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Fairfax County Board of Supervisors Fairfax County BOS: Nov. 25 Information Technology Committee, Tuesday, November 25, 2025

Date Tuesday, November 25, 2025
Place Fairfax County Board of Supervisors, Virginia
Length 1h 7m (video)

- Official meeting video (Fairfax County): <https://video.fairfaxcounty.gov/player/clip/3973>
- Official Board of Supervisors page (Fairfax County): <https://www.fairfaxcounty.gov/boardofsupervisors/>

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Speech-to-text: whisper.cpp, model large-v3-turbo. Produced 2026-10-28. Each paragraph starts with its time [HH:MM:SS] in the meeting video.

[00:00:03] All right, we're going to go ahead and get this meeting of our Information Technology Committee underway. It's a good afternoon to everybody. Several exciting presentations today. Our ITPAC has been working very closely with staff.

[00:00:21] We normally would have them here, but evidently they can telework, so they're all not in town. But I know several of them are watching. Before we jump into the presentation, I want to give a warm welcome to Matthew Harrison, our new chief information officer.

[00:00:38] I know everybody on the board's had a chance to meet with him, but got some very exciting things underway in a very few short months. But with that, Matt, we're glad to have you here. And what did he just say? Enjoy it while it lasts. Is that what he?

[00:00:55] Okay. The honeymoon. Anyway, I want to turn it over to you. And our first president, you want me to introduce our first presentation is on the, on, and I should have started with this.

[00:01:10] This is an idea Supervisor Alcorn brought forward, I think, the customer portal. And it's a great one. I'm looking forward to watching this one all the way through to completion. With that, I'm going to turn it over to you. Great. Thank you very much, Mr. Chairman.

[00:01:26] So quick agenda. So we're going to talk through the customer portal that we're working on. we'll have a couple IT initiative updates. We're going to have a quick discussion on the joint committee between us and IT here in the county, as well as with the schools, and then we'll do a wrap-up and answer any questions folks may have. So, Mr. Chairman, Mr. Chairman, members of the board, I'm Matt Harrison, the new director of DIT and the CIO. So, I'm going to kick off our

[00:02:00] conversation around the Fairfax customer portal, one account, one experience service, and then I'll hand over the discussion to members of my team. So our vision for the customer portal is pretty simple. It's going to provide a single point of access for residents and businesses to interact with government services. Customers will be able to initiate their experience through a web browser at first and over time be able to access the portal on a mobile device through an IVR interaction or a text message. Our ultimate goal is to meet our customers through the channel that they choose

[00:02:37] to engage with us. Fundamentally, we want to transform the experience of our customers through simple, seamless, transparent, and frictionless interactions that help them achieve what they need at a time and a place of their choosing. The portal fits neatly into our efforts around digital modernization and the simplification of our systems and workflows. The effort will challenge us to rethink how our business processes, applications, and infrastructure impact our ability to provide world-class services to our customers. And the customer portal will be designed

[00:03:11] for all residents across abilities and languages to ensure access and equity for our customers. This will be supported through the work of an AI ethics committee we will establish in 2026. So I'll turn it over to Maura Power.

[00:03:29] Maura Power, I am the Chief Technology Officer and Deputy Director. So moving on, you know, the vision that Matt has given us really sets us up to make sure that we're reducing the amount of friction and the amount of limited visibility that exists right now with our customers and how we're engaged.

[00:03:50] Right now, things are very fragmented. If you're trying to work with your SAC, register your kids for SAC, you have a different account than you would have if you were to then try and pay your car tax or do some residential permit. So we want to reduce the frustration that our customers and that our clients are having right now. So through that vision that Matt has given us, we are going to make sure that our technology addresses some of these inefficiencies. And we'll do this all while our environment and

[00:04:22] our systems maintain security in the utmost standards. So as mentioned, we know why this is a challenge, right? We understand that there's different things and different technologies and portals and systems that have come up over time. We understand why it matters, right? We understand the importance that it has to our community and to our customers. But I think the impact is one of the things that we'll really have to measure and keep track of as we move forward because this type of impact, this type of transformation will really impact the amount of time that people

[00:05:00] are spending with us. They're getting to their services faster and, you know, the citizens, the customers, our community base really, they don't care about the administrative silos that we have. They want to get to the services. They want to get to the action item as quickly as possible. So with that, I'm going to turn this over to Anita Rao, our Chief Applications Officer, to talk us through how we're going to do that. Hi, good afternoon. Anita Rao, Chief Applications Officer and Deputy Director in Information Technology. So how do we get to this vision

[00:05:35] and to our ideal future state? That is a complex way of getting there, but how do we get there? Our end goal is to enable access to services through a single entry point, basically giving the ability to our public to create one login and be able to seamlessly interact with different agencies and different departments so they don't have to maintain separate accounts.

[00:06:08] That's the goal we want to get to. And our roadmap on how we achieve this is structured around the capability maturity model, a model which helps us build, improve, measure our successes, and then improve our performance.

[00:06:24] So currently we are in, as Maura pointed out, we do provide all these services, online services, through our website. But however, they are siloed services. So users have to come in and maintain separate accounts. So our first focus is to go to level two, which is to create a unified digital front door for our users.

[00:06:47] So we want to, you know, to do all this, we must drive digital modernization across all our systems. So we are able to get all our systems to the same level and move forward with that.

[00:07:03] So the first goal for us is to ensure that we have a single entry point to come in. And then on that, we are going to build on having a single sign-on and unified profiles for all the users, which will then build to the next level of case management and providing transparency for users to check status at one site instead of going to different places.

[00:07:30] And ultimately, our goal is to get to a more personalized and proactive services by anticipating how users are interacting with us through this journey and how we get there. So this concept, though is simple, is very complex, right?

