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1 EXECUTIVE SUMMARY

The State of Iowa Department of Administrative Services, Information Technology Enterprise (DAS-ITE) department is pleased to submit this Statement of Work (SOW) to the County Real Estate Electronic Government Advisory Committee (CREEGAC).

The Iowa Real Estate On-Line Project will provide CREEGAC with an Internet web portal linking the websites/web portals of the four offices that serve as custodians of the county real estate data. The four offices: recorders, treasurers, auditors and assessors, hope to increase public access to Iowa real estate information from any web-accessible site.

Currently, several of the four offices have or are in the process of developing websites.

1. County treasurers – The County Treasurers have two distinct websites for housing real estate data, between which all 99 (ninety-nine) counties are represented. The systems were built for taxpayers, banks, credit unions, and mortgage companies to pay real estate taxes electronically and were funded by user fees.
2. County recorders – The County Recorders have a statewide website for indexing, housing and displaying images of recorded real estate documents and for electronic filing of documents. The system was paid by added real estate recording fees.
3. Assessors – The Assessors have a website that could be described as a loose confederation with links to 70 (seventy) assessors' websites, but which house no data. Assessors are in the process of exploring expansion to a statewide system.
4. County auditors – The County Auditors are in the process of developing a website for real estate information. The auditors' association contracted in 2006 with Iowa Interactive Inc. to build a website, with development costs to be repaid by marketing of auditors' data.

The key deliverables of the Iowa Real Estate On-Line project are to provide a system that will contain two main components:

1. web site – this will be the main point of interaction for users and contains all of the presentation logic.
2. web service – this will provide all of the data gathering, comparison and reconciliation logic and will be called from the web site in response to queries submitted by the user.

The web service will be comprised of the following functions:

- a. an application that would enable the public to go to one web portal to search and view information from the four independent websites/web portals;
- b. an application that would allow specific real estate parcel information to be displayed on a 'consolidated' screen that shows data accessed from multiple sources in a manner that is transparent to the user.

- c. an application that would initiate concurrent searches on multiple websites using their existing search engines to retrieve specified data. Because of this approach, the project will neither house data nor contain a search engine.
- d. an application that will have the following features:
 - a. property search – this will allow the user to search for property records from among the four affiliate databases
 - b. consolidated property view – this will allow the user to be able to view information about a single parcel with data from the affiliate databases
 - c. extended links - from the consolidated view, this will allow the user to be able to link out to other websites to view additional information about the selected parcel or perform actions such as paying property taxes
 - d. frequently asked questions (FAQS) – the website will include explanations of the property information and answer common question about discrepancies or limitations of the data
 - e. state and county links – the website will allow users to browse and follow statewide and county specific links to property related information and services
 - f. content administration – the application will allow authorized users from each of the four affiliates to update the FAQS and links content thereby eliminating the need to engage the services of ITE when changes are necessary.

The application will be available 24 hours a day 7 days a week

ITE is extremely appreciative and excited about partnering with the County Real Estate Electronic Government Advisory Committee on the Iowa Real Estate On-Line Project.

2 PROJECT SCOPE

2.1 PROJECT OBJECTIVES

The main objective of the project is to deliver a web-based on-line real estate application that allows public access to Iowa real estate information.

Currently, a member of the public would need to access websites/web portals separately to view information on a particular real estate parcel and/or a recorded real estate document. Implementation of the Iowa Real Estate On-Line project would enable the public to go to one web portal to search and view information from the four independent websites/web portals without reentering parcel information and without knowing that data had been accessed from different sources.

In addition to programming the application, ITE will guide users through the initial rollout and training period to the successful usage of the application in their business processes.

2.2 PROJECT DELIVERABLES

2.2.1 PLANNING PHASE DELIVERABLES

Use case and Process Flows – These documents are a graphical depiction that identifies the users; how each user will use the application; and the steps they will follow to accomplish their goals. This documents acts as the ‘checklist’ for creating the business requirements document.

Requirements document – This document contains a formal, detailed description of the things the system can and cannot do. This document serves as the base for the designs and plans that follows.

Data model – This document defines the structure of the data tables and the relationships between the tables.

Detailed design – This document identifies the set of screens, their layouts and behaviors when interacting with the user.

