

Report Title: Demand Details
Run Date and Time: 04/14/2025 03:56:22 PM Central Daylight Time
Run by: Cole Robison
Table name: dmn_demand

Demand

Number:	DMND0001745	Approved project start date:	
Initiative Name:	Board of Tax Appeals – Modernization Initiative – Enterprise Content Management System	Approved project close-out date:	
Initiative Acronym:		Estimated project start date:	04/01/2024
Category:	Strategic	Estimated project close-out date:	12/05/2026
Type:	Project	Estimated execution start date:	07/01/2024
Project:	Board of Tax Appeals – Modernization Initiative – Enterprise Content Management System	Estimated execution end date:	07/01/2025
Change:			

Description:

The purpose of this project is to replace the Board's aging document management system (KnowledgeLake), the application is used to track documents and files associated with tax appeals and to maintain the official board record in each appeal as required by Kansas law. The legacy system was installed in 2008, and currently is end-of-life. Given its age and lack of on-going hardware, software, and vendor support the system must be replaced, for security, efficiency, operational, and regulatory requirements. In June of 2023 the system experienced catastrophic hardware failure, subsequently the Agency was forced to utilize alternative content stores to maintain continuity and operations. The current alternative solution is not sufficient. The Board seeks to replace the legacy application with an enterprise content management system; this prospective application while also needing to maintain files and associated meta-data will also need to provide modern content management capabilities, integrations, and feature-sets, such as e-forms, document routing, workflow automations, signatures, annotations, versioning, co-editing, sharing, and public portal access. The Board also seeks to install an updated system that would integrate or facilitate future electronic filing of tax appeals. Implementation of a modern content management system would allow the Agency to deliver an improved customer experience, maintain compliance with statutory requirements, streamline availability of information, and improve operational efficiency for the benefit of the citizens and State of Kansas.

Details

Portfolio:		Priority:	4 - Low
Program:		Impact:	Agency/Local
Investment Class:		T-Shirt size:	S - Small
Investment Type:	Non-Infrastructure	Agency:	BOTA
Submitted by:	Gabriel Bullard	Project Manager:	
Demand manager:	Ryan Sandlin	Impacted Agencies:	
Collaborators:	kristen.Wheeler@ks.gov, Jody.Allen@ks.gov, Jeff Maxon, Gabriel Bullard, Kristen Wheeler, Joelene Allen	Business Capabilities:	
		Business Applications:	
		Idea:	

Business Case

Business case:

The purpose of this project is to replace the Board's aging document management system (KnowledgeLake), the application is used to track documents and files associated with tax appeals and to maintain the official board record in each appeal as required by Kansas law. The legacy system was installed in 2008, and currently is end-of-life. Given its age and lack of on-going hardware, software, and vendor support the system must be replaced, for security, efficiency, operational, and regulatory requirements. In June of 2023 the system experienced catastrophic hardware failure, subsequently the Agency was forced to utilize alternative content stores to maintain continuity and operations. The current alternative solution is not sufficient. The Board seeks to replace the legacy application with an enterprise content management system; this prospective application while also needing to maintain files and associated meta-data will also need to provide modern content management capabilities, integrations, and feature-sets, such as e-forms, document routing, workflow automations, signatures, annotations, versioning, co-editing, sharing, and public portal access. The Board also seeks to install an updated system that would integrate or facilitate future electronic filing of tax appeals. Implementation of a modern content management system would allow the Agency to deliver an improved customer experience, maintain compliance with statutory requirements, streamline availability of information, and improve operational efficiency for the benefit of the citizens and State of Kansas.

In scope:

Project deliverables will generally include implementation activities, services, hardware, and materials.

Specific service deliverables:

System design, configuration, implementation, and testing by vendor. System integration with existing Case Management System 'LawBase' by vendor. Migration and validation of legacy data from existing content management platforms to new system by vendor. End user and administrator training to Agency staff performed by vendor. On-going maintenance and support of application if on-premise implementation is chosen by the Agency, provided by vendor. On-going maintenance and support of application and infrastructure if cloud implementation is chosen by the Agency, provided by vendor.

Specific material deliverables:

System documentation by vendor. Training materials by vendor. Process flow charts by vendor.

Out of scope:

Case Management System design and configuration. Dependent on the deployment environment chosen by the Agency, on-premises or cloud, infrastructure and associated security, disaster recovery, and backup services administration and support may not be applicable.

