



THE COMPUTERWORLD HONORS PROGRAM

CASE STUDY

LOCATION:
*Tallahassee, Florida,
United States*

YEAR:
2006

STATUS:
Laureate

CATEGORY:
*Government and
Non-Profit Organizations*

NOMINATING COMPANY:
Deloitte

ORGANIZATION:

Florida Department of Revenue

PROJECT NAME:

System for Unified Taxation (SUNTAX)

Summary

The Florida Department of Revenue (DOR) is the first state government entity in the United States to implement an Enterprise Resource Planning (ERP) package for tax administration. DOR's integrated tax administration System for UNified TAXation, or SUNTAX, is a proven public/private partnership model that continues to deliver Florida's policymakers more bang per budgeted dollars.

Florida citizens and local governments have measurably benefited from SUNTAX technology. More efficient and cost effective collection and distribution of taxes has resulted in much needed increased tax collections for government-provided services (schools, roads, hurricane preparedness, public safety, and state parks and recreation).

In an era of government doing more with less DOR calculates a return on investment (ROI) of 8 to 1. Over the past six years, for every budgeted dollar expended on SUNTAX technology and staff, there has been an increase of eight dollars in revenue. Over \$638 million additional revenue has been realized from SUNTAX's enhanced capabilities of integrated receivables and registration, account management, data mining, and data matching.

Florida's businesses are benefiting from the SUNTAX system as DOR uses the powerful account management, integrated registration, and data mining tools to identify, register, and collect past due payments from noncompliant taxpayers. Ensuring that all businesses pay their share of taxes levels the competitive playing field as it augments the state treasury.

Introductory Overview

The primary function of the Florida Department of Revenue's General Tax Administration Program (GTA) is to collect public revenues (taxes and fees) in accordance with state, local, and federal laws. DOR processes almost ten million financial transactions annually from approximately two million taxpayers, resulting in revenues of over \$38 billion each year. Over 90 percent of these taxes and fees are electronically transmitted.



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In FY 1991-92, DOR began a multi-year process of replacing a complex web of tax administration technology that splintered a taxpayer's relationship with DOR into as many as 22 different computer systems. Systems that had been built as silos specific either to tax processing (e.g., sales and use tax, corporate income tax, motor fuels tax) or to a particular function (EFT, refunds, warrants, and bankruptcy) are now integrated into SUNTAX's "one-stop-shop."

Effective and on-going public/private partnerships have been key to accomplishing our SUNTAX vision. SUNTAX began with a conceptual design study completed in 1993 by Andersen Consulting followed by a bid for the ongoing development of SUNTAX that was awarded to SAP in 1999. Our success is directly attributable to the commingled expertise and planning skills of three partners - the Department of Revenue, Deloitte Consulting, and SAP.

Florida's citizens and policymakers demand that state agencies continually cut costs, increase productivity, and improve services. The cutting edge technological innovations afforded by SUNTAX have enabled DOR to better serve Floridians by improving service and significantly reducing staff and administrative costs. Over 95% of the taxes and fees (i.e., over \$36.1 of \$38 billion) administered by DOR are now administered in SUNTAX. Over the past six years, SUNTAX and related technologies have been responsible for creating over \$638 million in savings and increased tax collections at a cost of \$78.3 million (i.e., for every dollar expended the state reaps \$8 in benefits). A thorough description of return-on-investment calculations is presented in the SUCCESS section of this nomination.

Successfully implemented SUNTAX modules are highlighted below:

