVR could go in and change a GL value. The towns and PVR need to be on the same page. (Jill answered – the intent is that "edit" means a piece of communication on our part, and not to change information.)

What's currently NOT working well?

Parcel maintenance: No new maps received with property information, and comments added by town are added one property at a time and are not captured/corrected at Current Use. It is frustrating to keep track of changes when there are many parcels enrolled in a town. Contiguous parcel requirements are a problem and don't always make sense, especially since there is no continuity between towns.

Running Reports: Customer reports can be a burden. The report generator should be compatible with standard office software. When running reports, reports aren't specific enough. They should be modernized. Also, change of appraisal notices are "prehistoric and embarrassing to send out."

Simultaneous Use of Programs: Current Use and the current system can't be edited simultaneously. People cannot complete all work from one central program, there are too many separate programs. CAMA and the current system notes are not in the same spot and should be private, not public. CAMA is unfriendly to use, which contrasts with the current system being easy. The current vendor does not work with another vendor's CAMA; there are currently issues for other vendors when linking to the current system. Grand List and GIS functions do not mesh well with state mapping services. GIS users at the towns have different needs for parcels and grand list and data should include a unique ID.

Customer Support/Assistance: Customer support isn't terrific – PVR help needs improvement. The current cloud support is not good and cloud data gets lost, or the cloud crashes. The current trainings go over the same things repeatedly; training should be separated into "new" and "old" information. Several noted that the current system hasn't been changed or updated throughout the years. Many changes each year (as far as legislation and statutes) makes using the programs very complicated.

Microsolve: Sketching can be an issue. MicroSolve is good for residential but not as good for commercial -- Is there a next step to update this? MicroSolve data needs to be readily extractable. MicroSolve labeling is restrictive. Condos don't work in CAMA, and functionality needs to be expanded.

Homestead Declarations: Homestead declarations are frustrating, costly to towns, confusing, and homestead filings on life estates could potentially "game the system." Who polices the homesteads? Requires more time of listers if files are sent back before declaration downloads are complete.

eCuse isn't working as well as it should; hard copies of all GL notes still have to be kept to verify.

Apex drawing system is too clunky; Assesspro's drawing system is better.

Parcel transfers are delayed and require a working pile to reference until the electronic version appears.

Current Use worksheet printouts are not accurate, reversing GL information.

Current Use isn't purged quickly enough and the process should be tightened up.

Sales validation and Current Use require double entry. There is no ability to request back a sale from myVTax from the DA.

Some rural towns do not have the bandwidth to support advanced software as it is, so upgrades need to be flexible.

State adjustments are additional work; we should go back to rebate checks as the current system increases the cost to the towns.

The state should be handling all Current Use and their software should link with the GL, and re-figure values.

The system is too slow – saving takes way too long, up to 17 seconds.

There is an issue of timing out and having to log back in too frequently.

Listers need to have more support from the state. There seems to be a lack of respect to listers in some towns and many don't respect listers' education.

What features should be in the new system?

Would additional modules be able to integrate with other municipal offices/taxpayer programs be available as part of this upgrade? There should be a suite of modules. (Ex: Tax administration, dog licenses, etc.)

Will the backup services be built in to be an automatic process? Backups are currently costly, the new system should include them at no cost to the towns. Auto-backups would be helpful. Jill noted that auto-backups would be standard.

The platform needs to be able to accommodate future growth and be able to be maintained and updated to keep up with changes. It will need to meet the specific needs that not all municipalities have, such as TIF districts. It will need to integrate with data systems currently being used, be able to talk to other standard accounting software (like the Grand List) and be able to jump quickly with legislature changes. New software should be able to communicate with other departments in town offices if needed. There should be a smooth flow between one platform and the next, including tax administration.

Changing systems can be scary for towns, so training is important. Who will be responsible for the training? Hands-on training is not always offered, listers would like to see specific targeted training for more in-depth knowledge. PVR Training is not always taught as "hands-on" and needs to be. CU training needs to be more detailed regarding housesits vs. homesteads, and classes should be scheduled to fit alongside listers' duties and timeframes.