Project Plan – This document shows the detailed plan for creating and delivering the system. The individual tasks detail what work is to be performed; who will be performing the work identified by the task; the number of hours assigned to each task and the starting and ending dates of each task.

Statement of Work – This document serves as the contract for the delivery of the application between the DAS-ITE and CREEGAC areas.

2.2.2 EXECUTION PHASE DELIVERABLES

Source code – These are underlying instructions that comprise the software. This includes any third-party components and libraries that are needed by the system.

Release notes – For each version of the software sent to CREEGAC, we will provide a list of notes on the issues fixed within that ‘build’.

2.3 IOWACCESS FUNDING REQUIREMENTS

For projects funded from the IOWAccess fund, certain requirements must be met in order to qualify for these funds:

- The customer's obligation for development and first year hosting costs is limited to those monies allocated from the IOWAccess fund for this project. However, DAS-ITE is under no obligation to provide uncompensated work in order to complete the project. The first year is to begin upon the earlier of the following two events: (1) the completion of the project and signing of the updated SLA and/or the Customer Acceptance Form, or (2) the project is passed into production support. The first year may also begin at the discretion of the COO of ITE.
- The application must provide a service to the citizens of the State of Iowa.
- The funds allocated to the project will cover the total cost of implementation of the project; including the design and development, the first year's hosting fees, networking costs, etc. This work will be billed directly to the IOWAccess Revolving Fund.
- The development must be done primarily by or through the Information Technology Enterprise.
- The organization owning the application must provide the funding for the second and any subsequent, year's hosting and maintenance out of funds other than those provided through IOWAccess.
- Hours expended by or through ITE will be limited to the extent that allocated monies are available to pay for those hours.

3 PROJECT PROPOSAL

3.1 PROPOSED SOLUTION

DAS-ITE will deliver the Iowa Real Estate On-Line application using the PHP framework which includes pre-built functionality for displaying, editing and reporting of data. Using the ITE framework will also speed development by re-using many pre-built code modules and off-the-shelf components.

3.2 PROJECT-LEVEL DEPENDENCIES

The Iowa Real Estate On-Line application will be dependent upon data from each of the following sources:

1. Iowa County Recordors Association
2. Iowa State Association of Assessors
3. Iowa State Association of County Auditors
4. Iowa State County Treasurer’s Association
5. Iowa Tax and Tags

3.3 ASSUMPTIONS

The following general assumptions were made for the delivery of this project:

- CREEGAC or its successor will be responsible for the acceptance of this software. This includes development of any test plan, executing tests, creating bug reports, validating fixes and closing bug reports. DAS-ITE will provide assistance with these tasks upon request, but final responsibility for the code that goes to the production server will rest with DAS-ITE.
- DAS-ITE and CREEGAC will both be able to commit and deliver resources as outlined in the project plan. This includes availability of CREEGAC stakeholders and subject matter experts (SME) to resolve issues and make decisions during construction, as well as being available to test the software before deployment to production. The plan also calls for DAS-ITE project team members to be available for support during and immediately after the application is launched to the public.

3.4 RISK ASSESSMENT

Risk Description	Probability and Impact	Response Strategy
A funding request by one or more of the affiliates is not approved from IOWAccess	High / High	ITE does not have firm commitments from each of the affiliates that they will continue their involvement in the project should their funding request be denied by IOWAccess. The alternative will be to ask the State

		Legislature for funds.
ITE does not have a firm commitment that each of the affiliates will pay the costs of the hosting fees after the first year.	High / High	<p>CREEGAC has developed and distributed to the county affiliate members an inter-affiliate agreement that, among other things, requires each affiliate to pay one-fourth of the expenses to operate and maintain the web portal annually. CREEGAC members hope and expect to have an agreement signed during or shortly after the March 2007 meetings of the Iowa State Association of Counties.</p> <p>Additionally, CREEGAC has committed to an educational initiative to provide additional information (including discussions about the inter-affiliate agreement) at scheduled state wide meetings.</p> <p>The alternative will be to ask the State Legislature for funds to pay for hosting fees.</p>
One or more of the affiliates is not able to deliver their data file(s) within the scheduled timeframe.	High / High	<p>ITE does not have firm commitments from each of the affiliates and their IT representatives that they will deliver their data within the scheduled timeframes.</p> <p>ITE will work with the project sponsor and coordinator to verify firm commitments from the affiliates and their IT representatives are obtained.</p>
Test plan	Medium / Medium	A test plan must be developed utilizing personnel from ITE and each of the affiliates.
Testing	Medium / Medium	Testing of the finished software will take longer than scheduled.