[00:07:51] There are so many complexities in the back end with integrating multiple legacy systems and also trying to, and it requires a lot of coordination and technical depth and planning to make all this happen. So there's a lot of work, though it looks simple. In addition to that, we also have to make sure that we keep our customers as the most important thing, as the primary commitment should be towards them. And that means we also have to kind of develop a

[00:08:27] culture and environment where we are encouraging data sharing among departments and who are historically may have operated independently. And also leveraging responsible use of AI, machine learning, and data analytics to deliver smarter services. And we also have to invest in our workforce and help develop new skill sets to support this new environment. And of course, we have to continue to measure the results rigorously and commit to continuous improvement.

[00:09:03] And this is an ongoing commitment and cannot stop with a one-time endeavor of this sort. So this goes, leads to our next steps for the first year. So I think it's important to make sure that we have clarity and alignment on the goals we're trying to achieve and a shared understanding of what it's going to take to get us there.

[00:09:26] I'm not going to hit on every point on this slide, but there are some key thoughts that I want you to take away from the discussion. First, we need to get the foundation right on this complex effort by having a clear assessment of our current state and how it impacts our customers' ability to interact with us.

[00:09:41] This isn't just technical and architecture, this is a business process as well. Engagement with internal and external stakeholders is absolutely essential. Internal engagement focused on business processes and what change is going to mean for the agencies and externally with users of our digital services.

[00:10:02] We're going to utilize technology to evaluate customer behavior and help their preferences guide our design. Governance isn't the most exciting thing about creating new services, but it's essential if we're to understand our priorities, deliverables, and provide clear definition of responsibilities and accountability partners.

[00:10:24] We started the foundational work to evaluate various platforms, API integrations, security designs, and the upskilling of our staff. Further, we're going to hire an expert in user-centric design principles to ensure that we're always putting the customer's experience first.

[00:10:43] As we stand up our data lake, we will develop data standards, privacy policies, and work with agency partners to create data sharing agreements. Without a commitment to collaborate on this critical work, we are not going to be successful. And lastly, we must deliver.

[00:10:59] Our plan in calendar year 2026 is to integrate with two to three key systems, test and launch version one of the self-service portal, available through a web browser, no later than fourth quarter 2026. The customer portal is going to be a recurring topic in these meetings, as long as the chairman agrees to that.

[00:11:22] And I look forward to providing updates as we go into next year. So thank you, and we're happy to take any questions you have. All right. I'm going to start with just a couple of quick comments, and I appreciate the customer focus.

[00:11:39] I mean, this is not often we focus on requirements a lot of times, but we don't focus enough on service and customer focus. meeting residents expectation but the one that I didn't think you hit hard enough is the security challenges on this just you know we have so much PII personally identified and we need to protect that that makes your job that much harder it's not as easy this thing isn't as you said this isn't as easy as it sounds right but I think uh starting with small good achievable goals and then

[00:12:15] working our way through this is the right way to go, so thank you, but it is a monumental feat to pull these disparate systems together and still secure information and everything else that needs to be done. Go ahead. I'm just going to respond to your comment question that we do have security by design principles, so in everything we're doing, we have an outstanding security team, as you know, and leadership there, so this will absolutely be first and foremost in the work that we're doing. Mr. Chairman. Yeah, I love this. I think it's important. I love the timeline.

[00:12:49] I realize the complexity, but I think it's also important to point out the efficiencies within county that we get out of this as well. I mean, I can't imagine how much time our staff spends maintaining all these different systems, the clunkiness of them, or absence of a system, having to answer questions and administer things that could be done so much easier by our residents and can be done 24-7. I have to do it during the hours the county is open, and I'm thinking about looking at Jay, and I'm thinking about the portal people use for paying their car

[00:13:25] taxes. It's great. You can go on there. You can see all your property. You can verify it. You can click on it. You can change things with it, but I also know it's clunky, and it needs some sophistication, but

it saves Jay's folks an immeasurable amount of time where people can be empowered to do the things they need to do on their schedule at home helps the customer helps the county and so I just want to underscore the work that's being put into this and the resources needed to do this are so worth it for both of those reasons and so I'm excited about this I

[00:14:01] guess the challenge that's ahead of us and it may be too early to know this is we have a lot of what I would call oddities so we have county agencies obviously this should be an all-county hands-on deck exercise. But then we have the park authority who has their own board. If a customer can't go on and register for summer camps at the same time they pay their car taxes, we've lost a leverage opportunity. We of course have schools with their whole infrastructure and their whole system and separate logins and multiple different platforms. And I guess the question that I have for you is

[00:14:39] Have you identified where this will be really difficult? And I should have mentioned the CSB earlier where you have, you know, confidential medical information, but people who think of the CSB think of it as just Fairfax County and we run it and we don't.

[00:14:55] And so are you giving, are you predicting some of those anomalies that will be there? And are you building a system that maybe on day one doesn't envision accomplishing inclusion of all of those oddities? But in day 20, they can be added down the road.

[00:15:14] Sure. That's a great question. From a strategic point of view, we really want to focus on early adopters in this first year, right? So build out some of the foundational aspects. I call it confidence building measures so that agencies can see what we're capable of doing.

[00:15:29] The ones that want to be early adopters, they're going to help us get there, which then hopefully helps us create a great story for all the other agencies to work, you know, say, hey, we can do this. and we want to engage with IT now on it. And over the long term, I mean, this is going to be several years of work, and part of doing this work is going to be business process reengineering.

[00:15:54] And being able to think, again, long term and strategically about those business processes are going to help us as we continue down this path. Part of what we can do around Six Sigma activities or, you know, other things where we're able to identify breaks in the process or holes in the process or things that are just extraneous parts of the process, we can prove that through customer interaction.

[00:16:21] You know, we can prove that through those sort of design principles and then be able to share that, you know, with our partners and the agencies as well as the board so that hopefully we can break through some of those things. Yeah, I think that's important. And the early adopters, I think, are obvious. I would just say from a user experience, and you know this, what I'm getting ready to say, which is the more one can do with this account at the beginning is going to play a major role in how successful it's going to be.

[00:16:47] So with the car tax one, maybe somebody searches once a year to find their password to go in there and do something, and that's the only time they use it. And so as these pieces get stacked on here, people's ability to go visit it will increase dramatically, and it will become known as the place to go.

