

Pinellas County Board of County Commissioners (BCC)
BCC Assembly Room
315 Court Street, 5th Floor
Clearwater, Florida 33756

May 9, 2013

AGENDA

BUDGET INFORMATION SESSION

Citizen's Comments Will Follow Each Presentation

9:30 a.m.

1. [Tax Collector](#)
2. [Supervisor of Elections](#)
3. [Clerk of the Circuit Court](#)
4. [Pinellas Planning Council](#)
5. [Public Library Cooperative](#)
6. [Business Technology Services](#)

"Citizens' Comments"

Any Person Wishing to Speak During the "Citizens' Comments" Portion of the Budget Information Session Agenda Must Have a Blue Card Completed and Given to Staff at the Staff Table. The Chairman Will Call the Speakers, One by One, to the Podium to be Heard. Each Speaker May Speak up to Three (3) Minutes. Persons Who Have Been Authorized to Represent an Organization with Five (5) or More Members or a Group of Five (5) or More Persons Should Complete a Blue Card, Submit it to Staff at the Table Located at the Front of the Board Room, and Should Limit Their Presentation to Ten (10) Minutes.

Order of Items is Subject to Change. All Times are Approximate. Recess May be Taken.

TAX COLLECTOR

The Tax Collector bills, collects and distributes all taxes for the County, Municipalities, Tourist Development Council, School Board, and taxing districts. The Tax Collector issues licenses and titles for cars, trucks, boats and mobile homes, issues fishing and hunting licenses, and issues Drivers Licenses. This budget reflects the funds associated with the Tax Collector fees related to the collection of the Countywide and Unincorporated area (MSTU) millage. In addition, in accordance with Florida Statute 192.091, the fees associated with the School Board and Municipalities are paid for by the County and are included in the appropriations shown below. The amount the Board must budget as fees and commissions for the Tax Collector is set by statutory formula. In general the formula calls for fees of 3% on taxes collected up to an assessed valuation of \$50 million, and 2% on the balance above \$50 million. The Tax Collector's total budget request is approved by the Florida Department of Revenue (not the Board of County Commissioners). Statutory fees and commissions shown below reflect those in the General Fund only. Those of other property tax levying funds (EMS, Fire Districts, etc.) are shown separately within their fund budgets. Statutory fees and commissions not expended by the Tax Collector are returned proportionately to the taxing authority.

0001 GENERAL FUND

Department Revenues by Fund / Account		FY13 Revised	FY14	FY14 Request vs.	
		Budget (a)	Request	FY13 Bud	%
0001	Statutory Fees and Commissions	15,492,000	15,833,720	341,720	2.2%
Total Revenues & Fund Balance		15,492,000	15,833,720	341,720	2.2%
Department Expenditures by Program		FTE by Program			
0001	Tax Collector Program	15,492,000	15,833,720	268.0	341,720 2.2%
	Total Estimated Unused Fees Returned to BCC-GF	(6,881,250)	(7,566,794)		(685,544) -10.0%
Total Net Expenditures		8,610,750	8,266,926	(343,824)	-4.0%
Personnel Summary					
Total FTE (Full-time equivalent positions)		268.0	268.0	0	

Target Reconciliation	
FY14 Net Budget Request (Net Target of \$8,842.430)	\$ 8,266,926
Target Variance	\$ (575,504)
FY14 Decision Package Request	Not Applicable

TAX COLLECTOR TOTAL BUDGET	FY13 Budget	FY14 Request
General Fund Portion	15,492,000	15,833,720
Other BCC Ad Valorem Funds Portion	1,032,290	1,046,100
Fire Districts Ad Valorem Funds Portion	322,170	324,370
Other County Non-Ad Valorem Fees	545,920	594,570
Subtotal	17,392,380	17,798,760
<u>Not reflected in County budget:</u>		
Non-County Fees/Revenues (licenses, registrations)	1,992,513	2,084,973
Total Tax Collector Budget	19,384,893	19,883,733



(a) FY13 Revised Budget as of February 12, 2013

Pinellas County Tax Collector

Diane Nelson, CFC



Diane Nelson, CFC

Pinellas County Tax Collector

www.taxcollect.com

World-Class Service, Anytime, Any Place

2013-14 Budget Presentation

2013 Governor's Sterling Award

Being better tomorrow than you are today



Diane Nelson, CFC

Pinellas County Tax Collector

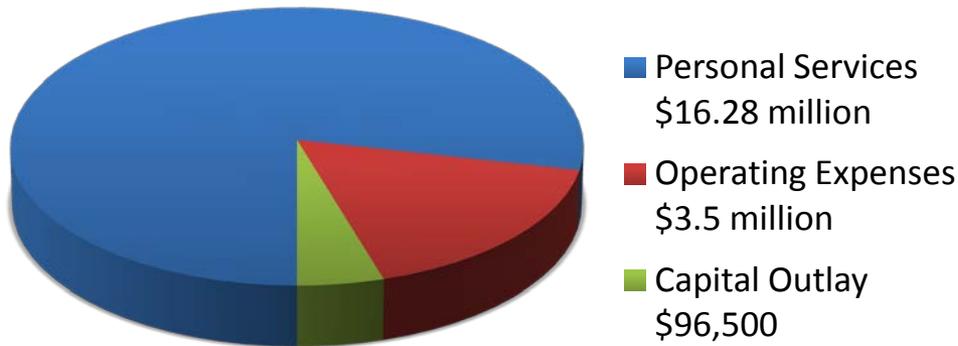
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2013-14 Budget Presentation

Budget Overview: 2013-2014

- Preliminary estimates
- \$19.88 million operating budget



- Final budget to Department of Revenue in August



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2013-14 Budget Presentation

Number of Transactions

- #1 among Tax Collectors for transactions per employee
- 2.9 million transactions in 2012
258 employees



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2013-14 Budget Presentation

Tourist Development

- \$28.7 million in 2012 – Pinellas County record
- 3,000 accounts
- 90% collected online
- Senate bill 1828



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2013-14 Budget Presentation

Online Tax Payments

- 2012 tax roll: online payments increased by 45%
25,000 total
- Email for tax payments
- Changing dynamics: 23,000 visits on the iPad



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2013-14 Budget Presentation

Use of Data and Metrics

- Measuring outcomes and quality of work
- Sharing best practices with other groups
- 93% of phone calls answered daily
300,000 calls a year



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2013-14 Budget Presentation

Challenges

- Closure of state driver license offices
 - ❑ More customers
 - ❑ More phone calls
 - ❑ More required services
- 60,000 additional walk-in customers



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2013-14 Budget Presentation

Conclusion

Thank you for the opportunity to present today.



Diane Nelson, CFC

Pinellas County Tax Collector

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2013-14 Budget Presentation

SUPERVISOR OF ELECTIONS

The Supervisor of Elections conducts all Federal, State, County and Municipal elections. The Supervisor registers and maintains the records for all County voters and qualifies all candidates for County, Special District and Political Party Executive Committees. The Supervisor recruits, trains and assigns all poll workers, locates and contracts with polling locations, surveys polling places and makes improvements to comply with ADA accessibility requirements, and purchases and maintains voting equipment and supplies. The Supervisor conducts voter registration and education for all senior high schools, colleges and citizens countywide. The Supervisor mails sample ballots to all registered voter households. Sample ballots, canvassing board meeting schedules and polling place changes are published in newspapers. The Supervisor maintains an internet website that provides information regarding voter registration, polling places, election dates, election results and candidates.

0001 GENERAL FUND

Department Revenues by Fund / Account		FY13 Revised	FY14	FY14 Request vs.	
		Budget (a)	Request	FY13 Bud	%
0001	General Fund Tax Support	4,453,940	5,028,170	574,230	12.9%
	FY14 Budget Issues - GF Tax Support Non-recurring		1,642,410	1,642,410	
Total Revenues & Fund Balance		4,453,940	6,670,580	2,216,640	49.8%
Department Expenditures by Program		FTE by Program			
0001	Elections	2,932,691	5,134,999	33.0	2,202,308
	Voter Registration	1,332,909	1,279,339		(53,570)
	Voter Education	188,340	256,242		67,902
Total Expenditures		4,453,940	6,670,580	2,216,640	49.8%
Personnel Summary					
Total FTE (Full-time equivalent positions)		34.0		33.0	-1

Target Reconciliation	
FY14 Base Budget Request (Target of \$4,574,170)	5,028,170
Target Variance	454,000 (b)
FY14 Decision Package Request	1,642,410 (c)
FY14 Total Budget Request	6,670,580

(a) FY13 Revised Budget as of February 12, 2013

(b) Increase associated with Risk Finance Allocation, number of days for early voting, equipment maintenance and replacement, and printing service charges.

(c) The Decision Package Request are non-recurring costs consisting of adding Electronic Poll Books. These Electronic Poll Books streamline the voter verification and check-in process during early voting and election day and administrative processes pre and post-election.

Department: **Supervisor of Elections**

Program	Classification	Description	FY14 Total Program Allocation (\$)	FTE's *	FY14 Total Program Revenue (\$)	Performance Measures
ELECTIONS <i>Pursuant to F.S. Title IX Chapter 100-107</i>	Mandatory	Conduct all Federal, State, County, and Municipal elections. Qualify all candidates for County, Special District and Political Party Executive Committees. Recruit, train and assign all poll workers. Locate and contract with polling places. Survey polling places and make improvements to comply with ADA accessibility requirements. Maintain all voting equipment and supplies.	\$ 5,134,999	33.0		1 Countywide Elections 20 Estimated Municipal Elections 0 Estimated Fire Districts
VOTER REGISTRATION <i>Pursuant to F.S. Title IX Chapter 97.032-97.105</i>	Mandatory	Register voters and maintain accurate voter registration records in accordance with the National Voter Registration Act (NVRA) and the Florida Voter Registration System (FVRS).	\$ 1,279,339	16.0		Maintain approximately 665,000 voter registration records. Process 40,000 new registration applications and 200,000 voter registration updates.
VOTER EDUCATION <i>Pursuant to Help America Vote Act of 2002, Pub. L. No. 107-252, 116 Stat. 1666 (2002)</i>	Mandatory	Voter education for all senior high schools, colleges and citizens. Voter education for elementary and middle schools. Sample ballots are published in newspapers and mailed to voters. Canvassing board meetings, polling places and changes published in newspapers. Maintains website to provide election and voter registration information.	\$ 256,242	1.0		8 Community Elections 32 School Elections
Total			\$ 6,670,580	33.0		

Decision Package Details

Implement electronic poll book system for early voting and election day

	FY14 Request
Recurring costs	\$42,160
One-time cost	\$1,642,410
Total Costs	\$1,684,570

CLERK OF THE CIRCUIT COURT

Pursuant to Revision 7 of Article V, the Clerk has three distinct functions - recording legal documents such as real estate transfers, performing statutorily mandated support for the court system and the legal community, and providing services to the Board of County Commissioners. The Clerk serves as Accountant and Clerk to the Board of County Commissioners, Custodian of county funds, Ex-Officio County Auditor and Clerk for the Water and Navigation Control Authority. Additionally, the Clerk provides printing services and mail services to County departments. The Clerk's varied court responsibilities are not reflected in the County budget, as they are a separate state budget responsibility, supported by fees. The recording function is also supported by fees, and if the revenues exceed expenditures the county receives excess fees from the Clerk.

0001 GENERAL FUND

Department Revenues by Fund / Account		FY13 Revised	FY14	FY14 Request vs.	
		Budget (a)	Request	FY13 Bud	%
0001	General Fund Tax Support	9,115,800	9,247,660	131,860	1.4%
	Court Revenues	395,720	369,170	(26,550)	-6.7%
	Fines and Forfeitures	31,500	35,000	3,500	11.1%
Total Revenues & Fund Balance		9,543,020	9,651,830	108,810	1.1%
Department Expenditures by Program		FTE by Program			
0001	Clerk of the Circuit Court-Board Support Program	9,543,020	9,651,830	110.6	1.1%
Subtotal Expenditures		9,543,020	9,651,830	110.6	1.1%
Personnel Summary					
Total FTE (Full-time equivalent positions)		109.0 (b)	110.6	110.6	1.5%

Target Reconciliation	
FY14 Budget Request Target	\$ 9,651,830
Target Variance	\$ -
FY14 Decision Package Request above target	Not Applicable

CLERK OF THE CIRCUIT COURT TOTAL BUDGET	FY13 Budget	FY14 Request
General Fund Portion	\$ 9,543,020	\$ 9,651,830
<i>Not reflected in County budget:</i>		
Recording (Legal Documents pursuant to Revision 7)	\$ 5,225,920	TBD (d)
State Funded Budget (c)	\$ 22,974,078	TBD (d)
State Regulated Trust Funds	\$ 6,112,001	TBD (d)
Clerk of the Circuit Court Total Budget	\$ 43,855,019	\$ 9,651,830



(a) FY13 Revised Budget as of February 12, 2013

(b) FY13 reflects total full-time permanent position headcount. FY14 reflects FTEs.

(c) The State-funded budget approved by the State reflects the state fiscal year of July 1, 2012 to June 30, 2013.

(d) The FY14 totals for the non-Board funded budgets are currently in development. These functions do not impact General Fund support of the Clerk's board functions.

Name of Department: **CLERK OF THE COURT**
 Strategic Focus Area: **EFFECTIVE GOVERNMENT**

Program	Classification	Description	FY14 Total Program Allocation (\$)	FTE's	Performance Measures	Estimated FY14
Clerk to Board Functions						
Finance Division	Mandatory	The Clerk serves as the accountant of the Board of County Commissioners pursuant to the Florida Constitution. The Finance Division is responsible for maintaining the official financial records and preparing reports for all monies received and disbursed by the Board. As custodian of county funds, the Clerk through the Finance Division ensures that County assets are safeguarded and that all transactions are properly recorded to facilitate the preparation of financial statements in accordance with generally accepted accounting principles and applicable laws and regulations. This department will be key to the success of OPUS implementation with primary responsibility for all financial applications.	\$3,527,426	46.00	Deposits w/1 business day Invoices received directly by Finance paid w/25 business days of Payroll disbursement accuracy rate Month end reports w/10 business days Contracts reviewed w/ 2 business days CAFR completed within six months of fiscal year end Bank reconciliation completed within 30 days of month end	92.00% 80.00% 99.00% 90.00% 95.00% 100.00% 85.00%
Board Records	Mandatory	The Clerk serves as the recordkeeper of the Board of County Commissioners pursuant to the Florida Constitution. Board Records attends, records and prepare minutes of all meetings of the Board of County Commissioners and other designated County Boards and Committees. In the Clerk to Board capacity, the Clerk maintains legal custody of the Board seal and performs the attest functions for Board approved documents. Board Records maintains an automated repository of all of the official actions of the Board including ordinances, resolutions, contracts, etc.	\$673,193	10.00	BCC meeting minutes w/ 15 business days BCC meeting documents posted to document management system within 15 business days of meeting VAB hearings scheduled in timeframe required by statute Ordinances filed with the State in timeframe required by statute	95.00% 95.00% 100.00% 100.00%
Inspector General	Mandatory	The Division of Inspector General (IG) is an independent, objective and consulting activity designed to add value and improve an organization's operations. It helps an organization accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control, and governance processes. The IG is responsible for auditing operations of the Board of County Commissioners, the Clerk of the Circuit Court and Comptroller, contractors doing business with the County, and County revenue sources.	\$1,234,365	12.00	% of annual planned audited initiated. % of the County's Fraud, Waste, and Abuse Hotline calls processed and/or investigated % of Guardianship's Fraud, Waste, and Abuse Hotline calls processed, investigated and/or audited Level 1, 2 and 3 guardianship audits processed and/or audited	85.00% 100.00% 100.00% 85.00%
Clerk's Administration / Court and Operational Services	Essential	Clerk's Administration is responsible for maintaining office wide policies and procedures, employment information and internal records for the entire Clerk's Office. Additionally, this department is responsible for the administrative oversight of all court, recording, branch office and records management, printing services and purchasing functions within the Clerk's Office. The budget here only reflect the prorata share related to the Board funded operations.	\$289,142	2.10	Total operating expenditures expended within budget constraints Accuracy within departments Positive customer service satisfaction Timeliness in turnaround times	100.00% 99.00% 100.00% 99.00%
Records & Information Management - Board	Mandatory	The Board functions of the Records & Information Management Department include assisting departments and independent agencies under the Board of County Commissioners in handling their information in the most efficient and economical way possible, whether in paper or electronic format. Services provided include: training user agencies on the principles of sound records management, understanding and following the State of Florida's Public Records Retention Schedules, and evaluation of emerging office technologies. The department provides offsite storage and retrieval of documents upon request, conversion to electronic media, and coordination with the State Bureau of Archives and Records Management requirements for destruction of records when retention has been met.	\$592,832	8.95	Positive customer service satisfaction Boxes imaged within 60 days of receipt Department records inventoried for compliance	100.00% 100.00% 75.00%

Name of Department: **CLERK OF THE COURT**
 Strategic Focus Area: **EFFECTIVE GOVERNMENT**

Program	Classification	Description	FY14 Total Program Allocation (\$)	FTE's	Performance Measures	Estimated FY14
Clerk to Board Functions						
Records & Information Management - Clerk	Mandatory	The Court-side functions of the Records & Information Management Department include offering a variety of cost-effective services to Clerk's Departments and other associated areas such as: storage of semi /inactive records; microfilming; imaging; retrieval and delivery of records upon request; inventory and tracking of records; training in Records Management retention and file tracking; and coordination with the State Bureau of Archives and Florida Rules of Judicial Administration requirements for destruction or records when retention requirements have been met.	\$115,052	1.30	Restructure/Reorganize warehouse	95.00%
					Maintain warehousing of County-related records	100.00%
					Assist with maintenance of County-related records	100.00%
Clerk's Technology-Court and Operational Services	Mandatory	This department is responsible for providing Technology support for the criminal justice information system under the Clerk's responsibility as required under Article V, Revision 7 to be funded by the Board. Costs here also includes the prorata share of technology support to the board funded administrative and records management functions describe within this document.	\$932,374	3.75	Support execution of the Justice CCMS-Odyssey milestone/go -live target date to permit the planned decommissioning of the IBM Mainframe	100.00%
					Total operating expenditures expended within budget constraints	100.00%
					Increase deployment of VDI thin client terminals during the year (Jury - Public View Stations)	30 more
					Deploy new hardware within 60 days of receipt.	97.00%
Printing Services - Printshop	Essential	The Printshop function provides cost efficient printing services to county government agencies internal departments and some local government agencies.	\$638,174	8.60	Clerk's Printing Services survey cards in excellent and very good category	100.00%
					Print Orders completed timely and accurately	99.64%
Printing Services - Mailroom	Essential	The Mailroom function is responsible for mail distribution and courier services to county government agencies and internal departments	\$745,967	11.90	Clerk's Mail Services survey cards in excellent and very good category	99.00%
					Metered mail completed timely and accurately	99.99%
Clerk's Technology - Financial Services	Mandatory	Clerk's Technology is responsible for supporting the information systems utilized by the Finance Division, including the official financial information system for the Board and the Clerk. This responsibility is supported by 2 groups: 1) Applications development and support and 2) desktop, local area network and connectivity support. This department will be an integral part of the support team for the OPUS project since they currently support most of the financial applications utilized by the Clerk's Office.	\$903,305	6.00	Maintain the legacy Infor system readiness and integrity during normal business hours.	99.00%
					Handle Finance Division service requests (SRs) to the satisfaction of the customer being serviced. (Based on SR opportunities)	95.00%
					Never to delay the normal check production cycle	100.00%
					Ensure 75% of programming staff have Oracler R12 training to assist w/ conversions, interfaces and day to day support.	100.00%
TOTALS			\$9,651,830	110.60		

PINELLAS PLANNING COUNCIL - FY14 Millage 0.0125

The Pinellas Planning Council (PPC) is a dependent special district that acts as the advisory body to the Countywide Planning Authority. Chapter 88-464, Laws of Florida, states that the Board of County Commissioners has the right to review and adjust the PPC's approved budget and certify its millage. The PPC is not included in the County's budget. The PPC mission is to maintain and enhance a representative forum for countywide planning and provides for overall policy direction, plan consistency, interagency coordination and technical assistance in furtherance of a coherent, efficient and effective countywide planning process. The maximum millage rate that can be levied is 0.1666 mills.

Department Revenues by Fund / Account	FY13 Revised	FY14	FY14 Request vs.	
	Budget (a)	Request	FY13 Bud	%
Ad Valorem Taxes	646,230	661,940	15,710	2.4%
Interest Earnings	1,500	1,500	0	0.0%
Total Revenues & Fund Balance	647,730	663,440	15,710	2.4%
Millage Rate	0.0125	0.0125	0.0000	0.0%
<i>*FY14 ad valorem revenues are based on a 2.5% increase in taxable values</i>				
Department Expenditures by Program	FTE by Program			
Personal Services	694,540	681,000	7.8	(13,540) -1.9%
Operating Expenses	434,560	437,040		2,480 0.6%
Subtotal - Expenditures	1,129,100	1,118,040		(11,060) -1.0%
Use of Reserves **	(481,370)	(454,600)		26,770 -5.6%
Subtotal Expenditures	647,730	663,440	7.8	15,710 2.4%
Personnel Summary				
Total FTE (Full-time equivalent positions)	7.0	7.8	7.8	0.8 11.4%

** In FY2010 the PPC lowered its millage rate as part of a planned drawdown of \$1,081,630 in reserves.

FY2014 will be the fifth year of the drawdown. Reserves are projected at a negative \$109,820 by the end of FY2014.

Target Reconciliation	
FY14 Budget Request Target	Not Applicable
<i>County support of the Pinellas Planning Council is funded by a separate property tax levy apart from the General Fund.</i>	
FY14 Decision Package Request above target	Not Applicable



(a) FY13 Revised Budget as of February 12, 2013

(b) FY13 reflects total full-time permanent position headcount. FY14 reflects FTEs.

PINELLAS PLANNING COUNCIL - FY14 Millage 0.0155

The Pinellas Planning Council (PPC) is a dependent special district that acts as the advisory body to the Countywide Planning Authority. Chapter 88-464, Laws of Florida, states that the Board of County Commissioners has the right to review and adjust the PPC's approved budget and certify its millage. The PPC is not included in the County's budget. The PPC mission is to maintain and enhance a representative forum for countywide planning and provides for overall policy direction, plan consistency, interagency coordination and technical assistance in furtherance of a coherent, efficient and effective countywide planning process. The maximum millage rate that can be levied is 0.1666 mills.

Department Revenues by Fund / Account	FY13 Revised	FY14	FY14 Request vs.	
	Budget (a)	Request	FY13 Bud	%
Ad Valorem Taxes	646,230	820,810	174,580	27.0%
Interest Earnings	1,500	1,500	0	0.0%
Total Revenues & Fund Balance	647,730	822,310	174,580	27.0%
Millage Rate	0.0125	0.0155	0.0030	24.0%
<i>*FY14 ad valorem revenues are based on a 2.5% increase in taxable values</i>				
Department Expenditures by Program	FTE by Program			
Personal Services	694,540	681,000	7.8	(13,540) -1.9%
Operating Expenses	434,560	437,040		2,480 0.6%
Subtotal - Expenditures	1,129,100	1,118,040		(11,060) -1.0%
Use of Reserves **	(481,370)	(295,730)		185,640 -38.6%
Subtotal Expenditures	647,730	822,310	7.8	174,580 27.0%
Personnel Summary				
Total FTE (Full-time equivalent positions)	7.0	7.8	7.8	0.8 11.4%

** In FY2010 the PPC lowered its millage rate as part of a planned drawdown of \$1,081,630 in reserves.
FY2014 will be the fifth year of the drawdown. Reserves are projected at \$49,050 by the end of FY2014.

