



Fulton County Board of Commissioners  
**Agenda Item Summary**

**BOC Meeting Date**  
 1/24/2018

**Requesting Agency**  
 Information Technology

**Commission Districts Affected**  
 All Districts

**Requested Action** *(Identify appropriate Action or Motion, purpose, cost, timeframe, etc.)*

Request approval of a task order against professional services contract – Fulton County Information Technology (FCIT), 15RFP52115B-TR, Organizational Strategic Partner in the amount of \$595,000.00 with Accenture, LLP (Atlanta, GA) to provide a complete business process review of the property tax system. Effective upon BOC approval through December 31, 2018.

**Requirement for Board Action** *(Cite specific Board policy, statute or code requirement)*

In accordance with Purchasing Code Section 102-360, requests for approval of Task Orders exceeding \$500,000 shall be forwarded to the Board of Commissioners for approval.

**Is this Item related to a Strategic Priority Area?** *(If yes, note strategic priority area below)*

Yes All People trust government is efficient, effective, and fiscally sound

**Is this a purchasing item?**

Yes

**Summary & Background**

*(First sentence includes Agency recommendation. Provide an executive summary of the action that gives an overview of the relevant details for the item.)*

**Scope of Work:** Accenture will conduct end-to-end process review, they will redesign and optimize key processes; and will develop actionable integrated roadmap to optimize existing resources while redesigning the taxpayer experience.

Accenture and County leaders will work together to conduct an end-to-end process review of the property tax assessment and collection system that generates:

- A detailed understanding of the current process that identifies the interactions between the various players in the process and how they contribute to and/or inhibit high performance
- A set of clear outcomes that the property tax system is expected to produce for taxpayers and the County, with accompanying metrics and performance targets
- A set of identified opportunities to change the process in ways that optimize the use of County resources (including people, process, technology, and governance) and deliver more efficient and effective performance
- New, innovative ideas to rethink/redesign the customer experience of County taxpayers
- A clear, actionable roadmap for improving the system and the outcomes it delivers over both the near & long term

**Community Impact:** Development of an integrated roadmap to optimize the taxpayer experience.

**Department Recommendation:** Department recommends the approval of this Task Order for this engagement.

**Project Implications:** Approval of this Task Order provides for an independent vendor to provide a full business process review of Fulton County’s assessment process and make recommendations for improvement.

**Community Issues/Concerns:** Fulton County citizens have displayed displeasure with last year's Tax Assessment process and this analysis/review is the initial step in enhancing and improving that process and the resultant service for citizens.

**Department Issues/Concerns:** There are no department concerns with this project.

**History of BOC Agenda Item:** This is a new request.

To protect the interests of the County, the County Attorney shall approve the Contract as to form and substance, and make any necessary modification, prior to execution by the Chairman.

| <b>CURRENT CONTRACT HISTORY</b> | <b>BOC ITEM</b> | <b>DATE</b> | <b>DOLLAR AMOUNT</b> |
|---------------------------------|-----------------|-------------|----------------------|
| Task Order No.1                 | 15-0708         | 8/19/2015   | \$685,440.00         |
| Task Order No. 2                | 15-1106         | 12/2/2015   | \$0.00               |
| Task Order No. 3                | 16-0145         | 2/17/2016   | \$875,000.00         |
| <b>Task Order No. 4</b>         |                 |             | <b>\$595,000.00</b>  |
| Total Revised Amount            |                 |             | \$2,155,440.00       |

The Partner and the County entered into a Master Agreement that describes the general terms and conditions under which the Partner will provide services. Once a specific project has been identified, the County will execute a Task Order in accordance with Purchasing Code Section 102-360. Each Task Order will include a detailed scope of services; project deliverables; project monitoring and reporting requirements for purposes of contract management.