[00:17:07] If it starts out with just you can do one or two things, and it's a separate account for this department. And so I would just say as you're building it and reach those milestones, messaging out to the public and to us about, hey, this is the starting core of things you can do.

[00:17:22] It's a lot more than you've ever been able to do with one login before. And we're going to be adding to this as the years go so that when a customer thinks about how they interact with Fairfax, they know to go here. Whether it's, you know, paying their car taxes, or I'm hoping we're even getting to a point where, you know, a customer is somebody who's trying to figure out how to get a permit to build their deck, that they can go log in one place and, you know, they'll be able to see their information more clearly, pay the fee for that at one place so that we don't have every agency collecting this and doing their own system.

[00:17:56] And so I see great hope in this, both for customer satisfaction, our constituents, but so much efficiency that we can accomplish within the county. And that's why this is so worth it. Thank you. Supervisor Alcorn, did you go first?

[00:18:14] All right. Thank you. Yeah, I'm going to pile on a little bit. I appreciate both the chair's comments. I guess I do have one question. This is great. This is – I love the customer focus. I think it's going to do great things, ultimately, on the business process side on efficiency as well.

[00:18:33] I guess one question I'm looking at Tony over there and wondering if maybe this could help lead to a direction that I know we've talked about on the board. We have a number of different programs that have income qualifications. And I realize a lot of that is on the back end.

[00:18:51] You know, it's not the front end. But is this a step towards that customer focus as well? So if you qualify for one program, you could qualify for others. Is this a step in that direction also? I think with the way technology is moving from a data and AI perspective, machine learning perspective, we can absolutely build that kind of intelligence into the platform.

[00:19:18] I think it's critical. We've talked about this on the health and human services side. you know, and again, even it'll happen with the park side as well, and I think in other areas too, that being able to build in that intelligence and have the system know through Gen AI what to ask next, right? There's not, it doesn't necessarily have to be something sequential. It can be something that is, you know, bigger than that. It could be, it may seem a little disjointed from a data perspective or from a question perspective, but if we're able to understand what questions should be asked next and then building that into the

[00:19:57] platform. And we can learn over time. So as we get more customers to engage in a particular product that we're offering, a particular process, the systems are going to continue to learn how one customer has asked about this and then takes information from the next customer and you're building that over time as you get thousands of different transactions that come into the platform. So short answer is yes.

[00:20:24] Well, thank you for that explanation because it does help provide, build that out as well. And let me add on to that as well. I think one of the things that we talked about at the beginning is that confidentiality, the PII, the confidence building, right? So the data lake is going to be our data, first of all. So there's confidence that and the way that we're interacting with it is with Fairfax and nothing else. But we also want to be to ensure that we're meeting all of the compliance standards, and so we're not taking anything that's going to expose people to any kind of sensitive data being released into any other streams of operations and processes. So that's the, it seems simple, but it's going to be a little bit more complex, but we want to ensure that all of our customers recognize that we're going to keep all of the

[00:21:03] same standards that we've held for years, but we're just going to allow their experience to be a little bit more robust as we move forward, and that we all feel confident that we're able to navigate breaking down barriers, but still keeping up the tight silos in terms of outside entities or compliance and sensitivity not being compromised at all.

[00:21:20] And having a portal allows us to segregate the data so Supervisor Stork won't see what Supervisor Alcorn sees. And as Matt stated, building the generative AI on the specific as well as the other helps us collect data so we can move forward together.

[00:21:40] And this approach should help as well. I know some of the data we collect are highly regulated by the feds, for example. Their federal programs are federally funded. So this approach would accommodate that. Is that right? That's the idea. Yeah. So within the data side of this, that data can be segregated however we need it to be.

[00:22:00] If there are certain regulations around it, certain restrictions, if we need to block certain pieces of data or mask it from a presentation layer, from the user interface perspective, That absolutely can be done. We've been doing that kind of thing for years.

[00:22:16] So from a technical perspective, it's pretty straightforward. Okay, very good. All right, thank you. To add to that, we also, I mean, we've been doing a lot of work with that stakeholder and stakeholder engagement. So the work that we've done and the conversations that we've had in previous efforts with the county attorney's office have really set that foundation level so that as we move into more predictive work, the analytics, the portals that we've talked about, The foundation of the policy is also there.

[00:22:47] Rodney. Thank you. I think I heard you say business process reengineering and BPR. I had the opportunity many, many years ago to work on the CSP model. And as a part of it, there was the technical analysis, the social analysis, and the business analysis.

[00:23:07] As I remember, with the business analysis, you're talking to your customers and really trying to get the feedback and input from them in terms of how to build out the system. So talk to me a little bit about the BPR process here and how it's being implemented to create this new model, which I'm going to say is also amazing that we're at a place now where we're even talking about this, and I think it's going to make a big difference in the use and quality of our residents' lives.

[00:23:37] So thank you. Sure, absolutely. So this is an area I like to get low tech because it's, and this is true, taking sticky notes, putting them on a wall with the different steps in a particular process, and really evaluating each one of those steps independently of the other to really determine, is this something we have to do?

[00:24:01] Is this a piece of data we absolutely have to collect? Why? You know, this is a challenging, you know, set of questions for the owners of the process. You know, we do it internally when it comes to, like, let's say we have an outage. We have a process called the five whys.

[00:24:19] I mean, you probably have heard of that. It's an industry thing. And when we look at something that happened within the problem, we dig as deep as we possibly can, keep asking why, why, why, why, why. and then you're able to distill that into the thing that's the most important.

[00:24:35] Same thing happens on business process, and that's where we want to get to. You want to simplify that as much as you can. Customers don't care about what our internal processes are and the

complexities that we've built around them. So we need to strip that down as much as we possibly can.