Target Reconciliation	
FY14 Budget Request Target	Not Applicable
<i>County support of the Pinellas Planning Council is funded by a separate property tax levy apart from the General Fund.</i>	
FY14 Decision Package Request above target	Not Applicable



- (a) FY13 Revised Budget as of February 12, 2013
 (b) FY13 reflects total full-time permanent position headcount. FY14 reflects FTEs.

PINELLAS PLANNING COUNCIL

Attachment No. 2
 Preliminary Budget Memo
 April 15, 2013

PROPOSED FY 14 WORK PROGRAM ALLOCATION

By Classification of Major Program Components					
	<u>Dollar</u>	<u>Percent</u>	<u>FTE's</u>		
<u>I. Land Use Plan and Local Assistance</u>	\$ 508,200	50%	3.90		
Countywide Future Land Use Plan / Rules					
<u>II. Countywide Plan and Intergovernmental Coordination</u>	\$ 390,923	38%	3.00		
Countywide Plan Coordination / Implementation					
<u>III. Council Operations</u>	\$ 117,277	12%	0.90		
Plan Administration / Management					
	\$ 1,016,400 *	100%	7.80		
*does not include 10% of budgeted Unexpended Expenditures					

**PINELLAS PLANNING COUNCIL
AGENDA MEMORANDUM**

AGENDA ITEM: V D.

MEETING DATE: May 8, 2013

SUBJECT:

Preliminary Budget Discussion for FY 2013/14 (FY14) – Review and Refinement

RECOMMENDATION:

Council Receive, Discuss, and Provide Further Direction on Preliminary Budget as Determined Appropriate (For Information Only – No Formal Action Required)

BACKGROUND

Due to an extended public hearing time in April we only had the opportunity to briefly review the budget with the Council. This memorandum includes much of the information from that previous meeting and relevant information that has been brought forward since that time.

Staff submitted our preliminary budget information to the County Office of Management and Budget (OMB) on April 16, 2013, and we will be appearing before the Board of County Commissioners on Thursday May 9th to answer any questions they may have regarding our budget. In addition, we have been working with OMB staff to finalize our information for you.

Here is a summary of the items involved in the FY14 budget:

- The direction applicable to those agencies with separate ad valorem taxing authority is to prepare a budget anticipating a 2.5 percent increase in ad valorem tax revenues, translating to a projected increase of approximately \$16,000 in the Council's ad valorem proceeds as compared to the current year (using the current 0.0125 mils).
- Last month we showed a proposed reduction of -3% in expenditures for FY14 and a deficit of (\$6,043). However, with a determination by our auditors that we need to set aside 310 Court Street rent in the amount of \$19,400 (that we understood could be deferred until years 3-5 of our lease), the reduction in expenditures is -1%. Further, the FY12 audit indicated an obligation to assign our employee compensated absences in the amount of \$50,240, resulting in a deficit of (\$109,816) for FY14 using the current millage rate of 0.0125. In total, this includes:
 - \$50,240 in compensated absences at the end of FY12;
 - \$6,438 in deferred rent for last 3 months of FY12;

PINELLAS PLANNING COUNCIL ACTION:

COUNTYWIDE PLANNING AUTHORITY ACTION:

SUBJECT: Preliminary Budget Discussion for FY14

- \$25,755 in deferred rent from FY13; and
- \$19,400 in deferred rent added under the “rent” line item for FY14.
- In April, we suggested raising the Council’s millage to cover any expected deficit, and to begin aligning the Council’s revenues with their expenditures for FY14 and beyond.
- At this time it appears as though a millage increase to 0.0155 is required to offset the deficit and further align the Council’s revenues with expenditures.
- Both the Metropolitan Planning Organization (MPO) and PPC have reduced expenditures as we have begun to carry out the unification of the MPO and PPC, and will continue to see these savings from year to year.
- The additional items associated with the unification of the PPC and MPO anticipated to impact our budget are being discussed with the MPO Interim Executive Director and County staff, are preliminarily included in this memo, and will be further refined as this information is developed.

With the Council’s input, and as preliminary estimates of ad valorem values are made available from the Property Appraiser by June 1st, a first draft of the budget will be further refined and coordinated with the annual work program in subsequent meetings with the Council.

A summary of the schedule for budget-related matters is in Attachment 1.

MORE DETAIL ON OUR BUDGET

The following will provide a summary of two main items: expected revenues and proposed expenditures.

FY13’s Impacts to FY14 Budget

In FY13 the Council relied on \$642,230 in revenues from ad valorem taxes while using a 0.0125 millage rate. We utilized our assigned fund balance from the end of FY12 of \$481,370 (and \$1,500 in interest) to make up the difference between our expenditures of \$1,129,100 and these revenues from taxes (see “History: FY09-FY13” for an explanation of why this was necessary).

For FY13 we showed that the entire assigned fund balance of \$481,370 as available for future budgets when we should have shown \$424,692 instead. The difference of \$56,678 represent our obligations to maintain funds for our long-term liabilities, including compensated absences (i.e., the value of accumulated employee leave time) in the amount of \$50,240, and deferred expenses related to our lease with Pinellas County at 310 Court Street in the amount of \$6,438.

This \$56,678 can be replenished with the funds in our unassigned fund balance of \$174,655. In addition, we are required to set aside deferred rent from FY13 in the amount of \$25,755 resulting in an estimated unassigned fund balance available for FY14 of \$92,222.

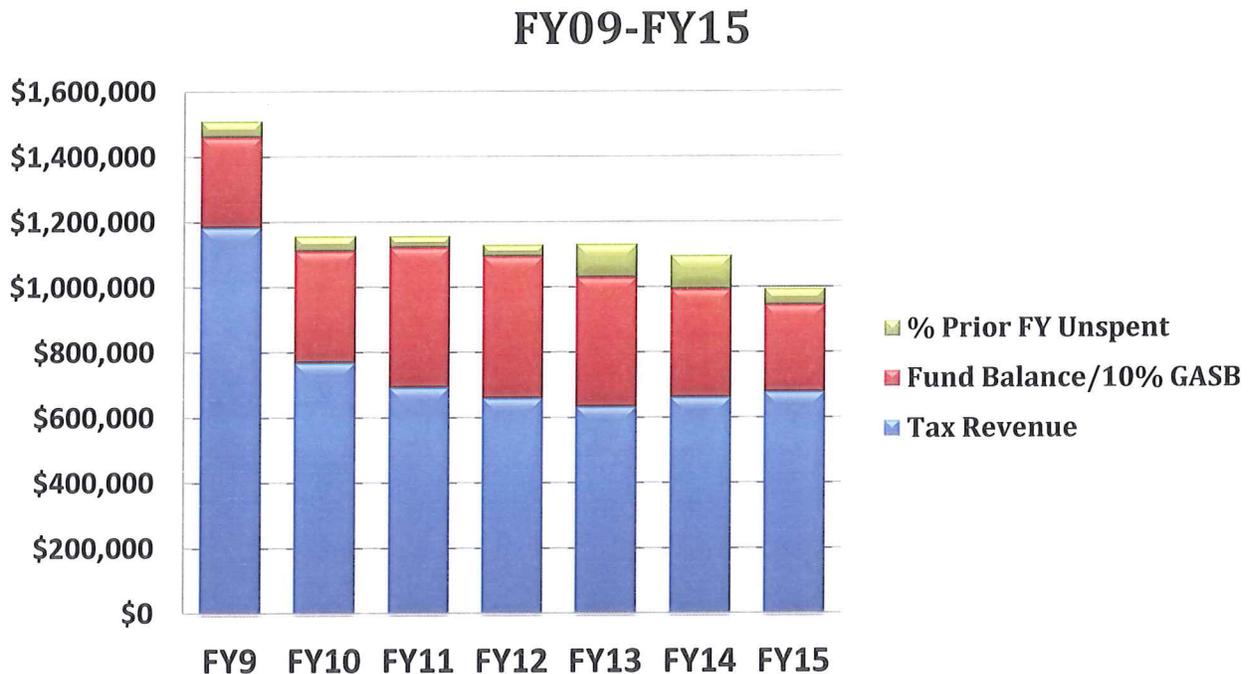
History: FY09-FY13

As the Council may recall, in addition to utilizing tax revenues we have been funding a significant portion of our expenditures over the past four years with our Fund Balance. This was

SUBJECT: Preliminary Budget Discussion for FY14

agreed to by the Council for FY10 and was planned to carry on for 3 years (through FY12). However, with further reductions in our expenditures, due mainly to our unification efforts and reductions in staff, we have been able to further reduce expenditures and use the remaining Fund Balance for a fourth year (FY13). Additionally, we expect an unassigned fund balance in the amount of approximately \$92,222 to be available for FY14; however, as anticipated this will not be adequate to cover our expenditures for an additional year.

The chart below shows that tax revenues were significantly reduced in FY10, and continually dropped for the next four years. It also shows that our expenditures dropped significantly that first year, and continued to be reduced to some degree over the next four years. Lastly, we have added estimates for FY14 and FY15.



PPC Millage – In accord with our commitment to utilize our Fund Balance to keep the tax revenues we generate¹ to a minimum, the Council has either kept its millage rate constant or reduced it over the past number of years (offset by use of the Fund Balance as discussed above) as follows:

- FY09 - 0.0170 (generating \$1,184,720 in tax revenues)
- FY10 - 0.0125 (generating \$769,410 in tax revenues)
- FY11 - 0.0125 (generating \$693,361 in tax revenues)
- FY12 - 0.0125 (generating \$660,280 in tax revenues)
- FY13 - 0.0125 (generating \$646,230 in tax revenues)
- FY14 - 0.0125 (generating an estimated \$661,938 in tax revenues)

¹ We are required to budget at 95% of expected ad valorem tax revenues.

SUBJECT: Preliminary Budget Discussion for FY14

FY14 Revenues

The following revenues (rounded) are expected to be available and will be included in the discussion of our FY14 budget:

- At 0.0125 mils our revenues from taxes for FY14 use are expected to be up \$16,000 (2.5%) for a total of \$662,000;
- We have an Unassigned Fund Balance to use of approximately \$92,200;
- We should be able to count on carrying over our unused FY13 10% Unexpected Expenditures (as stated in our fund balance policy) in the amount of \$100,560. This is essentially a contingency fund that we do not expect to tap in FY13;
- We can count on using 10% of our unspent FY13 revenues in the amount of approximately \$103,000, \$63,000 of which comes from not hiring an executive director during the fiscal year; and
- We expect to have a total of approximately \$50,000 available from a combination of interest on our cash invested, unexpected income from subleasing our space at the Bank of America building, and local assistance work/income.

All told we have approximately \$1,008,200 available for FY14. That consists of 61% from estimated FY14 tax revenues (at 0.0125) and 39% from other sources.

FY14 Expenditures

The following expenditures are included in the discussion of our FY14 budget:

- \$681,000 in Payroll Account, including salaries and benefits for staff as well as 35% of the unfilled executive director position. Even though this account includes a 3% cost of living increase for employees, potential payouts for the retirement of two employees, and allowable employee leave exchange expenditures, it is reduced (-2%) from the current fiscal year. This is due to a closer matching of budgeted expenditures to actual expenses (e.g., retirement payouts budgeted from previous fiscal years have been removed);
- \$335,400 in the Operating Account, which represents a small increase of \$1,400 from the current fiscal year. Although this will be the first year that we start to see reductions in our rent at 310 Court Street along with the expiration of our lease (and the associated lease payments) at the Bank of America building, as stated previously, our auditors have stated that we are required to set aside rent each year for our space at 310 Court Street.

All told we expect to include \$1,016,400 in expenditures in the FY14 budget. When the 10% of Unexpected Expenditures account is considered (\$101,640) the total expenditures for FY14 are expected to be \$1,118,040. This is an overall reduction (-1%) in budgeted expenditures from the current fiscal year of \$1,129,100.

FY14 Revenues vs. Expenditures

When our available revenues of \$1,008,224 are weighed against expenditures of \$1,118,040 we show a deficit of (\$109,816 under the current millage rate of 0.0125.

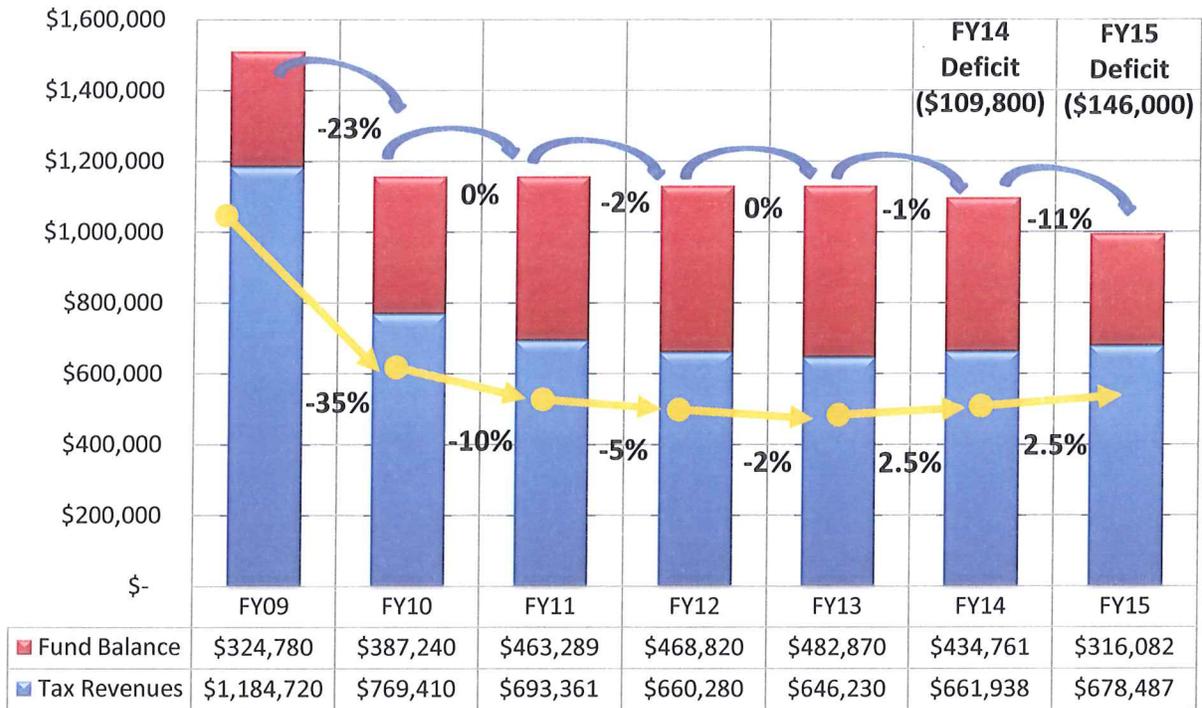
Outlook for FY15

The following (rounded) revenues estimated for FY15 should be included in the discussion of our FY15 budget, especially as they relate to our tax rate for FY14:

- Our revenues from taxes for use in FY15 are estimated to be up 2.5% for a total of \$678,000 (using 0.0125 mils);
- Using a 0.0125 millage rate we will not have an Unassigned Fund Balance to use from FY14. Of course we cannot carry forward the (\$109,816) deficit from FY14 so this is not included in the FY15 calculations, otherwise we would start the year behind by that amount;
- We should be able to count on carrying over our unused FY14 10% Unexpected Expenditures of \$101,640;
- We may be able to count on using 5% of our unspent FY14 revenues in the amount of approximately \$50,000;
- We are developing a plan to provide local assistance contract services that would generate some revenue, but at this point it is difficult to determine with much certainty how much that will be. However, as we help local governments transition to the updated Countywide Plan, as well as providing further planning assistance where needed, it could amount to approximately \$15,000; and
- We can expect to reduce our budget significantly (by an additional -11%) for FY15 due in part to further savings from our unification move to 310 Court Street and to some of the streamlining that should occur as we transition to the updated Countywide Plan.

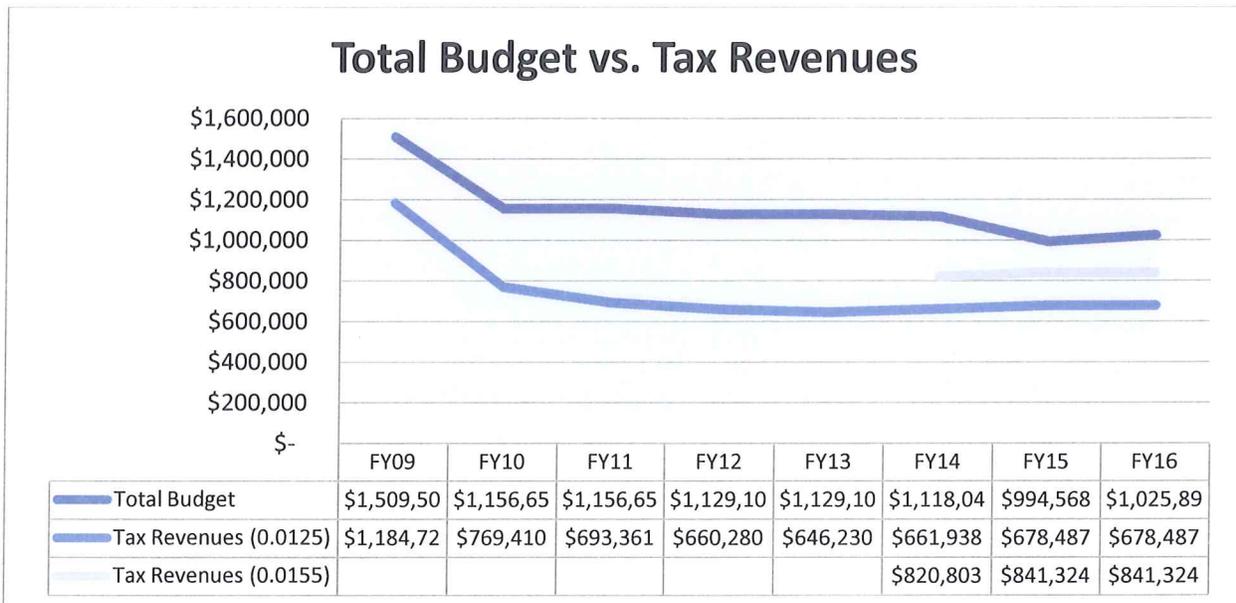
Current estimates indicate we would have approximately \$849,000 in revenues available for FY15, or approximately 86% of our needed revenues. As expected, even with an additional budget reduction of -1% for FY14, and another -11% for FY15 as discussed below, we will fall short of funding our expenditures utilizing tax revenues by approximately \$146,000 for FY15.

Tax Revenue plus Fund Balance @ 0.0125 Mils



In order to cover expenditures for this year, as well as put us on a more sustainable revenue track for the following years without needing a drastic increase in our millage rate during 2014, it is suggested that the Council increase its millage rate to 0.0155 in order to generate an additional \$158,865 for FY14, and \$162,837 for FY15 (if the estimated 2.5% increase in values holds true for both years). This 0.0155 is a 19% increase in our overall millage rate.

The impact to the average household in Pinellas County would be an additional \$0.29 above the PPC tax revenues generated at 0.0125 (to a total of \$1.50 per year, up from \$1.21).



Budgetary Implications of the MPO/PPC Unification

Last October we presented to the Council that we were expected to save \$1,601,000 over a five year period (\$320,000/year) due to our efforts to unify our two entities. These significant savings continue to be realized year after year, and added to where possible.

Our Next Steps timeline for MPO/PPC unification includes budgetary discussions with the MPO, which involves the potential for partial funding of the MPO’s needs. PPC staff has been researching this issue and working with the MPO and other Pinellas County staff to develop options that will be brought back to the Council for consideration in the next few months.

Two items being discussed are the MPO’s “10% local match” and the “capital float” that the MPO works with while awaiting grant reimbursement. Under earlier unification discussions these two subjects were discussed with the possibility of the Council’s millage providing some assistance in the form of a local match, but there must be a clear connection between the financial assistance provided and the work items relating to the Council’s Special Act.

These subjects, and additional background, will be brought to the Council as soon as they are developed further. However, if the Council were to provide the 10% match (approximately \$120,000 at this point) our millage rate would need to be set higher (approximately 0.0185 mils) than discussed in this memo.

Conclusion

At the current PPC millage rate of 0.0125 mils we will need additional funds to balance our budget and assign funds as discussed previously for FY12 and FY13 obligations. This would cause us to raise our millage rate to 0.0155, or an additional 19%.

ATTACHMENTS

Attachment 1	FY13 and FY14 Budget Comparison at 0.0125 Mils
Attachment 2	FY13 and FY14 Budget Comparison at 0.0155 Mils
Attachment 3	Preliminary FY14 Budget Details

FY13 and FY14 Budget Comparison at 0.0125 Mills

	FY13 As Adopted (unless noted)	FY14 Proposed	Variance
Beginning Fund Balance (FY13 per FY12 audit/FY14 estimated)			
Assigned (FB available for FY13 Budget)	\$ 481,370	\$ -	\$ (481,370)
Unassigned (estimated)	\$ 92,222	\$ 344,786	\$ 252,564
Total Fund Balance	\$ 573,592	\$ 344,786	\$ (228,806)
Revenues			
Tax Revenues	\$ 646,230	\$ 661,938	\$ 15,708
Interest	\$ 1,500	\$ 1,500	\$ -
Fund Balance (estimated actual Assigned FB needed for FY13)	\$ 380,810	\$ 344,786	\$ (36,024)
Total Revenues Available	\$ 1,028,540	\$ 1,008,224	\$ (20,316)
Expenditures			
Payroll Account (estimated actual expenditures for FY13)	\$ 694,540	\$ 681,000	\$ (13,540)
Operating Account (estimated actual expenditures for FY13)	\$ 334,000	\$ 335,400	\$ 1,400
Total Expenditures	\$ 1,028,540	\$ 1,016,400	\$ (12,140)
Unexpected Expenditures (10% of Expenditures)	\$ 100,560	\$ 101,640	\$ 1,080
Total Expenditures + Unexpected Expenditures	\$ 1,129,100	\$ 1,118,040	\$ (11,060)
Ending Fund Balance (estimated)			
Assigned	\$ -		\$ -
Unassigned	\$ 344,786	\$ (109,816)	\$ (454,601)
Total Fund Balance	\$ 344,786	\$ (109,816)	\$ (454,601)

FY13 and FY14 Budget Comparison at 0.0155 Mills

	FY13 As Adopted (unless noted)	FY14 Proposed	Variance
Beginning Fund Balance (FY13 per FY12 audit/FY14 estimated)			
Assigned	\$ 481,370	\$ -	\$ (481,370)
Unassigned	\$ 92,222	\$ 344,786	\$ 252,564
Total Fund Balance	\$ 573,592	\$ 344,786	\$ (228,806)
Revenues			
Tax Revenues	\$ 646,230	\$ 820,803	\$ 174,573
Interest	\$ 1,500	\$ 1,500	\$ -
Fund Balance	\$ 380,810	\$ 344,786	\$ (36,024)
Total Revenues Available	\$ 1,028,540	\$ 1,167,089	\$ 138,549
Expenditures			
Payroll Account	\$ 694,540	\$ 681,000	\$ (13,540)
Operating Account	\$ 334,000	\$ 335,400	\$ 1,400
Total Expenditures	\$ 1,028,540	\$ 1,016,400	\$ (12,140)
Unexpected Expenditures (10% of Expenditures)	\$ 100,560	\$ 101,640	\$ 1,080
Total Expenditures + Unexpected Expenditures	\$ 1,129,100	\$ 1,118,040	\$ (11,060)
Ending Fund Balance (estimated)			
Assigned			\$ -
Unassigned	\$ 344,786	\$ 49,050	\$ (295,736)
Total Fund Balance	\$ 344,786	\$ 49,050	\$ (295,736)

Estimated Revenues Available for FY14		
FY14 Estimate of Tax Revenues	\$ 661,938	@ 0.0125
FY14 Estimate of Interest	\$ 1,500	
FY13 BofA Sublease	\$ 49,150	
Unused FY13 10% Unexpected Expenditures	\$ 100,560	
FY13 Unassigned Fund Balance	\$ 92,222	
FY13 "unspent" Expenditures	\$ 102,854	
Total Revenues Available	\$ 1,008,224	
Expenditures for FY14		
Payroll Account		FY14
Salaries	\$ 490,000	
Benefits	\$ 191,000	
Subtotal	\$ 681,000	
Operating Account		
Contractual Support Services	\$ 70,000	
Legal Services	\$ 5,000	
Rent	\$ 94,400	
Equipment & Furnishings	\$ 15,000	
Telephone	\$ 4,000	
Mail	\$ 4,000	
Advertising Notice	\$ 42,000	
Printing/Reproduction	\$ 17,000	
Office Supplies/Materials	\$ 9,000	
Property Appraiser & Tax Collector	\$ 38,000	
Travel	\$ 9,000	
Reference & Education	\$ 5,000	
Audit	\$ 14,000	
Administrative Hearing	\$ 4,000	
Council Activities	\$ 2,000	
Contingency	\$ 3,000	
Subtotal	\$ 335,400	
Total Expenditures	\$ 1,016,400	
Unexpected Expenditures (10% of Expenditures)	\$ 101,640	
Subtotal	\$ 101,640	
Total Expenditures + Unexpected Expenditures	\$ 1,118,040	

Ending Fund Balance (prior to FY13 Audit)	
FY14 Budget Surplus(Deficit) - Unassigned	\$ (109,816)
Total Remaining Fund Balance	\$ (109,816)

PUBLIC LIBRARY COOPERATIVE - @0.4437 mills

The Public Library Cooperative (PLC) serves eligible residents of Pinellas County and its member public libraries. The Cooperative serves these groups through the management of county, state and federal funds for library development and by facilitating the sharing of materials and resources among its members. The Cooperative is funded by a millage levy in a portion of the unincorporated areas of the county and per capita dues paid by the participating municipalities without libraries. The maximum millage rate that can be levied is 0.5 mills.