Higher-level IT support would be helpful, possibly bringing back the "helpdesk."

Streamlining Programs: Multiple programs for the same data (current vendor, eCuse, VTax) is redundant. Everything should be more efficient and streamlined. The new program needs to work with the current vendor accounting software and with a variety of CAMA programs. New software needs to integrate with the state mapping program, and needs to be built for the future in terms of mapping capabilities. There are currently too many different passwords needed – can systems be combined? Hoping that all current modules can function through (or into) one product. Valuation, Current Use, GIS, and sales study should all be handled in one location to reduce multiple entry situations and time. "Link-ability" is key.

OTHER SUGGESTIONS:

More user friendliness would be appreciated, as some folks have a hard time learning the system. Off the shelf software should have the ability to be tweaked for various needs. There should be a follow-up with any bugs that are discovered in the program.

If it's a new vendor, they should be aware of Vermont legislation so that GL software can work with tax administration programs. National vendors should still have local support. All suite applications should be available from the start.

Increased security – tablets out in the field are a security risk. Also, new listers cannot create new passwords to access older password-protected files. At the same time, tablet or phone access to the system would be helpful.

Actual employees (who are going to use the software) should be involved in the alpha testing of the programs.

CAMA should have an ability to create a "what if" scenario without using a test parcel and be able to integrate CU calculations.

The new software should be able to post credits to a tax bill prior to sending; this will help people more easily understand what has been paid and what is due.

Assessing software should be set up like Turbo Tax – asking questions, system makes decisions based on responses; visual comparisons to others of the same grade to help with accuracy and to save time. Tax admin report production needs to be much less cumbersome; it is not helpful the way it is set up.

More than one lister should be able to use different modules at the same time.

Future program could allow for wastewater use data on a parcel level.

Lot line adjustments should have a digital trail.

The parcel overlays they are using are currently inaccurate and should be fixed.

Disaster recovery should be a given and included.

Whatever company gets the upgrade, towns don't want to be pushed into needing additional operating systems or CAMA programs. Will the vendor provide a bridge to various CAMA programs at no cost to the towns?

Better flagging to help with managing by exception.

Continued ability to do TIFs.

Real-time work, including access to tax maps.

Is there a better way to save history to keep from having to go back to when appraisal was, at a minimum? Build in the ability to generate reports without having to re-create them to do so. The current CAMA system does not have a history function.

Addition of online maps, and mapping layers, would be great. You should be able to get GIS data by clicking a button on the map. Foresters could map with GIS and replace paper mapping. E911 addresses could be integrated.

A more interactive system – possibly one that can auto-populate fields – would be beneficial and time-saving. One system needs to populate across programs. Fields should allow for at least 500 characters to describe a situation.

Two separate icons for historical data and the program. Better sorting in the program – be able to sort by street address and SPAN number.

Jill mentioned at the sessions that in the future, district advisors will be trained and continue providing support, and that there will be additional helpdesk support at the tax department. Attorneys will be educated on the LUCT, the PTTR, and related forms.

PILOT TOWNS – Many municipalities specifically noted that they are interested in being pilot towns for the new software when it becomes available.

Additional Comments:

From the Barre VMCTA Listening Session – 2020 is a presidential election year; with all the events that occur throughout the year it is not feasible to train clerks in the new system. Training should be similar to the SOS elections training for their new system. Would grants be available to help bring office technology (computers) up to standards? Will the per-parcel fee for maintenance and equalization study increase?

From the Brattleboro & Manchester Listening Sessions – Open forums such as this should be held yearly. The marketplace should be examined before deciding on a program, considering all three methods of valuation; no program will give you a 100% number. Homesteads should not have to be filed yearly; only if a change has been made. Listers are mostly retirees, no benefits, and are part-time with most tasks done only once a year. The select boards should be educated on the importance of listers and what they can do. A lawmaker should have been invited to the meetings for clarification.