- Corporate income tax (CIT) was the first tax to "go live" in the SUNTAX system. [Approximately 339,000 active accounts].
- An integrated registration system replaced nine separate tax registration processes allowing the elimination of two computer systems. A vast majority of businesses can now register on-line for most taxes at one time using one form.
- The communications services tax (CST) module was successfully implemented in 2001. The creation and implementation of this module in just six months from start to finish illustrates the flexibility of the SAP approach to reengineering the state's tax system. When the Florida Legislature passed a 2000 law establishing the Communications Services Tax, the law replaced and consolidated several different state and local taxes with a single tax and shifted the burden of administration from a mixture of local and state taxes collected by both local and state government entities to DOR. [Approximately 4,000 active accounts].
- Imaging Management System (IMS) takes electronic images of taxpayer returns and tax receipts and provides a platform through which user inquiries about tax return and payment information launch directly to the imaged document. IMS has interfaced seamlessly with the SAP application.
- In March 2003, the Department's SUNTAX system achieved its greatest milestone, to date, when sales and use tax (SUT) was linked with the other taxes already in the system. Sales tax is the state's largest single revenue source. Florida's sales and use taxpayers, most of whom remit taxes monthly, are now experiencing the benefits of integrated accounting. [Approximately 683,000 active accounts]
- Audit Case Management (ACM) - In December 2003, DOR launched ACM that to more ef-



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ficiently manage audits. Auditors now conduct multi-tax audits, viewing all taxpayer liabilities in one system, and in record time. The ACM solution has helped DOR focus its resources and avoid bothering taxpayers with duplicative and often unnecessary audits. Audit Case Management (ACM) also has a robust interface with the Windows Florida Multi-Tax system (WinFMT - DOR's standard audit software) that allows large uploads to SAP and large downloads to remote users' PCs. This solution provides field auditors with a seamless and efficient interface to taxpayer account information.

- Customer Interaction Center (CIC) Improved Customer Service - Our call center is using a Customer Relationship Management (CRM) application to better serve taxpayers. When a taxpayer calls the toll-free number for assistance, the call routes to an employee along with the account information.

- Business Warehouse (BW) Data mining and data matching - The Business Warehouse module in SUNTAX enables employees to view, sort, and report a wealth of data about taxpayers from the production system or other data sources. The use of the BW is important for a number of reasons.

Since the data is not housed on the production system, the running of queries does not compete with operational resources. This allows users to run queries and receive reports at any time.

The advanced analytics and querying capabilities allow users to identify data relationships needing further review or actions. This is particularly useful in the areas of taxpayer education, audit, discovery, and enforcement operations.

Finally, the BW enhances executive reporting. This "dashboard" technology provides managers a single view of key performance measures in a graphic format. The dashboard can highlight problem areas and allow managers to drill down for further analysis.

- E- Access 24/7 - Internet filing has quadrupled in just the past two years, with taxpayer's now e-filing approximately 2.4 million tax returns, and most bill payments may be accomplished on-line. Businesses also will soon be able to access the SUNTAX system through an enterprise portal 24 hours a day, 7 days a week. Two functions were recently activated:

- On-line resale and exemption certificates - A business that sells to other businesses can verify resale and exemption certificates on-line or upload a file of its customers. DOR matches the file against the SUNTAX database and makes the results available on a secure site, thus assisting these businesses in collecting the correct amount of tax.

The Enterprise Portal (e-Portal) is an external-facing, interactive functionality that allows both taxpayers and DOR users to conduct business over a secure, Internet connection. Through a single point of access, users are able to review all their accounts, file returns, remit payments and change social information using an Internet browser. This new functionality allows business owners to use a single sign-on for all taxes (rather than having different IDs and passwords for each tax they pay). The Clerks of the Court Remittance System is first to use e-Portal to electronically transfer taxes and fees to DOR. This system handles the electronic transfer of documentary stamp tax, class c intangible tax and over 100 different court-related fines, and fees that are managed by over 20 state agencies. Moreover, the clerks are able to view their filing history, change addresses, and correct data.



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Benefits

Florida's businesses are the primary beneficiaries of SUNTAX. The integrated tax administration environment afforded by SUNTAX has fundamentally changed how DOR interacts with taxpayers. SUNTAX streamlines account maintenance, registration, communication, case selection, as well as audit and collection activities, eliminates duplication of effort and provides an efficient, user-friendly interface with taxpayers that also saves administrative costs. An integrated view of taxpayers' multiple tax obligations is crucial to the 2,400 GTA Program employees who use the "drill-down" views of taxpayer information to ensure proper compliance with all tax laws.