**Contract & Compliance Information** *(Provide Contractor and Subcontractor details.)*

Contract Value: \$595,000.00  
Prime Vendor: Accenture, LLC  
Prime Status: Non-Minority  
Location: Atlanta, GA  
County: Fulton County  
Prime Value: \$595,000.00  
Subcontractor: None

Total Contract Value: \$595,000.00  
Total MFBE Value: \$0

[Click here to enter text.](#)

| <b>Solicitation Information</b> | <b>NON-MFBE</b> | <b>MBE</b> | <b>FBE</b> | <b>TOTAL</b> |
|---------------------------------|-----------------|------------|------------|--------------|
| No. Bid Notices Sent:           |                 |            |            |              |
| No. Bids Received:              |                 |            |            |              |

|                             |                             |
|-----------------------------|-----------------------------|
| <b>Total Contract Value</b> | <b>\$595,000.00 or 100%</b> |
| <b>Total M/FBE Values</b>   | <b>\$0.00</b>               |
| <b>Total Prime Value</b>    | <b>\$595,000.00 or 100%</b> |

**Fiscal Impact / Funding Source** *(Include projected cost, approved budget amount and account number, source of funds, and any future funding requirements.)*  
 100-999-S200-1160: General Fund, Non-Agency, Professional Services - \$595,000.00

**Exhibits Attached** *(Provide copies of originals, number exhibits consecutively, and label all exhibits in the upper right corner.)*  
 Exhibit 1: Task Order No. 4  
 Exhibit 2: Contractor Performance Report

**Source of Additional Information** *(Type Name, Title, Agency and Phone)*  
 Glen Melendez, Deputy CIO, FCIT, 404.612.0192

| <b>Procurement</b>  |                                      |  |   |
|---|--------------------------------------|--|---|
| <b>Contract Attached:</b><br>No   |                                      | <b>Previous Contracts:</b><br>Yes                      |   |
| <b>Solicitation Number:</b><br>15RFP52115B-TR   |                                      | <b>Submitting Agency:</b><br>Information<br>Technology | <b>Staff Contact:</b><br>Glen Melendez,<br>Deputy CIO |
| <b>Contact Phone:</b><br>404.612.0192   |                                      |  |   |
| <b>Description:</b> To provide a complete business process review of the property tax assessment and collection system. |                                      |  |   |
| <b>FINANCIAL SUMMARY</b>  |                                      |  |   |
| <b>Total Contract Value:</b>  |                                      | <b>MBE/FBE Participation:</b>                          |   |
| Original Approved Amount:   | \$685,440.00                         | Amount: .  | %. .  |
| Previous Adjustments:   | \$875,000.00                         | Amount: .  | %. .  |
| This Request:   | \$595,000.00                         | Amount: .  | %. .  |
| <b>TOTAL:</b>   | <b>\$2,155,440.00</b>                | Amount: .  | %. .  |
| <b>Grant Information Summary:</b>   |                                      |  |   |
| Amount Requested: .   | <input type="checkbox"/>             | Cash   |   |
| Match Required: .   | <input type="checkbox"/>             | In-Kind  |   |
| Start Date: .   | <input type="checkbox"/>             | Approval to Award                                      |   |
| End Date: .   | <input type="checkbox"/>             | Apply & Accept   |   |
| Match Account \$: .   |                                      |  |   |
| <b>Funding Line 1:</b><br>100-999-S200-1160   | <b>Funding Line 2:</b><br>.          | <b>Funding Line 3:</b><br>.                            | <b>Funding Line 4:</b><br>.                           |
| <b>KEY CONTRACT TERMS</b>   |                                      |  |   |
| <b>Start Date:</b><br>Upon BOC approval   |                                      | <b>End Date:</b><br>12/31/2018                         |   |
| <b>Cost Adjustment:</b><br>.  |                                      | <b>Renewal/Extension Terms:</b><br>.                   |   |
| <b>ROUTING &amp; APPROVALS</b><br>(Do not edit below this line)   |                                      |  |   |
| X   | Originating Department:              | Wright, Sallie   | Date: 1/12/2018                                       |
| .   | County Attorney:                     | .  | Date: .   |
| .   | Purchasing/Contract Compliance:      | .  | Date: .   |
| X   | Finance/Budget Analyst/Grants Admin: | Stewart, Hugh  | Date: 1/12/2018                                       |
| .   | Grants Management:                   | .  | Date: .   |
| .   | County Manager:                      | .  | Date: .   |

