BOARD OF COMMISSIONERS
SARPY COUNTY, NEBRASKA

RESOLUTION APPROVING AGREEMENT WITH AXIOMATIC, LLC FOR CONSULTING SERVICES
FOR THE BUSINESS REQUIREMENTS FOR A CAMA AND TREASURER SOFTWARE SYSTEM

WHEREAS, pursuant to Neb. Rev. Stat. §23-104(6), the County has the power to do all acts in relation to the concerns of the County necessary to the exercise of its corporate powers; and,

WHEREAS, pursuant to Neb. Rev. Stat. §23-103, the powers of the County as a body are exercised by the County Board; and,

WHEREAS, the County of Sarpy desires to enter into a consulting services agreement for the development of business requirements for a Computer Aided Mass Appraisal System (CAMA) including a treasurer software system, as outlined in the Agreement attached hereto; and;

WHEREAS, said consulting services agreement is for unique, non-competitive and professional services and is in the best interests of the citizens of Sarpy County.

NOW, THEREFORE, BE IT RESOLVED by the Sarpy County Board of Commissioners that this Board hereby approves and adopts the consulting services agreement with Axiomatic, LLC for the development of business requirements for a CAMA and treasurer software system, a copy of which is attached.

BE IT FURTHER RESOLVED that the Chairman of this Board, together with the County Clerk is hereby authorized to sign on behalf of this Board the consulting services agreement with Axiomatic, LLC, a copy of which is attached, and any other related documents, the same being approved by the Board.

The above resolution was approved by a vote of the Sarpy County Board of Commissioners at a public meeting duly held in accordance with applicable law on the 9th day of August, 2016.

[Signatures]
Sarpy County Board Chairman

[Seal]
ATTEST:
Sarpy County Clerk
MEMO

To: Sarpy County Board of Commissioners
From: Beth Garber
Re: Consulting Services for CAMA Software System

During the August 9, 2016 Board meeting, the County Board will be asked to approve the attached agreement with Axiomatic, LLC for consulting services related to the Computer Aided Mass Appraisal System (CAMA). The scope of the consultant’s services will include defining current practice and develop business rule requirements for the Assessor and Treasurer’s Office for CAMA, billing/collections, and assessment administration. The Requirements Management Plan deliverable will provide the necessary information required for CAMA software vendors to determine if and how their software product will work within Sarpy County’s framework without having to enter into a full product development agreement. Total project costs for Axiomatic’s services are $16,450.

The need for a CAMA system consultant is felt to be critical for several reasons:

1. The current operating system is at end of life.
2. The CAMA system performs critical functions in the Assessor and Treasurer’s Offices. Without it, no tax dollars can be levied, collected or distributed.
3. At budget time, it was felt that the County’s current CAMA system vendor may have an upgraded product at a reasonable price. In order to determine if the upgraded product will meet our needs, business processes need to be defined and evaluated by the County and current CAMA vendor.
4. The last time bids were taken for a CAMA system, three of the five bids were over $600,000. With that kind of an investment, we need to make sure the entire process is done correctly.

August 3, 2016

Beth Garber

cc: Deb Houghtaling
Mark Wayne
Scott Bovick
Brian Hanson
Dan Pittman
Jackie Morehead
Rich James
Sinda White

Eric Herbert
Leo Parkison
Mark Walters
CONSULTING SERVICES AGREEMENT

1. Parties

THIS CONSULTING AGREEMENT is made this day of August, 2016, between Axiomatic, LLC ("CONSULTANT") and Sarpy County (COUNTY).

2. Statement of Services

A. Scope of Agreement. This Agreement contains the entire agreement and understanding with respect to the subject matter hereof and supersedes all prior agreements, proposals, negotiations, or other correspondence, whether written or oral relating to the provision of services by CONSULTANT to COUNTY.

B. Scope of Work. Subject to the following terms and conditions, CONSULTANT shall provide consulting services in accordance with Attachment A agreed to between the parties (the "Work").

3. Payment

A. Time and Material. All work performed by CONSULTANT shall be rendered on a fixed sum basis. COUNTY will pay CONSULTANT for the services performed under this Agreement in the amounts specified in Attachment A.

B. Invoices. Invoices shall be rendered to COUNTY on a milestone basis pursuant to Attachment A. Payment shall be made by COUNTY to CONSULTANT within thirty (30) days from the date of submission of each Invoice.