Experience has shown that the vast majority of taxpayers will voluntarily meet their tax obligations if they are provided with the information and resources they need to do so. SUNTAX is removing technological obstacles and promoting communication and cooperation between DOR and taxpayers. Taxpayers now have a "one-stop shop," not only for registration, but also for remittance and compliance activities. Conducting tax business on-line has resulted in improved accuracy of taxpayer information, which will enable DOR staff to issue more timely and accurate bills and refunds, and to better respond to taxpayer questions. Larger businesses, which file consolidated returns, have found the efficiencies of this system especially helpful.

SUNTAX is helping "level the playing field" by providing the tools to ensure that all taxpayers pay their fair share of taxes. DOR has completed numerous data mining compliance projects. One example that has been recognized by a state productivity award program is our commercial rental compliance project. Unlike long-term residential rents, lease of commercial space is subject to sales tax in Florida. But not all businesses that lease property to commercial tenants have been collecting tax. Using SUNTAX's data mining and computing capabilities, DOR was able to compare property tax records and sales tax registrations, reviewing more than 49,000 businesses statewide that owe tax on commercial rentals. Over the past three years over \$81 million in additional sales tax has been collected due to this effort.

Florida's citizens and policymakers (Florida's Legislature and Governor) are also beneficiaries. Tax processing efficiencies afforded by SUNTAX have resulted in reduced operational costs for DOR. For example, as state policymakers ask state agencies to reduce their budgets, SUNTAX enabled DOR to delete 560 positions. Reduced staffing were comprised of vacant state positions and local government staff associated with administering taxes including communications services tax (CST) and unemployment tax (UT) (a cost savings of over \$78.3 million). During the same time frame SUNTAX enabled DOR to collect over \$638 million in additional revenue.

Our SUNTAX/SAP solution is a recognized model that many are working to emulate. During the past four years, DOR has hosted 14 different countries, the Internal Revenue Service, and numerous state, county and provincial revenue agencies interested in the extraordinary capabilities of the system. Both private and public sector entities are benefiting from using DOR's multi-year approach to building an exceptionally flexible and versatile integrated tax administration system. After seeing what an ERP package has accomplished for tax administration in Florida, many are implementing their own form of SUNTAX using SAP technology:

- Great Britain's Inland Revenue Agency and the Driver and Vehicle Licensing Agency;
- Denmark's Ministry of Taxation;

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- Zimbabwe's Revenue Authority;
- Australia's Office of State Revenue, as well as the revenue agencies for two Australian provinces;
- New Zealand's Inland Revenue Department;
- British Columbia's Ministry of Small Business and Revenue, as well as the Halifax Regional Municipality.
- The first phase of the DOR's CSE Automated Management System (CAMS) was implemented in March 2006. This SAP-based system will improve management reporting, data integrity, and data availability. CSE is benefiting from GTA's SUNTAX roll-out, but the real winners will be the people we are ultimately working for—the children whose well-being hinges on receiving reliable support payments.

The Importance of Technology

DOR has embraced process management practices and techniques, established leadership and management expectations for supervisors and employees, and established a performance measurement system that includes legislatively-monitored goals. However, motivating employees to work effectively and look for ways to continually improve the way they work can only produce incremental positive change. Truly radical improvements in tax administration can only be delivered by changes in information technology.

The rapid advances in information technology over the past few years have made this project possible. By contracting with SAP and Deloitte Consulting to implement SUNTAX, the Department is accessing the expertise and resources of two of the world's leading integrated software systems developers/integrators. The application of ERP to tax administration has revolutionized the way DOR does business and the way taxpayers interact with DOR.

One illustration of the fundamental importance of technology is Florida's successful administration of a 2003 tax amnesty program. On July 1, 2003, DOR began administering Florida's first tax amnesty program in more than a decade. Within two months after the Legislature passed the law, DOR was able to process delinquent payments and tax returns for 40,000 taxpayers who paid more than \$75 million in overlooked or overdue taxes. The flexibility of SUNTAX technology provided the means for DOR's quick response; a feat that would have been impossible using the previously disjointed web of Legacy computer systems!