**Task Order No. 4 to Form of Contract  
Contract 15RFP52115B-TR Organizational Strategic Partner  
by and between  
Fulton County and Accenture LLP**

THIS TASK ORDER NO. 4 to the Form of Contract 15RFP2115B-TR is effective as of the \_\_\_\_ day of \_\_\_\_\_, 2018, between the County and Accenture LLP, who agree that all services specified will be performed in accordance with this Task Order No. 4 to Form of Contract and the Contract Documents to modify Exhibits C, D, and E to Contract 15RFP52115B-TR, Organizational Strategic Partner ("Form of Contract" or "Contract" or "Agreement") by and between Fulton County, Georgia a political subdivision of the State of Georgia ("County") and Accenture LLP ("Accenture," or "Consultant") and together with Fulton County, the "Parties", dated August 31, 2015.

Pursuant to Article 7 of the Contract, the Parties hereby agree to amend Exhibit C (the Scope of Work), Exhibit D (Deliverables), and Exhibit E (Compensation) as follows:

**1. EXHIBIT C - SCOPE OF WORK**

The following additional scope of work to be performed (for purposes of this Task Order No. 4, the 'Program' or 'Project') is added to the current work scope set forth in Exhibit C – Scope of Work:

***a. Description of the Change***

Accenture and County leaders will work together to conduct an end-to-end process review of the property tax system that generates:

- A detailed understanding of the current process that identifies the interactions between the various players in the process and how they contribute to and/or inhibit high performance
- A set of clear outcomes that the property tax system is expected to produce for taxpayers and the County, with accompanying metrics and performance targets
- A set of identified opportunities to change the process in ways that optimize the use of County resources (including people, process, technology, and governance) and deliver more efficient and effective performance
- New, innovative ideas to rethink/redesign the customer experience of County taxpayers
- A clear, actionable roadmap for improving the system and the outcomes it delivers over both the near & long term

***b. Description and Scope of the Changes in Accenture's Services***

Accenture will provide the following additional Services under Exhibit C to the Contract to help the County achieve the identified activities outlined in (a) above:

- Mobilize
  - Develop project work plan
  - Confirm key stakeholders (including Steering Committee members)
  - Stand up recurring project governance (consisting of Steering Committee meetings and County project team meetings)
- Phase 1: Conduct End-to-End Process Diagnostic (6 weeks)
  - Validate / define the desired measurable outcomes of the County's property tax process

- Consolidate existing documentation on the County’s current state processes and baseline performance data
- Identify taxpayer requirements of the process through transaction observation and interviews
- Develop detailed operating model/map to show current-state process interactions, taxpayer pain points, data management issues, and technology enablers as well as performance metrics and targets for key elements in the process
- Develop “World on a Page” view to show primary value chain of the process
- Identify and prioritize process areas to be optimized based on their relative benefit and effort, to determine best candidates for significant redesign efforts
- Phase 2: Redesign and Optimize Key Process Area (5 weeks)
  - For process area that is identified for “deep-dive” redesign, validate current detailed process from a County and a Taxpayer / Customer perspective
  - Map specific issues and opportunities to optimize and/or innovate the process to improve process performance and taxpayer experience
  - Develop detailed “quick-hit” and longer term implementation recommendations and plan, as well as the future-state process map with the proposed solutions implemented
- Phase 3: Develop Actionable Roadmap (1 week)
  - Compare and prioritize opportunities identified in Phases 1 and 2 based on impact / value and cost / complexity
  - Identify key future capabilities and resources needed for implementation
  - Understand core dependencies and execution challenges
  - Define the sequence for longer-term transformation of the property tax process
  - Develop high level, long-term roadmap for implementation

**c. Project Organization and Staffing**

The additional work under this Task Order No. 4 will be under the direction of the Chief Financial Officer, or their County authorized and appointed successors, who will serve as Project Manager for the Project. The Accenture Project Team will meet at least once weekly with the County Project Manager to discuss performance, progress, and issues.

