

Technology for the Future (Rates and Property)

**Shared service with Indigo Shire Council
Funded with assistance from Local Government Victoria**

April 2018



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Request for Expressions of Interest

Seeking submissions for consultancy services for the completion of a study and report into a contemporary rates and property system for Towong and Indigo Shire Councils.

Expression of Interest Closing Date: 7 May 2018 5.00pm

Any Expression of Interest (EOI) received after the specified closing time and date shall not be considered.

A response to this Brief must include:

- a. A statement of the Consultant's understanding of the brief
- b. A description of tasks to be completed
- c. A quotation of fees, with applicable payment schedule
- d. An estimate of expenses necessary to complete the assignment, in addition to fees
- e. A project timetable with milestones
- f. A statement of the Consultant's expertise relevant to this project
- g. A resume of all staff and other consultants to be used in the project including qualifications and experience in similar projects
- h. Previous completion of similar projects and the phone numbers and details of referees
- i. Details of appropriate professional indemnity and personal liability insurances to a minimum of \$10m held by the organisation
- j. Declaration of any conflict of interest and how this will be managed

Enquiries about this Expression of Interest should be directed to:

Jo Shannon
Towong Shire Council
Director Community and Corporate Services
jo.shannon@towong.vic.gov.au
(02) 6071 5100

How to lodge an Expression of Interest:

By hand:

Towong Shire Council
32 Towong St
Tallangatta

By post:

Rates and Property EOI
Director Community and Corporate Services
Towong Shire Council
PO Box 55
Tallangatta VIC 3700

Electronic Lodgement:

Expressions of Interest may be emailed to: info@towong.vic.gov.au

Indicative selection timetable	Date
Invite to submit EOI	16 April 2018
Closing date for submissions	5.00pm 7 May 2018
EOI shortlisting and interviews	18 May 2018
Notification to EOI submitters	23 May 2018
Contract commencement	23 May 2018

Selection Criteria

All submissions will be assessed against the following criteria:

Criteria	Weighting
Price	15%
Demonstrated Understanding of the Project	35%
Demonstrated previous performance with projects of similar nature	40%
Methodology	10%

Goods and Services Tax

All Expression of Interest amounts shall be quoted as exclusive of GST. The successful EOI submitter must be registered for GST and shall provide to the Council valid tax invoices identifying the GST payable on each component of the supply items.

Disclaimer

While the information contained in this brief has been written with all due care, Towong Shire Council does not warrant or represent that the information is free from errors or emissions. The information is made available on the understanding that Towong Shire Council, and its employees and agents shall have no liability for any loss, damage, cost or expense incurred or arising from any person using or relying on the information, in the form of an error, emission or misrepresentation.

Project background

Towong Shire Council and Indigo Shire Council have partnered to deliver a shared rates and property service across the two Shires since 2013. The two Councils have combined their rates resources and established a rates team that operates from Towong's administration office in Tallangatta. This has resulted in a number of significant gains for both Councils including:

- Reducing the cost per rates assessment notice
- Increasing the level of service provided to ratepayers
- Increasing the resilience of the rates service by operating with a team rather than an individual Council approach (total FTE 1.73)
- Providing greater team support through adoption of a collaborative approach
- Improving regulatory compliance

The rates and property service currently uses Lynx Rating Manager software to manage all aspects of local government property management (including rates notices and assessments, rates debtor management, animal registrations, etc.). Over an extended period of time there has been very limited advancement on software improvements.

A working group has been established to seek a more contemporary rates and property system that can meet the needs of Council and community members into the future.

Funding has been secured from Local Government Victoria to develop a business case and a project plan for implementing a contemporary rates and property solution.

Project details

1. Project objective

The key objective of this proposal is to move both Towong and Indigo Shire Councils to a more modern, efficient, contemporary rating platform that enables property owners to transact with Council utilising a range of mediums, providing a better customer experience and a more efficient service for both Councils. This will provide the basis for expanding these efficiencies into other council services such as animal registrations, planning, communication and community engagement.

The current software has been identified as the greatest impediment to expanding our proven Rates and property collaboration to other councils. This proposal would enable existing collaborative efforts to be extended to include other willing partners.

By focusing on a collaborative procurement approach to an existing shared service, strengthening the existing shared service and providing opportunity to expand the shared service, the proposal directly aligns with the funding programs objectives to explore shared services and/or collaborative procurement opportunities that will enhance financial sustainability or improve service outcomes.

2. Project outputs

The key output of this project is a fully-costed business case for a contemporary rates and property system for Towong and Indigo Shire Councils. The business case would include results from the following activities:

- Define business requirements for a shared rates and property service
- Define system technical requirements for both Councils
- Conduct a risk assessment over the Councils' security exposure and take steps to mitigate those immediate risks
- Investigate service improvements that could be addressed through the provision of appropriate software solutions, including consideration of:
 - Electronic communications
 - Self-service portals
 - Direct debit capability
 - Ability to recover merchant fees
 - Debt management
 - Reporting for a range of needs
- Analyse and evaluate available options and a recommendation on a solution that can meet Councils' needs, now and into the future
- Develop a project plan for implementation
- Develop key performance measures to identify if the project is a success.

3. Stakeholders

The primary stakeholders who will need to be included in consultation activities include:

- Council officers from Indigo Shire Council
- Council officers from Towong Shire Council

4. Timeframe and Milestones

Milestone	Date
Appointment of consultant	End May 2018
Confirm Project Plan	Early June 2018
Consultation, analysis and draft Business Case	Early July 2018
Presentation and consideration of Draft Business Case	Early August 2018
Finalisation of Business Case	Late August 2018

Project conditions

5. Project management

The Project will be supervised by the Rates and Property Working Group. Day to day contact will be through the Director Community and Corporate Services at Towong Shire Council, unless otherwise advised.

6. Key performance measures

The Project's key performance measures will be:

- Delivery of project milestone deliverables:
 - On time
 - In full
 - To the satisfaction of the Working Group

- Delivery of regular progress reports to the Project Manager, in full and on time according to the agreed reporting schedule and format.

7. Conditions of engagement

Conditions of engagement include:

- a. Any variation to this brief will be agreed between the Working Group and the Consultant subsequent to engagement or if changes are required during the project, prior to such work being undertaken by the Consultant
- b. The report and all background documentation will be the property of all collaborating Councils and will remain strictly confidential until released by each Council
- c. The Consultant will accept an offer of engagement by means of signing an agreement with Towong Shire Council to provide professional services in accordance with this Brief and the agreed fee
- d. Towong Shire Council (on behalf of the Working Group) reserves the right to dismiss the Consultant if there is a failure to meet timelines or failure to undertake work (or portions of it) specified and agreed to on appointment

8. Intellectual property and copyright

At the completion of this project, the Consultant must deliver to Towong Shire Council all contract material brought into existence as part of, or for the purposes of, performing the consulting service.

This material must include, but not be limited to, reports, documents, maps, information and data stored by any means. The Consultant, its employees or agents must not disclose or make public any information or material acquired or produced in connection with or by the performance of the consulting service without prior approval in writing of Towong Shire Council.