4. Confidentiality

A. Definition of "Confidential Information." The term “Confidential Information” shall mean matters relating to COUNTY’s business activities that are in a written form clearly marked “Confidential”, except such information which: (i) was previously known to CONSULTANT, (ii) is generally available to the public, or (iii) is subsequently disclosed to CONSULTANT by a third party who is not under any obligation to COUNTY.

B. Standard of Care. CONSULTANT shall use its best efforts to hold all Confidential Information in confidence for COUNTY. Upon termination of this Agreement CONSULTANT will deliver to COUNTY all COUNTY materials containing Confidential Information or make such other reasonable disposition of such materials as COUNTY may direct.
5. Proprietary Rights
   A. COUNTY Property. Any programs, data, or other materials furnished by COUNTY for use by CONSULTANT in connection with the services performed under this Agreement shall remain the sole property of COUNTY. All such materials shall be returned to COUNTY upon receipt by CONSULTANT of the final payment for all Work performed. Any report or study submitted to the COUNTY by the CONSULTANT becomes the property of the COUNTY.
   B. CONSULTANT Property. Any ideas, concepts, know-how, techniques, or sequences, developed during the course of this Agreement by CONSULTANT, or jointly by CONSULTANT and COUNTY, shall be the exclusive property of CONSULTANT.

6. Term, Termination
   A. Commencement Date. This Agreement becomes effective on the date signed by CONSULTANT and COUNTY.
   B. Termination. Unless otherwise provided, either party may terminate this Agreement at any time, provided the COUNTY reimburses the CONSULTANT for all work done up to and including day of notice of termination.
   C. Independent Contractors. In the performance of this Agreement CONSULTANT is acting as an independent contractor and not as an employee or agent of COUNTY.

7. Residency Verification
   The Consultant agrees to comply with the residency verification requirements of Neb. Rev. Stat. §4-108 through §4-114. The Consultant is required and hereby agrees to use a federal immigration verification system to determine the work eligibility status of new employees physically performing services within the State of Nebraska. A federal immigration verification system means the electronic verification of the work authorization program authorized by the Illegal Immigration Reform and Immigrant Responsibility Act of 1996, 8 U.S.C. 1324a, known as the E-Verify Program, or an equivalent federal program designated by the United States Department of Homeland Security or other federal agency authorized to verify the work eligibility status of a newly hired employee.

   A. Entire Agreement/Assignment. This Agreement: (i) is the complete and exclusive statement of the agreement between the parties and supersedes all oral, written, and other communications between the parties relating to the subject of this Agreement; and (ii) may not be
assigned or otherwise transferred by either party without written permission of the other party.

B. **Governing Law.** This Agreement shall be governed by the laws of the State of Nebraska.

C. **Severability.** The failure by either party at any time to required performance of the other party of any provision of this agreement shall in no way affect the right of such party thereafter to enforce the same or any other provision, nor shall the waiver by either party of any breach of any provision hereof be taken or held to be a waiver of any succeeding breach, or as a waiver of the provision itself.

D. **Titles.** The section headings in this Agreement are for convenient reference only and shall be given no substantive or interpretive effect.

E. **Notices.** All notices, requests, demands, and other communications hereunder shall be in writing and shall be deemed to have been duly given if delivered or mailed, postage prepaid, certified mail, return receipt requested:

1. Axiomatic, LLC  
   500 Market Street, Unit 2B  
   Portsmouth, NH 03801

2. Sarpy County Clerk’s Office  
   1210 Golden Gate Drive, Suite 1250  
   Papillion, NE 68046

and/or to such other person(s) and address(es) as either party shall have specified in writing to the other.

**IN WITNESS WHEREOF,** the parties hereto have executed this Agreement by their duly authorized representatives.

**CONSULTANT**  
Axiomatic, LLC

By: [Signature]  
David Salzer-Principal  
8/3/2016  
Date

**SARPY COUNTY**

By: [Signature]  
Don Kelly, Chairman  
8-9-16  
Date

Approved as to Form:

[Signature]  
Deputy County Attorney
SARPY COUNTY NEBRASKA
Consulting Services for the Business Requirements for a CAMA and Treasury Software System

PREPARED FOR:
Sarpy County
Attn: Beth Garber
1210 Golden Gate Drive
Papillion, NE 68046

PREPARED BY:
Axiomatic, LLC
David Salzer
500 Market Street, Unit 2B
Portsmouth, NH 03801
David@axiomnh.com

JULY 12, 2016
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<td>New Hampshire Mosaic Parcel Map</td>
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<td>Selected Publications</td>
<td>7</td>
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EXECUTIVE SUMMARY

Sarpy County, Nebraska ("County") desires to purchase or develop a new Computer Assisted Mass Appraisal ("CAMA") and Treasury system to manage the property taxation process. In order to successfully identify the application that will best suit the counties needs it is necessary to first develop business rules and requirements for the assessing and treasury departments (CAMA, Billing/Collections, and Assessment Administration).