From the Burlington Listening Session – Towns should have assistance transitioning to the new system, especially as it relates to reappraisal schedules. Data conversion should be offered. Will PVR allow towns to migrate to the new program in the future if not done now? The timeline is aggressive – is it realistic? Can assessment officials write letters in support of a preferred vendor? There should be a secure way for the public to access the data in both Grand List and CAMA, and be able to view and print documents. Each municipality would need the ability to choose what data to allow access to.

From the Vermont League of Cities & Towns – VLCT is gathering information to see what local officials need, looking into help for communities with limited accessibility, and working with Champlain College to help communities with cyber security.

From Windsor County – Vendors should be sure that they can support the various listers throughout the state. Historical data needs to transition seamlessly into the new system. Many offices have older software, so there needs to be flexibility. The vendor should "do some homework" to show that they can support a variety of situations.

From the Hartford Listening Session – Vermont's structure is local, yet a larger structure makes it easier for some of these changes. Town offices will change dramatically with technology. Things should be available online – younger people's expectation is to pick up a smartphone and get any information they need. There is a disparity of knowledge and technology between towns. If the new system doesn't work, many departments will be affected. The main focus needs to be on doing things well and adding wish-list items ("bells and whistles") as we go to keep costs down. A homestead forum would be helpful to provide feedback on that process.

From Essex County – A concern if there will be a cost to the town involved for upgrading software. Appreciated the sessions being held in locations statewide; webinars for future sessions would help reduce travel time and mileage.

From Washington County – Would like to know if an RFP will include a question about the compatible zoning database module as a specific town is/was planning to work with NEMRC to implement a database.

From the Middlebury Listening Session – The RFP as is seems as if it was written to favor NEMRC. The number of DAs could be reduced. Paper manuals for the new software, along with workshops, would be helpful. Manuals would also help with on-site assessment. A lot of time is spent on homestead declarations, what about a combined tax for NR and HS? Would this be expected to happen by 2021?

From the Moretown Listening Session – Mixed opinions on changing the system. Some feel that the changes should be small, others feel that there needs to be big changes to bring in new/younger listers. The lister positions are mostly part-time and underpaid; this would need to change to encourage assessment as a career and make the position more appealing to younger people. PVR will be asking for more money for towns. Listers from one of the towns that attended this session are very appreciative of the listening tour and being able to be involved in the process by interacting with PVR staff. They hope to be a part of the pilot program.

From the Morrisville Listening Session – It should not require three years to become a lister. Programs should be easier to edit and/or "undo" actions. Books and pages of deeds should be auto-linked from the clerk's recording software. Tax refunds are the Tax Dept's responsibility; the towns aren't getting the money in a timely fashion.

From a PVR Staff Member – It would be helpful to include temporary DA positions in the budget for additional assistance with workloads during training in the implementation year, workloads may be greater in year 2 if it's decided to go with the moratorium on reappraisal. VLCT should ask about unique billing issues across the state - some towns have complicated structures involving HS-122s and while the current vendor has been supportive of specific needs, any vendor chosen for the new software needs to have that ability as well.

From the St. Albans Listening Session – VALA and VLCT cater to larger towns, leaving out smaller towns. Will PVR be adding new data fields to a CAMA system? Will there be a new tax bill format? New software should handle contiguous properties automatically. A specific municipality noted that they would like to be invited to sit on the review team if possible.

From the St. Johnsbury Listening Session – Is the state planning to do away with listers? It is a concern that the state is putting too much emphasis on one contractor. Why doesn't CU have bigger maps and accurate numbers of structures? Inquired about improving the HS-122 filing system.

From Chittenden County – Competitive bid proposals are a step in the right direction. CAMA has had a lot of enhancements in 12 years, looking forward to a hands-on learning opportunity. Hoping for a more automated system that will integrate with other systems and easily run

query reports. The current CAMA contract should be continued to support the towns that do not wish to migrate to the new system immediately. Microsolve had assistance at the municipal level; will training be provided to compatible assessing software?

From Rutland County – GL software should be constantly updated to incorporate new mandates. While the current vendor has been consistent and generally get the job done, they seem to have more of a monopoly and have branched into appraisals, causing support to be somewhat stretched.