1014 PUBLIC LIBRARY COOPERATIVE

Department Revenues by Fund / Account		FY13 Revised Budget (a)	FY14 Request		FY14 Request vs. FY13 Bud	%
1014	Ad Valorem Revenues*	4,560,270	4,666,470		106,200	2.3%
	Excess Fees - Constitutional Officers	18,230	15,000		(3,230)	-17.7%
	Interest Earnings	3,490	2,900		(590)	-16.9%
	Subtotal PPLC Revenue	4,581,990	4,684,370		102,380	2.2%
	Beginning Fund Balance	278,650	172,730		(105,920)	-38.0%
Total Revenues & Fund Balance		4,860,640	4,857,100		(3,540)	-0.1%
	Millage Rate	0.4437	0.4437		0.0000	0.0%
	<i>*FY14 ad valorem revenues reflect a 2.5% increase in taxable values</i>					
Department Expenditures by Program		FTE by Program				
1014	Public Library Cooperative	4,658,900	4,608,330	n/a	(50,570)	-1.1%
	Constitutional Officers Transfers	100,000 (b)	151,630	n/a	51,630	51.6%
	Reserves Program	101,740	108,980	n/a	7,240	7.1%
Subtotal Expenditures		4,860,640	4,868,940	0	8,300	0.2%
	Less Reserves	(101,740)	(108,980)		(7,240)	7.1%
Total Expenditures without Reserves		4,758,900	4,759,960		1,060	0.0%
Personnel Summary						
Total FTE (Full-time equivalent positions)		0.0	0.0	0	0.0	*****

Target Reconciliation

FY14 Budget Request Target Not Applicable

County support of the Public Library Cooperative is funded by a separate property tax levy apart from the General Fund.

FY14 Decision Package Request Not Applicable

	FY13 Budget	% of Total	FY14 Request
PUBLIC LIBRARY COOPERATIVE TOTAL BUDGET			
County Aid to Govt Agencies (c)	4,626,580	86.1%	4,597,300
State Funded Budget (d)	746,600	13.9%	740,000
Total Budget	5,373,180	100.0%	5,337,300



(a) FY13 Revised Budget as of February 12, 2013

(b) FY13 Transfer to Tax Collector; FY14 Transfers to Tax Collector and Property Appraiser

(c) Excludes Cost Allocation Operating Expense

(d) FY14 State Funded Budget is subject to Legislative Appropriations

PUBLIC LIBRARY COOPERATIVE - @0.5000 mills

The Public Library Cooperative (PLC) serves eligible residents of Pinellas County and its member public libraries. The Cooperative serves these groups through the management of county, state and federal funds for library development and by facilitating the sharing of materials and resources among its members. The Cooperative is funded by a millage levy in a portion of the unincorporated areas of the county and per capita dues paid by the participating municipalities without libraries. The maximum millage rate that can be levied is 0.5 mills.

1014 PUBLIC LIBRARY COOPERATIVE

Department Revenues by Fund / Account		FY13 Revised	FY14	FY14 Request vs.	
		Budget (a)	Request	FY13 Bud	%
1014	Ad Valorem Revenues*	4,560,270	5,258,580	698,310	15.3%
	Excess Fees - Constitutional Officers	18,230	15,000	(3,230)	-17.7%
	Interest Earnings	3,490	2,900	(590)	-16.9%
	Subtotal PPLC Revenue	4,581,990	5,276,480	694,490	15.2%
	Beginning Fund Balance	278,650	172,730	(105,920)	-38.0%
Total Revenues & Fund Balance		4,860,640	5,449,210	588,570	12.1%
	Millage Rate	0.4437	0.5000	0.0563	12.7%
	<i>*FY14 ad valorem revenues reflect a 2.5% increase in taxable values</i>				
Department Expenditures by Program		FTE by Program			
1014	Public Library Cooperative	4,658,900	5,174,410	n/a	515,510 11.1%
	Constitutional Officers Transfers	100,000 (b)	165,820	n/a	65,820 65.8%
	Reserves Program	101,740	108,980	n/a	7,240 7.1%
Subtotal Expenditures		4,860,640	5,449,210	0	588,570 12.1%
	Less Reserves	(101,740)	(108,980)		(7,240) 7.1%
Total Expenditures without Reserves		4,758,900	5,340,230		581,330 12.2%
Personnel Summary					
Total FTE (Full-time equivalent positions)		0.0	0.0	0	0.0 *****

Target Reconciliation

FY14 Budget Request Target Not Applicable
 County support of the Public Library Cooperative is funded by a separate property tax levy apart from the General Fund.

FY14 Decision Package Request Not Applicable

PUBLIC LIBRARY COOPERATIVE TOTAL BUDGET	FY13 Budget	% of	FY14 Request
		Total	
County Aid to Govt Agencies (c)	4,626,580	86.1%	5,163,380
State Funded Budget (d)	746,600	13.9%	740,000
Total Budget	5,373,180	100.0%	5,903,380



(a) FY13 Revised Budget as of February 12, 2013

(b) FY13 Transfer to Tax Collector; FY14 Transfers to Tax Collector and Property Appraiser

(c) Excludes Cost Allocation Operating Expense

(d) FY14 State Funded Budget is subject to Legislative Appropriations

Name of Department: Pinellas Public Library Cooperative
 Strategic Focus Area: Environment, Open Spaces, Recreation, & Culture

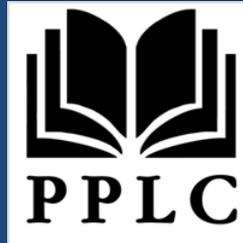
Program	Classification	Description	FY14 Total Program Allocation (\$)	FTE's*	FY13 Total Program Revenue (\$)	Performance Measures	Estimated FY14	Actual FY11	Actual FY12	Estimated FY13
County Budget										
Unincorporated Area Library Services <i>Pursuant to an Inter-local agreement between 13 member libraries</i>	Essential	Funds are distributed to city libraries to allow access to services by unincorporated area residents and to improve the quality of library service countywide. The distributions are based on an Interlocal Agreement; the current agreement expires in 2013. Of the total, 95% is allocated according to a formula based on population and per capita library expenditures; 10% is allocated based on non-resident circulation of library materials; and 5% is allocated for facility expansion or special projects or programs.	\$4,367,435		see note	Registered Borrowers	550,000	582,287	546,666	550,000
						Library Circulation	6,800,000	6,735,647	6,763,579	6,800,000
						Library Visits	5,000,000	4,909,448	4,744,559	5,000,000
						Expenditures per Capita	\$ 32.00	\$ 31.61	\$ 30.61	\$ 32.86
Library Cooperative Administration	Administrative	Personnel (2.5 FTE) manage Cooperative funds and countywide library programs; includes operating and capital expenses.	\$229,865	2.5*	see note					
	Administrative - Other	Tax Collector fees, Property Appraiser fees, Full Cost Allocation	\$162,660		see note					
SUBTOTAL - EXPENDITURES			\$4,759,960		\$0					
Reserves	Administrative	Reserves			see note					
TOTAL (County Budget):			\$4,759,960	2.5*	\$0					
<i>Note: This budget is totally supported by a separate property tax levy for the Pinellas Public Library Cooperative</i>										
<i>* = Grants & Aid expenditures include the 2.5 FTEs. These FTEs are not County personnel positions.</i>										
State-Aid-Funds										
County-wide Library Programs	Essential	By offering a cooperative library service, State Aid funds are made available to the Cooperative. These funds would not otherwise be available without a consolidated countywide library system. State Aid funds a variety of county-wide programs including ; the Talking Book Library for the Blind & Physically Handicapped; the Deaf Literacy Center; Countywide Library Automation System support; Program and Operating materials support. FY12 State Aid was \$703,683.	\$740,000		\$746,611	Rate of return in State Aid (cents in aid generated per dollar of local expenditures) Subject to Legislative Appropriation.	2.76	3.75 cents	2.55 cents	2.76 cents
STATE & COUNTY TOTALS:										

SERVICE ANALYSIS 11/12

Pinellas Public Library Cooperative Member Libraries

	Clearwater	Dunedin	East Lake	Gulf Beaches	Gulfport	Largo	Oldsmar	Palm Harbor	Pinellas Park	Safety Harbor	St. Pete Beach	St. Petersburg	Seminole	Tarpon Springs	TOTALS	AVG
GENERAL INFORMATION																
Population of Legal Service Area	107,805	35,307	30,962	15,989	12,022	77,653	13,597	57,439	49,286	16,881	9,334	246,293	17,215	23,465	713,248	
Total Square Footage of Library Facilities	129,670	38,561	6,484	10,000	12,000	90,300	19,800	26,190	31,283	24,400	8,200	147,748	52,000	20,000	616,636	
Per Capita Square Footage of Library Facilities	1.20	1.09	0.21	0.63	1.00	1.16	1.46	0.46	0.63	1.45	0.88	0.60	3.02	0.85		1.05
Library Service Hours per typical week	51	60	50.75	49	51	56	60	44	66	62	48	75.5	76	56	805	58
AMOUNT OF INCOME BY SOURCE																
Local Funds - (City/District)	\$ 4,975,268	\$ 1,510,469	\$ -	\$ 220,000	\$ 314,163	\$ 2,521,883	\$ 619,141	\$ -	\$ 1,483,758	\$ 1,075,078	\$ 360,044	\$ 5,170,171	\$ 951,079	\$ 953,182	\$ 20,154,236	
Co-op/County Funds	\$ 705,622	\$ 286,392	\$ 408,520	\$ 163,501	\$ 161,952	\$ 649,740	\$ 184,263	\$ 909,930	\$ 358,932	\$ 183,098	\$ 168,334	\$ 636,892	\$ 180,301	\$ 192,873	\$ 5,190,350	
State Funds	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Grants - LSTA/Other	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Other Funds	\$ 82,591	\$ 140,646	\$ 36,206	\$ 29,653	\$ -	\$ 10,175	\$ 10,000	\$ 116,717	\$ 16,761	\$ -	\$ 6,059	\$ 57,870	\$ 38,109	\$ 35,703	\$ 580,490	
PERCENTAGE BY SOURCE																
Expenditures per Capita	\$51.48	\$56.37	\$15.31	\$26.78	\$34.00	\$34.02	\$59.04	\$18.67	\$37.73	\$63.20	\$58.59	\$23.13	\$54.87	\$49.49		\$ 41.62
Salaries as a Percentage of Expenditures	46.53%	50.61%	52.01%	49.66%	55.00%	35.60%	56.15%	56.55%	50.96%	56.47%	46.81%	50.28%	68.67%	43.35%		49.07%
Materials as a Percentage of Expenditures	11.17%	9.00%	11.21%	12.61%	10.48%	14.76%	9.54%	3.73%	5.88%	8.83%	10.61%	9.88%	8.47%	10.88%		10.09%
Materials Expenditures per Capita	\$ 5.75	\$ 5.07	\$ 1.72	\$ 3.38	\$ 3.56	\$ 5.02	\$ 5.63	\$ 0.70	\$ 2.22	\$ 5.58	\$ 6.22	\$ 2.29	\$ 4.65	\$ 5.38		\$ 4.08
Electronic Materials Expenditures	\$ 21,476	\$ 23,607	\$ 693	\$ 6,000	\$ 1,500	\$ 38,000	\$ 8,800	\$ 20,539	\$ -	\$ 350	\$ 2,000	\$ 89,963	\$ -	\$ 5,593	\$ 218,521	
Total Operating Expenditures	\$ 5,550,076	\$ 1,990,351	\$ 473,993	\$ 428,222	\$ 408,725	\$ 2,642,020	\$ 802,731	\$ 1,072,455	\$ 1,859,450	\$ 1,066,888	\$ 546,856	\$ 5,697,210	\$ 944,519	\$ 1,161,238	\$ 24,644,734	\$ 1,760,338
Total Materials Expenditures	\$ 620,151	\$ 179,093	\$ 53,120	\$ 54,005	\$ 42,831	\$ 390,000	\$ 76,610	\$ 39,955	\$ 109,280	\$ 94,231	\$ 58,017	\$ 562,843	\$ 80,000	\$ 126,320	\$ 2,486,456	\$ 177,604
STAFFING LEVELS																
Number of Professional Staff (FTE)	31.95	11.00	1.50	2.38	3.00	13.50	4.00	7.00	9.00	6.25	2.00	18.00	8.50	5.00	123.08	
Number of Support Staff (FTE)	41.62	13.00	7.00	3.00	4.00	28.25	8.00	6.00	18.00	11.00	5.00	62.00	9.30	11.75	227.92	
Annual Salary of Library Director	\$ 94,700	\$ 82,112	\$ 45,000	\$ 50,000	\$ 65,000	\$ 101,442	\$ 74,346	\$ 76,575	\$ 59,105	\$ 66,955	\$ 63,100	\$ 84,484	\$ 73,678	\$ 54,614	\$ 991,111	
Minimum Annual Salary for Beginning Full-time Professional Librarian	\$ 35,345	\$ 36,143	\$ 29,000	\$ 32,232	\$ 34,075	\$ 35,506	\$ 35,797	\$ 29,000	\$ 44,557	\$ 36,254	\$ 37,800	\$ 35,247	\$ 34,819	\$ 31,863	\$ 487,638	
Total Salaries	\$ 2,582,614	\$ 1,007,342	\$ 246,546	\$ 212,642	\$ 224,803	\$ 940,447	\$ 450,761	\$ 606,427	\$ 947,588	\$ 602,426	\$ 256,000	\$ 2,864,712	\$ 648,608	\$ 503,347	\$ 12,094,263	\$ 863,876
LIBRARY COLLECTION AND ITS USE																
Holdings Per Capita	5.71	4.53	1.73	4.83	7.93	3.22	5.52	2.19	2.77	6.59	7.99	1.66	9.69	5.10		4.96
Total Holdings	615,945	159,975	53,682	77,236	95,393	249,666	75,066	126,041	136,730	111,165	74,598	409,370	166,817	119,565	2,471,249	
Subscriptions per 1,000 Population	4.12	3.77	68.86	6.07	6.74	2.46	4.41	0.96	4.85	4.62	6.86	1.28	7.20	7.97	130.16	9.30
Total Subscriptions	444	133	2,132	97	81	191	60	55	239	78	64	316	124	187	4,201	
Total Circulation	1,099,573	638,605	169,798	136,329	92,016	920,427	163,671	532,738	367,293	296,348	172,082	1,582,485	288,647	303,567	6,763,579	
Per Capita Circulation	10.20	18.09	5.48	8.53	7.65	11.85	12.04	9.27	7.45	17.56	18.44	6.43	16.77	12.94		11.62
Registered Resident Patrons	57,983	20,575	9,397	7,803	6,605	36,322	7,412	24,323	26,030	10,056	7,082	137,596	1,980	13,100	366,264	*
Total Number of Registered Patrons	88,413	27,669	13,072	11,255	9,160	71,338	10,319	30,570	42,044	15,240	12,696	148,966	33,145	32,779	546,666	
Percentage of Population Registered	53.79%	58.27%	30.35%	48.80%	54.94%	46.77%	54.51%	42.35%	52.81%	59.57%	75.87%	55.87%	11.50%	55.83%		
Circulation Per Registered Patron	12.44	23.08	12.99	12.11	10.05	12.90	15.86	17.43	8.74	19.45	13.55	10.62	8.71	9.26		13.37
Reference Questions	275,630	128,473	15,643	5,753	7,081	204,448	21,492	25,931	106,274	29,578	14,745	385,012	20,441	23,196	1,263,697	
Number of Library Programs	1,101	1,262	492	404	192	739	382	774	478	504	191	1,675	687	364	9,245	
Program Attendance	28,664	29,244	5,597	51,115	1,737	30,146	6,001	20,141	11,855	13,493	2,446	1,675	24,234	7,378	233,726	
ILL - to other libraries	1,844	1,140	203	94	86	4,367	1,006	896	1,130	707	55	2,131	150	2,758	16,567	
ILL - from other libraries	876	571	71	69	7	1,397	167	602	459	439	8	1,000	305	434	6,405	
# of Internet computer hits	479,059	116,815	77,770	56,660		63,716	55,243	137,685		103,412	10,067	538,027		90,063	1,728,517	
Library Visits	836,919	307,372	101,169	83,412	42,015	567,749	115,173	159,215	318,107	201,137	106,667	1,372,408	324,993	208,223	4,744,559	
Internet Terminals for Public	179	46	15	10	14	63	20	48	39	35	14	225	71	55	834	

Yellow highlighted fields indicate data entry error by City of Seminole staff which makes the patron registration data invalid.

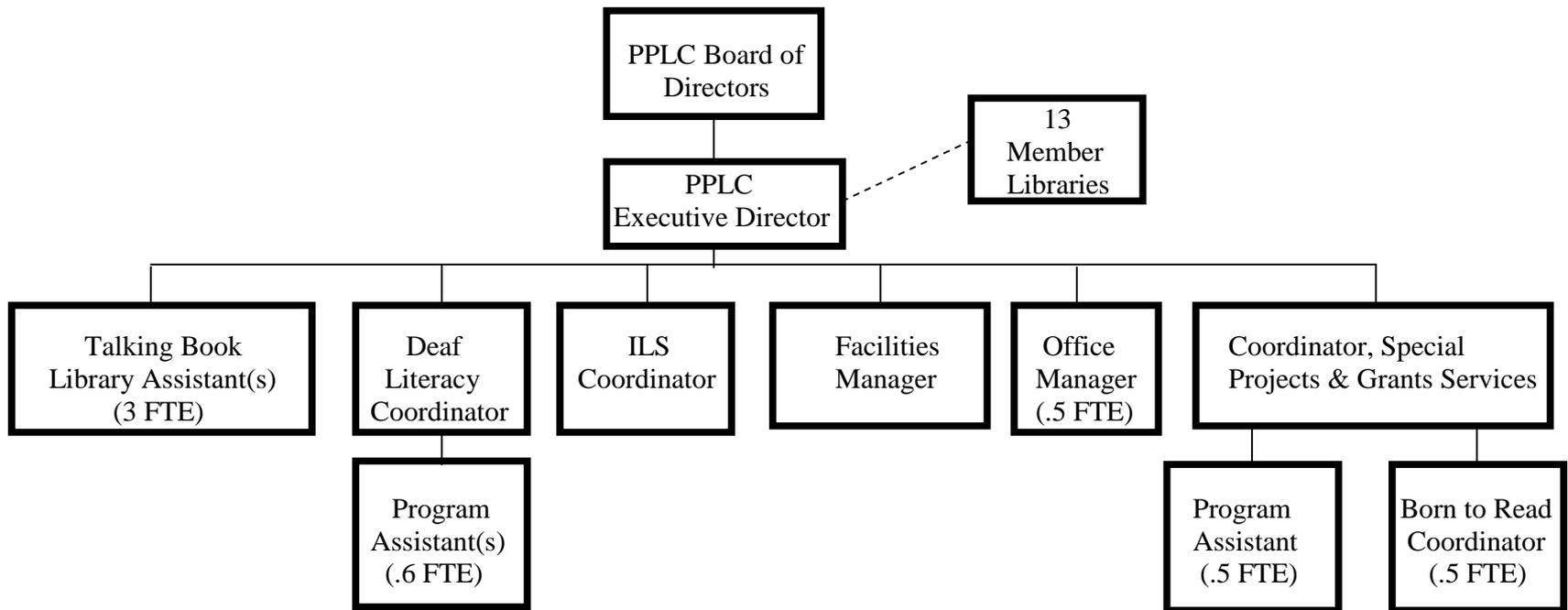


Pinellas Public Library Cooperative

May 2013

Organization Chart Administrative Staff

Pinellas Public Library Cooperative Organizational Chart



Mission Statement

PPLC provides leadership resources and opportunities to enhance the quality, value and availability of library services to members.