On-premises: Agency and partner agencies responsibility Cloud: Vendor responsibility

Risk of performing:

Potential loss or corruption of data during database migration and conversion services.

Risk of not performing:

The Agency will continue to experience significant challenges in performing its obligations. Specifically, the Agency will struggle to retrieve content associated with records, such as applications, evidence, notices, and decisions. This will hamper or entirely prevent the Agency from creating official Board records in the event of appeal, fully responding to KORA requests, and responding to other requests for information from parties or interested individuals. It also increases the administrative overhead incurred during content capture. Without new system the Board faces potential loss of meta data associated with not indexing files to LawBase records. Ultimately the longer the Board goes without a dedicated content management solution, the greater the cumulative toll of not having one will be, and the increased chances of data loss occurring.

Enablers:

Barriers:

Assumptions:

The Agency assumes 100 percent of the initial funding will be sourced from either A0200 or A0147 SPARK awarded federal grant funds. The Agency anticipates that some future licensing fees will need to be provided through State General Funds or the Agency's Filing Fee Fund.

Financials

Rate Model:

Capital expense:	\$134,999.92	Capital budget:	\$0.00
Operating expense:	\$88,075.96	Operating budget:	\$0.00
Total planned cost (minus Quarterly Oversight Fee):	\$219,995.9371	Discount Rate %:	0
Total planned cost:	\$223,075.88	Net present value:	\$0.00
Financial return:	\$78,017,315.12	Internal rate of return %:	
Financial benefit:	\$78,240,391.00	Demand Actual Cost:	\$0.00
ROI %:	34,973		

Estimated annual ongoing costs of new system:	\$150,000.00	Estimated life/length of commitment (in years):	15
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Assessment Data

Business Risk Evaluation Required:	true	KITO Confirmed:	Confirmed
KITO Reportable:	true	KITO Follow-Up:	false
Strategic Risk Score:	1	Overall Business Risk Evaluation Score:	1.94
Operational Risk Score:	1.5	Security & Compliance Risk Score:	2.2
Financial Risk Score:	2	Reputational Risk Score:	2.3

Notes

Watch list:	Work notes list:
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Work notes:

03/25/2024 09:47:28 AM - Alex Wong (Work notes)
Since this is a KITO reportable project, the agency will have to fill all the remaining required fields in the demand for JCIT Advise and Consult. Please work with Cole or Sara for any question regarding the information you will need to complete the demand or any question you might have.

@Gabriel Bullard @Sara Spinks @Cole Robison

03/15/2024 10:05:33 AM - Gabriel Bullard (Work notes)
1. We are looking at different options.
2. We have not decided between RFP or non-RFP procurement routes.
3. Undetermined, as no decision has made on any one solution.

03/11/2024 09:55:22 AM - Alex Wong (Work notes)
CITA reviewed and has the following questions:
1. Is this an upgrade of KnowledgeLake or is the agency considering a different option?
2. If agency is considering a different option, will this implementation be going through the RFP process?
3. What is the ballpark estimate of the implementation cost and / or the operational cost?

@Gabriel Bullard @Sara Spinks @Cole Robison

Preferences

Close Demand:	Project calculation:	Automatic
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Related List Title: Demand Task List
Table name: dm_n_demand_task
Query Condition: Parent = DMND0001745
Sort Order: Number in ascending order

▲ Number	Short description	Due date	Percent Complete	Priority	State	Assigned to
DMNTSK0001162	SOW/RFP			4 - Low	Closed Complete	Gabriel Bullard
DMNTSK0001165	JCIT Review			4 - Low	Closed Complete	

Related List Title: Demand Stakeholder List

Table name: dmn_m2m_demand_stakeholder

Query Condition: Demand = DMND0001745

Sort Order: None

5 Demand Stakeholders

Number	User	Key Stakeholder Type	Function
STAK0001543	Kristen Wheeler	Executive Authority	Chair
STAK0001606	Gabriel Bullard	PMO Director	
STAK0001605	Joelene Allen	Finance Director/CFO	
STAK0001545	Gabriel Bullard	IT Director/CIO	
STAK0001544	Joelene Allen	Sponsor/Business Owner	Executive Director

