

# Case Study: City of Oakland

## LicenseTrack™ -- Revenue Collections & Audits



## CITY OF OAKLAND

### Case Summary

The **City of Oakland**, California was founded in 1852 and is a full-service city with an estimated population of 415,492. Oakland is located in Northern California in the San Francisco Bay Area, the sixth-most-populous metropolitan area in the United States.

Oakland is the eighth largest city in California and serves as the county seat for Alameda County. Based upon 2006 statistical data, Oakland is the third largest city in the San Francisco Bay Area, after San Jose and San Francisco.

2007 revenue for transient occupancy, business, parking, excess litter, rent adjustment & utility tax reached over \$200 million.

Oakland is a major west coast port and home to several fortune 500 companies including Kaiser Permanente & Clorox as well as corporate headquarters for national retailers like Dreyer's and Cost Plus World Markets.

According to the 2000 U.S. Census, the California cities of Oakland & Long Beach, are the most ethnically diverse in the United States, with over 150 languages spoken in Oakland.

Oakland offers a temperate and seasonally arid Mediterranean climate. Attractions include Jack London Square, the Oakland Museum of California, the Chabot Space & Science Center, Lake Merritt and Chinatown.

The city has standardized on Microsoft® technology including Windows®, SQL Server and Office. *Progressive Solutions® Incorporated (PSI)*, the city selected application vendor, incorporates Microsoft® standards to ensure reliable, robust & progressively improving software.

**Progressive Solutions®**, developer of the **QuickServe™ Suite**, brings heightened security, efficiency and convenience to users. PSI has incorporated next generation hardware and software technology enabling market-ready governmental enterprise solutions. Based in Brea, CA, the company distributes their product through an extensive network of value added reseller channels and has entered into strategic partnerships.

**The Project:** The revenue collections staff at the City of Oakland is known for ensuring that those who owe the city taxes pay their fair share. Staff struggled with outdated home grown business registration software for many years. After over a decade of searching for adaptable commercial software, staff concluded that no vendor to date offered adequate flexibility, breadth and depth. Fortunately, PSI contacted the city and offered a demonstration. The city conducted extensive user evaluations. Staff concluded that the combination of PSI technology and customer service were exceptional. Clearly PSI was willing and able to meet all of Oakland's stringent requirements.

Terry Adelman serves as the city's Revenue Manager and supervises 50 staff members. According to Terry, *"PSI's references substantiated PSI's impressive representations and their 29 years of experience increased our confidence that our implementation would be successful."*

**Numerous customizations** were tailored to our exact needs simultaneously with the conversion of our legacy data. PSI customizations made sure funds were not commingled thereby facilitating compliance with the city municipal code. Our experience with PSI was identical to the experiences of those we contacted. While our old system was unable to calculate certain fees per the municipal code, PSI ability to easily perform these calculations exactly per the code is expected to result in an annual \$225,000 revenue increase. Calculations of multi-year penalties and interest are quick and easy. PSI also implemented several **high speed document scanners** which instantly attach documents directly to tax accounts saving substantial staff time previously required for document filing and retrieval. PSI's products are **light years ahead** of our previous software and all other software we have reviewed. PSI's service continues to exceed our expectations!

*Our previous revenue collections software was cumbersome and lacked numerous features such as: automated journal entries, automated zip plus four address validation, ability to integrate business registration with transient occupancy, utility, parking, excess litter fees and rent adjustments. PSI's enterprise business tax system consolidates eight previously independent/separate tax software systems into one high quality tightly integrated solution.*

*PSI has reduced the labor required for operations and provided city staff with valuable tools to audit accounts and to further automate the import of tax payments (lockbox processing). The city desired a full featured application that could integrate with their general ledger package, provide flexible ad-hoc reporting and offer the efficient means to notify and track individual account activity. With PSI, the revenue division has achieved its goals."*

**LicenseTrack™**, revenue collections software from **Progressive Solutions®** has enabled the city to reap the benefits of improved automation of their Revenue Collections operation. Upgrades and minimal report customizations are included in the annual support so ad hoc requirements do not require additional mid year budgeting.

**The Future:** The city has selected PSI's **MailCentral™** product to maximize the automation of outgoing mailings for the 2009 Business Registration and the Rental Adjustment Programs. As needs and technologies continue to evolve at the City of Oakland, Bill Milny, Revenue Analyst, is confident PSI will be there to assist the city with their changing needs and will continue in their mission to continuously enhance the software.

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