2012-2013 Board of Directors

- **Judith Burr, Chair**
(At-Large District 1)

Palm Harbor

- **Jan Setzekorn, Vice Chair**

Clearwater

- **Sharon Oliphant,**
Treasurer

Seminole



Judith Burr



Jan Setzekorn



Sharon Oliphant

- **Cecelia Burke,**
(At-Large District 2)

Seminole-Largo

- **John Doran**

Clearwater

- **Gary Lewis**

Oldsmar

- **Janet O'Harrow**

Dunedin

- **Janina Patrus**

Largo

- **Kathy Ralph,**
(At-Large District 3)

Tierra Verde

Our Member Libraries:

- Clearwater Public Library System
- Dunedin Public Library
- East Lake Community Library
- Gulf Beaches Public Library
- Gulfport Public Library
- Largo Public Library
- Oldsmar Public Library
- Palm Harbor Public Library
- Pinellas Park Public Library
- Safety Harbor Public Library
- St. Pete Beach Public Library
- St. Petersburg Public Library System
- Seminole Community Library
- Tarpon Springs Public Library



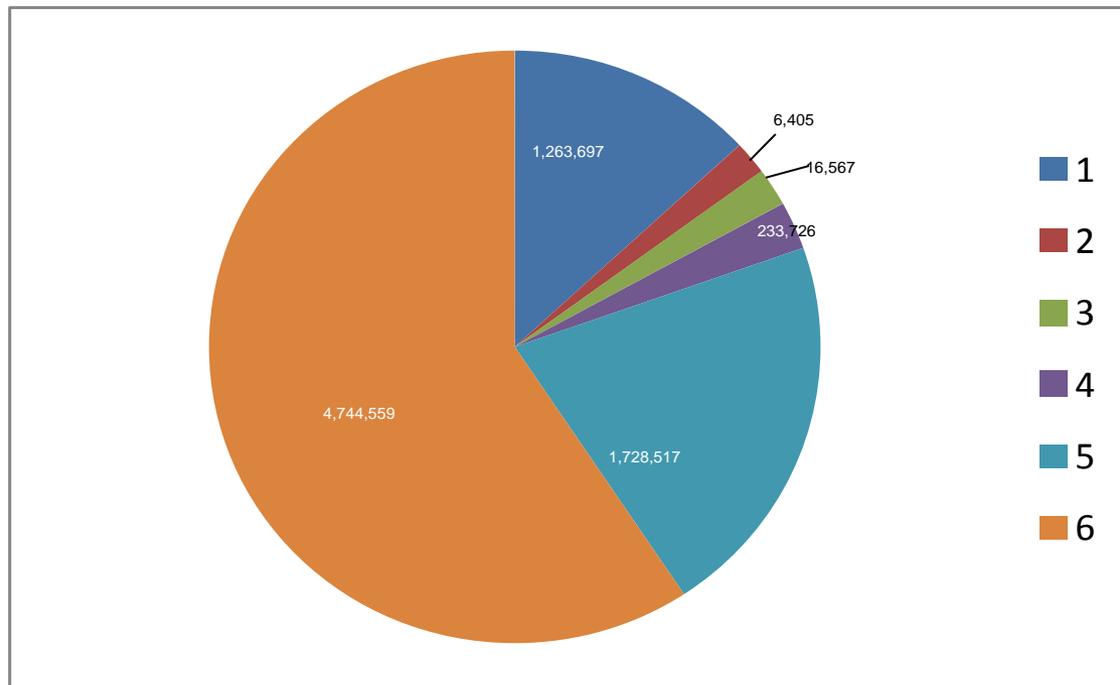
East Lake Library Groundbreaking Ceremony



Safety Harbor Library Grand Re-Opening

Library Service Snapshot I

Library Services



1- Reference Questions 1,263,697

2- Interlibrary Loan from Other Libraries 6,405

3- Interlibrary Loan to Other Libraries 16,567

4- Program Attendance 233,726

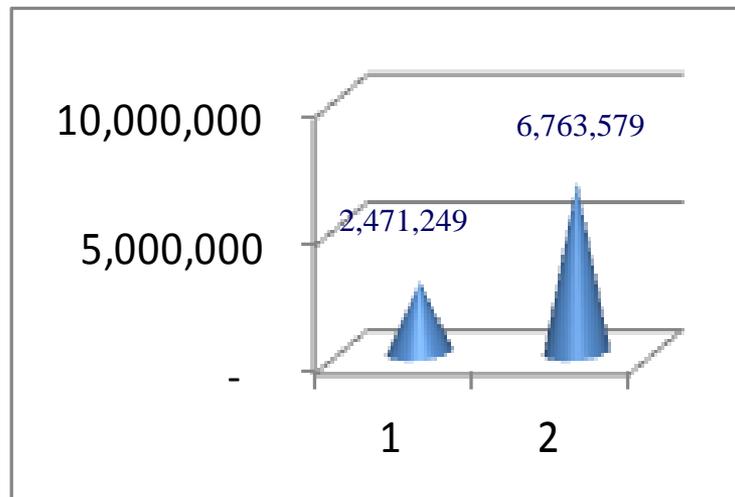
5- Number of Internet

Computer Hits 1,728,517

6- Library Visits 4,744,559

Library Service Snapshot II

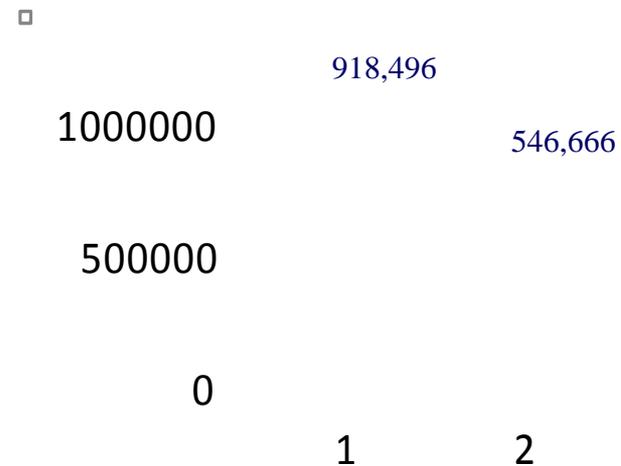
Circulation



Pyramid 1—Total Library Holdings

Pyramid 2—Total **Circulation** of Materials

Registered Borrowers



Cylinder 1—County Population

Cylinder 2—Total Number of **Registered Patrons**

Library Services Comparison

2006/2007 & 2011/2012

	<u>2006/2007</u>	<u>2011/2012</u>
Library Visits	5,024,180	4,744,559
Service Hours	62 average/hrs	58 average/hrs
Circulation	5,383,948	6,763,579
# of Computer Terminals	708	834
Professional Staff	131	123
Support Staff	281	227

Pinellas Public Library Cooperative

- Administers countywide contracts with selected vendors at the request of the Library Directors Advisory Council.
- Coordinates and communicates public service policies as well as provides a centralized communication and distribution point for external agencies and County.
- Manages delivery service contract and the Polaris automation system contract for the automated library catalog.

Pinellas Public Library Cooperative

- Receives and disburses funds from federal, state and local sources.
- Advocates for public library service on a local and statewide basis.



Pinellas Public Library Cooperative

▶ **Born to Read.....**

is a family literacy program that encourages reading by distributing developmentally appropriate books and informs parents about the benefits of reading to their children.

In FY 11/12: 3,900 books distributed; 230 families enrolled; 300 new library cards issued

▶ **Deaf Literacy Center.....**

is a library-based literacy program for Deaf individuals and their families.

In FY 11/12: served over 500 Deaf community members; 75 program volunteers

▶ **Talking Book Library.....**

is a free service to residents of all ages who are unable to read standard print material due to visual, physical or learning disabilities.

In FY 11/12: 2,869 patrons; 142,547 items circulated; 1,755 volunteer hours

PPLC Grants & Partnerships

Grant Awards in Brief

• All American Sertoma Club (Deaf Lit Ctr)	\$ 500
• Alpha Chi Omega (Born to Read)	\$ 190
• Amscot (Deaf Literacy Center)	\$ 250
• Bank of America	\$ 10,000
• Early Learning Coalition—Born to Read	\$ 37,500
• Florida Humanities Council (St Pete PRIME TIME)	\$ 10,000
• Florida Humanities Council (St Pete PRIME TIME)	\$ 2,000
• FHC/Shell Oil (St Pete PRIME TIME)	\$ 2,000
• Lions Club (TBL)	\$ 500
• Northern Trust (TBL)	\$ 500
• READ Pinellas Literacy Grant (Deaf Literacy Center)	\$ 250
• READ Pinellas Literacy Grant (Born to Read)	\$ 350
• READ Pinellas Literacy Grant (Conference)	\$ 825
• Volunteer USA Foundation (DFFLA/Deaf Literacy Center)	<u>\$ 30,000</u>

Total:

\$ 94,865

Hire Me!
Teen Secrets for Getting the Job

• Resume Building • Team Building • Prizes • Mock Interviews

Teen Job Skills Program
JUNE - JULY - AUGUST 2012
Library Program Locations:

June 12 5:30 - 8:00 pm Seminole Community Library	June 28 1:00 - 3:30 pm Palm Harbor Public Library	July 19 1:30 - 4:00 pm Tarpon Springs Public Library	July 26 6:30 - 8:30 pm St. Pete West Community Library	August 2 5:30 - 8:00 pm Safety Harbor Public Library
June 20 11:00 am - 1:30 pm Dunedin Public Library	July 14 11:00 am - 1:30 pm Pinellas Park Public Library	July 21 11:00 am - 1:30 pm Largo Public Library	July 31 1:00 - 3:30 pm Clearwater Main Library	August 6 11:00 am - 1:30 pm Gulfport Public Library

REGISTRATION REQUIRED

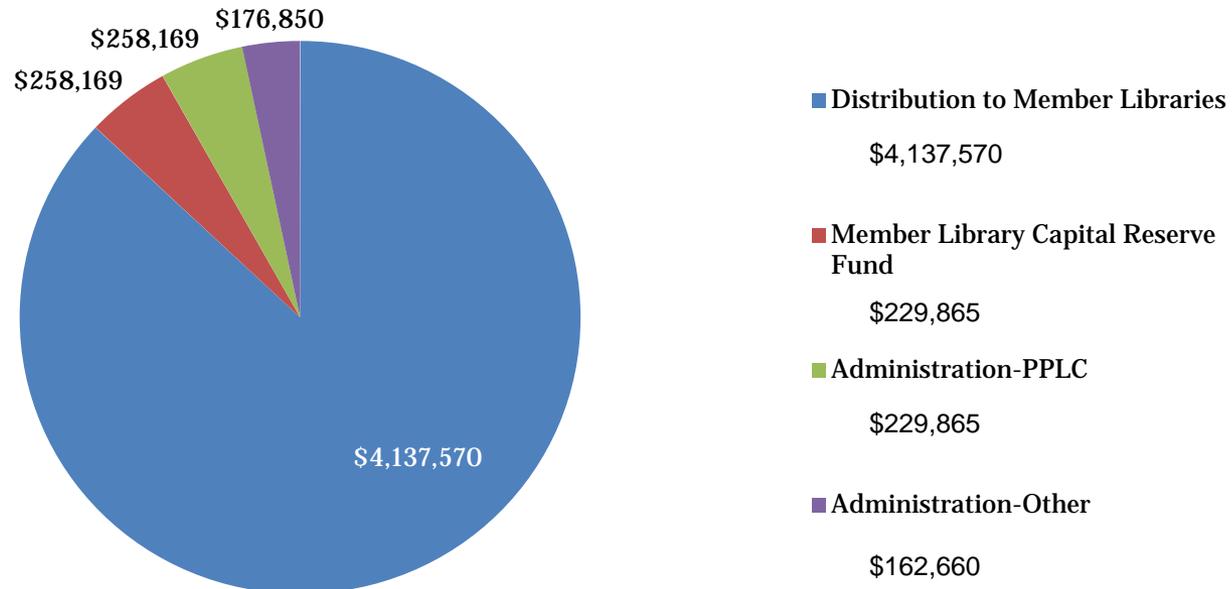
Junior Achievement Bank of America PPLC
Pinellas Public Library Cooperative

Pinellas County Program Budget Submittal

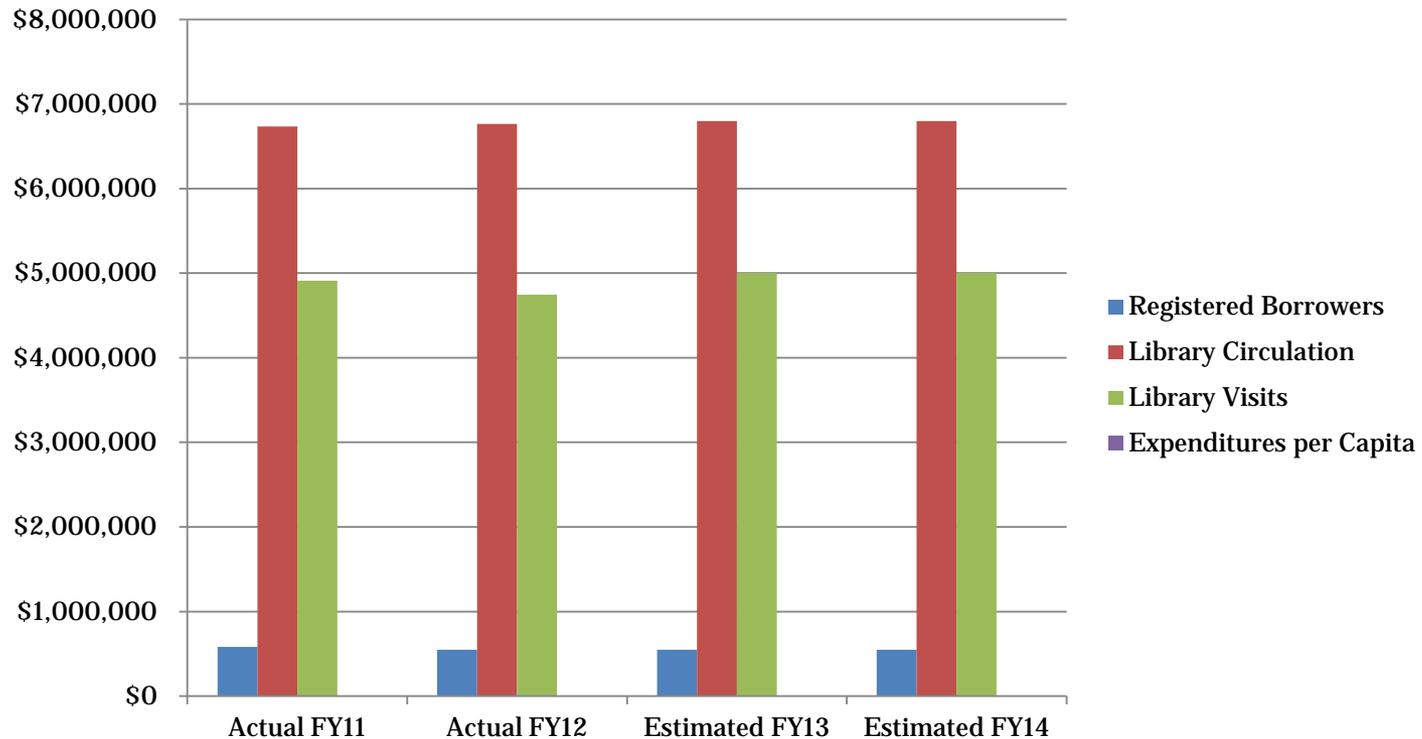
- **The Pinellas Public Library Cooperative (PPLC) is funded by a separate property tax levy apart from the general fund and does not receive any general fund tax support.**

FY14 Total Program Allocation

Calculated at approved millage of 0.4437; Total appropriation \$4,759,960



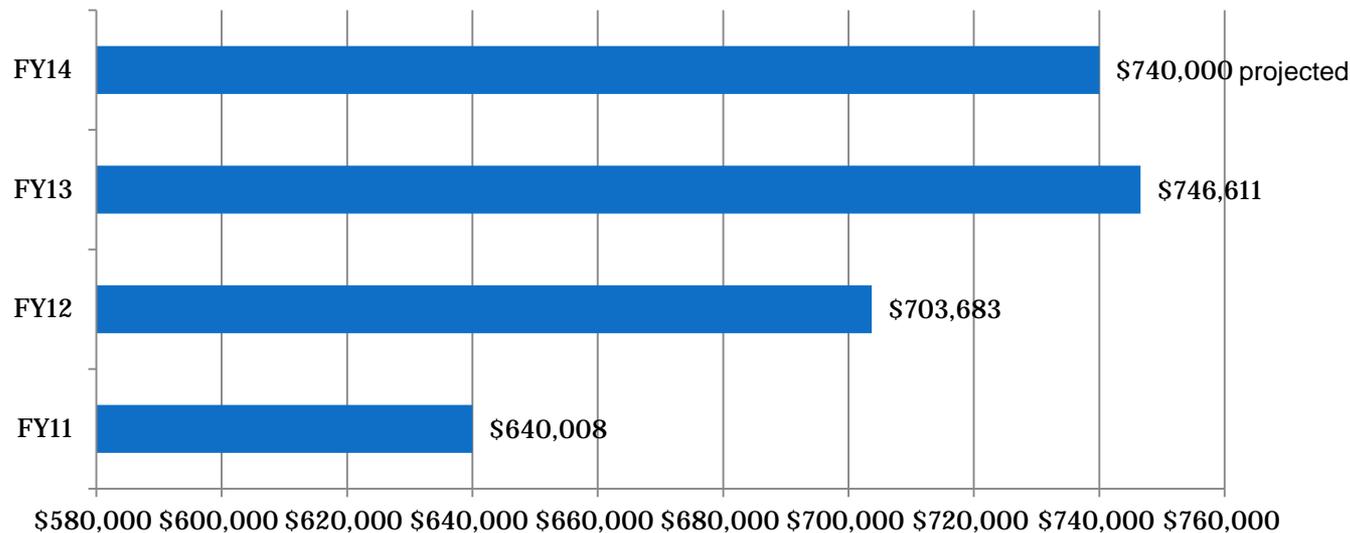
Performance Measures



	Actual FY11	Actual FY12	Estimated FY13	Estimated FY14
Registered Borrowers	\$582,287	\$546,666	\$550,000	\$550,000
Library Circulation	\$6,735,647	\$6,763,579	\$6,800,000	\$6,800,000
Library Visits	\$4,909,448	\$4,744,559	\$5,000,000	\$5,000,000
Expenditures per Capita	\$31.61	\$30.61	\$32.86	\$32.00

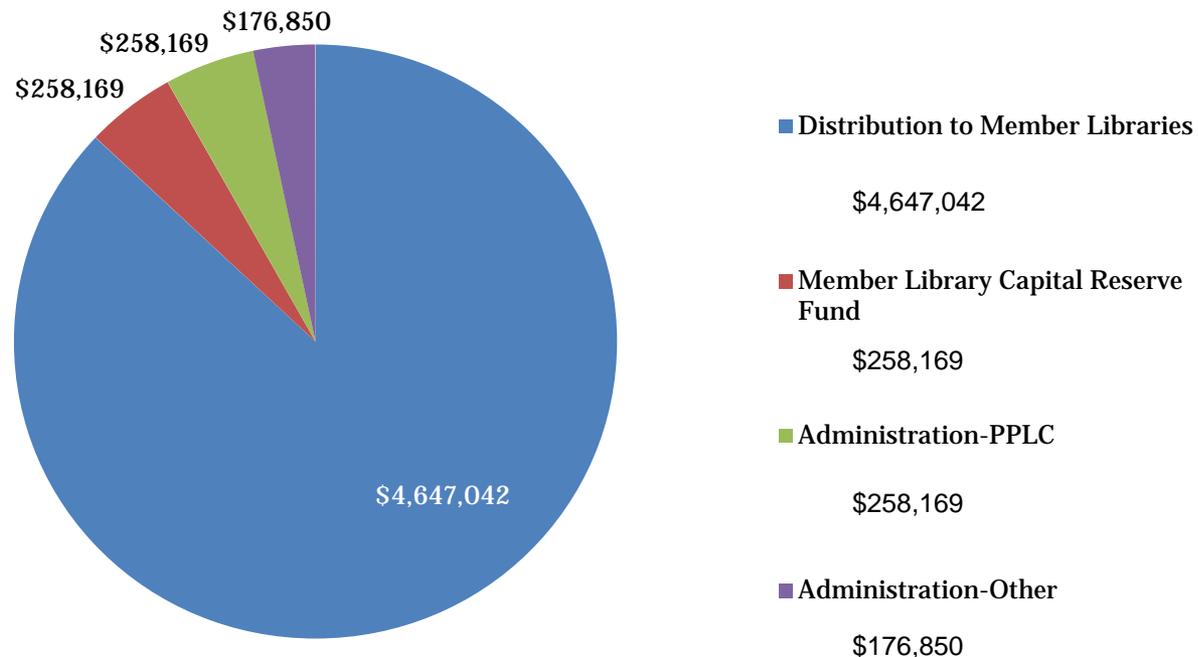
State Aid to Libraries

Legislative session allocated \$22.2million in support of public library service.



FY14 PPLC Board Recommendation

Calculated at 0.500; Total appropriation
\$5,340,230



Pinellas Public Library Cooperative

A Year In Review

- Our member libraries circulated 6,763,579 items.
- Over 1,263,697 reference questions were answered.
- We had over 4,744,559 visits to our libraries from patrons in Pinellas County.
- Our libraries offered 9,245 adult, teen and children's programs with 233,726 community members in attendance.
- We had 546,666 registered patrons.
- We received over \$94,000 in grant funds.

**Pinellas Public
Library Cooperative**
**Mary A. Brown, Executive
Director**
 1330 Cleveland Street
 Clearwater, FL 33755-5103
 Phone: (727) 441-8408
 Fax: (727) 441-8938

Visit Our Web Site!
<http://www.pplc.us>

MARY A. BROWN, EXECUTIVE DIRECTOR

The values that comprise the guiding principles of the Cooperative and which were established and approved by the PPLC Board of Directors in the organizations strategic plan are as follows: Efficient and effective sharing of resources; Diversity; Inclusiveness; Member focused needs; Advocacy; Financial Stability; and the Promotion of literacy. PPLC enhances the ability of its members to provide services and resources beyond those that they could provide individually. Efforts to centralize agreed upon operational functions are coordinated by the Cooperative to maximize the benefit to the members and the public. The Cooperative continues to manage contracts for the library automation system, the delivery service that moves library materials throughout the county and for electronic resources that are made available to eligible users countywide. In 2012 the Cooperative negotiated agreements with four database vendors for countywide access to electronic resources in addition to contracts negotiated on behalf of individuals member libraries.

The primary focus in 2012 was working with the Cooperative membership to update the current Interlocal Agreement in preparation of its upcoming renewal in 2013. The Interlocal Agreement Committee (IAC) consisting of city managers (or their designees), Pinellas County Deputy County Administrator Mark Woodard, the Palm Harbor Community Services Chair, the PPLC Board Chair, and the PPLC Executive Director and other key stakeholders, met in April of 2012. Presentations were provided to the Board of County Commissioners (BCC) by PPLC staff in March 2012 and July 2012. The BCC will schedule a work session for early 2013 to continue discussion on the ILA.

The management of funds received from governmental agencies (local, state, and federal) and private sources are the responsibility of the Cooperative. In 2012 the Cooperative distributed \$4,268,484 in funds collected through the millage assessment to residents of unincorporated Pinellas County to eligible member libraries. State funds received in 2012 totaled \$703,683 and were used to support programs and services countywide. In addition, over \$94,000 in grants and awards were received and were used to provide programs and services over and above those being funded at the local level.

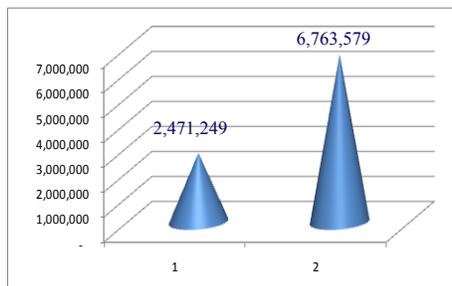
Providing support for countywide programming continued to be a strong initiative in 2012. Member libraries provide a wide range of programs for adults, young adults, and children. Some of the programs enhanced through PPLC's efforts include the following: Hire Me! A teen job skills workshop, Plug in at Your Library for teens, the Florida Library Youth Summer Reading Program, Reading with the Rays, Chipotle Teen Programs, Teen Tech Week, the Adult Summer Reading Program, and Libraries Linking Lifetimes.

The Cooperative submitted and received a number of grants through local funding sources such as Bank of America, Barbara Bush Foundation for Family Literacy, Florida Humanities Council, Read Pinellas, Early Learning Coalition, and other local agencies. These grants enhanced our literacy and programming efforts and helped establish new partnerships for the Cooperative.