Originality

SUNTAX is a visionary, multi-year project that directly benefits Florida's businesses and the tax administration agency and indirectly benefits Florida's citizenry and policymakers.

As mentioned in the short summary, the launch of this cutting-edge computer system marked the first time a state tax agency has used Enterprise Resource Planning (ERP) technology to administer taxes, and this distinguishes the DOR as one of the world's largest public agencies using ERP successfully. These new technologies have enabled DOR to remain competitive and deliver quality service to the public even while increasing revenue collections and reducing or avoiding costs.

As functionality has been implemented, DOR has used lessons learned to effectively incorporate



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other systems. By implementing an industry standard package, DOR has investigated a variety of software options for future functionality from software products certified to interface with the application. For example, during spring 2006 DOR is implementing an enterprise portal (e-Portal) system for the Florida Clerks of the Court that will allow them to conduct business over a secure, Internet connection. Users of the e-Portal will ultimately be able to review accounts, file returns, remit payments and change social information through a single point of access.

Additionally, the unique partnership between DOR and SAP has proven beneficial for both parties. The DOR purchased “out of the box” SAP software in order to take advantage of system upgrades and advancements. However, in some areas, DOR customized the system to meet the specific needs of the organization. Several of these DOR customized areas, including a customer overview screen, search enhancements, and business partner identifiers were adopted by SAP as improvements to their standard software package.

Since 1992, DOR has been working to replace mainframe-based computer architecture with a more responsive and flexible client server based computer system.

Implementation milestones are summarized below:

- 1998 integrated registration for two taxes
- 1999 procurement and contract negotiation with SAP
- 2000 integrated registration for 7 taxes
- 2001-2002 brought corporate and communications services tax into the system
- 2003 integrated sales and use tax, audit case management and a CIC call center (using a CRM application)
- 2004 added gross receipts tax and documentary stamp tax and brought up the business warehouse
- j2005 integrated fuel tax and severance taxes and added discovery case management and bankruptcy case management into the CRM module
- 2006 added insurance premium tax, secondhand dealer/secondary metals recycler registration
- On the horizon in 2006-2007 is the implementation of an e-Portals system for Florida Clerks of Court, an audit lead development program, integration of the final taxes including unemployment tax, and continued improvements to the system

SUNTAX is now serving the registration and tax remittance needs of over two million active taxpayers and is providing cutting edge financial accounting, reporting, and information profiling capabilities in one integrated system that has reduced administrative costs borne by businesses and increased government efficiency.

Success

During the SUNTAX roll-out, Workforce Transition conducted employee satisfaction surveys. The first survey compiled in 2003 documented a lot of frustration with system’s stability; 54% of respondents said they needed additional training to effectively use the system. The 2004 survey showed improvement with 62% of users saying they had received sufficient training to



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effectively use the system. A 2005 audit-related survey indicated that 72% of auditors felt they were well prepared for the Audit Case Management (ACM) module “going-live” in December 2003.

And while the 2003 survey surfaced a lot of change management issues, the major finding of the 2004 survey was that users had taken ownership of the system and wanted more tools and training to do their jobs. Sixty-nine percent of users said they could complete their job tasks using the system.

In the 2005 survey, 80% of Audit Case Management (ACM) users agreed that they could complete their job tasks using ACM. Included below are some comments regarding ACM received from DOR audit managers:

“There is much more control and accountability throughout the audit process. This also helps ensure consistency and gives managers a much better picture of what is going on at any one time.”

“ACM is a very good tool for managing audits and time effectively as well as keeping track of Statute of Limitation dates, the 120 days from the DR-840 to start an audit and the aging of an audit from assignment to auditor to processing to the Process Coordinator.”

“Better time management is possible by knowing where each case is in the workflow. Auditors and supervisors are better able to maintain their audit inventory and readily determine the status of cases. Supervisors can better determine where an auditor may need training and assistance.”

“Auditors are doing more audits and a lot of that has to do with the ability to track time spent on audits and see what is going on.”