3.5 PROJECT SCHEDULE

Milestones

Plan Date

*Execution Phase Start Date	April 2, 2007
Customer Acceptance testing begins	July 16, 2007
Customer Acceptance testing complete	August 13, 2007
Customer Acceptance Sign-off	September 10, 2007
Service Level Agreement (SLA) Signatures	September 14, 2007
Production Rollout	September 17, 2007
Project Completion	September 21, 2007

*The Execution Phase Start Date is dependent upon the receipt of a signed SOW no later than March 31, 2007. No work will be done in the Execution Phase without receipt of the signed document.

3.6 PROJECT BUDGET

CATEGORY	ESTIMATED COSTS
*Iowa State Association of Assessors (Assessors Data)	\$20,000.00
**Iowa State Association of County Auditors (Auditors Data)	\$25,000.00
Application Development (DAS-ITE)	\$60,000.00
Unit Test (DAS-ITE)	\$12,500.00
Testing (Bug Fixes) (DAS-ITE)	\$ 5,500.00
Training & Documentation (DAS-ITE)	\$ 2,500.00
Anticipated Expenses for Educational Meetings	\$10,000.00
Project Management – Execution (DAS-ITE)	\$10,500.00
Total	\$146,000.00

* Funds in the amount of \$15,400 have been expended by the Assessors' organization to date on their website. They have budgeted matching funds to complete the Assessor website and have it compatible with CREEGAC requirements. It is estimated it will take an additional \$40,000 to complete.

** County auditors are asking for matching funds of \$25,000 from the IOWAccess Advisory Council. The purpose is to defray part of the initial out-of-pocket costs to

implement an auditors' website, and thereby to encourage participation from the majority of county auditors in the state.

Unlike treasurers and recorders, county auditors do not have a regular source of revenue such as daily transactions. The auditors' affiliate organization has therefore contracted with Iowa Interactive Inc. to build and maintain an Internet website at no cost to county auditors.

For the system to work, however, each auditor will need to set up a daily process to export a set of data to Iowa Interactive. Ninety-two of the 99 auditors use one of two major software providers for real estate tax administration, and the other seven each use in-house systems. The two major software providers have set fees ranging from \$500 to \$960 per county to set up an automated daily export of data to Iowa Interactive. It is these fees for which the county auditors are asking to use the \$25,000 matching funds, as follows:

- Each auditor will be reimbursed for one-half of actual out-of-pocket costs.
- The maximum reimbursement per county is capped at \$500.
- Each auditor will be responsible for the ongoing costs for exporting data.

Participation of county auditors is critical to the overall success of the Iowa Real Estate On-Line project. While county auditors may not be associated with the real estate tax administration process by much of the general public, they nonetheless have an important behind-the-scenes role in that process. Most importantly to the operations of a real estate website, they provide a vital bridge to integrate and link the county recorders' and treasurers' data.

3.7 PROJECT TEAM

Project Sponsor	Kenneth Kline
Project Coordinator	Dave Ellis
Project Manager	Deb McDaniel
Technical Team Lead	Michael Tutty
Programmer	Martin O'Keefe

4 PROJECT METHOD

4.1 CHANGE CONTROL PROCESS

DAS-ITE believes that to deliver a successful project, effective project control procedures must be followed. DAS-ITE will use the change control process requiring sign-off by CREEGAC Project Sponsor, Kenneth Kline, and ITE Project Manager, Deb McDaniel for all changes. Changes may impact requirements, resources, schedules and costs

4.2 COMMUNICATION PLAN

4.2.1 STATUS REPORT DETAIL

A weekly status report will be submitted. An electronic copy is to be stored in the shared project folder. The weekly status report will identify the tasks and hours spent in the previous week and the projected tasks for the coming week. In addition, the Status Report will provide information on any issues for the project and steps being taken to resolve them.

4.2.2 PROJECT MEETINGS

The ITE Project Manager will schedule and hold Project Team meetings, which will include representatives from both ITE and CREEGAC staff, on a periodic or event-driven basis, depending on the needs of the project team.