(cont on Page 2)

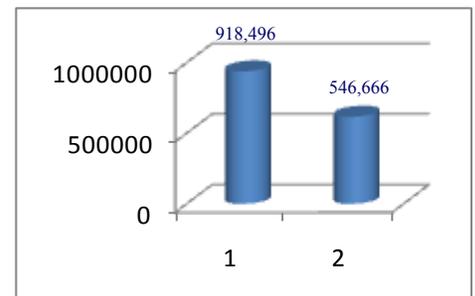
LIBRARY SERVICES

Circulation



Pyramid 1—Total Library Holdings
Pyramid 2—Total **Circulation** of Materials

Registered Borrowers



Cylinder 1—County Population
Cylinder 2—Total Number of **Registered Patrons**

COOPERATIVE PROGRAMS



Born to Read

Born to Read is a library literacy program that informs parents about the benefits of reading to their babies. The program encourages reading by distributing developmentally appropriate books to families. This year, approximately 230 new families were enrolled in the program with over 300 new cards issued. The program also provided over 3,900 books and parenting materials that were distributed to Born to Read families. The program received grant funding for these books from community partners including the Early Learning Coalition, READ Pinellas, Friends of the Library, Clearwater Pi Beta Phi, Alpha Chi Omega, and First Book.



Deaf Literacy Center

This past year, the Deaf Literacy Center continued to fulfill its mission of providing basic literacy instruction, life skills training, and library and information services to Deaf individuals and their families. The program received over \$31,000 in grant funds including the Barbara Bush Foundation for Family Literacy to sustain the program's services to include family literacy. Additionally, over 500 Deaf adults and family members attended DLC programs and over 1,500 individuals participated in Sign Language instruction and programs.



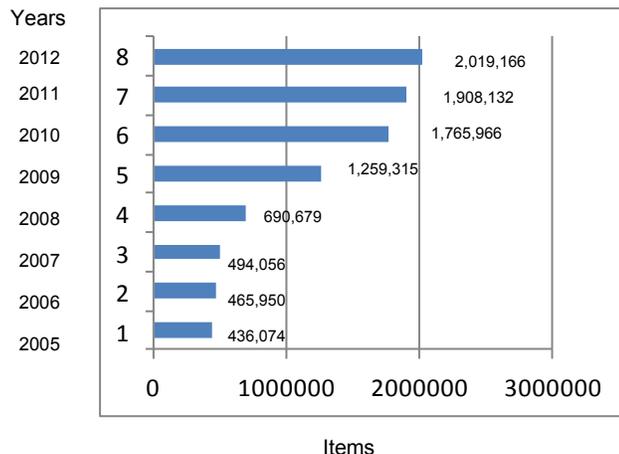
Pinellas Talking Book Library

During the past year, PTBL volunteers donated over 1,700 hours assisting in daily operations critical to the organization. The library also received grants and donations including funds from the Northern Trust, the Loebenberg Foundation, the Lions Club and individual supporters. In 2012, the PTBL continued the relationship with Sarasota County to provide services to their patrons. The TBL continues the conversion to digital books for its collection. TBL also hosts the Low Vision Center which added a SARA CE™ for its patrons. The library also continues its partnerships with local community organizations, including Lighthouse of Pinellas' Summer Transition Program and the Nina Harris School.

COURIER SERVICES

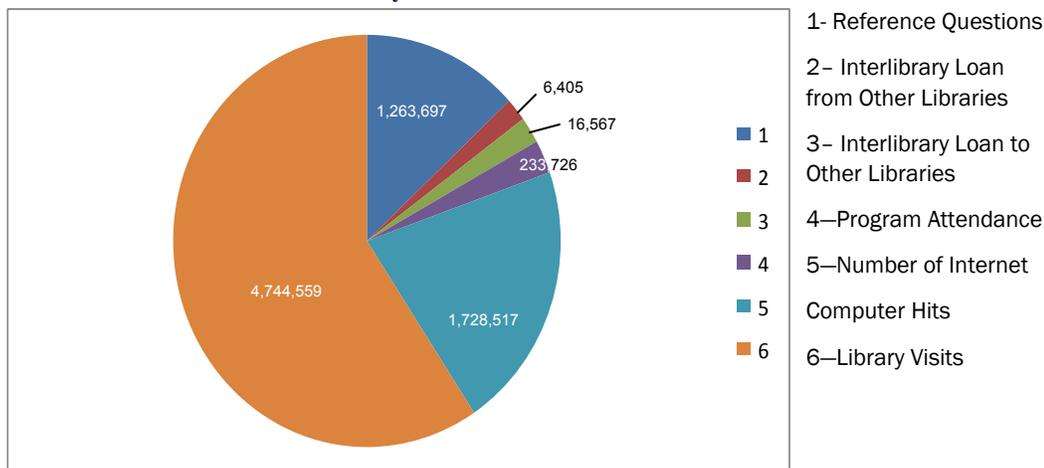
The Pinellas Public Library Cooperative handles the distribution of library materials among member libraries. Since 2009, the Cooperative has managed the courier delivery service contract with Velocity Express. This vendor is responsible for the delivery of materials from member library to member library—including books, DVDs, games, etc. Delivery figures continue to increase with the 2012 figure showing over 2 million books, videos, DVDs and more being delivered between the PPLC member libraries for Pinellas County residents.

Courier Service—Items Delivered



SERVICE SYNOPSIS

Library Services



EXECUTIVE DIRECTOR REPORT (continued)

The Cooperative continued its contract with Polaris Integrated Library Systems for the provision of automated library system services. The Cooperative manages the contract and acts as the primary point of contact with Polaris staff. The Cooperative expended \$ 213,187 in FY 12 for Polaris system support and maintenance fees. The delivery of materials throughout the county is a key component of the success of the countywide automation system. The Cooperative manages a contract with Velocity Express through the Tampa Bay Library Consortium for the provision of this service. Fees covered by the Cooperative in 2012 totaled \$141,507.

Advocating for libraries and the critical services they provide is a key element of the Cooperative's mission. The Cooperative Board and staff met with local, and state elected officials to encourage their support and remind them of the major impact libraries have on their communities. Legislators were visited in their local offices by the PPLC Executive Director, PPLC Board of Directors, and local library directors. During the 2012 legislative session legislators were also visited in Tallahassee during the FLA sponsored Library Days event.

The Cooperative currently has reciprocal borrowing agreements with the participating members of the Tampa Bay Library Consortium, St. Petersburg College, and the City of Indian Rocks Beach.

Over the past three years the Cooperative Board, staff, and members have made a major commitment of time, effort, and resources toward the successful renewal of the Interlocal Agreement. The continuance of this partnership is in the best interest of the members and most importantly to the library users in Pinellas County. I look forward to finalizing a new agreement in 2013 and to working with the Cooperative Board of Directors and our member communities in continuing to enhance the quality and availability of a wide range of library services countywide.

BUSINESS TECHNOLOGY SERVICES

Business Technology Services (BTS) provides a full suite of technology services to all BCC Departments, as well as continuing services to the Constitutional Officers, Agencies, and the Courts to enable business strategies that enhance the mission of Pinellas County Government. Internal centers of competency are developed to protect information assets, ensure business continuity, and leverage financial resources through shared business services. In response to citizen demands for more responsive and self service government, strategies are implemented that enable more ubiquitous access to public information. The adoption of strategic planning, project management and service management best practices add value to county operations in the form of cost effective service delivery and support. Internet services also promote world-wide branding, tourism and positive economic impact to the County. The BTS Department is governed by the BTS Board. This Board consists of representation from each Constitutional Officer, the County Administrator and the Judiciary.

The budget associated with the BCC Strategic Projects and Utilities Enterprise cost centers are controlled through the BCC Technology Steering Committee. The budget associated with the OPUS Project cost center is controlled through the Oracle Business Applications Executive Committee. The budget associated with the Justice CCMS cost center is controlled through the CJIS Policy Board.

5001 BUSINESS TECHNOLOGY SERVICES FUND

Department Revenues by Fund / Account		FY13 Adopted	FY14	FY14 Request vs.	
		Budget	Request	FY13 Adopted	%
5001	Internal Service Charges	31,981,950	27,612,110	(4,369,840)	-13.7%
	Interest Earnings	47,340	42,750	(4,590)	-9.7%
	Sales - Surplus	-	108,250	108,250	*****
	Other Miscellaneous Revenues	83,020	39,320	(43,700)	-52.6%
	Interfund Transfers (One-time Wage Adjustment)	-	-	0	*****
	Beginning Fund Balance	8,459,160	8,655,350	196,190	2.3%
Total Revenues & Fund Balance		40,571,470	36,457,780	(4,113,690)	-10.1%

Department Expenditures by Program		FTE by Program				
Recurring Programs						
5001	Enterprise IT Services (a)	22,869,400	23,216,820	139.9	347,420	1.5%
	Custom IT Services	1,518,270	1,694,290	8.1	176,020	11.6%
	Enterprise Computer Replacement (c)	875,000	-	-	(875,000)	-100.0%
	DEI Enterprise (funded entirely by DEI Enterprise)	2,591,000	2,896,150	-	305,150	11.8%
	Reserves	2,741,010	1,012,610	n/a	(1,728,400)	-63.1%
Non-Recurring Programs						
	Retire Mainframe Project (Year 3 of 3)	1,054,280	1,054,280	2.0	0	0.0%
	BCC Strategic Projects	3,236,110	4,064,150	1.0	828,040	25.6%
	OPUS Project	1,010,100	607,980	-	(402,120)	-39.8%
	Justice CCMS (a)	4,676,300	1,911,500	3.0	(2,764,800)	-59.1%
Total Expenditures		40,571,470	36,457,780	154.0	(4,113,690)	-10.1%

Personnel Summary

Total FTE (Full-time equivalent positions)	148.0 (b)	154.0	6.0	4.1%
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Target Reconciliation	
FY14 Budget Request Target (applicable to Enterprise & Custom IT Services programs)	\$ 23,538,200
<i>Target Variance</i>	\$ -
FY14 Decision Packages	
Non-recurring Request	\$ 3,648,550
Recurring Request	\$ 1,001,110
Total Request	\$ 4,649,660

- (a) FY13 Adopted Budget includes \$4.3M in non-recurring project appropriations (\$3.9M for Justice CCMS and \$0.4M for WiFi Connectivity).
- (b) FY13 reflects total full-time permanent position headcount. FY14 reflects FTEs.
- (c) Effective FY14, this program will be incorporated into the Enterprise IT Services program and BTS will no longer purchase computers and lease to customers.



BUSINESS TECHNOLOGY SERVICES DEPARTMENT

Program Descriptions

Recurring Programs

Enterprise IT Services	BTS Board supported services that are available for use by all County departments under the BOCC as well as BOCC approved agency affiliates, Independents, and Constitutional Officers. Funding is primarily General Government and consumption of services is tracked and notionally billed by BTS. This program tracks all recurring expenses for labor, licensing, maintenance and support, and technology refresh in support of Enterprise IT Services.
Custom IT Services	This program tracks all labor, licensing, maintenance and support, and technology refresh in support of Custom IT Services. BTS Custom Services are particular to a specific business need that falls outside or is in addition to Enterprise IT Services. Customers of these services are directly billed according to the terms of a negotiated service level agreement with BTS.
Enterprise Computer Replacement	This is a BTS managed program on behalf of the BCC and other subscribing agencies. BTS coordinates the purchase, and all logistical aspects of timely replacement of computers for customers of the program. Effective FY14, this service will be incorporated into the Enterprise IT Services.
DEI Enterprise	Provide essential services and support to maintain DEI-Utilities day-to-day Operations such as, but not limited to, desktop file and print services, infrastructure, etc.
Reserves	Oversees the management and allocation of the county's financial reserves.

Non-Recurring Programs

Retire Mainframe Project	Mainframe dependencies currently exist with many County systems. The largest being the county's Financial system which is being replaced by Oracle, and CJIS which will be replaced by JUSTICE. It is estimated that support for the Mainframe will be needed until the Justice CCMS project is complete.
BCC Strategic Projects	Provide business services needed to manage and implement strategic projects for the BCC departments at the direction of the BCC Steering Committee.
OPUS Project	Oracle Project Unified Solution (OPUS) goal is to implement an integrated countywide financial platform that supports all aspects of the County's financial and human resource operations.
Justice CCMS	Justice Consolidated Case Management System (CCMS) project goal is to replace the current legacy Criminal Justice Information System (CJIS).
Enterprise Capital Improvement	End-of-Life infrastructure replacement.



Pinellas County Business Technology Services

Strategic Business Plan 2013 and BTS Budget Executive Overview

Aligning resources to what is most important to our Customers' Business

May 9, 2013

Vision and Mission

VISION

Service Provider of Choice:
Partnering in relentless pursuit of value-added service

MISSION & VALUES

Specializing in leadership within Pinellas County Government, we are driven to ensure the total success of our customers by providing experienced professionals, innovative business solutions, and core enterprise technologies that meet their critical business needs.

We value the contribution of our employees as a core competency, and are committed to recruit, develop, reward, and retain personnel of exceptional character and dedication.

Delivering Business Value

Collaboration and Partnerships:

Enabled Business Strategies

Reduced Operating Costs

Mitigated Operational Risk

Complied with Legislative Mandates

Promoted Pinellas County Brand

Primary Strategic & Recurring Priorities

BTS PRIORITIES – “THE SHORT LIST”

Enhance & Maintain the Production Environment

Major Projects

JUSTICE_{ccms}
Public Safety Complex
Enterprise GIS (eGIS)
Enterprise Asset Management (EAM)
Enterprise Wi-Fi

Business Disciplines

- Security Management
- Project Management
- Service Management
- Service Strategy, Design, and Continual Service Improvement
- Organizational Change Management
- Financial Management & Cost Recovery

Application Portfolio Management & Service Modernization

Investing in Talent and High Performance Organization

Major Business Strategies

More Collaboration and Partnership:

Focus on IT Service Best Practices

Public Safety Complex (PSC) – Data Center Migration

Transition to Cost Recovery

Business Application Modernization

Mobile Computing & Wireless Service

Social Media & Citizen Engagement

Cloud Computing

Oracle Unlimited Licensing

Business Intelligence

Security Assessment & Remediation

Video Conferencing & Collaboration

Enterprise Content Management

Replacing Aging Cable Infrastructure

Enterprise Email & Office Automation

Total Budget = Base Budget + Cost Pools

\$35,445,170 = \$23,538,200 + \$11,906,970

FY14 Budget Target	23,538,200	Cost Pools	\$11,906,970
FY14 Proposed Budget	23,538,200	<i>CIP</i>	1,372,910
<i>Personal Services</i>	13,993,060	<i>Retire Mainframe Project</i>	1,054,280
<i>Shifted Personal Services</i>	(369,375)	<i>Justice CCMS Project</i>	1,911,500
<i>Operating Expenses</i>	827,025	<i>OPUS Project</i>	607,980
<i>Enterprise Lic & Mtnc</i>	6,667,760	<i>BCC Strategic Projects</i>	4,064,150
<i>Inter-Gov & Adjustments</i>	2,419,730	<i>DEI Enterprise</i>	2,896,150
		<i>Computer Replacement Program</i>	0

**Excludes Reserves*

Budget Issues

- Customer Projects (in progress)
 - Public Safety Complex ... \$1,270,200
(One-Time Funding)
Recurring maintenance would begin in FY15 in the amount of \$235,840
- Clerk Paperless / Tyler Gap ... \$1,600,000
(One-Time Funding)
- Capital Improvement Plan ... \$111,351
(One-Time Funding)

Budget Issues

- Network Fiber ... \$338,000 (One-Time Funding)
 - St. Petersburg Courthouse
 - Keller Well Field
 - US19 Road Widening Project
 - Public Safety Complex
- Security Vulnerability Assessment
 - Personnel... \$269,600 (Recurring)
 - Staff Augmentation... \$50,000 (Recurring)
 - Security Tools... \$105,000 (One-Time Funding)

Recurring maintenance would begin in FY14 in the amount of \$20,000
Additional recurring maintenance in FY15 in the amount of \$23,000

Budget Issues

- Personnel... \$653,011
 - Infrastructure Server Support
 - Organizational Change Management
 - Customer Support Center
 - Project Management
 - Vendor Contract Management
 - Technology Trainer

- Oracle ULA ... \$224,000

Recurring maintenance would begin in FY14 in the amount of \$8,500

Budget Issues Analysis

Total Issues (One-Time):	\$3,648,551
<u>Total Recurring (FY14):</u>	<u>\$1,001,111</u>
Total FY14:	\$4,649,662
Total Recurring (FY15):	\$258,840

Note: Approval of all budget issues would constitute an additional \$4,649,662 (one time funding + recurring cost for FY14), and an additional \$258,840 (recurring cost) for FY15.

The total budget proposal for FY14 would then be as follows:

Total Budget = Base Budget + Cost Pools + Issues

\$40,094,832 = \$23,538,200 + \$11,906,970 + \$4,649,662

Future Budget Issues

- Aging Cable Infrastructure
- Email & Office Automation

Opportunities / Challenges

- Economic Recovery
- Limited Resources/Competing Priorities
- BTS Governance
- Unfunded Legislative Mandates
- Organizational Change Management
- Staff Retention/Competitive Pay



Pinellas County Business Technology Services

**Strategic Business Plan 2013
Version 1.0**

Prepared by the Strategic Leadership Team

Partnering to provide the solutions most important to our Customers' Business

April 2013

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Revision History

Release	Date	Release Reason - Description of Change(s) - Author
1.0	4/19/13	Initial Version for BTS Board– Strategic Leadership Team

Introduction

The Business Technology Services (BTS) Department exists to enable the business with speed and scale, and to provide solutions to real business problems and opportunities in pursuit of customer satisfaction as a "Service Provider of Choice".

Under the direction of the BTS Board, BTS collaborated and partnered with Constitutional Officers, BCC Agencies, and the Courts to enable business strategies that have enhanced the mission of Pinellas County Government. We continue to leverage internal centers of competency to maintain and protect information assets, ensure business continuity, and leverage financial resources through shared business services. In answer to citizen demands for more responsive and self-service government, we implemented strategies that have enabled more ubiquitous access to public information. Business process disciplines in the areas of strategic planning, project management, and service management best practices continue to mature and add significant value to county operations in the form of cost effective service delivery and support. Major initiatives progressed in accordance with project schedules relating to Health & Human Services, Criminal Justice, GIS, Asset Management, Finance, Human Resources, Budgeting, and Purchasing.

As part of the Strategic Planning Process, BTS developed, updated, and refined a Common Requirements Vision (CRV) that documents current business trends and the collective interests of our customers. Trends including video conferencing, tablets, social media and mass collaboration and business intelligence continue to top the list. Additionally, organizational change management, business / workflow analysis and training have gained significant interest from our customers.

Primary Strategic and Recurring Priorities include: Application Portfolio Management and Modernization, Business Process Disciplines, Evolve and Maintain the Production Environment and Investing in Talent Management and High Performance Organization.

Major Projects include: JUSTICE_{ccms}, Public Safety Complex, Enterprise GIS (EGIS), Enterprise Asset Management (EAM) and Enterprise Wi-Fi.

Major Business Strategies include: Service Management Evolution, Public Safety Complex Data Center Migration, Cost Recovery Model, Application Portfolio Management and Modernization, Mobile Computing and Wireless Connectivity, Social Media and Mass Collaboration, Cloud Computing Services, Oracle Unlimited License Agreement, Leverage Business Intelligence Application, Security Vulnerability Assessment Remediation and Ongoing Best Practices, Video Conferencing and Collaboration Tools, Enterprise Content Management (ECM), Preparing to Replace Aging Cable Infrastructure and Refresh Enterprise Office and Collaboration Applications.

The purpose of our Strategic Planning Process is to determine how we can provide the greatest business value to our customers. Our goal is to be the Service Provider of Choice, and we seek to identify and pursue only those opportunities that will enhance the mission of Pinellas County Government by enabling the business strategies of most importance to our customers.

To accomplish this, we recognize the critical need for effective collaboration and partnership to help us identify specific business requirements and industry trends that are affecting our customers' businesses. We use this valuable insight to determine how best to apply our resources to meet the business objectives and desired outcomes.

BTS remains committed to the success of our customers, and will continue to provide experienced professionals, innovative business solutions, and core enterprise technologies that enable the business to better serve the citizens of Pinellas County.

On behalf of the Business Technology Services Department, thank you for the opportunity to serve you and the citizens of Pinellas County.

Sincerely,

James Russell
Interim Executive Director, Business Technology Services

Vision & Mission Statements

VISION

Service Provider of Choice:
Partnering in relentless pursuit of value-added service

MISSION

Specializing in leadership within Pinellas County Government, we are driven to ensure the total success of our customers through the provision of experienced professionals, innovative business solutions, and core enterprise technologies that meet their critical business drivers.

We value the contribution of our employees as a core competency, and are committed to recruit, develop, reward, and retain personnel of exceptional ability, character, and dedication.

Enterprise Projects and Accomplishments

Project Name	Description	Accomplishments	Stakeholders
OPUS	The goal of OPUS is to implement an integrated countywide financial platform that supports all aspects of the County's financial and Human Resource operations to enable Enterprise Resource Planning. The OPUS project represents collaboration among stakeholders from all across the County and is governed and influenced by the Oracle Business Applications Executive Committee (OBAEC), the OPUS Project Sponsors Committee, and the Core Project Management Team under the guidance of the Business Technology Services (BTS) Board. BTS offered project management, organizational change management(OCM), technical and business architecture, implementation and support resources, and actively participates in OBAEC and OPUS Project Sponsors Committees	Dramatically increased reporting efficiency, reducing calculations from taking days to taking minutes, by implementation of Hyperion 11.1.2.2 on an Oracle Exalytics In-Memory machine in March 2013.	OBAEC Committee, Board of County Commissioners, Human Resources, BTS, Clerk of Court
JUSTICE CCMS	The JUSTICE CCMS replaces the legacy CJIS platform for the County. Project success will be measured by the new system's ease of use, navigation consistency, ability to support and accommodate changing business needs and legal mandates, and the capability to interface with other databases and software. CJIS User Policy Board Members include the Pinellas County Clerk of the Court, the State Attorney-Sixth Judicial Circuit, the Public Defender-Sixth Judicial Circuit, the Chief Judge-Sixth Judicial Circuit, the Trial Courts Administrator-Sixth Judicial Circuit, the Pinellas County Sheriff, one Pinellas County Commissioner, and three local Law Enforcement Chiefs. In addition to the Board Members, the Justice Project is guided by the Justice Management Team, which includes representation of CJIS User Policy Board Members, Business Technology Services (BTS), and a Justice Project core team that is comprised of a Project Sponsor, Coordinator, Project Manager and Analyst.	Civil Courts went 'live' for citizens with Odyssey in September 2012, including Public Access online. Conversion of data, development and configuration activities are continuing for the Probate and Criminal Court phases of the project.	CJIS Policy Board, Courts, Clerk of Court, Public Defender, State Attorney, Sheriff, Board of County Commissioners, BTS
CHEDAS	CHEDAS supports Health & Human Services' need to redesign business processes and replace their current case and medical management systems with a fully integrated suite of products that will: reduce manual processing time, reduce service delivery costs, maximize staff efficiencies, offer enhanced eligibility review, self sufficiency planning, performance outcome tracking, ad hoc reporting, and interfaces to OPUS for	Successfully implemented NextGen and Carescope to promote, strengthen and support data collection and evaluation systems that allow for data-driven decision making and funding, improved operations, speed, organizational vitality,	Board of County Commissioners

	finance. The system also supports data-driven decision making, standardize data exchange with partners, and reduce risk for HIPAA compliance. BTS offers program management, technical and business architecture, implementation and support resources, and actively participates in the CHEDAS Management Team.	improved productivity, transformation of business processes, and better services that demonstrate respect for clients.	
Enterprise Asset Management (EAM)	The goal for an Enterprise Asset Management offering is to upgrade and unify the work order and asset management systems currently on various platforms throughout the County to a common, vendor-supported version to ensure business continuity and agility to make improvements quickly. Current focus is on the Maximo platform. Maximo currently exists in 3 different versions (v4, v5, v6) in use in BCC departments. Enterprise Maximo would bring the entire platform to the current supported version 7+.	Conducted visioning sessions in March and December 2012 to establish a Vision and next steps for creating a holistic EAM approach that integrates Asset Management, Enterprise GIS and Business Intelligence platforms into final requirements vision and resulting solutions. Completed gathering requirements. Discovery phase of the project is now in progress until mid 2013.	Board of County Commissioners – Department of Environment and Infrastructure (DEI), Real Estate Management (REM), Parks & Conservation Resources (PCR)
Enterprise GIS (eGIS)	This program focuses on a “One County” approach to citizen engagement and transparency of services using all County geographic information systems and geographic data sets to maximize County benefit. The establishment of a GIS Steering Committee, chaired by the Property Appraiser, and a GIS Services Bureau will set ongoing work priorities, GIS standards, provide guidance for GIS projects, and secure funding for GIS initiatives.	The new GIS ESRI infrastructure completed and in use by multiple stakeholders and citizens. The system offers high availability to a large number of users. New citizen-facing applications are Live: “Bikes and Trails”, “Aerials Viewer” and “Election Polling Place”. Scheduled to be live on April 15th are “Know Your Zone” (for hurricane evacuation) and Property Appraiser’s Parcel Viewer. Four years of Pinellas county aerial images have been consolidated on the eGIS infrastructure for share access.	Board of County Commissioners, Property Appraiser, SOE, Sheriff, and municipalities

Stakeholder Projects and Accomplishments

In addition to established Enterprise Services and Major Project efforts, BTS worked on focused business enablement efforts with our stakeholders. These accomplishments are viewable online here:

<http://intraweb.co.pinellas.fl.us/bts/pdf/stakeholder-accomplishments.pdf>

BTS Major Business Strategies & Initiatives:

Each year, BTS works with County Agencies, Constitutionals, and the Courts to determine the business drivers, industry trends & best practices, and environmental trends that will affect them over the coming 1-3 years. The results of this analysis is a set of common requirements that BTS considers when planning its strategic response to what the County Agencies, Constitutionals, Courts, and BTS will need over that time frame.