Axiomatic, a business process reengineering ("BPR") and software development firm located in Portsmouth, NH proposes to conduct the abstract and document the processes, scenarios, workflows, data sources, regulations, reporting needs and external dependencies for each business process. To accomplish this goal Axiomatic proposes to utilize a proven, standard process referred to as the Axiomatic method. The Axiomatic method is a five step process (Figure 1) that leverages the business process lifecycle to ensure that stakeholders are provided with a clear assessment and a successful path forward.

<table>
<thead>
<tr>
<th>Plan</th>
<th>Assess</th>
<th>Analyze</th>
<th>Redesign</th>
<th>Execute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Major Goals</td>
<td>Gather Information</td>
<td>Define Macro Process</td>
<td>Define New Processes Completely</td>
<td>Implement New Processes</td>
</tr>
<tr>
<td>Identify Stakeholders</td>
<td>Document Current Process</td>
<td>Conduct Gap Analysis</td>
<td>Develop Implementation Plan</td>
<td>Monitor &amp; Train</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Identify Opportunities to Improve</td>
<td>Communicate and Coordinate Plan with Stakeholders</td>
<td>Refine as Needed for Improved Functionality</td>
</tr>
</tbody>
</table>

Figure 1: Business Process Re-engineering workflow

SCOPE OF WORK

Axiomatic proposes to perform BPR services and develop detailed business requirements for the County’s Assessing and Treasury departments. To accomplish this goal Axiomatic will utilize the Axiomatic method, a proven BPR methodology. For the purposes of this project Axiomatic will only conduct the first four steps of the process as the goal of this project is to develop business requirements which will be leveraged to purchase or develop a property tax management application that is capable of meeting the needs of the stakeholders. A project specific Axiomatic method diagram is shown in Figure 2.

<table>
<thead>
<tr>
<th>Plan</th>
<th>Assess</th>
<th>Analyze</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Major Goals and Vision</td>
<td>Existing Documentation and Regulations Review</td>
<td>Conduct Gap Analysis</td>
</tr>
<tr>
<td>Identify Stakeholders</td>
<td>Stakeholder Meetings</td>
<td>Identify Opportunities to Improve</td>
</tr>
</tbody>
</table>

Figure 2: Business Process Re-engineering workflow
PHASE 1-PLAN

Axiomatic will first work with the County project owners to develop refine the project vision and scope. It is also essential to identify the stakeholders for each business process, as they will play a critical role in the Phase 2 (assess) of the Axiomatic method. Axiomatic will also finalize the work plan for the subsequent phases of the project.

PHASE 2-ASSESS

The process of business process and knowledge base abstraction and documentation requires several steps to ensure that all relevant information is captured. Axiomatic uses a variety of methods to work through the Assessment Phase. At this time Axiomatic recommends utilizing the following methods to fully document the existing processes, scenarios, workflows, data sources, regulations, reporting needs and external dependencies for each business process.

Existing Documentation Review-Identifying or obtaining documentation for each functional group’s structure, roles and responsibilities will allow the project team to study the existing processes and minimize the amount of time required for stakeholder meetings. Once Axiomatic has completed the documentation review, information can be organized and questions structured to optimize the stakeholder meetings.

Stakeholder Meetings-Following the aggregation and review of existing documentation and statutes, Axiomatic will schedule stakeholder discovery meetings with directors, managers and personnel. Axiomatic will use a top down approach for conducting onsite, stakeholder meetings. The project team will first meet with the Director and/or manager of each business process to get a macro perspective of the processes, data streams and personnel. Axiomatic will have previously generated process workflows and details which will serve as the basis for the stakeholder meetings.

Subsequent to those meetings, Axiomatic will meet with personnel that conduct the work for each business process as determined through the results of the director/manager meetings. To minimize the impact on the daily operations, Axiomatic will make efforts to schedule meetings in blocks and to facilitate conference calls and web meetings when possible.