The County will staff this Project as follows:

| Role   | Job Description   | Est. Time Commitment |
|--|---|----------------------|
| <b>County Project Sponsor (County Manager)</b>             | <ul style="list-style-type: none"> <li>● Assume overall responsibility and accountability for program effort</li> <li>● Participate in Steering Committee meetings</li> <li>● Serve as primary liaison with Board of Commissioners and other elected officials as needed</li> <li>● Review and comment on final deliverables, as appropriate</li> </ul> | 1-2 hours per week   |
| <b>County Project Leadership (Chief Financial Officer)</b> | <ul style="list-style-type: none"> <li>● Assume overall responsibility for project management and adherence to the project work plan</li> <li>● Lead Steering Committee meetings</li> <li>● Serve as primary liaison between program team and County Executives</li> <li>● Review draft deliverables and approve final deliverables</li> </ul>          | 2-3 hours per week   |

| Role  | Job Description   | Est. Time Commitment                                    |
|---|---|---|
| <b>Property Tax Process Redesign Steering Committee Members</b> | <ul style="list-style-type: none"> <li>• Provide executive sponsorship for initiative</li> <li>• Sign off on performance targets for property tax process</li> <li>• Review and vet current-state process map</li> <li>• Review and prioritize process redesign opportunities</li> </ul>  | 3-4 hours per month (per member)                        |
| <b>Department Liaisons</b>                                      | <ul style="list-style-type: none"> <li>• Coordinate all activities related to the Property Tax Process Redesign initiative's interaction with relevant County departments (including data / information requests, analysis, communications, etc.)</li> <li>• Serve as primary liaison as a process owner for the rest of their department as appropriate</li> <li>• Identify staff to participate in process diagnostic meetings and redesign workshop sessions for specific process areas</li> </ul> | 2-3 hours per week, 1 liaison per impacted department   |
| <b>Process Area Specialists</b>                                 | <ul style="list-style-type: none"> <li>• Participate in diagnostic meetings and attend re-design workshops (e.g. Clerks, Assessors)</li> <li>• Provide expertise as the day to day "user" of the process</li> </ul>   | 2-3 hours per week (Phase 1); ~32 hours total (Phase 2) |
| <b>Subject Matter Advisors, including Tyler Technologies</b>    | <ul style="list-style-type: none"> <li>• Participate, as necessary, in collaboration sessions and Steering Committee meetings</li> <li>• Review progress and draft deliverables at regular intervals and at particular trigger points during the project (e.g., Steering Committee meeting, significant milestone)</li> <li>• Identify issues and actions the integrated teams should take to improve deliverable analysis and quality</li> </ul>   | As needed   |

Accenture will staff this project as follows:

| Role                               | Job Description   | Est. Time Commitment               |
|------------------------------------|---|------------------------------------|
| <b>Accenture Program Executive</b> | <ul style="list-style-type: none"> <li>• Assume overall Accenture responsibility and accountability for program effort</li> <li>• Participate in Project Steering Committee, County Executive Team, and Board of Commissioners meetings as appropriate</li> <li>• Review and comment on final deliverables, as appropriate</li> </ul> | 2-4 hours per week (for 12 weeks)  |
| <b>Accenture Project Advisor</b>   | <ul style="list-style-type: none"> <li>• Lead the development of desired, measurable outcomes of property tax process</li> <li>• Advise on County stakeholder management issues</li> <li>• Facilitate meetings of the Steering Committee</li> </ul>   | 8-10 hours per week (for 12 weeks) |
| <b>Accenture Project Team Lead</b> | <ul style="list-style-type: none"> <li>• Assume overall Accenture responsibility for project management and adherence to the project work plan</li> <li>• Serve as primary point of contact for County Project Leadership</li> <li>• Serve as primary liaison between and across Accenture program</li> </ul>                         | 40 hours per week (for 12 weeks)   |