BTS will also carry over strategic and recurring priorities from the previous year. We have dubbed these recurring priority and carry over items, "The Short List".

Primary Strategic & Recurring Priorities

BTS PRIORITIES – “THE SHORT LIST”	
Major Projects	JUSTICE <small>ccms</small> , Public Safety Complex, Enterprise GIS (eGIS), Enterprise Asset Management (EAM), Enterprise Wi-Fi
Application Portfolio Management & Modernization	
Business Disciplines	<ul style="list-style-type: none"> • Security Management • Project Management • Service Management • Service Strategy, Design, and Continual Service Improvement • Organizational Change Management • Financial Management & Cost Recovery
Evolve & Maintain the Production Environment	
Investing in Talent and High Performance Organization	

BTS Priorities – Short List Descriptions

Major Projects

- Justice ccms – Transforming and modernizing Pinellas County’s Consolidated Court Management System by partnering with and moving to a commercial-off-the-shelf offering.
- Public Safety Complex – Moving mission critical systems to the Category 5 Hurricane survivability location at the Public Safety Complex.
- Enterprise Geographic Information System – Collaborating and consolidating on GIS to simplify management and launch Pinellas into the next generation of mobile-enabled mapping applications.
- Enterprise Asset Management – Improving and unifying the work order and asset management systems to support strategic initiatives and sustainability practices.
- Enterprise Wifi – Enabling mobility throughout County staff locations by providing wireless connectivity.

Application Portfolio Management & Modernization

Enabling the County to advance to new platforms such as tablet PCs, mobile devices, and faster operating systems is imperative now and through the next three years. The entirety of the BTS-supported application portfolio must be analyzed and plans developed for transitioning to modern, sustainable technologies.

Business Process Disciplines – Driving Business Decisions:

BTS blends a series of best practice disciplines for leading and managing the County’s business technology investments. The combinations of these best practices is the foundation for enabling BTS to be agile, cost-effective, and achieve our vision of being the “Service Provider of Choice” for Pinellas County business technology services. New emphasis will be put toward Service Strategy, Service Design, Continual Service Improvement, and Organizational Change Management practices to support Cost Recovery on the ongoing evolution of Business Technology Services.

These Disciplines include:

- Information Technology Infrastructure Library (ITIL)
- Project Management Body of Knowledge (PMBOK)
- Enterprise Planning and Architecture Strategies (EPAS)
- Solution Development Life Cycle (SDLC)
- Enterprise Security Policy
- Service Level Agreements (SLA)
- Performance Management / Goals & Objectives
- Organizational Change Management (OCM)

Evolve & Maintain the Production Environment

Technology is a critical component of business optimization and quality service levels. As such, BTS considers building and maintaining quality technology environments as a top priority. Availability, business continuity, disaster recovery, security, and total cost of ownership are forethoughts in all system designs. New trends in technologies for mobility, tablets, cloud, data, and social media will necessitate evolving legacy platforms to enable Pinellas County Government to take advantage and enhance citizen experiences.

Investing in Talent and High Performance Organization

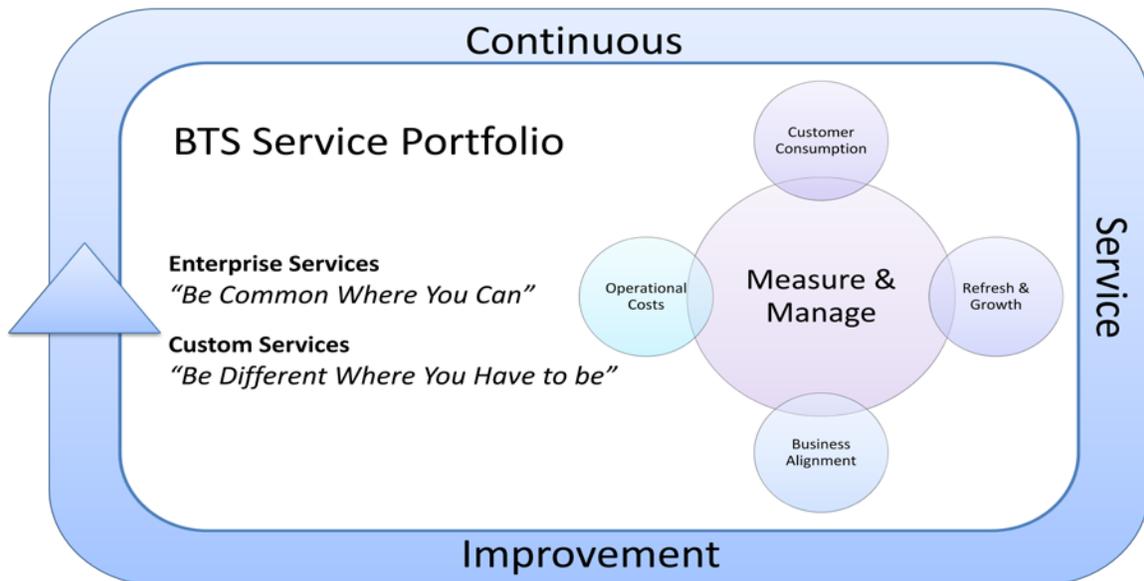
BTS values the contribution of our employees as a core competency, and we are committed to recruit, develop, reward, and retain personnel of exceptional ability, character, and dedication. We are a continually learning organization, continually evolving and staying apprised and ahead of business and technology trends. Our people are our service and to keep pace with constant changes in technology and the high level of expertise required, continual investment in education is imperative. Additionally, as the next wave of mobility and cloud technologies emerges, stakeholders and customers will require training to assure they get the maximum benefits from new business processes and efficiencies.

BTS Major Business Strategies & Initiatives Detailed Descriptions

Cost Recovery – The Transition from Cost Allocation to Cost Recovery

Previous Cost Allocation accounting methodologies were confusing to some customers and sometimes inadequate for transparently tracking consumption of business and IT services in a way that was easily understood.

Fiscal Year 14 will be the first year BTS is actively communicating in terms 'Services' and providing a budget in terms of 'Services.' Recovering in terms of services has already evolved within the 2011 and 2012 BTS Cost Plans. The 2012 Cost Plan implemented an allocation basis in terms of "Enterprise" and "Custom" services. Moving forward, consumption of each set of services and the complete actual cost of each service critically depends on the ability of BTS to effectively measure and manage in terms of services.



Over the last two fiscal years (FY12 & 13), BTS has worked with the BTS Board and Financial Sub Committee to define a portfolio of services that are consumed by Pinellas County Organizations and Citizens. The goal of Cost Recovery is not only to manage the budgeting, accounting, and charging requirements for IT, but also to quantify & qualify the value of IT services. The IT financial management discipline allows for BTS to balance the cost and quality of a service and to maintain the right balance of supply and demand between BTS and the customer.

Cost Allocation via the BTS Cost Plan effectively provided a financial mechanism to recover the costs of Pinellas County's internal IT service organization (BTS) in a way that assumed maximum benefit from federal grant reimbursement and alignment with OMB circulars. Though a viable financial mechanism for this purpose, mapping 'cost' with measures of cost effectiveness and or value were difficult and not clear; customers were distracted by a cost allocation (a "bill") that they could not understand. Cost allocation for some customers became a distraction and a deterrent from partnering with BTS.

The Cost Allocation methodology has three fundamental challenges:

1. Accounting for service usage was two years in arrears and this accounting was used for future state budget allocations and requests. With technology needs and technology possibilities changing rapidly, it was difficult to equate the usage from two years ago to future budget needs for each customer.

2. Metrics used for calculation relied on personal computing and/or staff counts to distribute costs across consumers rather than reflect actual service consumption per service and customer. This made it difficult for consumers to make decisions about changes in their service or service levels provided.
3. Capturing projected funding needs for technology and Service upgrades was not reported or built into the ongoing costs of the technology or Service refresh, resulting in large capital investment requests at 3-5 year intervals.

The new Cost Recovery methodology begins the transition away from the challenges of Cost Allocation. Cost Recovery looks to address the three challenges above by:

1. Adding a multi-year projected budget and cost per service; recognizing variances and making adjustments within one year will have/could have a multi-year impact on the cost of a service regardless of which fiscal year service costs are recovered; In-arrears recovery for BTS services will remain as the primary mechanism for billing.
2. Implement a service consumption basis that aligns with industry standards (where possible); basis measures that are directly related to service consumption and will be continually compared to industry standards to assure cost effectiveness. The cost of the service and who consumes that service must be clear.
3. Include the cost of technology refresh & growth into the overall cost of the Service to level out ongoing cost; keep the Service up-to-date and competitive with industry standards and business needs.

Cost Recovery requires that BTS become more disciplined than ever with resource management, project management, and program/service budgeting to adequately and efficiently manage cost for Services provided by BTS.

Focus on Services: Service Strategy, Service Design, Continual Service Improvement, and Organizational Change Management

A key strategy in the evolution of Business Technology Services is to improve Service Management and business improvement processes. Initial success with ITIL best practices that focused on Incident, Change, and Configuration Management processes resulted in a 50% reduction of Priority 1 (Major) Incidents and these processes continue to add value in measuring performance. Following this success, a strategic focus will be placed on additional Service Management stages and business processes.

- Service Strategy – will focus on evolving strategy, business relationship, demand, service portfolio, and financial management improvements to better manage the pipeline of requests and service delivery for our customers by aligning business outcomes with each service.
- Service Design – will focus on the appropriate quality, capacity, security, and service level management practices to ensure we meet or exceed expectations while balancing sustainability of a service as forethought.
- Continual Service Improvement – will focus on continual improvement for all processes, activities, roles, services, and technologies.
- Organizational Change Management – will focus on the human side of change, including training plans and business analysis, to ensure successful outcomes.

Service Strategy, Service Design, and Continual Service Improvement

These stages in the ITIL framework are covered, in detail, in the Best Management Practice 2011 Edition books bearing their name. Our goal is to implement the practices that will streamline and improve our ability to deliver solutions to our customers.

Organizational Change Management

Organizational Change Management (OCM) is a vital element to successfully implementing and sustaining business technologies. During implementation projects, application upgrades, or new releases, Pinellas County departments and agencies experience changes in their business processes and the way County employees use and interact with systems. OCM activities minimize the amount of time people spend in a state of confusion and uncertainty while also minimizing the risks associated with the “human” aspects of transformation. This leads to increased adoption of new systems and processes, increased sustainability, and reduced backsliding to the old way of doing business.

Public Safety Complex Data Center Migration

The new Public Safety Complex (PSC) is a state-of-the-art Category-5 rated facility designed to protect infrastructure and staff, allowing critical operations to continue to function during many types of potential disasters. BTS will lead and manage the migration of critical Information Technology infrastructure maintained by BTS to the new data center within the PSC to improve disaster recovery and business continuity on behalf of our stakeholders.

Application Portfolio Management & Modernization

Enabling the County to advance to new platforms such as tablet PCs, mobile devices, and faster operating systems is imperative now and through the next three years. The entirety of the BTS-supported application portfolio must be analyzed and plans developed for transitioning to modern, sustainable technologies. A repeatable methodology has been developed to analyze the County’s application portfolio each year to assess what actions will be needed to manage the total cost of ownership versus business value of each application. Emphasis must be placed on this initiative to assure stakeholders are not held back from taking advantage of newer efficiencies and technology platforms.

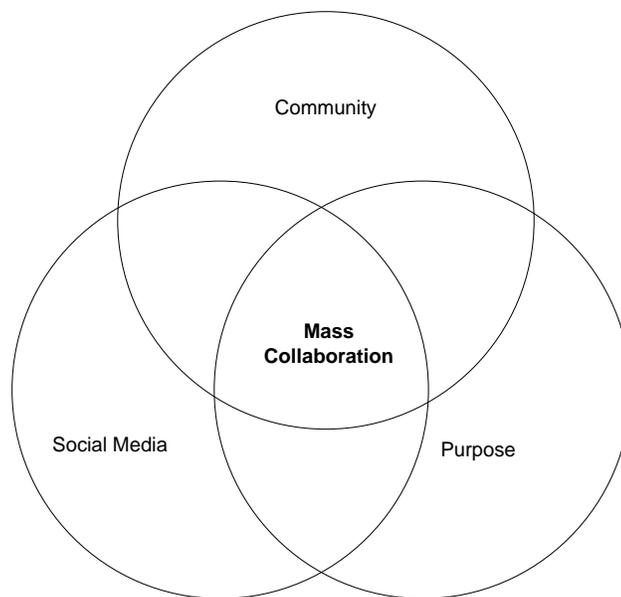
Mobile Computing and Wireless Connectivity

Gartner and other leading IT research groups estimate that by 2015, smart phones and tablets will sell more devices than laptop and PC sales combined. As of 2012, PCs and laptops sold about 350 million units worldwide, while tablet devices were about 120 million. Business trends with “bring your own device” (BYOD) and cloud-based services will continue to heavily influence the trend away from laptop and PC productivity to a “work from any device, anywhere” culture in the next generation of workforce. A BYOD usage and security policy must be developed. Based on the policy, the ability to centrally manage devices may need to be put in place to ensure security for the network and County data assets are not compromised. Central management of devices may include the ability to remotely wipe a device containing sensitive data, the ability to have password policy enforcement, and to provision approved applications. Mobile computing will be essential to new initiatives such as the Enterprise Asset Management (EAM) and GIS projects.

In 2012, the BTS Board and the Board of County Commissioners approved funding for an enterprise scale Wi-Fi networking project to support the continuing influx of new, mobile wireless devices. This project will allow coverage of all County office buildings and is projected to be complete by the end of 2013.

Social Media & Mass Collaboration

Expertise in mass collaboration theory may emerge in County business areas and BTS should be poised to assist, guide, and take advantage of new ways to serve constituents. (See: "The Social Organization: How to Use Social Media to Tap the Collective Genius of Your Customers and Employees" by Anthony J. Bradley and Mark P. McDonald). Facebook, Twitter, and other social networking sites have brought "social media" and associated technologies to mainstream consciousness in recent years. Government sectors have struggled to take these platforms beyond marketing and communication tools to tap into the collective genius of the citizenry. To move from marketing via social media to fully realizing the potential of mass collaboration, where communities actively participate in government rather than just consuming government services, new business initiatives must emerge to define and drive 'purpose'. Defining 'purpose' around mass collaboration efforts establishes 'why' a community would come together to collaborate using social media tools. Gov 2.0, Smart Government, and CRM/311 initiatives will have inevitable touch points into social media and mass collaboration efforts.



A Social Networking policy has been approved and established for BCC departments. It includes the specific roles and base strategy.

http://intranet/directives/pdf/documents/Internet_Social_Network.pdf

Cloud Computing

As public cloud offerings continue to grow, BTS will begin implementing and brokering contracts for cloud services as a strategy to reduce costs while increasing capabilities. The need to develop competency in cloud services brokerage is imperative to negotiate cloud service level agreements and protect the confidentiality, integrity, and availability of this method of delivering technology. In-house private cloud tools and streamlined service delivery should also be invested in to provide BTS customers with secure multi-customer and single-customer environments. Hosted services will also be considered, including offsite disaster recovery locations. Hosted services can include leased or owned infrastructure at a remote site.

Oracle Unlimited License Agreement - The Significance of Scaling Up by January 2014

To fully leverage the Oracle Unlimited License Agreement (ULA) negotiated as part of the OPUS Project implementation, BTS has formalized a plan to expand implementation and usage of Oracle products covered under that agreement. This will require time commitment from stakeholders to analyze future needs, investment dollars for hardware to support the products, and BTS staffing time to accomplish this effort before the terms of the ULA 'lock-in' and finalize coverage and ongoing maintenance costs in January 2014.

Business Intelligence

Business intelligence is a set of business practices and technologies that aim to support data-driven decision making. Pinellas County has invested in two market-leading business intelligence and performance measurement platforms for the enterprise: Oracle Business Intelligence Enterprise Edition (OBIEE) and Hyperion Financial Management. Fully engaging these tools and data-driven decision processes will be transformational in improving the information readily available to decision makers.

Security Vulnerability Assessment Remediation and Ongoing Best Practices

Following recommendations from our 3rd party security assessment, BTS will increase dedicated security staff and our emphasis on security best practice enforcement. Protection of the County's critical systems and sensitive data is paramount. In addition to ongoing security practices, new, disruptive technologies and policies such as Bring Your Own Device (BYOD) and cloud services adoption will require new security skill sets and training plans to assure continuity, integrity, and availability standards are defined and met.

Video Conferencing and Collaboration Tools

Video conferencing and collaboration tools adoption rate is increasing throughout the world as an ongoing business trend. Vendors, standards, and technologies in this space have been volatile and constantly changing as newer, cheaper, solutions become available. Over the last 5 years, BTS has seen a common requirement trend among agencies looking for ways to limit travel while increasing collaboration. Common goals are to increase productivity by removing travel time, 'go green' by reducing fuel usage and carbon emissions, and save money on travel reimbursements. As the market stabilizes video communication standards are ratified over the next year, BTS will work with agencies to come up with a common strategy that meets the needs of their business. This could be a two part approach that encompasses a room to room solution and a desktop/mobile solution that in the future could integrate with a Unified Communications and Collaboration strategy.

Enterprise Content Management (ECM)

Encompassing 'paperless' efforts that include scanning, document management, records management, enterprise search, workflow/business process management (BPM), collaboration, and web content management, the goal for this program is to take a "One County" approach to how the County captures, manages, stores, retrieves, preserves, and delivers content internally and to citizens.

The top 5 business drivers for ECM efforts are:

1. Improving operational efficiencies.
2. Providing more efficient information sharing.

3. Improving the quality of decision making.
4. Reducing costs.
5. Ensuring records retention compliance, transparency, and effective reporting.

ECM is a business and management discipline with a tightly integrated software suite that requires input and participation from many stakeholders to be successful. As such, this strategy will require identification of key stakeholders and a governance body to guide and oversee the investment in this effort.

Real Estate Management, in partnership with many content management stakeholders and a 3rd party assessment group, studied current physical storage and records management practices in their “Records Management and Retention Study” (Feb. 2009 – July 2010). In their findings, the potential for significant savings was identified with an initial focus on eliminating physical storage needs in lieu of electronic equivalents. Current ECM-related projects include the Clerk’s Paperless Project that eliminates paper as well as improves and streamlines Clerk processes. Other enterprise projects such as OPUS, JUSTICE ccms, and CHEDAS intrinsically eliminate the need for paper records and may play part in the overall ECM effort.

Preparing to Replace Aging Cable Infrastructure

Planning has begun to develop a funding strategy to replace the aging network cabling infrastructure throughout the County enterprise. The need for additional speed and throughput to support newer technologies such as video-conferencing, distance learning, and mass collaboration coupled with a continuing increase of ‘connected’ devices across the enterprise will push and possibly exceed current capacities. Additionally, as copper and fiber optic cabling ages, the potential for unplanned outages and higher maintenance costs increases. Preparing to update and replace the network cabling (cable plant) infrastructure will become increasingly imperative over the next 1-3 years.

Refresh Enterprise Office and Collaboration Applications

A significant investment will be required in the next 2-3 years to update licensing for current Office Productivity and Collaboration software. To maintain vendor support and compatibility with other commercial-off-the-shelf products within the County, new software versions will be required. Planning and research has begun this year to explore business options leveraging cloud-based, mobile-friendly alternatives that may eliminate or reduce the overall total cost of ownership of this type of software.

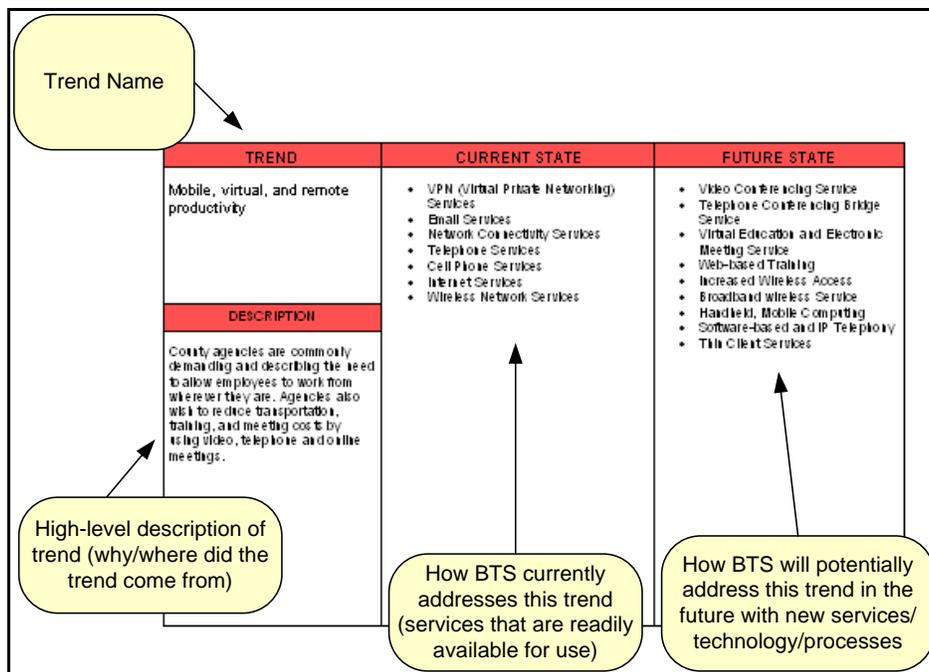
Common Requirements Trends

Each year, Common Requirements gathering is done using BTS Business Relationship Managers (BRMs), via questionnaires and one-on-one interviews with our customers.

