WSLCA

Asset Management Committee
State Trust Business Systems

WSLCA Asset Management
January 10 & 11, 2017

January 10th
Agenda

- 2:15 PM - 2:45 PM: Existing systems
- 2:45 PM - 3:15 PM: Lessons Learned
- 3:15 PM - 3:30 PM: BREAK
- 3:30 PM - 5:00 PM: Best Management Practices and Principles

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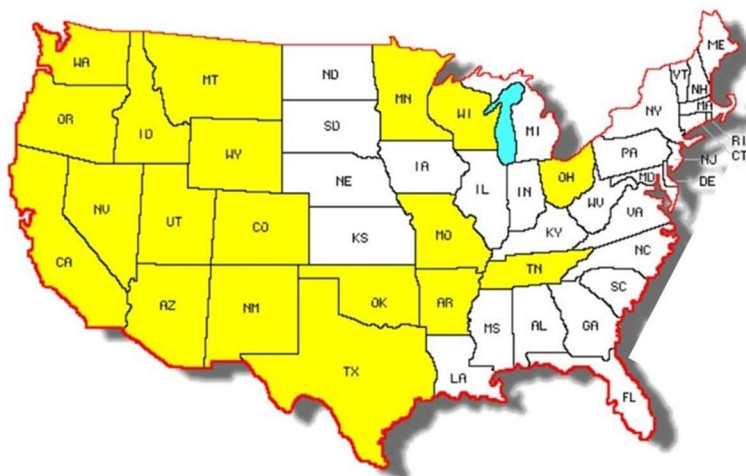January 10 & 11, 2017

Priority Strategy

In order for state trust management agencies to maximize the value of trust assets for beneficiaries, we need to optimize business processes and business systems that support the needs today and for years to come.

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Existing State Trust Systems
North Dakota/Major Oak Business Survey Results 2016

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Existing State Trust Systems
North Dakota/Major Oak Business Survey Results 2016

State	Name of Department or Office	Business/System Area			
		Land Management	Financial Accounting	Grant Administration	Unclaimed Property
Arizona	State Land Office www.land.az.gov	X			
California	State Controllers Office				X
Colorado	State Land Board www.colorado.gov/statelandboard	X	X		
Idaho	Department of Lands www.idl.idaho.gov	X	X		
Minnesota	Dept. of Commerce-Consumer and Industry Services				X
Montana	Dept. of Natural Resources and Conservation--Trust Lands Division www.dnrc.mt.gov/divisions/trust	X	X	X	
Nevada	Department of Conservation and Natural Resources--Division of State Lands www.lands.nv.gov/index.htm	X			
New Mexico	State Land Office www.nmstatelands.org	X	X		

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State	Name of Department or Office	Business/System Area			
		Land Management	Financial Accounting	Grant Administration	Unclaimed Property
Oklahoma	State Land Office www.clo.ok.gov/	X	X		
Tennessee	Dept. of General Services and State GIS Office www.tn.gov/finance/topic/gis-contacts-topic	X			
Texas	General Land Office www.glo.gov	X	X		
Utah	School and Institutional Trust Lands Administration (SITLA) www.trustlands.utah.gov/	X			
Wisconsin	Dept. of Revenue-Bureau of Tax Operations				X
Wyoming	Office of State Lands and Investments- Trust Land Management Division www.lands.wyo.gov	X	X		
Federal Government	U.S. Bureau of Land Management (Colorado Office)	X			

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Existing State Trust Systems
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State	LM and Accounting Integration*	System Type**	System Status		
			System in Operation and Maintenance Mode	Planning for System Replacement or Major Enhancement	Implementation of New System or Major Enhancement in Progress
Colorado	INT	COTS	X		
Idaho	SEP	COTS			X
Montana	INT	CUS	X	X	
Nevada	INT	CUS	X		
New Mexico	SEP	COTS/CUS	X		X
Oklahoma	INT	CUS	X		
Texas	SEP	CUS	X	X	
Utah	SEP	CUS	X		
Wyoming	INT	COTS	X		

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COTS Platforms/Vendors

Land Management Software:
- NetSuite* (Colorado State Land Board)
- Salesforce (Wyoming Office of State Lands and Investments)
- PCC (New Mexico State Land Office)
- WebSoft Developers (Nevada Division of State Lands)
- Trimble-Spatial Dimensions (Idaho Department of Land)

Accounting/Financial Management Software:
- NetSuite* (Colorado State Land Board)
- Abila MIP (Texas General Land Office)
- Microsoft Dynamics (Idaho Department of Land)**

- *Integrated land management and financial accounting system using NetSuite ERP development tools
- **Will be integrating Microsoft Dynamics software with new implementation

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What have we learned?

Provide lessons you have learned through operating and/or implementing state trust business systems.

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What have we learned?

- CO – Systems need to evolve
- CO – Everyone owns the system, it is not just the IT group's responsibility
- CO – Set exceptions for everyone (employees, contractor, management).
- CO – Constant engagement with implementer (do not let them go dark!)

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What have we learned?

- State X –
- State Y –

Best Practices for State Trust Systems

- Possible Areas of Focus
  o Lessons Learned
  o Business Functions and Systems
  o Technology
  o System Implementation
- Questions we need to answer
- Who and when?
- Other

January 11th
Agenda

- 8:15 AM - 9:00 AM: Client Server Solutions - Ed Reyes, IT Director Oklahoma Land Office
- 9:00 AM - 9:45 AM: Customer Portals - Lynell Rogeri, Managing Director Opportune LLP
- 9:45 AM - 10:30 AM: Map System Innovations - Brent Jones, ESRI
- 10:30 AM - 11:15 AM: Cloud Based Solutions - Steve Young and Nancy Marvin, Washington Department of Natural Resources
- 11:15 AM - 12:00 PM: Enterprise Resource System Solutions - Tobin Follenweider, Colorado State Land Board

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