| Role  | Job Description   | Est. Time Commitment             |
|---|---|----------------------------------|
|   | teams <ul style="list-style-type: none"> <li>• Provide primary facilitation of process mapping and redesign activities</li> <li>• Review draft deliverables</li> </ul>  |                                  |
| <b>Accenture Property Tax Redesign Process Lead</b>       | <ul style="list-style-type: none"> <li>• Drive the development of deliverables and execution of activities associated with the Property Tax Process Redesign initiative – including the inventory and analysis of process steps, materials for Steering Committee meetings, and key deliverables</li> <li>• Participate in Steering Committee meetings</li> </ul> | 40 hours per week (for 12 weeks) |
| <b>Accenture Property Tax Redesign Process Specialist</b> | <ul style="list-style-type: none"> <li>• Work with Lead Facilitator and Process Lead to support execution of activities and development of deliverables</li> <li>• Participate in Steering Committee meetings as appropriate</li> </ul>   | 40 hours per week (for 9 weeks)  |

## **2. EXHIBIT D – DELIVERABLES**

The following Deliverables shall be added to the list of Deliverables in Exhibit D – Deliverables:

| Deliverable / Work Product                        | Description  | Approximate Due Date |
|---|--|----------------------|
| <b>Phase 1: End-to-End Process Diagnostic</b>     | <ul style="list-style-type: none"> <li>• A statement of the desired, measurable outcomes for the property tax process</li> <li>• Inventory of current-state processes and system performance</li> <li>• “World on a Page” view of process interactions</li> <li>• Operating model/map of current-state process and performance metrics and targets</li> <li>• Prioritized list of processes to optimize/innovate.</li> </ul> | Week 6               |
| <b>Phase 2: Deep-Dive Redesign of Key Process</b> | For the selected process area: <ul style="list-style-type: none"> <li>• Detailed current state process map</li> <li>• Quick hit action plan that can be implemented within 45 days</li> <li>• Long term action plan to implement recommended changes</li> <li>• Detailed future state process map of redesign process area</li> </ul>  | Week 11              |
| <b>Phase 3: Roadmap</b>                           | Actionable, integrated roadmap to optimize existing  | Week 12              |



| Deliverable / Work Product | Description   | Approximate Due Date |
|----------------------------|---|----------------------|
|                            | resources while redesigning the taxpayer experience |                      |

The parties will develop mutually agreeable acceptance criteria and procedures that will apply to the Deliverables developed by Accenture hereunder in accordance with Article 21.

The only basis for acceptance of Deliverables will be substantial conformance to such acceptance criteria, in accordance with the acceptance procedures. The only basis for rejection of Deliverables will be the failure of the Deliverables materially to conform to the acceptance criteria, in accordance with the acceptance procedures.

### **3. ASSUMPTIONS**

In addition to any other assumptions described in Contract 15RFP52115B-TR Organizational Strategic Partner:

- Fulton County will identify and secure the commitment of key staff for this project – including the Project Leadership, Steering Committee members, and Department Liaisons. Accenture’s facilitative approach and analysis will depend on appropriate involvement from key staff and stakeholders.
- The composition of the Steering Committee and the definition of approval will be agreed upon by Fulton County and Accenture leadership during the Mobilize phase of the project. Accenture assumes the Steering Committee will be limited to approximately 8-12 people, with meetings occurring approximately every 2-3 weeks for three months.
- Fulton County will provide information, data, and/or documentation requested by Accenture in connection with Accenture’s services under this Agreement. Accenture’s findings and analyses will depend on accurate and complete information, data, and documentation.
- Accenture will work collaboratively with County designated subject matter advisors (SMAs) or organizations – including Tyler Technologies - identified by the County as part of the Property Tax Process Redesign initiative. Any contractual relationship will be directly between these SMAs / organizations and the County; Accenture will not establish a contractual relationship with the SMAs.

