

Staff Report

Subject: Approval of Amendment to TrueRoll Software Services Agreement

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Department: Tax Assessor

Meeting Date: March 4, 2025

Item Description: Consideration to approve the Amendment to the Software Services Agreement between Effingham County Tax Assessor's Office and TrueRoll.

Summary Recommendation:

Staff recommends approval of the amendment to the Software Services Agreement between Effingham County Tax Assessor's Office and TrueRoll.

Executive Summary/Background:

The Tax Assessor's Office currently uses TrueRoll software to identify improper homestead exemption claims by cross-referencing databases across multiple jurisdictions. The service helps ensure tax compliance and has been effective in detecting homestead exemption violations, recovering lost revenue, and improving overall tax integrity.

The original agreement, executed on April 18, 2023, had a three-year term with automatic one-year renewals unless terminated. The proposed amendment, effective July 1, 2025, includes the following key changes:

1. Change in Services:

- New Service Added: Application Vetter
 - Intake:
 - New homestead exemption applications will be sent to TrueRoll for verification.
 - Applications will originate from an existing County CAMA system, an online form provider, or scanned paper applications uploaded to a secure portal.
 - Output:
 - The Application Vetter Report will provide automated verification results accessible through TrueRoll's web-based application currently used by the Tax Assessor's Office.

2. Implementation Timeline & Budgeting:

- Setup Process Begins in May 2025 to ensure a full start date of July 1, 2025.
- The 2025/2026 budget will include the full payment, with the first invoice due in July 2025.
- A signed agreement is required before setup can begin.

3. Change in Fees:

- The annual service fee will increase from \$10,900 per year to \$19,350 per year, reflecting an \$8,450 annual increase for the additional services.

4. Change in Invoice Schedule:

- A pro-rata invoice will be issued for the new services effective July 1, 2025.

Alternatives for Commissioners to Consider

1. Approve the amendment to the Software Services Agreement between the Effingham County Tax Assessor's Office and TrueRoll so that setup can begin in May 2025.
2. Deny and discuss alternatives.

Recommended Alternative: 1

Other Alternatives: 2

Department Review: Tax Assessor, Procurement, Finance

Funding Source: FY 2026 Budget

Attachments: Original Agreement and Amendment