PHASE 3-ANALYZE

Axiomatic will analyze all of the gathered data, processes, and needs to identify potential gaps or deficiencies between what exists and what the project goals are. The gap analysis is the final process prior to the development of the Requirements Management Plan.

PHASE 4-REDESIGN

At the completion of the Analyze phase the project team will have identified the existing processes (that will be kept and discarded) and any gaps or deficiencies between what is done and what will be done. This will allow Axiomatic in partnership with the County to develop a Requirements Management Plan. The Requirements Management Plan will allow the county to develop a verified project scope ensuring that processes that have business value are identified and integrated into the long term project plan.

The Requirements Management Plan will detail the processes and requirements necessary for the County to fulfill the overall project goals. Through the use of business rule documentation, Axiomatic will be able to provide to the County tabular business rules. Axiomatic will conduct this process with an eye towards generating specifications that will be able to be reviewed by a developer/software provider to provide a clear scope and cost for the implementation of the new
software application. The plan will be provided in draft form to the County for review prior to Axiomatic finalizing the document.

DELIVERABLES

Requirements Management Plan-The Requirements Management Plan will provide the necessary information required for the County to successfully execute the procurement process. The report will include scope verification, risk assessment, refined product features and technical requirements, project component requirements and an anticipated project timeline. It will also include business rule documentation for both Assessor and Treasurer’s Office processes. The plan will also contain a product road map which will serve as a high level guide to executing the project successfully.

PROJECT COST

Axiomatic has estimated the overall project cost at $16,450, firm fixed. Axiomatic utilizes a work hour based cost estimate approach derived from details provided in the RFP and past experience with similar projects. The proposed cost is a fully loaded rate and encompasses all required travel to the project site. Axiomatic uses the Federal per diem rates for lodging, meals/incidentals and mileage published by the General Services Administration (“GSA”).

MILESTONES

Axiomatic proposes to distribute the total project cost based on four milestones as listed in Table 1. Upon the contract signing Axiomatic requires a 20 percent project down payment. Subsequent milestone payments will be billed at the acceptance of the milestone by the County.

<table>
<thead>
<tr>
<th>Milestone Group</th>
<th>Milestone Description</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Contract Signing (20%)</td>
<td>$3,290</td>
</tr>
<tr>
<td>D</td>
<td>Delivery of Requirements Management Plan</td>
<td>$13,160</td>
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<tr>
<td><strong>Total Project Cost</strong></td>
<td></td>
<td><strong>$16,450</strong></td>
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BILLING AND PAYMENT TERMS

Axiomatic will bill at the completion each identified milestone. Payment is due within 30 days after the submission of each invoice.

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1 Treasurer’s office business practices that are related to the billing, collection, and administration of Property tax matters.
AXIOMATIC was retained by Xerox in 2015 to assist in the development of their Property Tax Manager (PTM) solution that is being deployed to 31 counties in Minnesota. Axiomatic has provided business area analysis services, process mockups and storyboards, technical designs, and client interaction services (demonstrations, client reviews, etc.). Additionally, Axiomatic has conducted a market analysis, a competitive analysis and usability services for Xerox for PTM. Axiomatic is currently engaged in multiple projects with Xerox in addition to PTM.

De Ana Thompson
Vice President of Solutions Development
Xerox Local Government Solutions
(909) 677-7892
DeAna.Thompson@xerox.com

AXIOMATIC conducted an in depth existing processes analysis and needs assessment for the New Mexico Taxation and Revenue Department (TRD) Property Tax Division (PTD) to develop a plan to modernize all data management systems. PTD currently conducts highly specialized work related to property assessment, auction of delinquent tax properties and valuation of complex industry. Currently all PTD processes are conducted manually with minimal data management systems.

Larry Brotman
Director of Municipal and Property Division
GIS Coordinator
(505) 231-5948
Larry.Brotman@state.nm.us

In New Hampshire, local property tax rates (municipal, school, county) are set by the NHDRA utilizing approximately 1,000,000 data points supplied through the submission of thousands of forms from 550 political subdivisions. For years, the NHDRA relied upon institutional knowledge and software system that utilized Microsoft Access databases and manual data entry to calculate property tax rates that are used to levy $3 billion annually.