[00:24:52] And some of this we can do through technology. We can utilize some tools out there that can observe customer behavior, present different options to customers, whether it be language or the next step in a process, and find which one they choose. And we could put 10 of these into production at the same time, and then you pick the one that wins. So you're using data from the customers actually engaging with it to determine what that next step can be. So there's a lot of different ways we can approach it, but we're never going to be successful unless we distill that down to

[00:25:28] you know the real critical components and then last if I could ask about the the worker obviously those employees and the departments and agencies are going to be melded to create this new process we have to help them understand this isn't necessarily going to remove them from employment right we've got to have them feel comfortable with the development of this as a way to help them do their jobs better I guess absolutely this is Brian and I have talked oh sorry

[00:25:58] Yeah, I'm sorry. I was just going to interject quickly that we look at this, and I think we had IPAC about a year ago, and I believe I stated this is a workforce augmentation. It's not a workforce reduction. So it's going to be a lot of skilled training, upskilling, redoing, doing new things.

[00:26:19] And, you know, with the help of the Deputy County Executive Seard as well as our new CIO, we're looking at new ways to engage our staff. But with collective bargaining, I'm going to have to kind of work that mix into it as well because I can't just go forward with anything.

[00:26:37] I'm going to have to lay out a plan. We are going to have to lay out a plan. The Board of Supervisors is going to have to get behind the plan so we can go forward with the negotiations to ensure that we can have everybody move forward. That's the absolute right point. And, you know, if a worker can handle five cases today, when we build out this kind of technology, now they can handle 15.

[00:26:57] So to the chairman's comment earlier, the efficiency gains are substantial, and you provide a better customer experience at the same time. Those are the goals. Yeah, that's the point I'm making is we just don't want people to be fearful of this change.

[00:27:13] And the way we communicate it and the way we interact with them is going to be critical in breaking down that fear. Thank you. Great point. Thank you. And the training is a big component of that, too, because it's famously said by some AI professional, you're not going to get replaced by AI.

[00:27:30] The job will go to somebody who knows how to use AI, which is really what the goal here is, the 5 to 15. Anyway, any more questions down on the end? I think with that, we're going to go to the next session, which is the food and beverage tax overview.

[00:27:48] Is that going to Jay? Yes, sir. Good afternoon, Mr. Chairman, Supervisor Herity, members of the board. My name is Jay Doshi. I serve as director of tax administration. As you know, the board approved a food and beverage tax effective January 1 of 2026.

[00:28:10] The tax will apply to food, prepared food, and beverages that are sold as a meal. The tax rate is 4% and will apply to the total cost of food and beverages that are sold as part of a meal.

[00:28:26] And we have embarked on a journey to have our first 100% online back-end solution to support the collection, the reporting, and administration of this tax. We have been working very hard on this.

[00:28:48] A huge thanks to teams from DTA, OPA, the county attorney's office, and DIT that have worked extensively now on this project. And our goal is to have, in time, a portal to register, file, and pay online, and to have a module that works with the other pre-existing taxes that these customers are subject to, such as a business professional occupational license or a business personal property tax

[00:29:25] system. We have been embarking on a substantial outreach plan to include workshops, another one coming up December the 8th online, one more final one in January, outreach through business organizations chambers of commerce and the like which is critical the next step will be board offices and general outreach to the consumers and all of this intended to ensure that we do our very best to ensure that no one is left behind no one does not know that the tax has come into place

[00:30:03] we have sent directly and i have additional copies should you need them they will go to the board offices as well. We have a guideline document that lays out the specifics of the tax, and we have it translated in six different additional languages, and it is all available on our website in an easy-to-access format. So with that, I'll pass it on to Rob, who will talk to you a little more about the technical solution. Thank you, Jay. Good afternoon. I'm Robert Barr.

[00:30:34] I'm the IT program director of Revenue Systems Branch. We're closely with Jay and his team to ensure we're meeting the capabilities of the Department of Tax Administration. So this project has been a very robust project. A dedicated team of project managers, business analysts, developers, attorneys, public information officers, and testers have been diligently working to deliver a solution that will support the business needs, a communication package that will reach out to the community and meet the internal operational needs of the Department of Tax Administration as well.

[00:31:04] In this project, we utilize an agile methodology, which encompassed of a 14-month plan from end to end with the termination of the actual project not being done until later next year. This was a cloud-first initiative.

[00:31:20] As you can see, we want to take a step back. We had about 34 sprints total in this whole package. That means sprints are two weeks long, so you're looking at about 68 weeks of development and work as far as that goes, and about 1,100 tasks throughout the whole process. And this was all developed in-house, which is a great process for us.

[00:31:39] It's exciting to me to see it come alive and build upon our technologies that we have, such as this being a cloud-first initiative. We merged two project plans with this. As part of the tax modernization project, we had put in a cloud-first initiative for all future implementations for the Department of Tax Administration.

[00:31:59] We will be moving our current personal property B-POL system to a cloud-elastic environment, which should ensure better uptimes, more accessibility, and a more robust solution for that going forward. It's also built on our framework, which is known as TAPS, or the Tax Application Business System, which will allow us to utilize and reuse code and modernize standards across the board.

[00:32:27] Additionally, we work closely with our partner in DTA to ensure both a great internal and external system, making sure the user experience externally is easy flows appropriately and it also includes a real-time interface for both register file and pay and changes to the person's accounts this will allow for transactions to be all in one session which currently is not the way we do business usually we

usually have a approval step in between so we've now accelerated that to be all in one shop it also removes some older processes and streamlined some of our other

[00:33:04] business processes to allow for a smoother process in the back end, removing overlapping procedures that were done. And as part of the project, we're also deploying advanced security features to once again protect that PII that's very important to protect for our constituents.