ITE will also hold internal team meetings for ITE staff to handle technical and project-related issues. These meetings may be held on a periodic or event-driven basis, depending on the needs of the project team.

4.3 ROLES AND RESPONSIBILITIES

Customer Project Sponsor

Name: Kenneth Kline

Phone: 641-421-3034

ITE Manager

Name: Mark Uhrin

Phone: 515-281-5518

ITE Project Manager

Name: Deb McDaniel

Phone: 515-281-4449

5 BILLING

5.1 BILLING METHOD AND CYCLE

Automated Funds Transfer All accrued charges will be billed through ITE's standard billing process – the PACE Billing System, based on time and materials.

State agencies on the Integrated Information for Iowa system (I/3) agree to process payments to ITE under the general annual certification done by their agency for all costs included in this SLA. The general provision of the certification agreement between the agency and ITE include coverage for these items.

General coverage includes: Agency authorizes monthly transfer of payment in I/3 from them to ITE for billed amounts for services to the agency. ITE agrees to present a timely invoice, provide notice of transfer at least 4 working days from transfer date and to ensure error resolution regardless of transfer timing.

5.2 BILLING RATES

The fiscal and time estimates provided in this document are intended for planning purposes only. All work is to be done on a time and materials basis, using ITE published rates.

Any services provided by ITE as described in this document will be billed at ITE's rate in effect at the time of service delivery. Questions about ITE's rates, billed services, or related descriptions for specific billing line items may be directed to the Finance Division (Business Office) of DAS.

ITE's billing rates may be adjusted periodically and are published on the following Intranet web site:

(<http://das.ite.iowa.gov/rates/index.html>).

This site includes a list of services, descriptions for the services provided by ITE, as well as the current rates for these services. The rate for the staff working on this project at the time of the document, February 20, 2007 is \$84.59 for ITS 4 & 5 positions.

5.3 BILLING CONTACTS

DAS / ITE Billing Contact

Julia Heil

515-281-6334

Customer Billing Contact

Kenneth Kline

641-421-3034

6 TERMS AND TERMINATION

Any and all changes made under this agreement will be handled in the Change Control Process.

6.1 TERMINATION DUE TO LACK OF FUNDS OR CHANGE IN LAW

Either party shall have the right to terminate this SLA without penalty by giving sixty (60) days' written notice to the other as a result of any of the following:

- Adequate funds are not appropriated or granted to allow either party to operate as required and to fulfill its obligations under this SOW;
- Funds are de-appropriated, not allocated or if funds needed by either party, at either Party's sole discretion, are deemed insufficient for any reason;
- Either party authorization to operate is withdrawn or there is a material alteration in the programs administered by either Party;
- Either Party's duties are substantially modified.

6.2 TERMINATION DUE TO NON-APPROPRIATION

Notwithstanding any other provision of this SOW, if funds anticipated for the continued fulfillment of the SOW are, at any time, not forthcoming or are insufficient, either through the failure of the State to appropriate funds or funding from a federal funding source is reduced or discontinued for any reason, or through discontinuance or material alteration of the program for which funds were provided, CREEGAC shall give the ITE written notice as soon as practical documenting the lack of funding, discontinuance or program alteration. Unless otherwise agreed to by the parties, the Agreement shall terminate on the last day of the fiscal year for which appropriations were available. However, in the event that an appropriation to cover the cost of this SOW becomes available within sixty (60) days subsequent to termination under this section, the ITE agrees to re-enter the Agreement with ITE under the same provisions, terms and conditions as the original SOW.

6.3 TERMINATION

CREEGAC may terminate this Agreement, without penalty or incurring further obligation, upon one hundred twenty (120) days written notice. ITE may terminate this Agreement, without penalty or incurring further obligation, upon one hundred twenty (120) days written notice. ITE shall be entitled to compensation for services provided up to and including the termination date.

7 CUSTOMER ACCEPTANCE

Selecting the first acceptance line below will signify that CREEGAC wishes to proceed with the work as defined in this document.

- I accept this estimate and would like to proceed into the Execution Phase.
 - This Project will continue under the IOWAccess Funding Requirements described in section 2.3 of this document.
 - This Project will not use IOWAccess Funds and the accounting code this project is to be billed to is _____.

- I accept this statement of work and do not want to proceed.

KENNETH KLINE

JOHN P. GILLISPIE

Date

Date