### **4. OTHER TERMS AND CONDITIONS**

No additional terms and conditions outside of those described in Contract 15RFP52115B-TR Organizational Strategic Partner.

### **5. EXHIBIT E - COMPENSATION**

The County agrees to compensate Consultant for all services performed under this Agreement in an amount not to exceed \$595,000 in line with the rate card established in Contract 15RFP52115B-TR Organizational Strategic Partner. This original Contract 15RFP52115B-TR 2017 rate card plus five percent annual increase for the roles in this Task Order is provided below for reference.

| <b>Contract 15RFP52115B-TR<br/>Position / Role</b> | <b>Task Order No. 4<br/>Role</b>                   | <b>Task<br/>Order<br/>No. 4<br/>Hours</b> | <b>Contract<br/>15RFP52115B-TR<br/>2018 Rates</b> | <b>Total Task Order<br/>No. 4 Fee</b> |
|--|--|---|---|---------------------------------------|
| Program Executive/Quality Assurance                | Accenture Engagement Lead                          | 48  | \$637   | No Charge                             |
| Project Manager                                    | Accenture Project Advisor                          | 120                                       | \$491   | \$58,920                              |
| Experienced Manager/Team Lead                      | Accenture Project Team Lead                        | 480                                       | \$434   | \$208,320                             |
| Senior Initiative Lead                             | Accenture Property Tax Redesign Process Lead       | 480                                       | \$365   | \$175,200                             |
| Functional/Technical Specialist                    | Accenture Property Tax Redesign Process Specialist | 336                                       | \$318   | \$106,848                             |
| <b>Total Expenses</b>                              |  |   |   | <b>\$45,712</b>                       |
| <b>TOTAL NOT TO EXCEED PRICE</b>                   |  |   |   | <b>\$595,000</b>                      |

Accenture will invoice this amount as follows:

| <b>Date</b>    | <b>Task</b>                           | <b>Cost</b>      |
|----------------|---------------------------------------|------------------|
| March 16, 2018 | Conduct End to End Process Diagnostic | \$318,432        |
| April 20, 2018 | Redesign and Optimize Key Process     | \$232,943        |
| April 27, 2018 | Develop Actionable Roadmap            | \$43,625         |
|                | <b>TOTAL NOT TO EXCEED PRICE</b>      | <b>\$595,000</b> |

Except as modified by this Task Order No. 4 to Form of Contract provided herein, the Contract and all Contract Documents, remains unchanged and in full force and effect.

This Task Order No. 4 to Form of Contract shall not become binding upon either Party and neither Party shall be obligated to perform or incur any liability upon same until this Task Order No. 4 has been executed by Consultant and the County by the Chair of the Commission, attested to by the Clerk to the Commission and delivered to Consultant. In the event of a conflict between any term of the Contract and this Task Order No. 4, the terms of this Task Order No. 4 shall prevail.

IN WITNESS THEREOF, the Parties hereto have caused this Task Order No. 4 to Form of Contract to be executed by their duly authorized representatives as attested and witnessed as of the day and year date first above written.

OWNER:

**FULTON COUNTY, GEORGIA**

CONSULTANT:

**ACCENTURE, LLP**

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Robb Pitts, Commission Chair  
Board of Commissioners

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Robert Friess  
Managing Director

ATTEST:

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Tonya Grier  
Clerk to the Commission (Seal)

APPROVED AS TO FORM:

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Office of the County Attorney

APPROVED AS TO CONTENT:

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Richard "Dick" Anderson  
County Manager