[00:33:23] And the good part about that is most of these features will in the near future be rolled out in our other online platforms as we move forward with updating those. This was a multi-agency team with an integrated solution for not only DIT teams involved, such as GIS and PLUS, but teams that are across the DTA area also working with county attorney and OPA for a communication package. But it also was working with other county agencies to obtain data, especially the health department for these current restaurants that exist. So it's been a very large

[00:34:03] effort across the board. So looking at where we are, we're excited to say that we're on track. We're going to meet our go-live date of January 2nd for the external portion of things, but we have two major milestones as part of this project. The first is going to be the move through the cloud and releasing it internally so our staff and DTA are able to get out there and see and get look and feel of the actual solution and also support businesses that have questions. Additionally,

[00:34:37] we're going to be rolling out the next phase of that, which is the external portion on January 2nd, which will be the major milestone because that's when people are going to be able to get in and actually see how this works. So we anticipate a lot of questions. So we are going to be ramping up appropriately for that as the first billing cycle approaches, which is February 20th, which we also anticipate a lot of questions, as this will be the first time people will be actually doing this tax. So we are prepared and ready to go. Additionally, we are always looking forward. In an agile project, you always create a backlog of nice-to-haves or items that may not

[00:35:16] need to be done. So in the first few months, we're going to be enhancing the system. We're going to be getting rid of more of the other processes that take overnight or rely on different system some interactions, making things more real-time, integrating with other areas as well. And we're going to be re-architecting the solution as well to ensure that it's robust and able to handle any load that we get around that.

[00:35:38] So as we move forward, we look forward to the challenge of accepting this new tax. And with the support of both DTA and other teams, I feel this project has been very successful and is moving forward well. And do we have any questions?

[00:35:55] Okay. With that, I'm going to ask two real quick ones. I think they're real quick. And you may not have the answer. Do we have a feel for how many of our restaurant owners, et cetera, this will be their first time dealing with the meals tax versus a chain restaurant that is used to it?

[00:36:13] I mean, I'm sure McDonald's and et cetera can just roll a system out. But do we have a kind of a percentage feel there? I don't, Mr. Chairman. Nationwide, it appears in terms of number of locations, you might be in that 30% range for the chain versus 70% for non-chain.

[00:36:37] So that's a very high-level estimate and may not apply to us. So it's probably the majority we'll be dealing with at the first time. Yeah, you've got over 1,800 restaurants in Fairfax County that are not associated with Wegmans or Harris Teeter or whatever sundry supermarkets.

[00:36:55] So if you use Jay's number, you take out a 400, So you're looking at at least 1,200 restaurants potentially that don't have facts. It's big. I think that's important because if it's the Harris Teeters or whatever, they're just going to roll out what they've already got developed.

[00:37:11] And that brings me kind of to my second question, and I understand there was some industry questions about how some other jurisdictions are treating the beverage piece when it's beverage alone versus food and beverage. and I'm more interested in not necessarily the interpretation, but why is there a difference between some and others?

[00:37:38] Sure thing. So I'll take a crack, and I see that Corinne Rockett, our deputy county attorney, has also taken a seat. This stems from the fact that the enabling legislation in the Code of Virginia is different for cities and towns versus the counties.

[00:37:56] So we have one section of the code 581-3833 that applies to counties and 581-3840 that applies to cities and towns. It absolutely creates confusion. We flagged this for you in March when we joked about the fact that Christina Jackson's chai, if purchased alone, would not be subject to a food and beverage tax in Fairfax County, but the identical item would be subject to a meal stacks in Fairfax City if she were to buy one.

[00:38:31] So we do believe that there's an opportunity to harmonize these provisions and to make it easier for the small and multi-location businesses alike. Very good answer. Do you have anything you want to add? Or did Jay cover the legality?

[00:38:46] He did an amazing job, so I don't have anything to add. I think he's been well coached. All right, with that, I'll turn it over to the chairman. Yeah, I brought this up before, and I just want to get reassurance on this. Because it's a Virginia locality issue, the debacle that Richmond had implementing and collecting their meals tax, we've studied that hard and are confident we don't potentially have some pieces of the same problem with our own rollout and implementation.

[00:39:13] And the reason I bring it up is because it's a city, but it's also Virginia, and it was recent, and it didn't go well. Mr. Chairman, you're right. And that for a tax that in that city has been in existence for over 30 years. So I don't believe it was the initial rollout, but it was events thereafter and most importantly, lack of communication, outreach, and just the willingness to sit down and discuss differences when audits and other.

[00:39:45] The nature of the beast is that there will be items that we will work on. There will be items where the industry may have one perspective, we may have a different one. But the important part is that we communicate, we resolve issues, and there's a path for communication. And we worked hard on those fronts, absolutely, from those lessons and just in terms of how DTA in a business-friendly environment such as Fairfax County operates.

[00:40:11] I appreciate that. And I would just say also that even despite all of that, we know there's going to be people who aren't going to focus on any of it until they have to go implement something. And so I'm hoping that we're prepared from a staff resource standpoint to deal with potential tsunami of folks coming in. I mean, you deal with this all the time when car taxes and real estate taxes are due. But with this especially, because it's a first time and there are so many unique non-chain franchise, potentially people involved here that may be setting something

[00:40:48] up for the first time that we're ready and have the resources and people to be able to help them through that? Yes, sir. Thank you, Mr. Chairman. Okay. Thank you. Let me start down at that end and work this way if anybody's got anything. Go ahead, Rodney.

[00:41:05] I'll just make a comment. And there's a restaurant that is in the Franconia district that was actually paying the tax to a, I didn't want to call them out, but to a city. And the thing is, we have to ensure, obviously, I think we don't want to be in that same position collecting from a jurisdiction that's outside of Fairfax.

[00:41:30] So I just was going to ask, how do we ensure that that doesn't happen here in Fairfax County? So as part of our system implementation, we are utilizing the MAR system. That's one of our integration points, which only contains addresses within Fairfax County borders that are within Fairfax County jurisdictions.

[00:41:47] We're also tracking by jurisdiction and also tracking by payment area. So if it's a split location, some, you know, fall on that line. So we do have some line locations that we're also working with. but we're ensuring that the addressing when they come and register for the first time is within the borders of Fairfax County.

[00:42:08] I appreciate that. I think that's a great idea and suggestion. Thank you. Very good. Anybody else coming down this side? All right. Well, I think you got off good there, Jay. With that, let's see, we were going good news, bad news, wrong, good news now.