From these common requirements, BTS derives the future state and business strategies needed to achieve business goals for our customers. From the future state, BTS initiates the creation of processes, technologies, services, projects and programs to respond directly to customer needs.

Note that the future state is a guideline, or *potential* future state, that is not intended to be fully realized. Each future state item must be considered and justified via business case and/or customer approval. Steering committees such as the BCC Technology Steering Committee, Justice Management Team, Oracle Business Applications Executive Committee (OBAEC), and the Technology Steering Cooperative will provide additional guidance on which future state items provide the most value to their represented interests. As future state items become implemented, standard BTS policies and procedures will be followed to ensure quality and fiscal responsibility.

How to read the “Common Requirements Trends”:



Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Mobile, virtual, and remote productivity</p>	<ul style="list-style-type: none"> • VPN (Virtual Private Networking) Services • Email Services • Network Connectivity Services • Telephone Services • Internet Services • Wireless Network Services • Online Collaboration Services • Wireless and Broadband Connectivity Services 	<ul style="list-style-type: none"> • Video Conferencing Service • Web-based Virtual Education and Electronic Meeting Service • Web-based Training • Increased Wireless Access • Bring Your Own Device policy • Handheld, Mobile Computing • Thin Client and Web Client Services • Portal Services
<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • Fixed Location Video Conferencing • Mobile Internet/Email/Calendar Services • Telephone Conferencing Bridge Service • Software-based and IP Telephony • Virtualized Application Services 	<ul style="list-style-type: none"> • Expanded Collaboration Software Services • Expanded Telecommuting Services • Location Aware Services • Mobile Device Management • Mobile applications • HTML5 applications • Unified Communications
<p>As part of their efforts to reduce operational costs and improve service efficiency, County agencies have identified the need to enable employees to easily and cost effectively work from remote, field-based and mobile locations with a variety of devices and platforms. Agencies also wish to reduce transportation, training, and meeting costs by using video, telephone, online meetings and other collaboration & communication tools.</p>		

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Collaboration, sharing, and data integration</p>	<ul style="list-style-type: none"> • Email Services • Website Hosting Services • Network Connectivity Services • Telephone Services • Internet Services • Wireless Network Services • Collaboration Software Services • File and Print Share Services • Application Development Services • Database Administration Services • Document Management Services • Instant Messaging Services • County Justice Information System Services • Project Management Office Services • Collaboration Software Services • Web-based Information Subscription Services • Extranets Services • Web-based Survey Tools Services • Telephone Conferencing Bridge Services • Software-based and IP Telephony • eTown Hall Meetings • OPUS • JUSTICE <small>ccms</small> 	<ul style="list-style-type: none"> • Expanded Video Conferencing Services • Web-based Virtual Education and Electronic Meeting Service • Web-based Training • Increased Wireless Access • Bring Your Own Device policy • Unified Citizen Portal to County Services • Application Integration Services • Data Integration Services • Enhanced mobile computing • Web 2.0 Initiatives • Public Safety Complex (PSC) Co-location • Online Community Subscribed Services (forums, newsgroups, mailing lists, wiki, blog, Twitter, social networking mash-ups) • RSS/Atom Feeds • Mash-up Application Services • Portal Services • Expanded Collaboration Software Services • Location Aware Services • Constituent Relationship Management • Unified Communications
<p>DESCRIPTION</p>		
<p>County agencies are commonly looking for more ways to easily and seamlessly share information – within agencies, inter-agency, externally with other counties, and interacting with citizens. Agencies are asking for more ways to engage with each other and citizens via the Internet. Sharing information is called out as one of the most prolific trends across all agencies. Additionally, social networking is a common, worldwide trend where more citizens are interacting with each other via technology with an expectation that governments will follow suit.</p>		

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Reduce Costs</p>	<ul style="list-style-type: none"> • Technology Consolidation • Server Virtualization Services • Service Management <ul style="list-style-type: none"> ○ Change Management ○ Configuration Management ○ Business Continuity and Disaster Recovery Management ○ Service-Level Management ○ Financial Management ○ Problem Management 	<ul style="list-style-type: none"> • Cloud Services • Video Conferencing Service • Web-based Virtual Education and Electronic Meeting Service • Web-based Training • Bring Your Own Device policy • Rapid Application Development Tools • Service Management <ul style="list-style-type: none"> ○ Release Management
<p>DESCRIPTION</p>		
<p>Fiscal responsibility is a common priority and agencies need to balance budget constraints with the ability to deliver new services and maintain sustainability of existing services.</p>	<ul style="list-style-type: none"> • Strategic Planning and Consulting Services • Enterprise Architecture Services • Identity Management Services • Extensive Utilization of Web Environment to Citizens • In-house PC Services, Leasing and Support, Remote Desktop Support • IP Telephony and Stipend Program • Application Virtualization Services • Telephone Conferencing Bridge Service • Metro-Ethernet Service • OPUS 	<ul style="list-style-type: none"> • Software License Compliance Management – Enterprise Service • Technology Asset Management – Enterprise Service • Identity-driven workflow and provisioning of services • Service-Oriented Architecture • Reusable/Modular/Object-Oriented Design and Development • Expanded Utilization of Web • Paperless initiative combined with PDF print driver on every machine • Technology Standardization • Automated Vehicle Dispatch Routing

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Green Initiatives</p>	<ul style="list-style-type: none"> • Server Virtualization Services • Pinellas County Government Green Local Government Distinction • Extensive Web Presence Distributes Government Information Electronically, On-demand. • All HP PC equipment is Energy Star Certified 	<ul style="list-style-type: none"> • Paperless Office • Charge back printer management services (per page costing) • Free PDF Writer Initiative • Workstation power management profiles to reduce power consumption
<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • Cell Phone Recycling Program • Cardboard for all PCs, Laptops and Servers Recycling Program • Batteries for UPS, Cell Phones and Laptops Recycling Program • Energy-saving Awareness Program • Technology Consolidation • Purchase EnergyStar Certified equipment and use via manufacturer recommendation • Printer Management • Recycle Toner Print Cartridges 	<ul style="list-style-type: none"> • Web-based Virtual Education and Electronic Meeting Service • Expand Opportunities to Deliver Information Paperless via the Web • Expand Collaboration and Mobile Computing Services • Continue Current Recycling Programs • Continue replacing older technology with more energy efficient technology • Continue Hardware/Software Consolidation/Virtualization • Work from Anywhere Mobile Offices • Automated Vehicle Dispatch Routing
<p>Aligning with the Quality Pinellas Community programs, Green Initiatives are called out here that can explicitly reduce consumption, waste, and environmental impact. Pinellas County was the First Government in the State to Achieve the “Green Local Government” Distinction in 2007.</p>		

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Enterprise Content Management (ECM): Imaging, Document Management, Paperless Office</p>	<ul style="list-style-type: none"> • Document Imaging Services • Document Workflow Services • Electronic/Desktop-based Fax Services • Extensive Utilization of Internet, Intranet and Collaboration Software Services for Electronic Sharing of Information 	<ul style="list-style-type: none"> • Document Imaging Services • Document Workflow Services • Image Heritage Village Archive/Collection for Public View • Image Human Resources files • Aerial Oblique Photographs for Property Appraisals
<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • OPUS • JUSTICE <small>ccms</small> • CHEDAS 	<ul style="list-style-type: none"> • Document Storage and Retention Policies Documentation Needed • Potential Mandated Electronic Availability of County Records to Citizens
<p>County agencies and departments wish to replace traditional paper-driven processes with electronic equivalents. Electronic storage and retrieval may eliminate the need for expensive physical warehousing, record retention, and disposal. Electronic Filing (E-Filing) is a pending mandate coming from the state and other agencies where electronic interaction will be required to replace paper-based systems.</p>	<ul style="list-style-type: none"> • Electronic Timesheets and Payroll Remittance Advice • Electronic/Desktop-based Fax Services • E-Filing Services 	<ul style="list-style-type: none"> • Paper on Demand • Free PDF Writer Initiative • Enterprise Workflow Solutions and Business Process Management Tools • Stored docs central repository • Expand Collaboration Software Services

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Customer Self-Service / eGovernment</p>	<ul style="list-style-type: none"> • Internet Web Sites • Public Records View Services • Self Service Payment Websites • Interactive Voice Response Systems • Payment kiosks • Third-party Payment Providers (such as paying traffic tickets at Amscot) • Internet Web Sites with extensive self-service capabilities for transactions, reservations, subscription services, video on-demand, mapping on-demand, automated request/feedback forms, access to data deeds, etc 	<ul style="list-style-type: none"> • Unified County Citizen Web Portal Integrating All Agencies' Services • Outward-facing Web Services for Self-service Functionality for 3rd Party Usage • Web 2.0 Initiatives and Online Community Services (forums, newsgroups, mailing lists, wiki, blog, Twitter, social networking mash-ups) • RSS/Atom Feeds • Mash-up Application Services • Potential Mandated Electronic Availability of County Records to Citizens • Service Catalog • Expanded Public Record View/Print • Common Point-Of-Sale and Online Shopping Cart Services, PCI requirements, and ePay overhaul • Constituent Relationship Management\311
<p>DESCRIPTION</p>	<ul style="list-style-type: none"> • OPUS • JUSTICE <small>ccms</small> • CHEDAS 	
<p>County agencies are asking for additional options to allow internal and external customers to help themselves to County services. Emphasis is on more citizen engagement mechanisms and transparency of all County services. Self-service web-based portals and new, expanded data access methods will allow anyone requiring services or information new ways to access those services. This may further reduce costs and aligns with pending legislation mandating electronic access to County information sources.</p>		

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Data mining, data analysis, and performance measurement</p>	<ul style="list-style-type: none"> • Report Writing Services • Localized and Ad Hoc Web-based Analytics • Localized and Ad Hoc Web-based Reporting (Application Specific) 	<ul style="list-style-type: none"> • Business Intelligence Services • Data Marts • Data Warehouse • Executive Dashboards • Data Analysis Tools • Predictive Analysis Tools • Increased Utilization of Web Analytics to Support/Validate Paperless and Self-service Initiatives • Expanded Ad-hoc Reporting Capabilities • Data Catalog
<p>DESCRIPTION</p>		
<p>Information is our most valuable asset. Business Intelligence provides the tools and systems that play a key role in the strategic planning processes of an organization. New and better ways to interrogate and report information is required for better, faster business decisions.</p>		

Common Requirements Trends – Current State & Future State

TREND	CURRENT STATE	FUTURE STATE
<p>Automation, workflow, and business process optimization</p>	<ul style="list-style-type: none"> • Identity Management Services • Service Catalog Services • Process Improvement Projects and Services 	<ul style="list-style-type: none"> • Business Process Analysis/Reengineering • Business Process Management Systems • Business Process Modeling • Continual Service and Process Improvement Program • Identity-driven workflow and provisioning of services • Enterprise Workflow Solutions and Business Process Management Tools • Improved Process Metrics-gathering and Reporting • Rapid Application and Solution Development Methods • Smaller Solution and Development Focus Teams
<p>DESCRIPTION</p>		
<p>County agencies need new, better ways to improve work processes and increase efficiency. Business process analysis and automation of key processes are required.</p>		

Future State Technical Architecture

The Enterprise Planning and Architecture Strategies (EPAS) process used by BTS creates architecture viewpoints. Architecture viewpoints are simplified perspectives and views of the composition of complex systems. EPAS recognizes four different architecture viewpoints:

- **Business Architecture** – this viewpoint puts business processes in visual form to describe how the business process works with information and technology to deliver business capabilities. Example documents include business process swim lane diagrams, business and functional requirements documentation, organization charts, business units interaction diagrams and unified modeling language (UML) documentation.
- **Information Architecture** – defines information assets, the flow of information (origin and destination), and the composite views of information required for decision making. Example documents include information flow diagrams, entity-relationship modeling and diagrams (ERMs and ERDs), and unified modeling language (UML) documentation.
- **Technology Architecture** – defines standard technology products, configurations and services, and how they interoperate. Example documents include future state technical architecture, topology drawings, unified modeling language (UML) documentation, and configuration management database(s).
- **Solution Architecture** – this view considers where relevant subsets of business, information, and technology intersect with one another to describe the overall solution.

For the 2013/2014 planning cycle, BTS developed an updated future state technical architecture one-page diagram to describe a high-level technical target state. This diagram provides guidance to various stakeholders, including staff participating in gap analysis, to develop a road map to the future state.

The diagrams on the proceeding pages are presented with two views. The first Technical Architecture view, titled “BTS Future State Technical Architecture (2-3 years Target)”, uses the technology product name with the vendor or manufacturer specific terminology. The second view, titled “BTS High-Level Future State Architecture (2-3 years Target)”, maps directly to the first view but uses the generic technology terminology to describe the type or intent of product.

*Note: The Enterprise Project technologies are typically composed of multiple technology components or suite of products that could occupy entire pages on their own, so these are presented by their project names rather than the underlying parts.

BTS Future State Technical Architecture (2-3 years Target)

Friday, April 19, 2013

Windows 2008 & 2012, RHEL 6	Windows 7, Windows 8 or next version	SAN (Compellent)
Windows File & Print	Internet Explorer 10	Tivoli, Windows ASR Cloud Svcs or Co-fo (Backup & Recovery)
Exchange 2013, Lync, C2C	Office 2013	iPad, Android Tablets
ESXi	ZENworks Configuration Management (ZCM)	Virtual Desktop Infrastructure\ VMWare View
Windows Server Update Service	ZENworks Application Virtualization	Trend Micro OfficeScan AV

Server/Desktop

Metro Ethernet	Siemens VOIP, OpenScape (Unified Communications)	CheckPoint, Cisco ASA Firewall
1 GB to Desktop(core sites), 1GB & 10GB to Server	Interactive Voice Response TBD	Barracuda Anti-Spam
F5 BIG-IP	Polycomm Video Bridge, Siemens UC	CheckPoint Web & Network Content Filtering
Juniper VPN, Juniper Secure Meeting, Cisco Gate-to-gate	Vpro	SNORT, OSSEC, AlienVault Host-based Intrusion Detection
Cisco Wireless	Splunk (Security Event Management)	Infoblox IPAM

Networking/Security

Odyssey	Maximo	Hyperion Business Intelligence (BI)	Enterprise Content Management (ECM)	Esri, Enterprise Geographic Information System (GIS)
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Enterprise Projects

Service Desk r12	CA CMDB r12	Spectrum	SolarWinds/ Splunk	Clarity r12, Oracle Project Manager
CA Service Catalog	CA Workflow	Oracle Enterprise Manager 12c	SQL Server Mgmt Studio, Redgate SQL DBA Bundle	

Business Technology Tools

Java EE 7	JDeveloper, Visual Studio & CSS, Dreamweaver, FlexBuilder	Oracle Application Development Framework	Ivy/Maven, Hudson, Weblogic Deployment Tool	Subversion (SVN)	Oracle Application Testing Suite, Siteimprove, Browsera
Oracle 11g,12c, SQL Server 2012, ESSbase 11	OBIEE 11g, 12c,Hyperion	Crystal Reports, BI Publisher, SSRS, SQLPlus, Oracle App Exp	SharePoint 2010	Weblogic 11g,12c, IIS 8, Oracle HTTP Server	Oracle Service Registry\ Enterprise Repository
Oracle SQL Dev, SQL Dev, Data Modeler, SQL Plus, SQL Studio	PL/SQL, SQL, T-SQL	Oracle E-Business Suite R12	ESRI ArcGIS Server 10, ArcGIS Online, Pictometry-EFS	eTX HEMI, Oracle Data Integrator, SSIS	Automate BPA Server, Campaign Enterprise
Trakman, Appl Xtender, Odyssey, Oncore	Additional roadmap detail on scripting and other tools can be found in the BTS Technology Roadmap at http://intraweb.co.pinellas.fl.us/bts/BTSRoadmap.pdf				

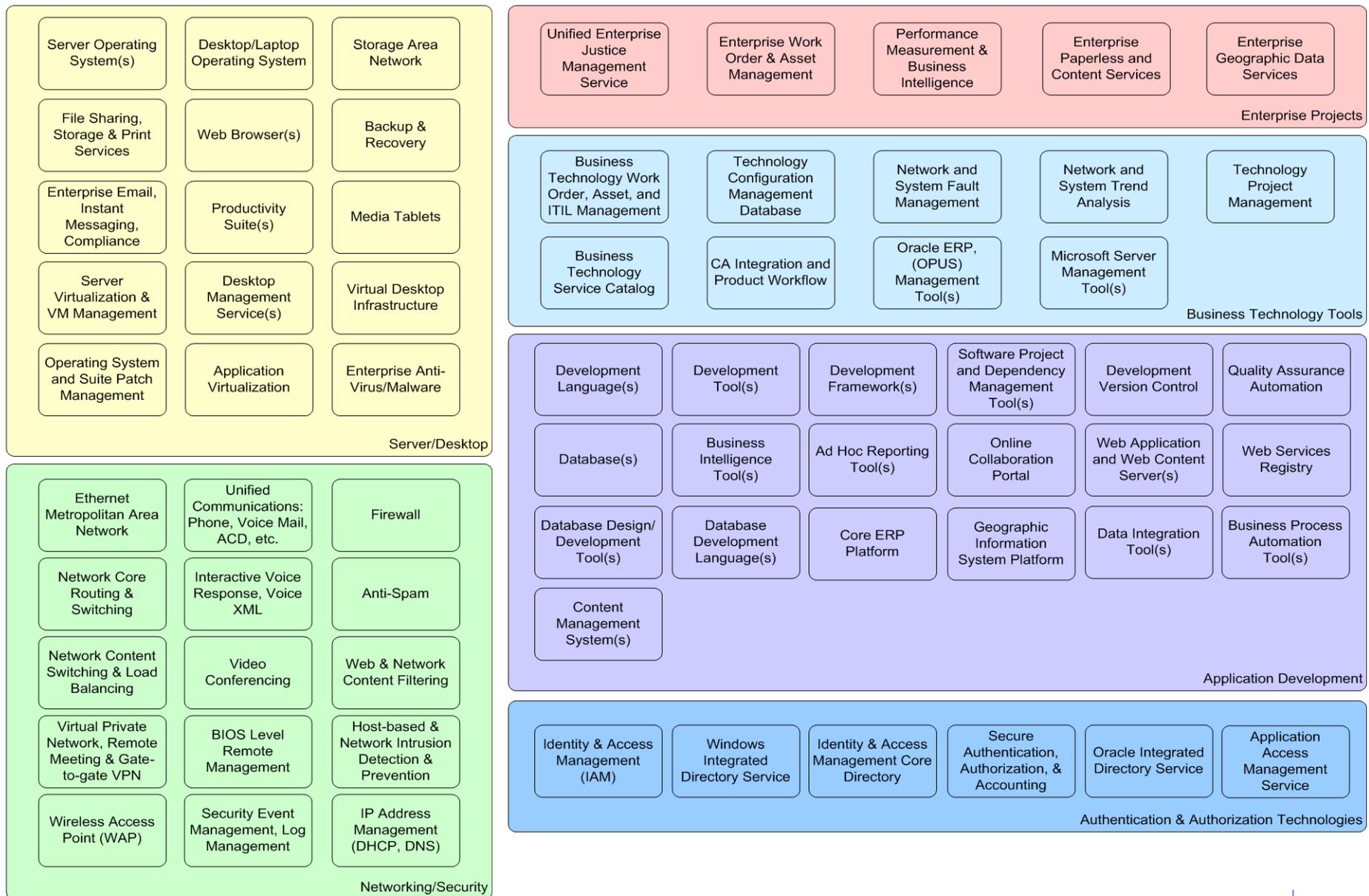
Application Development

NetIQ Identity Manager (IDM)	Active Directory	eDirectory (Novell's IAM)	RADIUS	Oracle Internet Directory (OID)	Oracle Access Manager (OAM)
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Authentication & Authorization Technologies

BTS High-Level Future State Architecture (2-3 years Target)

Tuesday, March 26, 2013



Guiding Principles

1. Promote “One County” Collaboration.

Rationale:

- BTS is committed to the success of others and promotes this philosophy for all.
- Promote a “One County” holistic approach to service provision while respecting the autonomy of Constitutionals, Agencies, and the Courts.
- Autonomy at the local and state levels is necessary to facilitate the unique purpose of an Agency, Constitutional Officer or the Courts.
- A holistic approach promotes trust, collaboration and cooperation throughout the enterprise.
- This approach minimizes redundancy and complexity and simplifies citizen interaction with government.
- This approach is consistent with the BTS Board Interlocal Agreement.
- Be common when you can ... be different when you need to be.

Implications:

- It is essential that Constitutionals, Agencies and the Courts collaborate, participate and commit to the discipline and guiding principles of a Federated Governance Model.
- Regulatory compliance is a top priority.
- A holistic approach requires open and constant communication that may result in longer decision-making cycles that extend the implementation time for solutions.
- Consistency and commonality will allow for agility, minimizing integration complexity.
- Trust, communication and credibility are critical to success.
- Commit to the success of others.

2. All Decisions Must Be Fiscally Responsible.

Rationale:

- Cost Recovery discipline must be applied to all BTS efforts.
- The Cost Allocation Method should be discarded for a model shaped from the current enterprise, in alignment with ITIL Finance Management best practices.
- Transparency of the cost of all investments and services provided is imperative.
- When stakeholders can clearly see the cost of services they can take a more active role in cost savings and make informed choices.
- All initiatives should be supported by a business case and if the solution or service is not aligned to the business, it should not be done.
- Negotiations around costs, efforts to reduce costs wherever possible, and the lowest prices for the best solutions are expected.
- Notional billing will allow for stakeholders to take advantage of common enterprise investments without additional cost and enable more equitable accounting for costs.

Implications:

- A BTS Finance sub-committee is established to report to the BTS Board and provide guidance and collaboration with BTS Finance staff.
- All BTS staff must diligently and accurately track all costs for investments and services provided.
- All BTS staff must be actively involved in budget, finance, and cost recovery processes with a focus on cost reduction and best pricing.
- Based on long-term viability and fiscal responsibility, specific projects may not be eligible to begin or continue to completion based on financial analysis.

- Business sponsorship involvement is required to identify and justify business value of new and ongoing investments and services.
- The expense of ongoing maintenance and technology refresh costs will be incorporated into the cost recovery model to guarantee budgetary funds are available.
- Combine and collaborate whenever possible to realize economy of scale savings.
- Legacy solutions and technology will be replaced when financially viable equivalents that may reduce total cost of ownership are available.

3. Balance Quality with Sustainability.

Rationale:

- We must be the best we can afford to be while avoiding incurring additional ongoing cost, where possible, to avoid negatively impacting a sustainable future.
- Excellence is expected in everything BTS does.
- Excellence does not mean perfect.
- In the face of competition, BTS desires to distinguish itself and to be recognized by our customers as the Service Provider of Choice.
- Quality of workmanship in products and services is the distinguishing factor in business.
- The public expects more efficient and responsive government with quality services.
- Agencies demand quality, customer-centric service and business solutions.
- Quality encourages a favorable public image.

