



Town of Newmarket
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New Property Tax System: Implementation & Communication Plan Information Report to Council

Report Number: 2019-28

Department(s): Financial Services, Information Technology, Corporate Communications
& Corporate Customer Service

Author(s): Grace L. Marsh, Robin Macken, Amber Chard, Jamie Boyle

Date: December 11, 2019

In accordance with the Procedure By-law, any member of Council may make a request to the Town Clerk that this Report be placed on an upcoming Committee of the Whole agenda for discussion.

Executive Summary

See below.

Purpose

The purpose of this report is to provide Council with the current status of the ongoing implementation of the new property tax system referred to as TXM, and to provide notice of pending communication to approximately 6,500 taxpayers that are currently enrolled in any of the monthly pre-authorized tax payment plans.

Background

On May 7th 2018, Council approved the awarding of a single source contract for the purchase and implementation of a new property tax system known as Tax Manager (TXM), see Attachment 1.

The implementation of TXM has proceeded according to schedule with the system provider, the City of Mississauga, preparing regular implementation plan updates. The most recent update shows the project in an overall “Good” status.

Discussion

The next steps in the project require a communication to approximately 6,500 residents that are currently enrolled in any of the Town’s monthly pre-authorized tax payment plans.

In previous years, monthly payments for property taxes have started in January and continued to the final withdrawal in October. Due to TXM going live in January 2020, there is insufficient time to provide taxpayers with proper notification of a January withdrawal amount; therefore, the plans have been altered to run from February to November for 2020 and beyond.

The project team has worked directly with Communications and Customer Service to draft the communication plan and the letter for the affected property owners. Please see Attachment #3.

Conclusion

It is anticipated this will be seen as a positive change by the ratepayers due to January traditionally being a month with other financial priorities. The communications plan includes measurements for the number of calls and feedback review.

Business Plan and Strategic Plan Linkages

This report supports the Community vision of being Well-Planned & Connected.

Consultation

Consultation has taken place with the City of Mississauga TXM team, Newmarket’s TXM team, Corporate Communications, Corporate Customer Service and Property Tax & Assessment staff.

Human Resource Considerations

None.

Budget Impact

There will be a short delay of approximately 1 month in the receipt of the first monthly payment, slightly affecting cash flow. The Director of Finance has indicated that this would not have a significant impact.

Attachments

1. Council Extract May 7, 2018
2. Newmarket TXM Implementation Report as at November 22, 2019
3. Communications Plan

Contact

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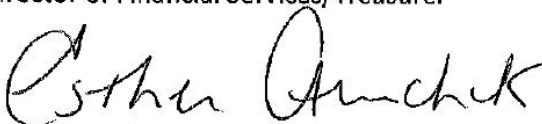
Robin Macken, Ext. 2315

Jamie Boyle, Ext. 2254

Approval



Mike Mayes, CPA, CGA, DPA
Director of Financial Services/Treasurer



Esther Armchuk, LL.B
Commissioner, Corporate Services



Town of Newmarket
Council Extract

Extract from the Minutes of the Council Meeting held on May 7, 2018.

7. Committee of the Whole Meeting Minutes of April 30, 2018

Moved by: Councillor Kerwin
Seconded by: Councillor Kwapis

(6) Award of Single Source Contract

1. That the report entitled Procurement Services, IT & Financial Services 2018-07, regarding the awarding of a single source contract for property tax software, known as Tax Manager (TXM) be received; and,
2. That Council approve a single source/partnership process to award a contract for a new property tax system to the Corporation of the City of Mississauga, on terms satisfactory to the Treasurer, the Manager of Procurement Services and the A/Director of IT.

In Favour: Mayor Van Bynen, Deputy Mayor & Regional Councillor Taylor, Councillor Vegh, Councillor Kerwin, Councillor Twinney, Councillor Hempen, Councillor Kwapis, Councillor Broome, Councillor Bisanz

Opposed: None
(9 in favour, 0 opposed)

Carried

Newmarket TXM Implementation

Project #: 17546

Date Prepared: 2019/11/22

Prepared by: Carm Cyrus

Overall



Project Purpose: To implement the TXM Tax Manager property management system in the Town of Newmarket.