[00:42:26] You're going to give us an update on the affidavit for the board matter. Yes. Again, Maura Power, Chief Technology Officer and Deputy Director, I've got a short two slides just to kind of review where we are with the affidavit process. So last February, the board raised the issue of affidavits and the cumbersome process that the board offices go through, that the county attorney offices go through, that our customers also go through in terms of getting an affidavit generated and then submitted and notarized so that we can meet the disclosure obligations.

[00:43:00] So after that meeting when the board matter was raised, we developed a group to really address some of these challenges. So we looked at the challenges that we had. We know that there was a lot of human error that was going on. I talked with Frank over there about the process that they do, and I was amazed at how labor-intensive staff have to go through in order to get the names to do that reconciliation.

[00:43:28] So we work in a modern technology age. All of this is standardized information that we should be able to have. So working very closely with our friends at DPD, at OCA, and two different groups within DIT, we established a team to really address the issue.

[00:43:45] So we did go through and have some of those business process engineering discussions. The Office of the County Attorneys and Department of Planning and Development worked through, you know, Are there things that they need to modernize or change to make the process easier as well?

[00:44:01] And then those initial requirements were really talked through with our application development team, so both from the PLUS team as well as our business applications team. So they've gone through an agile application development process to really create a much more streamlined form that can be done electronically, which also, you know, stores that data in a very clean way so that the automation can happen to do some of that disclosure reconciliation.

[00:44:32] So on the next slide, I do have some just high-level forms to kind of show you what they look like with screenshots, where you can see that there's a stepped process that will walk you through it. Attorneys, homeowners, whoever is filling out that affidavit can go to this system.

[00:44:50] They can log in. The login can actually be one of the tools that is associated with the customer portal that we have. And then they're filling out the data in a very seamless way. They can copy features. They can do things again. We know the same affidavit sometimes has to be done several times.

[00:45:08] So they're not redoing it every single time again. They have those copy features. And granted, I don't think a lot of this process will be on the phone, but there is that option for people to go that way as well. And I think really the key point here is that the data is standardized, right?

[00:45:27] First name, last name, all of the relationships that may exist with someone in your office is standardized so that, again, the work process, the data at the end of it for doing that reconciliation is much more seamless. So with that, I'm going to ask if you guys have any questions.

[00:45:46] All right. I'm going to first say thanks, Frank, because your name's come up a couple of times on showing them how complicated the process can be. So thank you, and thank you for taking the time to go see Frank. Absolutely. I guess the first one is, and I know the answer to this, industry input.

[00:46:04] Oh, yeah. So we've been working with, Tracy's back there, and she can come forward and speak to some of the process that we've been working very closely with them. They've been working with the industry folks who also have been part of that process. I'm not sure if Tracy wants to.

[00:46:23] I think that's going to help them as well. Tracy Strunk, Director of Department of Planning and Development. Yeah, we've had some meetings with the folks who file these all the time, and we're going through the testing process with our DIT friends now, and sort of after we get it internally tested, we're going to start having them test it.

[00:46:40] So we're working with them. And there wasn't a timeline up, but anticipated rollout date, if you've got one, or testing date. Yeah, we're still working through the final testing processes phase. Again, we're going to have the internal testing, but we're looking to have the solution out within this next quarter is really where we're going for.

[00:47:01] And we can iterate from there for any other enhancements. All I got, Mr. Chairman. Yeah. So just to be clear, this does not replace the standard affidavit requirement. So they'll still be going through filing the standard affidavit because obviously there's a signature at the bottom of that.

[00:47:19] certifying the information above is correct. And I don't know if that's another thing that's in this, just to make sure. But what I'm worried about is instances where there might be a discrepancy between the paper filed affidavit and what an applicant has entered into the application.

[00:47:39] So what this actually will do is create the affidavit form. So you'll put all your information in the affidavit form. It will print out something that's very nice and clean, and you'll have it in a PDF form. And you should eventually also, the hope is the next step will be create, have it create a list of names, but that will be printed and you will have, they will have to notarize and sign all of that, including the list. So they will still be reviewing and responsible for the information that is finalized and delivered to you all. It doesn't, it doesn't go into this system and then automatically come to you all to review. They print it, they notarize it. Maybe that will

[00:48:16] happen electronically someday in the future, but they're still responsible for certifying that they do, in fact, that all of that information is correct before it's delivered to you. So can there be an instance where there's a discrepancy? My guess is there probably could be. And then what do we rely on, this or the affidavit itself? I'm just asking before, you know, we get to a situation where something is in the affidavit that potentially wasn't properly entered into the electronic application that we're talking about here.

[00:48:48] Can there be a discrepancy, and have we thought about that? There shouldn't be a discrepancy because they're not certifying the electronic. The electronic is just a way to create the affidavit form. Their responsibility is to review that and make sure it did all print out correctly, and if not, then we'll have it, you know, then correct it.

[00:49:08] I think what the chairman is saying is if they submit the incorrect file that didn't have the last-minute correction in it and certify the corrected one but submit the uncorrected electronic, so it's a reconciliation between the paper version and the electronic version.

[00:49:30] Which means you have to go through the same process, pretty much, because if you're going to trust it and not review it, you're going to have the same issue. Well, for me, it's not the trusting and reviewing part.

[00:49:45] It's the if there needs to be an update to the original affidavit, it also has to be updated in here. And we have to have that information. So right now we deal with one thing. It's the paper affidavit that comes to us. And now we have the paper affidavit that this is helping create.

[00:50:03] But as changes happen to this over time, the person who's creating the affidavit or making the change to it might not be the same person that has to go in and make the update and correct this. I'm asking that I don't end up with a paper affidavit that's different than anything that's in the electronic version, particularly in an instance where an affidavit could be updated through our process.

[00:50:26] You will not. I mean, this is an app that prints out a form at the end. They take the form. They notarize it. They send it in. We review it. If they update it the same way. Today, actually, some of our partners actually use an electronic fillable PDF to create them.