Implications:

- Accountability for excellence to ourselves and to our customers must be entrenched in our culture.
- Establish a culture of quality and continuous process improvement.
- Commit to the success of others.
- Internal and external cultural changes are required.
- The pursuit of excellence and the desire to be progressive comes with a price. All personnel must be responsible for effectively using resources and leveraging assets for achieving appropriate levels of competency.
- Don't let "perfection" get in the way of "better". – Roger Goodell

4. Simplify and Reduce Complexity.

Rationale:

- Reduction of unnecessary complexity or duplicity may make solutions easier to use, maintain, and support, potentially reducing costs.
- Easier to understand and communicate.
- Allows focus on core competencies.
- Provides consistency, stability, and helps improve continuity.
- Reduces unnecessary redundancy.

Implications:

- Combine what should be combined, separate what should be separated, and eliminate what can be eliminated.
- Simplicity requires the reduction or elimination of the unessential.
- Simplifying solutions must be balanced against purpose, goals, and functionality to ensure we deliver usability.
- Reduce abstract language, jargon, or wordiness internally and especially with customers.
- Internal and external cultural changes may be required.
- Focus on what is probable or likely, not all possibilities.

- Customize as a last resort.
- Retire legacy solutions when outdated or overly complex.
- Re-engineer and challenge the 'status quo' to reduce complexity and duplication of effort wherever it occurs throughout the County.

5. C.I.A., Continuity, and Recovery in All Solutions.

Rationale:

- Confidentiality, Integrity, and Availability (CIA) of information assets are vital security issues for the enterprise.
- Availability, responsiveness, and protection of mission-critical systems are to be embedded in all solutions.
- Continuity of business services and timely recovery of services are expected for all solutions.
- Customers expect more efficient and responsive government that is there when called upon for service - building trust through BTS responsiveness, reliability and agility.

Implications:

- BTS support and delivery foundation needs to be in place.
- A combination of processes and tools are needed.
- Internal and external collaboration is required.
- C.I.A., Continuity, and Recovery discipline must be embedded in all solutions as a forethought.
- Accurate and detailed Risk Management is required, with a comprehensive inventory of our assets.
- Disaster Recovery plans need to be fully developed, communicated, and funded.
- Business Continuity plans need to be defined and funded for all solutions.
- Operational redundancy needs to be in place and funded where required.
- This strategy can potentially involve more complex design and cost for redundancies - slowing down system upgrades and product deployments.
- All hardware and software systems require a defined "Maintenance Window".
- Change Management maturity is required to mitigate unnecessary risk to the production environment.

6. COTS Over Custom (Reuse, Buy, then Build).

Rationale:

- When planning a project or defining a solution: analyze reuse, then buy, then build.
- Analysis before reusing solutions or components must ensure that reuse is the best option, especially when options for reuse involve technologies or processes that no longer align with future state plans.
- This approach should minimize duplicity and complexity, enabling enterprise transparency and agility.
- Leverage commercial off the shelf (COTS) packages that incorporate industry standards and best practices.

Implications:

- Customize as a last resort.
- The Reuse option should be based upon sound analysis and require minimal customization. Plan for reuse as a forethought, not an afterthought.
- Reusing existing solutions or components should be considered for technologies or processes that are aligned with future state architectures, but reuse should not occur for solutions or components that are identified as outdated or costly to continue maintaining.
- Retire legacy solutions when outdated.
- This approach will exercise efficiencies, shorter time to market and fiscal responsibility.
- Preparation of a detailed business case will be provided as justification for an intended solution.
- BTS staff must become integration specialists, creating middleware options for connecting disparate systems.

- COTS applications must have API, web service, and/or other service-oriented architectures to allow interoperability and integration.
- The analysis required for building a solution is pre-empted if reuse or the buy options are viable.

7. Go Green.

Rationale:

- Reduce paper, consumables, waste, energy consumption, and environmental impact to save costs.
- Aligns with Pinellas County Sustainability principles and Pinellas “First Green County” achievement (<http://www.pinellascounty.org/sustainability/history.html>)
- Protects health and global standard of living.
- Positive leadership role for coworkers and citizens that shows good financial stewardship.

Implications:

- Reduced power consumption saves on electricity bills, reduces heat in the workplace and data center, and decreases air pollution.
- Reduced printing can save significant tax payer dollars spent on paper, ink/toner, and waste disposal.
- Purchase devices that are EnergyStar compliant. Consider power consumption and power management for all electronic devices.
- Leverage or reuse existing equipment before considering new purchases based on cost analysis for effective use.
- Consider options for reuse and disposal methods when products have reached end-of-life for business purposes.
- Recycle paper, manuals, and packaging whenever possible.
- Make more resources electronically available, replacing manual and paper-based methods when possible.
- Must measure and monitor use for accountability.

High-Level Guiding Principles
1. Promote “One County” Collaboration
2. All Decisions Must Be Fiscally Responsible
3. Balance Quality with Sustainability
4. Simplify and Reduce Complexity
5. C.I.A, Continuity, and Recovery in All Solutions
6. COTS Over Custom (Reuse, Buy, Build)
7. Go Green

Appendix A: BTS Technology Roadmap (Example)

Full Roadmap found online: <http://intraweb.co.pinellas.fl.us/bts/pdf/bts-roadmap.pdf>

Legend

Invest / Deploy	
Maintain / Support	
Migrate / Eliminate	
End of Sustainability	

High Level Category	Technology Solution	2014				2015				2016				2017				2018				2019				2020			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Desktop/Laptop Operating System	Desktop	XP																											
		Win 7 32bit																											
		Win 7 - 64bit																											
		Win 8 or Next Version (64 Bit)																											
Mobile OS	IOS																												
	Android																												
Mobile Device Mgmt																													
Server OS	Windows	2008r2																											
		2012																											
	Linux	RHEL 5																											
		RHEL 6																											
	RHEL 7																												
Web Browser	Internet Explorer	IE 8																											
		IE 10																											
Productivity Suite	MS Office	2007																											
		2013																											
Enterprise Email, IM, Compliance	Exchange	2007																											
		2013																											
	Instant Messaging	Comm2007																											
	Compliance	C2C																											
Server Virtualization	VMware	ESXi																											
		TBD																											

Appendix B: Enterprise Business Services

The BTS Board has promoted and approved the following set of Business Services aligned with the Cost Recovery model, thus far, to allow for transparent accounting of Enterprise and Customer Services provided by the BTS Department.

Service Name	Description
County Web	Internet/Intranet hosting. Internet domain management, availability monitoring & reporting. Internet, Intranet & Extranet contributor training, support & licensing; backup/archiving; search engines. Centralized publishing & file management. Enterprise SharePoint hosting. Extranet SharePoint management. Web forms/surveys. Streaming video infrastructure & support. Internet Public notice calendaring
Customer Support Center (CSC)	Includes incoming contacts, infrastructure monitoring, ticket creation, first level resolution or escalation, Incident tracking, tape management and loaner equipment services
EGIS Bureau	EGIS Service Bureau maintains EGIS data for Pinellas County
EGIS Technical	Includes In-house developed and COTS GIS applications, databases and associated hardware.
Enterprise Asset Management (EAM)	Includes In-house developed and COTS (Maximo and Agile Assets) applications, databases and associated hardware.
Email	Includes individual, group and facility Email and calendar accounts, Sunshine law compliance for archiving and retrieval and Business Continuity.
Justice	Serves the Pinellas portion of the 6th Judicial Circuit for the Criminal, Civil, Juvenile, Probate & Traffic Courts.
Network	Includes Internet Access, Wide Area Network (WAN), Local Area Network (LAN), 100Mb at the port and Business Continuity
Oracle eBusiness	Includes Self Service, Human Resources, Payroll, Time Keeping, Benefits, Learning Management, Purchasing, Projects Costing, Budgeting, Performance Scorecard Reporting, Accounts Payables, Accounts Receivables, Fixed Assets, Bank Reconciliations, General Ledger, User Productivity Kit, Business Intelligence Enterprise Reporting
Business Intelligence	Includes OBIEE\Hyperion
Clerk Imaging	Includes document scanning, archival, retrieval, and workflow processing for Clerk's Probate, Official Records, Traffic, Accounting, and Criminal depts. Provides reporting services for the Financial Division. Provides public image retrieval for Probate, Traffic, and Official Records images
Infrastructure	Includes all hardware and OS software for Custom IT Services. Also includes all SAN storage and backup equipment for every BTS service

Service Name	Description
Personal Computing	PC Image creation, testing & maintenance for all PC models. Base software lifecycle management. Packaging of customer software for distribution. Maintenance of distribution software tools. Includes associated hardware.
Security	Includes Anti-Virus, anti-Spam, Firewall, Content filter, Identity Management, Directory services, Forensics, Risk assessments, Remote Access, PCI quarterly scans and Log Management
Telephone	Includes phones, phone numbers, voicemail, caller ID, call waiting, local and LD calling and Business Continuity

Appendix C: Custom Business Services

Service Name	Description
BCC Custom IT Service	Includes development and database labor support for In-house developed and COTS applications
DEI Custom IT Service	Includes IT field services and development and database labor support for In-house developed and COTS applications
Clerk Custom IT Service	Includes development and database labor support for In-house developed and COTS applications
Community Development	Includes development and database labor support for In-house developed and COTS applications
Courts Custom IT Service	Includes development and database labor support for In-house developed and COTS applications
JWB Custom IT Service	Includes IT field services and infrastructure labor support
MedExam Custom IT Service	Includes development and database labor support for In-house developed and COTS applications
SOE Custom IT Service	Includes IT field services, database, and infrastructure labor support
Sheriff Custom IT Service	Includes development and database labor support for In-house developed and COTS applications

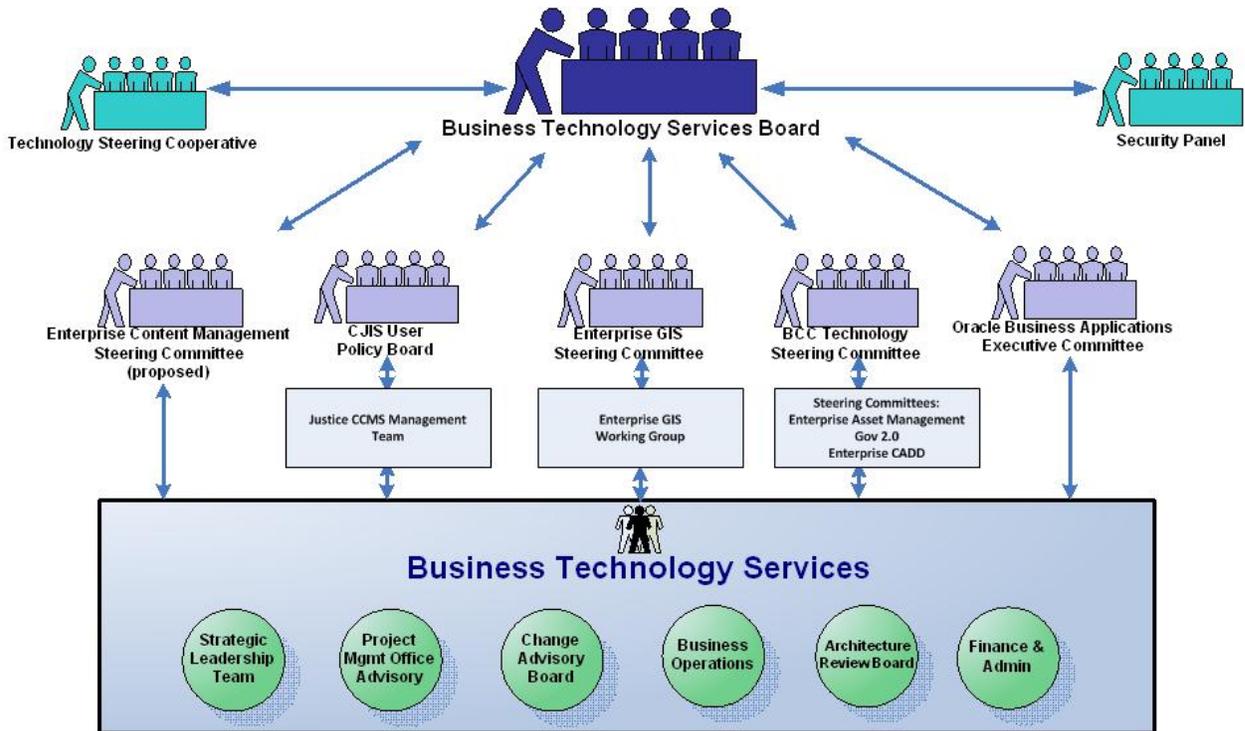
Appendix D: Governance – Successful Leadership Through Collective Guidance

Background

BTS is the champion for a formal, business-led Executive Leadership framework that ensures technology projects are business driven, collaborative, foster partnerships, and give guidance and communication around Business and Information Technology investments. The BTS Governance framework is designed to increase collaboration and partnerships between all stakeholders. Governance provides Senior County Executives with a formalized management structure that enables them to ensure that investments and the engagement of limited staffing resources are aligned with stakeholder business objectives. Governance encourages Executives to consider implications both vertically within their own domain and horizontally across the broader County organizational landscape to make the best possible investments on behalf of our citizens.

Pinellas County Governance Overview

The following diagram illustrates the overall BTS Governance framework and identifies the key Governance committees that have been established to date.



Cost Savings	Cost Avoidance	Risk Avoidance	Decision Points
		X	<p>Public Safety Complex ... \$1,270,200 (One-Time Funding) <i>Recurring maintenance would begin in FY15 in the amount of \$235,840</i></p>
<p>Public Safety Complex Datacenter Infrastructure is not currently funded by the project. Technical infrastructure in this facility is critical to business continuity and Disaster Recovery measures for business critical and mandatory systems in support of Pinellas County services.</p>			<p>Base infrastructure needed to allow moving Data Center located in 315 Court Street basement to the Public Safety Complex. Infrastructure includes network switches and routers, storage and backup equipment.</p>
X	X	X	<p>Clerk Paperless / Tyler Gap ... \$1,600,000 (One-Time Funding)</p>
<p>\$400K Cost Savings from termination of existing agreements. Estimated \$1M in future interface cost avoided and additional complexity in total system architecture and support.</p>			<p>To close Odyssey functionality gaps required by the Justice community for paperless workflow throughout the judicial system. This effort will also reduce the complexity of various interfaces and current needs for a 3rd party tool.</p>
		X	<p>Capital Improvement Plan ... \$111,351 (One-Time Funding)</p>
<p>Close FY14 Gap in BTS Capital Improvement Plan.</p>			<p>BOCC approved \$1,372,910 on a recurring basis to address the County’s Business Technology Services 10 year Capital Improvement plan. There are gaps between what has been approved and what is needed to fully fund CIP for a given fiscal year. \$111,351 represents the gap for FY14 (\$1,484,261). The BTS capital improvement plan contains all refresh and growth of systems in support of BTS provided services.</p>
	X	X	<p>Network Fiber ... \$338,000 (One-Time Funding)</p>
<p>St Pete Courthouse & Keller Well Field are opportunities to improve future growth and avoid future costs related to growth.</p> <p>US 19 Road Widening & Public Safety Complex are critical and have high risk and cost if implementation is not timed with driving construction projects.</p>			<p>Partner with DEI to expand transportation fiber infrastructure projects to bring County owned facilities onto the fiber optic network.</p> <ul style="list-style-type: none"> ➤ St. Petersburg Courthouse <ul style="list-style-type: none"> ○ Extend the fiber to courthouse providing significantly higher bandwidth and cost avoid the recurring cost of redundant carrier (\$12K/year). ➤ Keller Well Field <ul style="list-style-type: none"> ○ Extend the fiber to DEI facility providing significantly higher bandwidth and cost avoid the recurring cost of redundant carrier (\$6K/year). ➤ US19 Road Widening Project <ul style="list-style-type: none"> ○ In anticipation of road widening, relocate conduits; pull boxes, and fiber optic

			<p>cabling outside of right of way and onto County property.</p> <ul style="list-style-type: none"> ➤ Public Safety Complex (PSC) <ul style="list-style-type: none"> ○ Extend fiber into PSC complex allowing for relocation of primary data center components
	X	X	<p>Security Vulnerability Assessment</p> <p>Personnel ... \$269,600 (Recurring) Staff Augmentation ... \$50,000 (Recurring) Security Tools ...\$105,000 (One-Time Funding) <i>Recurring maintenance would begin in FY14 in the amount of \$20,000</i> <i>Additional Recurring maintenance in FY15 in the amount of \$23,000</i></p>
<p>Recommended remediation steps close gaps in protecting Pinellas County information assets and network. Risk and cost is high if no action is taken.</p>			<p>BOCC approved budget Issue for Security Vulnerability Assessment to be performed. External assessment is being performed by Securance and an internal audit by the Inspector General's Office to assess Public Key Infrastructure (PKI) certificate management.</p> <p>Recommended Remediation Actions: Personnel – (2) Senior Security Analysts, (1) Security Analyst, (1) Staff Augmentation Security Application Development resource (part time, ad hoc as needed) Tools – Mobile Device Management (MDM) for Bring Your Own Device(BYOD) and mobile security, Checkpoint Data Loss Prevention (DLP), Additional Splunk license for audit/reporting, and Intrusion Detection Systems (IDS) Public Key Infrastructure (PKI) – Certificate Management system for maintaining authentication and encryption infrastructure</p>
X	X	X	<p>Personnel ... \$653,011 (Recurring)</p>
<p>Reduction of approximately \$400K (recurring) is anticipated as part of the FY15 BTS Labor budget resulting from the completion of the Justice Project.</p>			<p>Infrastructure Server Support, Organizational Change Management, Customer Support Center, Project Management, Vendor Contract Management, Technology Trainer</p>
<p>Rightsizing staffing levels in the Infrastructure Support area is critical to maintaining and accommodating service levels for critical and mandatory business services.</p>			<p>Infrastructure Server Support</p> <p>As a result of new initiatives over the last three years, including Justice, OPUS, GIS, etc, the number of servers has grown nearly 50%. BTS has leveraged server virtualization technologies (484 of the current 920 servers are virtual), state of the art monitoring, and consolidation to more efficiently manage servers as a way to contain staffing levels. However, the rapid expansion has added nearly 300 servers to the environment over the last three years and current staffing levels are not adequate to support this volume.</p>

	<p>According to Gartner, the industry average for 2012 was 46 to 1; servers per technician. In a complex environment like ours, the average drops even lower according to the level of complexity. We currently have a ratio of 57 to 1; servers per technician. These same technicians also work on new efforts, over and above maintaining the current environment. Operating at current staffing levels is not sufficient to maintain minimum service levels for business critical and mandatory services. The County is currently exposed to higher levels of risk for service interruptions, accidental data loss or exposure of sensitive information.</p> <p>Two additional server staff will bring the ratio down to 51 servers per technician which is more efficient than the industry average, but also at a more reasonable level of risk. Future growth should be staffed at a 50/1 ratio, or slightly above the current market average, and revisited each year.</p>
<p>New BTS discipline that minimizes the risk of failed technical implementations by focusing on the people side of Change to ensure smooth transition from old to new ways of doing business using technology.</p>	<p>Organizational Change Management (OCM) Benefits - The OCM discipline works to drive faster adoption, greater ultimate utilization and higher proficiency on the changes impacting employees in the organization such that business results are achieved more rapidly. Response to change can be positive or negative; OCM helps to minimize employee resistance and maximize employee engagement. OCM activities help to reduce the amount of time people spend in a state of confusion and uncertainty.</p> <p>Through ongoing efforts, OCM will facilitate the evolution of business process management to help transform the enterprise's customer experience and internal operations while providing agility and flexibility through automation and optimization of end-to-end processes.</p> <p>Risks - Business Owner Depts risk project delays and even implementation failure if the people side of change is not managed alongside the functional and technical aspects of these technology initiatives. Once systems are implemented, Business Owner Depts risk slower adoption of the new systems and processes, decreased sustainability, and a greater likelihood of backsliding to the old ways of doing business. To avoid these risks, we must shift our view of OCM from a "nice to have" to a "must have".</p>
<p>Rightsizing staffing levels in the Customer Support Area is critical to maintaining and accommodating service levels for critical and mandatory business services.</p>	<p>Customer Support Center All customer request initiation, issue reporting, and follow-ups start in the BTS Customer Support Center (CSC). The CSC averages 75,000 contacts per year and resolves 71.89% requests/incidents in first level support. In the past year, the Customer Support Center has been operating with 9 agents. With the current staff level, the CSC has reached a plateau while customer demand continues to rise. In comparing the CSC to industry metrics, we are</p>

	<p>finding the CSC is out of balance in the following areas which will cause decreased levels of customer satisfaction and high turnover in staff.</p> <p><u>High Utilization Rate:</u> Currently about 80% vs. industry recommended 65% - 70%. This results in long hold queues and response time, high abandonment rate, and low customer satisfaction. High utilization rates can also lead to high turnover and faster burnout rates.</p> <p><u>High Call Abandonment Rate:</u> CSC at 6.4% vs. Industry average at 5% or less.</p> <p>The CSC is currently unable to accept additional workload from 2nd Level Support and maintain the expected level of customer satisfaction. This ultimately affects the customer due to increased resolution time when escalating incidents, higher incident resolution costs, and reduced 2nd Level Support availability to work on new customer requests/projects.</p>
<p>Rightsizing staffing levels in the Project Management area is critical to maintaining and accommodating the demand for the project management discipline which measures and manages the successful implementation of approved & funded County projects.</p>	<p>Project Management BTS is currently supporting a project portfolio of over 25 major, active projects with an additional 20 projects pending. The combined value of these projects is estimated between \$30-\$40 million. Active projects are supported by 5 current Project Managers. This request would increase capacity to deliver needed innovations to our customers.</p>
<p>Cost savings and cost avoidance opportunities through retaining expertise to align BTS services, Customer business requirements and contractual agreements in a way that optimizes business value and minimizes total cost to the County. Initial special focus is Cloud Computing for Pinellas County and related risk, contract terms and cost benefit.</p>	<p>Vendor Contract Management The vendor contract management position would be responsible for managing vendor contracts, vendor relationships, negotiating savings, terms & conditions, and reducing risks and liabilities associated with contract and vendor management.</p> <p>BTS has approximately 75 contracts with a value of \$30+ million dollars. The Enterprise License & Maintenance fund includes these contracts and on an annual basis is approaching \$7 million dollars. Currently, BTS does not have anyone with the right skillset or capacity to manage these contracts and leverage the savings that are possible.</p>
<p>Minimize risk of failed technical implementations by focusing on training needs and requirements related to new and or changing technology aligned with approved and funded projects and the BTS Strategic Plan.</p>	<p>Technology Trainer This request is for one position to address the growing need for this training which will enable customers to fully leverage the investment made in new and existing technologies. Over the last year, we have had requests for technical training (Office Productivity applications, Operating Systems, Personal computing equipment) as well as training for mobile devices such as iPad and Android devices. The County currently does not have any dedicated technical training resources.</p>

	X		<p>Oracle ULA ... \$224,000 <i>Recurring maintenance would begin in FY14 in the amount of \$8,500</i></p>
<p>Cost avoidance is estimated at \$1.2M One-Time and \$220K Recurring if action to approve \$224K in hardware is not taken prior to January, 2014 when the opportunity to expand Oracle Software via the current Unlimited License Agreement expires.</p>			<p>This request is to add server hardware that would allow the installation of additional Oracle software to leverage the Unlimited License Agreement. Pinellas County approved and entered into an Unlimited Licensing Agreement (ULA) with Oracle Corporation (January 2010) for the software technology licenses and maintenance. Pinellas County and Oracle will be going through a license certification process to verify the quantities of the applicable license type(s) for each Unlimited Deployment Program installed and running. All products installed before the January 2014 deadline will owned by the County in perpetuity in accordance with the terms of the agreement.</p>