Related List Title: Requirement List

Table name: dmn_requirement

Query Condition: Parent = DMND0001745

Sort Order: Number in ascending order

2 Requirements

▲ Number	Short description	Priority	State	Approval	Created
DREQ0001384	Compliance Acknowledgement	4 - Low	Accepted	Not Yet Requested	03/27/2024 10:59:36 AM
DREQ0001416	Demand: KITO Review	4 - Low	Accepted	Not Yet Requested	05/10/2024 01:37:18 PM

Related List Title: Benefit Plan List

Table name: benefit_plan

Query Condition: Work in (DMNTSK0001162, DMNTSK0001165, DMND0001745, DREQ0001384, DREQ0001416) AND Benefit type = Monetary benefits

Sort Order: Name in ascending order

None

Related List Title:

Benefit Plan List

Table name:

benefit_plan

Query Condition:

Work in (DMNTSK0001162, DMNTSK0001165, DMND0001745, DREQ0001384, DREQ0001416) AND Benefit type = Non-monetary benefits

Sort Order:

Name in ascending order

None

Related List Title:

Demand Baseline List

Table name:

dmn_demand_baseline_header

Query Condition:

Demand = DMND0001745

Sort Order:

Name in ascending order

2 Demand Baselines

▲ Name	Demand	Description	Plan	Created
05/30/2024 - DMND0001745 - ECMS	Board of Tax Appeals – Modernization Initiative – Enterprise Content Management System	Pre -JCIT Advise & Consult		05/30/2024 03:38:11 PM
DMND0001745 - PRJ0020463	Board of Tax Appeals – Modernization Initiative – Enterprise Content Management System	Created before conversion to project		05/28/2024 09:33:30 AM

Related List Title:

Assessment Instance List

Table name:

asmt_assessment_instance

Query Condition:

Task = DMND0001745

Sort Order:

Number in ascending order

2 Assessment Instances

▲ Number	Metric type	Taken on	State	Assigned to
AINST0387687	Business Risk Screening	03/06/2024 08:40:30 AM	Complete	Gabriel Bullard
AINST0388266	Business Risk Evaluation	03/06/2024 10:33:45 AM	Complete	Gabriel Bullard

Related List Title: Assessment Category Result List
Table name: asmt_category_result
Query Condition: Source = 5cd5a54187f80a14de9484050cbb358a
Sort Order: None

6 Assessment Category Results

Assessment group	Category	Weight	Rating	Normalized value
ASG0388263	Strategic		0	0
ASG0388263	Financial		5	1
ASG0388263	Security & Compliance		6	1.2
ASG0387684	Risk Screening		4.44	4.44
ASG0388263	Operational		2.5	0.5
ASG0388263	Reputational		6.66	1.33

Related List Title: Approval List
Table name: sysapproval_approver
Query Condition: Approval for = DMND0001745
Sort Order: Created in descending order

2 Approvals

State	Approver	Comments	▼ Created
Approved	Jeff Maxon	05/28/2024 09:33:27 AM - Jeff Maxon (Comments) reply from: jeff.maxon@ks.gov Ref:MSG8730186	05/22/2024 02:02:20 PM
Approved	Kristen Wheeler		04/19/2024 02:28:20 PM

Related List Title: Attachment List
Table name: sys_attachment
Query Condition: Table name = dmn_demand AND Table sys ID = 5cd5a54187f80a14de9484050cbb358a OR Table name = dmn_demand_task AND Table sys ID in 10f0fd4c879dca90d6b3877acebb35db, 483a185b1b868a10eac12f85624bcbc9 OR Table name = dmn_requirement AND Table sys ID in 94f0bd4c879dca90d6b3877acebb3546, 9ffa5a1b420a18eac12f85624bcb97 OR Table name = risk AND Table sys ID in OR Table name = issue AND Table sys ID in OR Table name = dmn_decision AND Table sys ID in OR Table name = project_action AND Table sys ID in OR Table name = project_change_request AND Table sys ID in OR Table name = sysapproval_approver AND Table sys ID in f14d78eb97e14e50d1b7ba4ef053afe1, f2c3320a979a46508e6cb631f053af95
Sort Order: Created in descending order

1 Attachments

File name	Content type	Table name	▼ Created	Created by
Statement of Work for Board of Tax Appeals – Content Management System.pdf	application/pdf	dmn_demand_task	04/19/2024 02:26:05 PM	gabe.bullard