[00:50:43] So it's kind of, this is not a fillable PDF, but it's the same idea. If they make an update, they update it through the process. And they will print out a new affidavit, and it will be reviewed the same way. So you will only ever be working with the final product that they have notarized and said, this is what it is.

[00:51:06] The one difference is we have talked about how that creates a PDF that's readable. And so it would be lovely if the affidavit form, you know, it spits out a PDF, can you just take that? But if we're saying you print it and notarize it, even that is going to be better because that will be clean and it can be scanned in and it will make your process easier.

[00:51:28] But that one little piece is something that we're looking at is does this spit out a PDF and can you use that PDF before it has been notarized or not? And that the county attorneys are on that. Okay, I mean, I ask all these questions because as my colleagues know, at the end of the day, we're on the hook for these. And so there's no pointing back and blaming an application or some other thing. We are ultimately accountable for these. And that's why I'm asking these questions to make sure there are safeguards in place where there's not ever a situation where there could be a discrepancy between the two that could create a problem where we've looked at one thing and not the other and didn't know the other existed.

[00:52:07] And I don't know how that notification process is going to work. If it's going to be the same as what we deal with now when there's a change in affidavit, then we're used to that. But I just think we have to think about the ones that change once the initial affidavit's been filed and making sure that the board has the most recent information because ultimately the buck stops with us on this.

[00:52:28] Despite the best advances in technology, it's still going to be our responsibility to verify all this information. And I'm not a programmer, but I'm wondering if when you decide you've got the signature copy, if that can't be stamped somehow so that we, with a timestamp, so that we know when we see the paper copy, it's the same as the elect.

[00:52:51] I don't know if that kind of, I'll let you guys figure it out, but there may be better ways. There are additional technology tools that we can use. I think the first phase of this conversation was really getting that electronic form or getting that paper form that people are handwriting things where the data is not standardized into a standardized format.

[00:53:10] So I think that would be the kind of next phase that we look at. But it really depends on the kind of the partnership that we have with the end stakeholders, including your offices as well. Yeah, I think industry is very interested in seeing this happen. Correct me if I'm wrong, but it'll help them and help us.

[00:53:30] They have identified some things that will be better for them through this process. Yeah, okay. I'm going to start down here this time with our land use chair. So I never have to check affidavits because I have staff, but since we used Frank's name, how will this change the process for Frank to check the affidavits, or is this really just creating a cleaner form?

[00:53:52] It's a cleaner form with better data. So there is data on the back end that's being stored with the relationship. So I think the area that still needs to be worked through is that affidavit name, like signature portion.

[00:54:09] So like he could really extract it. Because I think right now, like some of it's handwritten, some of it's typed in. It might be first name, last name, last name, first name, Jack versus, you know, John S or something. So the names, there's not consistency.

[00:54:25] So all of that information hopefully is extractable, but I do think there's some complexities around actually getting and making sure you have the finalized version of that affidavit. So I think those are some of the last kind of things that we're going to have to be working through in this last quarter.

[00:54:43] So I assume what Frank's going to do is download the names and then match it. Yeah, go ahead. Go ahead. Because, I mean, he goes through a similar process that our office does. No, he can't. Yeah. Thank you, Mr. Chairman. Frank Anderson, Braddock District Supervisor, Chief of Staff.

[00:55:05] When it comes to our process, we would be taking the data and cross-referencing it with the third-party or campaign data to match names. And so this piece of the process would definitely streamline it by organizing the names in a fashion that we can compare them better.

[00:55:21] It was as opposed to PDF where you can't always even select the text off of the document. Yeah, go ahead. Can I ask a follow-up question? Names and employers or just names? It's names. It's up to us to see who their employers are.

[00:55:38] So that employers won't be part of the form. Is that correct? Literally everything that's in the form now is there. So it's the names, it's the relationships, it's the corporations, every single piece of that very complex form is in there.

[00:55:55] I just want to make sure we didn't look at it. Now you can pull it down in electronic format and it's cleaner and you can match it up and you can let ai help you match it up too if you want thank you frank anybody else with questions on this one wow white group all right we are on to uh the update on joint uh board of supervisors uh school board i.t committee great so just in terms of introduction i just want to give everybody a couple highlights uh it's been a very productive uh two months since we really

[00:56:33] kicked off this process with our partners over in the schools um i've had a couple conversations with Gautam Sethi, who's the CIO there. We came up with an initial list of eight to ten things that we wanted to talk through in a little bit more detail. And then at the end of October, we had our first joint meeting. I felt like it went really well, and it was a very productive conversation. I was happy with the engagement that was going on. And what we decided to do coming out of that was push the conversations down a level so that our deputies on both sides

[00:57:13] of the house could work together with their teams and start coming up with some tangible things that we want to move forward with. So that's what they've been working on. And then we're going to regroup in December. So I'll pass it over to Maura and she can provide some more information. Yes. So thank you for that introduction. Again, I mean, I know you guys are familiar with the committee that you stood up. It is actually a very, really innovative opportunity for us to work across the aisle with our schools. Again, we are one Fairfax, and this is an opportunity to look at technology with that, you know, unified mindset. So obviously our major objectives that we have

[00:57:50] are really trying to improve some of those operational efficiencies, identify cost savings or cost avoidance in the technology that we're working through, and identifying opportunities for some of that resource utilization. As mentioned before, we met, our first meeting was October 31st.

[00:58:09] That was a great introduction for the teams, for everyone to meet and get on the same page about what we're going to do and what our next steps are going to look like. With that, we have created a technical working group. So we have folks who are, as Matt mentioned, that are down a level who are actually working in the technology, who are working on the certain procurements that we may have and really understanding what we have that could work really well across the aisle on both sides to identify some of those, you know, efficiencies.

[00:58:41] So with our first meeting that we're having, like the working group, the technical working group between both sides, we're meeting with them in early December. And in that time, we're going to talk around certain focus areas. So space consolidation, facilities and data centers, right?

