

County Real Estate Web Portal Board
March 26, 2008 Minutes
ISAC Office, Des Moines, Iowa

Voting Members Present

Ken Kline, Chair
Holly Fokkena
Diane Swoboda Peterson
Deb Roberts
LaRayne Riccadonna
Kathy Croker
Mike Grandon
Peggy Weitzl

Representing

ISACA, Auditors' Affiliate, (Cerro Gordo County)
ISACA, Auditors' Affiliate, (Butler County)
ICRA, Recorders' Affiliate, (Woodbury County)
ICRA, Recorders' Affiliate, (Floyd County)
ISAA, Assessors' Affiliate, (Polk County)
ISAA, Assessors' Affiliate (Buena Vista County)
ISCTA, Treasurers' Affiliate, (Cerro Gordo County)
ISCTA, Treasurers' Affiliate, (Carroll County)

Advisory Members Present

Mary Maloney Iowa Tax & Tags, (Polk County Treasurer)
Scott Williams ICIT, (Marshall County)

Education/Outreach Committee Members Present

Darrell Bauman ISCTA, Treasurers' Affiliate, (Dallas County)
LaRayne Riccadonna ISAA, Assessors' Affiliate, (Polk County)
Mary Maloney Iowa Tax & Tags, (Polk County Treasurer)
Marsha Carter ISACA, Auditors' Affiliate (Shelby County)

Guests Present

Michael Tutty DAS-ITE
Deb McDaniel DAS-ITE
Scott LaBlanc Iowa Interactive
Don Wilson ABC Virtual
Robin Harlow ISAC

The meeting of the County Real Estate Web Portal Board of Directors (CREW Board) was called to order at 10:10 a.m. by Ken Kline.

Designation of Voting Members:

Auditors:	Ken Kline	Holly Fokkena
Recorders:	Diane Swoboda Peterson	Deb Roberts
Treasurers:	Mike Grandon	Peggy Weitzl
Assessors:	LaRayne Riccadonna	Kathy Croker

It was moved by Croker, seconded by Swoboda Peterson to approve the minutes of the February 22, 2008 CREW Board meeting. Motion carried.

It was moved by Roberts, seconded by Riccadonna, to approve the Treasurer's Report, with a current balance of \$22,435.81, as presented by Fokkena. Motion carried.

Kline queried the group as to their recollections regarding early conversations of both the CREEGAC and CREW boards regarding the original intent as far as statewide search functionality of the CREW portal. He reported that he could only find two references in the minutes of both boards regarding the topic. Minutes of CREEGAC from January 27, 2006 reflect, "Ms. Fenton stated the goals of the Assessor's Association were to 1) provide statewide research capabilities with basic data ..." Minutes of CREEGAC from December 19, 2006 state "The group moved to discuss a 'neighbor' function that would return surrounding counties' information with a search on request."

Carter recalled that the intent has always been to provide a statewide search function. Riccadonna reiterated the same. Grandon remembered that statewide search was discussed but doesn't remember "committing" to it. Williams remembered the "neighbor" search, but no further details. Maloney stated she always believed the statewide search was one of the goals.

McDaniel reported that DAS-ITE records dating back to September 27, 2006 show that statewide search was to be included in the portal.

It was reported that the Recorders, Auditors, Assessors and Iowa Tax & Tags all have statewide search functionality at the affiliate level.

Kline asked Don Wilson of ABC Virtual what it might take to build statewide functionality into the ISCTA site. He was unable to answer at this time, without further research.

Weitl stressed that her first responsibility was to her own constituents and did not want to risk the speed and quality of their website in order to allow for the statewide search. She did however state that she would be willing to provide it if it could be done without detriment to their current site.

Kline personally requested that the ISCTA Treasurers' group consider adding the statewide search functionality to their current site.

Tutty indicated that a set of "notes" would have to be developed indicating to the user why a result was not available (i.e. Butler County does not allow a search by name). He indicated that doing so would temporarily resolve the "data holes" that may exist in the portal currently. It was agreed that the goal would be 100% participation in the statewide search in the future. Tutty is to develop a sampling of "notes" in response to different search/result scenarios and bring them to the group for comments.

Fokkena requested a list of participating counties from the Affiliates currently providing for statewide name searches. Her thought was if we overlay that information on a county-by-county basis, we may find that we have fewer "data holes" across the state than we think.

Tutty also asked for guidance as to how long a search should be allowed to run before the user would get a "note." The group agreed that initially all searches (single jurisdiction, multiple jurisdiction and statewide) should be allowed to run for 60 seconds. Tutty indicated that the amount of time would be configurable and could be changed if necessary. Croker requested that the group be informed as to how long it is currently taking for a search to return results.

A lengthy discussion ensued regarding establishing Business Rules at the CREW Portal level. The affiliates would be asked to conform to such Business Rules. Kline is to prepare a list of the proposed Business Rules and get them to the affiliate representatives as soon as possible to allow them to get input from their leadership as to whether or not they could/would comply.

The group then discussed benchmarks as to how to determine when the portal would be ready to be released to the public. McDaniel requested some idea for a timeframe. Kline suggested July 1, 2008. After much discussion, it was determined that setting a specific date at this time would be premature. It was agreed that setting a specific functionality criteria would be much more effective to assure a quality result.

Kline indicated that the next meeting of the CREW Board would be Friday, April 18, 2008 at 10:00 a.m. Location to be announced.

There being no further business appearing before the Board, the Chair declared the meeting adjourned at 2:00 p.m.

Respectfully submitted,

Holly A. Fokkena
Secretary-Treasurer

BUSINESS RULES

As adopted 3/26/08

1. Name Order
<Last Name> <First Name> separate fields
2. Casing
CREW search will be case insensitive
(Each affiliate will have to allow for case insensitive search at their level)
3. Punctuation, Suffixes, Other Extra Marks
Hyphen becomes a space
Remove everything that is not an alpha or numeric character
4. Partial Matching
Require at least 3 characters (Lucy Lu?)
Wildcard at beginning and end of Last Name
Wildcard at beginning and end of First Name
(Mc and Mac to be addressed at later time)
5. Street Name
Require at least 3 characters
Wildcard at beginning and end of Street Name