In 2013, Axiomatic principals were retained to conduct a BPR process and to develop an enterprise-level data capture and management system to be used by the NHDRA and multiple users from each of the political subdivisions. Extensive
stakeholder meetings were conducted with NHDRA, municipal focus groups, industry association (Government Finance Officers Association, Association of School Business Officers, etc.) to identify and document the existing processes. Recommendations were made to NHDRA to “lean” the process by condensing common forms, and streamlining review processes. Subsequent to the leaning process, electronically-filed PDF forms were developed, and a purpose-built ASP.NET web application with a SQL database was developed. The web application provides a streamlined process that integrates data collection, review, and validation tasks as well as complex reporting into a simple interface. Launched in 2014, the system is relied upon by all 235 property tax jurisdictions (municipalities) in the state.

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<thead>
<tr>
<th>REFERENCE</th>
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<tbody>
<tr>
<td>David Cornell</td>
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<tr>
<td>Assistant Director, Municipal &amp; Property Division Bureau</td>
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<tr>
<td>New Hampshire Department of Revenue Administration</td>
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<tr>
<td>(603) 230-5970</td>
</tr>
<tr>
<td><a href="mailto:David.Cornell@dra.nh.gov">David.Cornell@dra.nh.gov</a></td>
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NEW HAMPSHIRE PROPERTY TAX EQUALIZATION SYSTEM

Axiomatic was contracted by the New Hampshire Department of Revenue Administration to develop a replacement for the existing Property Tax Equalization system, an outdated MS DOS-based solution which had been in use for over a decade. Axiomatic developed a full-featured .NET web application with powerful data analysis and reporting capabilities to validate and normalize approximately 35,000 annual real estate transactions. The New Hampshire Property Tax Equalization System (“DRAEQ”) serves over 500 users, allowing municipal assessing officials to log in and validate real estate transactions within their jurisdiction and providing interfaces for state users to audit the validated sales and perform statistical analysis on the data. Advanced analysis capabilities were built with the R programming language and provided libraries. The systems hierarchical permissions architecture allows for various user levels with module- and page-based restrictions. In an effort to increase user adoption and minimize workflow disruption, the new system implemented various supports for legacy functionality (such as keyboard shortcuts). The system utilizes standardized data from the 235 municipal jurisdictions, and information from the 10 county registries of deeds. All exports are provided in flat text file format and converted to the project format using custom Extract Transform Load Processes (ETL).

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<tr>
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<tbody>
<tr>
<td>Linda Kennedy</td>
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<tr>
<td>Supervisor, Equalization Bureau</td>
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<tr>
<td>New Hampshire Department of Revenue Administration</td>
</tr>
<tr>
<td>(603) 230-5965</td>
</tr>
<tr>
<td><a href="mailto:Linda.Kennedy@dra.nh.gov">Linda.Kennedy@dra.nh.gov</a></td>
</tr>
</tbody>
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NEW HAMPSHIRE MOSAIC PARCEL MAP

Axiomatic principles developed the Mosaic Parcel Map for the New Hampshire Department of Revenue Administration ("NHDRA"). The project began with an internal needs assessment to determine the extent and types of data integration that would be required for the NHDRA to develop systems to meet their statutory duties to equalize property values statewide. Axiomatic conducted a leaning process which identified necessary integrations between geospatial parcel data, Computer-Assisted Mass Appraisal (CAMA) data from different sources, registry of deeds data, and real estate transfer tax records from over 240 different political entities. This project required the development of standards and procedures for handling the data streams, building a custom integration processes, and developing two web-based applications to allow the NHDRA to effectively and accurately administer the property tax equalization process. Mosaic represents one of the most up-to-date and integrated land records systems in the country and was awarded the URISA Excellence in Government Award – Enterprise System Category in 2014, and designated a “Bright Idea” by the Kennedy School of Government at Harvard University.
MPOWER INTEGRATOR DEVELOPMENT PROJECT MANAGEMENT

Axiomatic was retained by mPower Innovations in 2015 to project manage the completion of their flagship mapping and data visualization product: mPower Integrator. Axiomatic provided project development leadership, and management through a number of challenging situations including: significant staffing changes, termination of vendors, and identification and selection of new development resources. Services provided included mockup development, testing, vendor management, and development of a product roadmap. Axiomatic is currently engaged in a project management capacity for ongoing system development.

SELECTED PUBLICATIONS


Jones, Brent David Salzer, and Patrick Santoso, 2013 “Who Will Compile the National Parcel Map and Why”, Fair and Equitable, May 2014, pages 16-17

Salzer, David and Patrick Santoso, 2013 “State Agencies Collaborate on New Hampshire Mosaic of Parcel Map and Assessing Data”, Fair and Equitable, February 2013, pages 3-6