[00:58:57] Maybe we both have leased space for data centers. Is there a way to optimize and save some of that? Is there extra room? Things like that, things where we can find some opportunities. Additionally, we're going to be looking at platforms and applications. So are there opportunities from us, from a purchasing power?

[00:59:15] Are we using the same vendors? Are there something that we can have where we have the power, the buying power, to really acquire the tools with kind of less effort? Additionally, we're going to be looking at security services or monitoring services.

[00:59:34] You know, we do a lot in-house, and our, you know, our securities still needs to remain separate. But there are options for services that we might be able to procure and get to realize some of those efficiencies. Additionally, you know, we've talked a lot about business process and business process engineering.

[00:59:52] There are IT processes that probably could be identified jointly. So we're going to be working through that, identify some key action items that we can take on that. And then we've added in also looking at emerging technologies, right? So there is a lot that's happening with AI.

[01:00:08] There's a lot that's happening. And we are in that space and we are, you know, making investments on it. So is there anything that we can do to kind of help on that finding efficiencies, find some savings, leveraging the same tools to kind of help us as we look at how do we move forward considering the difficult budget times that we're now facing.

[01:00:29] And so our tactical kind of operational plan will have some tangible things that we can do within this next fiscal year with a report to you guys by March. We know that's a very aggressive time frame. We want to have at least a couple key things that we can do and then also identify some of those longer-term initiatives or things that will get us to a place where we're using our county resources more efficiently.

[01:00:59] So both short-term and long-term objectives, we hope to have that report to you by the end of March. Okay, thank you very much. What I think I want to do is turn to our IT committee members first to see if you've got anything to add.

[01:01:17] No, that was an amazing description of our meeting and some excellent additional information beyond what we got. So you're doing a great job. Thank you to the whole team that's making this happen. So that's all I've got. I would just worry about the March report out because there's – I don't know how we get there.

[01:01:38] I'm sorry. But I realize that was the instructions we got. But this is a little bit more complex than that. And we're still, I think, figuring out the basics as of the last meeting at least. Yeah, and I think, I mean, to me it would be that's the first report and you get the quick hits, but you identify the areas you continue to work on.

[01:01:59] I know we need the quick hits, but I think the long term is as important as the short term. With that, I'll turn it over to the Chair. Yeah, just to comment on that, since when I made the board matter, it was specifically, first of all, thank you for staying on message that this is about efficiencies and cost savings, because it could have gone a lot of other places.

[01:02:19] And with that being said, the driver behind the schedule was we have some tough budgets coming up, as you acknowledge. We all know that. And so it's really important to try to get as much done as we can until March. I don't have a problem if there are things that have to continue after that, but I will say that there are two drivers to the schedule.

[01:02:39] One is the budget, and one is the amount of staff time and energy that has to go into maintaining these committees. And so these were not set up to be like the skipped committee, which is ongoing and in perpetuity. These were meant to be shorter-term committees that respected the amount of staff time and energy.

[01:02:58] We've got our folks working on a lot of stuff. And so I would just say we crosswalk that in fairness, that if there are some big things that need to be worked on, just being cognizant of how much staff time that takes. But absolutely, if there are some low-hanging fruit items for this budget, we need to be taking advantage of that with both of those things in mind.

[01:03:19] The only other thing I would say is in the report, because the driver here is efficiencies, are we going to see the potential efficiencies? Some of these could be long-term. They're not going to be immediate.

[01:03:35] But if we start to transition to this, are we going to see projected efficiencies and where those efficiencies lie, whether right now the funding associated with activities that will become more efficient used to be housed in the school budget or in the county budget so that we can kind of track?

[01:03:52] Because at the end of the day here, it's not schools versus county money. At the end of the day, it's creating efficiencies for everyone and for our county taxpayers. But it is helpful for us to know if we take on more responsibility, that could potentially cost us more as an expense than that comes out of something else.

[01:04:11] Are we going to know that part of it so that we can kind of track that? Yeah, I'm sorry, Supervisor Herdy, thank you. And Chairman McKay, thank you. You know, when you're looking at these collaborative committees, it's not, as you said, it's not going to be a skip. However, the collaboration are going to continue throughout.

[01:04:29] Once we continue to collaborate and we find new ways of doing business, yes, there will be an impact of some sort. And through the budget process as well as through the collaboration with Matt and his team and the schools, we will have do-outs consistently throughout the year that we continue to show what we're doing as a team as opposed to what we're doing in silos.

[01:04:52] And that's the key is getting them to be more efficient and get away from the silos. When we speak about cybersecurity, we have a very robust team here in Fairfax County, but it's not as many people as we have in Fairfax County public schools. One of the things that we're going to try and do is marry them together to see if our performer or our platform can work with the schools when they image their machines.

[01:05:17] So there's a lot of different things that we're going to continue to work on, but the one key aspect of this is continued collaboration. I totally agree. I just want to make sure at the end there's some accounting for where the efficiencies were created because what I don't want to do is saddle our IT department or a county agency with taking on a major undertaking for schools and then our cost goes up.

[01:05:43] Yeah, but the net out is the county taxpayer wins. We've got to be able to track that and see that because there's efficiencies that are better use of our staff time and energy. And then there are also efficiencies that lead to cost savings. And being able to identify those is going to be really important as we have to deal with school transfers, you know, responsibilities between the county and schools that continue collaboration is what we want.

[01:06:10] But we've also got to be able to track where that goes when that begins so that we're properly resourcing our IT department and other county agencies and properly resourcing schools if they're taking on more responsibility for us. And so I just want to make sure there's a fiscal impact piece of this that is as clear as it can be for some of the recommendations that come forward.

[01:06:34] All right. Any other questions or comments as I look down the aisle? Okay, with that, we're to a wrap-up, and I guess wrap-up and adjourn. Good job. I mean, it was nice that you had two or three months to warm up before you got here, so you got some accomplishments under your belt before you show up.

[01:07:00] With that, this committee meeting is adjourned.



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