

# **Application Software Systems Portfolio Review and Plan**

**Town of Cohasset, Massachusetts**

**EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT**

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## **PROJECT SCOPE AND METHODOLOGY**

At the request of Town of Cohasset (Town), the Collins Center for Public Management (the Center) was requested to perform a review of the application software systems currently in place and develop a plan going forward. The review does not include the public safety and school district systems and town systems in the process of implementation (e.g. electronic document management and permitting/licensing).

The engagement involved several tasks:

- a. Review of background material;
- b. Interviews of key staff;
- d. Development of the review and plan; and
- e. Presentation and discussion of findings and recommendations.

In order to meet Cohasset's needs and expectations, the review combines both an informed view of the Town's functional requirements and an understanding of the various options which Cohasset ought to be considering in developing its strategy for application software systems.

Specifically, the IT Review includes:

- Findings and recommendations;
- Articulation of a strategy for Cohasset to take as part of its effort to enhance the deployment of application software systems as a critical function in the delivery of Town services;
- Priorities among actions which Cohasset ought to take with respect to the objectives consistent with Cohasset's vision or other circumstances; and
- Short-range and longer-term actions that Cohasset should take to strengthen its software systems portfolio.

### **Methodology**

The Center's research was guided by the following principles:

- Understand that every municipality and district is unique and reflect that uniqueness in the recommendations;
- Obtain diverse points of view on all issues;
- Focus on the current situation and future opportunities, and refrain from passing judgments on past occurrences; and
- Make recommendations that are pragmatic and adaptable.

## **ABOUT THE COLLINS CENTER**

Established in July 2008, the Edward J. Collins, Jr. Center for Public Management is dedicated to improving efficiency, effectiveness, governance, and accountability at all levels of government, with a particular focus on state and local government. The Center's aim is to enable public entities to provide high quality services to the people they serve on a sustainable basis. The Center is located within the John W. McCormack Graduate School of Policy and Global Studies at the University of Massachusetts Boston. For more information, please visit the Center's website: <http://www.umb.edu/cpm>

## **CURRENT APPLICATION SOFTWARE IN PLACE**

### **Locally Hosted**

- SoftRight Financial Management (enterprise financial/business system for the Town and School district), Accela, Inc.
- LaserFiche, Electronic Document Management Software.
- Patriot Properties, (Computer Assisted Mass Appraisal (CAMA) system).
- CDS, Betterments
- COATS, CDS for COA Transportation
- PetroVend, for gasoline/diesel fuel use monitoring.

### **Cloud Based/Software as a Service (SAS)**

- RRC (Real Estate Research), Assessing.
- Full Circle, e-permitting software
- LiData, application for boards and commissions appointment tracking.
- FMLA Manager
- AIRBO, HR policy employee acknowledgement system.
- GetHired, onboarding system.
- People Forms, PeopleGIS.
- MySeniorCenter Software, (Senior Center Management System).
- SchoolDude, (Work Order System for Facilities), Dude Solutions, Inc.
- TimeclockMTS, time and attendance for the Recreation Department.

## **BACKGROUND/MAJOR INITIATIVES UNDERWAY**

The Town has supported and experienced significant improvement in its Information Technology (IT) position over the past four years with a new IT organization supporting both Town and District and substantial infrastructure improvements.

Two major application software initiatives are underway at present.

A permitting/licensing system with the Building Department currently online and plans to extend it across all regulatory departments.

A long-term overall strategy (with defined stages) to implement a town-wide electronic document management system (EDM). Goals for this initiative are:

- Reduce paper document use and related physical storage.
- Serve as a central document repository for the Town.
- Adhere to retention rules.
- Support electronic workflow.
- Replace paper documents with e-forms.
- Link (integrate with) all existing application systems. Rather than implementing a specific EDM tied to one application (typically the financial system) or a system that is standalone and not integrated with application systems; the Town has sought a common solution that will potentially integrate (via API's) with all town application systems. The Town's CIO is working with other municipalities which are pursuing the same objective to share knowledge and experience.

Progress to-date:

- 131 Town-wide processes and related documents were identified and flowcharted.
- Retention rules defined.
- Microfiche of static, older documents has started.

# **KEY FINDINGS, SYSTEM GAPS AND RECOMMENDATIONS**

## **Key Finding Number 1: Financial Information System**

An obstacle facing the EDM strategic initiative is the current financial software which uses an older database "FoxPro" which is incompatible with the EDM solution.

For the most part end users felt the system works but felt the original implementation was not done properly and with limited training. In addition to the above noted EDM database incompatibility, other concerns/issues/desires emerged during our review:

- Several department heads expressed concerns about the user friendliness of the product, "Cumbersome to use", "Too many steps to accomplish a task".
- Desire for better reporting tools and multi-year reporting. There is no end user reporting facility (standard reports are available with selection criteria; many reporting needs are satisfied by downloading data to Excel spreadsheets).
- The Purchase Order workflow process is not pro-active, one must sort through a queue of PO's awaiting approval to determine which ones are awaiting a specific staff member's approval. Several departments create their own paper purchase orders rather than using the system.
- Desire for an integrated utility billing solution; Softright (SR) has a utility billing module but end user reluctance to adopt due to concerns about SR as a long-term solution.
- Concerns about SR when "links" are dropped.
- The School District desires a position control facility.
- Concerns expressed about the SR system not verifying account numbers.
- A question as to why re-programming is required with each tax billing cycle!
- Desire for a "Dashboard" type facility for the Town Manager.
- Desire for the "Open Checkbook" facility, a question whether compatible with the SR system.
- Overall concerns about the long-term future of SR product.

## **Recommendation**

The financial system is a key central application in terms of document reference. If a solution can't be found to support integration with the EDM product, consideration should be given to replacing the current financial system with one that uses a compatible database.