This Period

Progress for the Period – ending November 22, 2019

Deliverables

- ✓ Newmarket OCR line changes tested successfully
- ✓ Milestone 4 – on Target
- ✓ Milestone 5 – Training Initiated – UAT setup Dec 3rd – delayed

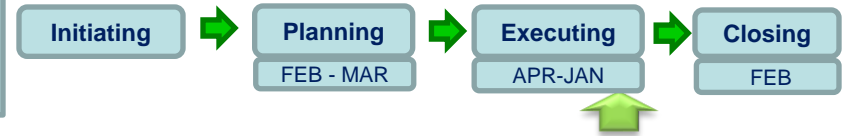
- Newmarket Onsite Meeting Nov 25th – DesTech Printer setup
Module 2 – Client Serv/C&AM/Payment/Adjust Part 1 - Training

Next Period

Action Plan for Next Period – ending December 31, 2019

Deliverables

- Module Training to Continue
- UAT environment and acceptance - Dec 3 - 16
- Remote Connectivity – follow-up continuing
- Ongoing weekly touchpoint meetings with Project Manager



Issues/Risks/Decisions Required/Comments

Milestone 5 – Environment for UAT to be set up by Dec 3rd – revised – Resourcing overlap

Newmarket Interfaces – GL, Payment Load, POS - Out of Scope

- Newmarket is aware this is outside the scope of the project. Newmarket will assume responsibility for this functionality.

Remote Connectivity – ongoing for future support – followup November

- *Comment:* ScreenConnect is the application used for remote access to Newmarket. A request for change to the firewall rule has been approved by security. This remote access will be the method used for ongoing support according to the Support Agreement.

Upcoming Key Milestones

	Milestone	Plan Start Date	Plan Completion Date	Status
4	Interfaces, Loads and Customizations	Jul 15	Nov 28	G
5	Training and UAT	Oct 31	Dec 6	Y
6	Pre - GO LIVE activities	Oct 31	Jan 10	G
	GO LIVE Weekend	Jan 10	Jan 11	G
	Post-Implementation Support	Jan 12	Jan 20	G

Background/ Overview:

The Town of Newmarket's Finance department will be implementing a new property tax system (software) for 2020. This new software was purchased from the City of Mississauga and is an in-house solution built by Mississauga.

The new tax system will allow for future online tax billing and will also help streamline the process and make it more efficient for Town staff. With the updated system, the tax bill will also have a new look in the New Year.

Residents that are currently enrolled in the monthly Pre-authorized Payment (PAP) previously had their property tax installments withdrawn from January to October. Due to the functionality of the new property tax system (taxes cannot be calculated until January of the current year), the Town will now withdraw the tax payments from February to November (on either the 15th of the month or the last business day of the month depending on which plan the resident/business is registered in). The payment schedule will remain from February to November for all future years.

The launch date for the property tax software is scheduled for **January 13, 2020**.

Objective:

- To inform monthly PAP members that their payment dates will now be from February to November, beginning in 2020 and continuing in future years.
- To inform all Newmarket residents that their tax bills will have an updated look in 2020.

Business Case/ Strategic Link:

This is consistent with the Town's commitment to be well managed.

Key Audience:

- Monthly Pre-authorized Payment Plan members (residents who are currently part of the PAP withdrawal plan on the 15th or the last business day of the month) – approximately 6,500 residents and 170 businesses
- Town of Newmarket Council and staff
- All Newmarket residents/businesses

Tactics:

EXTERNAL

Letter to all PAP members	December 2019	Communications to draft Finance/IT to send via Canada Post
Town Page ads – new year, new look for your tax bill, direct PAP participants to website for more information	January 2, 9 2020	Communications/approved by Finance
Town website (updates under PAP and news and notices on the home page)	January 2020	Communications/approved by Finance
Social media posts (Facebook, Twitter)	January 2020	Communications/approved by Finance
Newmarket Now newsletter	January 2020	Communications/approved by Finance

INTERNAL

Information report to Council	December 2019	Finance
Town Central article	January 2020	Finance
NewsMarket article	January 2020	Finance

Evaluation:

- Number of Customer Service calls (Less than 5 per cent of participant calls from mid-December 2019 to mid-February 2020)
- Feedback from monthly PAP participants (collected through Customer Service and Finance)