In light of both the EDM initiative/strategy and above expressed needs/desires, it appears timely to review the current financial system's ability to serve the long-term needs of the town and consider alternatives.



### **Key Finding Number 2: Time and Attendance Gathering Process**

There are opportunities for process improvements as time and attendance and other compensation data are directly posted to the payroll system, captured on paper, posted to Excel spreadsheets, re-entered into other systems and forwarded to Treasurers for entry into the payroll system.

The Recreation Department uses a time and attendance system (TimeclockMTS) to record hours from which a report is printed (during the summer camp season upwards of 110 staff are employed) for entry into an Excel spreadsheet then forwarded to Treasurers.

The District uses the Harper's Payroll System's time clock application for custodians and is planning to extend to bus drivers.

### **Recommendation**

The Center recommends that the Town (and District) consider replacing the current time reporting processes with a Time and Labor Management System (Labor collection system) to allow direct, timely, straight-forward electronic capture of time worked and maintenance of accrual information. Gathering time directly from employees electronically can more likely assure accurate time reporting and payroll expense. These systems place responsibility for time submission on the employee with an act to indicate their presence at work. Extending the current solution used by the District to all Town Departments should be a consideration.

In the short term, the Center recommends the Town explore the feasibility of file interfaces (imports/export) from the Public Safety IMC and TimeclockMTS systems to the Payroll system.

### **Key Finding Number 3: Geographical Information Systems (GIS)**

GIS technology is at an early and limited stage of adoption in Cohasset. A staff member's own personal copy of the GIS software (ARC/GIS) provides the base platform for the town. In addition, the town uses the People Forms/People GIS product.

As GIS technology functions are considered in a variety of departments and citizen demand for related information increases, the Center is concerned that without a planned, coordinated approach the result will not deliver full benefits from this technology.

### **Recommendation**

The town should purchase the base GIS software ARC/GIS.

The Center also recommends creation of a GIS Steering Committee to include representation of potential use departments including DPW/Water, Assessors, Harbormaster, Police, Fire, Planning/Zoning/Building and Conservation. The Committee's role should include considering issues such as application, access, control and ownership of geographical information and outputs. The IT Department should play a significant role in the future direction/planning and oversight of this important technology and its application.

The Town of Falmouth has made extensive use of GIS and may serve as an example.

**Key Finding Number 4: System Applications with the Potential for New Software Solutions.**

The Department of Public Works would benefit from a DPW-focused asset management and work order system, with tablet access. The Facilities Department uses the “SchoolDude” system to generate work orders.

The Human Resources Department desires enhanced tools such as Applicant, FMLA and Grievance tracking facilities. The department recently added FMLA Manager to satisfy FMLA needs.

**Recommendation**

The DPW Department should consider purchase of an asset management and work order (WO) software system (s).

The HR Department should consider additional modules within the current payroll system or other software to potentially satisfy the above needs.

**Key Finding Number 5: Procurement**

Paper purchase orders are created in some departments, while the District uses the SoftRight financial system’s purchasing facilities with electronic approval of purchase requisitions/orders.

**Recommendation**

The Center recommends the Town consider use of the purchasing facilities inherent in the SoftRight financial system (with consideration of Recommendation 1) to enter and approve requisitions/purchase orders electronically and generate standard purchase orders that are serially numbered across all Town departments. Funds can be encumbered once purchase orders are approved and regular budget reporting could reflect encumbered expenses, reducing the need for departmental filing/bookkeeping activities.

Electronic workflow used to approve requisitions by supervisory personnel could be subject to ranges of approval by dollar amount. Board member sign-off of certain expenditures may limit the electronic solution in some instances.

If replacement of the financial system is considered, a full review of procurement needs should be done for inclusion in the requirements for a replacement system and in concert with the EDM solution.

**Key Finding Number 6: Council on Aging Systems**

The department uses a locally sourced system (COATS) for transportation scheduling, there are concerns about long term support from a small vendor. The Director felt the MySeniorCenter transportation solution required too many steps and didn't meet their needs.

Program fees are collected in a spreadsheet and then posted by program/account in the SoftRight financial system (turnover screen), printing a form for approval by the Director.

## **Recommendation**

The department should consider using the Recreation Department's RecTrac system for program tracking, online registration and payment. The feasibility of exporting this information directly into the financial system should also be considered.

The department should continue the search for a transportation solution by conversations with state and regional COA organizations.

## POTENTIAL PLAN/SCHEDULE

### Permitting/Licensing:

Implement at Board of Health	4 Qtr. 2019
Implement at Planning/Conservation/Zoning/ZBA	4 Qtr. 2020
Implement at Fire	3 Qtr. 2021

### EDM:

Scanning quote accepted	4 Qtr. 2019
Process Static documents to microfiche	4 Qtr. 2020
Develop API's to applications	2021 - 2022
Implement workflow and e-forms	2021 - 2024

### Time and Attendance:

Extend current solution to Bus Drivers	4 Qtr. 2019
Extend to applicable District employees	4 Qtr. 2020
Pilot in Town Department	1 Qtr. 2020
Extend to all Town employees	2 Qtr. 2021

### Financial System:

Assess SR long term viability	4 Qtr. 2019
Define requirements	1 Qtr. 2020
Search for/select replacement	1 Qtr. 2020
Implement system	3 Qtr. 2020

### DPW Asset management and Work Order System:

Define requirements	4 Qtr. 2019
Search/Select solution	2 Qtr. 2020
Implement solution	2 Qtr. 2022

### GIS Base Software and Committee Formation:

Purchase base software	1 Qtr. 2020
Form Committee	4 Qtr. 2019