Over the years, many DOR employees have been received statewide recognition from a private budget-watchdog agency, Florida TaxWatch, created the Davis Productivity Awards to recognize state employees for innovations that help Florida government perform more efficiently and effectively. Most of the awards received by GTA employees involve developing improved collection methods using the enhanced capabilities of SUNTAX. For example, over the past three years over \$81 million in additional sales tax has been collected on delinquent or unregistered taxpayers owing tax on commercial rentals. This project was a Davis Productivity Program top winner in 2004.

Florida’s policymakers now agree that SUNTAX has been an outstanding investment for Florida’s citizens. Ninety-five percent of DOR’s 36 taxes are administered in the SUNTAX system. To date, SUNTAX and related technologies have been responsible for creating over \$638 million in savings and increased tax collections at all levels of state and local government. Over the past six years, for every budgeted dollar expended on SUNTAX technology and staff, there has been an increase of eight dollars in revenue.

The GTA program successfully implemented dramatic and complex technology changes even as it took on greater responsibility with fewer staff. GTA’s currently staffing of 2,411 staff stands steady after 560 positions were eliminated due technological efficiencies afforded by SUNTAX in the administration of CST, restructuring of front counter support staff, registration, enforcement/audit, collections, and account resolution staff (a reduction in financial costs of more than \$78.3 million over the past six years).



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Florida's business owners have experienced the benefits of DOR's integrated view of all their tax obligations. For example, while no one enjoys receiving bills for underpayment of tax, SUNTAX has speed up the billing process enabling delinquent taxpayers to avoid higher than anticipated interest and penalty obligations. Compliant taxpayers are also pleased to know that DOR is better able to identify noncompliant taxpayers and that we are registering and billing them, thus ensuring that all Florida businesses pay their "fair share" of tax.

During the past four years, due in large part to the communication and training strategies of GTA's Workforce Transition team, 2,400 GTA employees are now more comfortable with the completely new computer system and have experienced its benefits. Beginning in 2002, a comprehensive Workforce Transition effort was put into place to ensure the success of employees using this new "real-time" accounting-based system. The workforce transition concept emphasizes training, communication and support provided to the end user. DOR partnered with Deloitte Consulting to develop a blended learning training approach that has provided over 2,000 employees with a mixture of multi-day instructor led hands-on training, workshops, on-line training, expert-led training and personalized one-on-one training. Special training and designation of local experts has been especially vital to our exemplary training efforts.

A strong support network (site support teams) is in place to ensure quick problem resolution and effective communications. These site support teams respond to 90% of employee inquiries; questions they are unable to answer locally are forwarded immediately to a central Workforce Transition team via a telephonic "hot-line" or electronic mail and are quickly resolved.

And, select employees have received a tangible reward for their newly acquired computer expertise and productivity. In FY 2005-06, the Legislature approved a \$1.95 million technology-based pay package for a subset of GTA employees who rose to the challenge of mastering completely different technologies amid staff reductions and without a reduction in productivity or quality of service. Some 550 GTA employees received 10% pay increases in recognition of their accomplishments that have made it easier for Florida taxpayers to do business with the State of Florida while also increasing employee productivity and reducing costs.

Difficulty

Florida policy makers' shifting priorities: Over the years, the SUNTAX implementation schedule has had to adjust to Legislatively-directed additions to DOR responsibilities. As DOR has been asked to absorb the administration of a new Communications Services Tax and Unemployment Tax, as well as conduct a broad 2003 amnesty program, some SUNTAX goals had to be adjusted. The capabilities of SUNTAX may soon be further challenged as the Florida Legislature explores proposals that would allow tax credits to be used across multiple taxes and transferred among taxpayers. Accounting for and tracking such complex transactions may be the next big challenge for SUNTAX in 2006.

Employee change management issues: Aside from procuring the necessary annual budget appropriation, by far one of the biggest initial challenges was employee reticence to adapt new ways of doing their jobs. Moving to a GUI based, PC/mouse driven computer system was difficult for many of DOR's employees. The Workforce Transition team's early work focused on the change management aspect of the systems implementation. The primary goal was to ensure management understood how to assist their employees through a change of this magnitude. Early training had focused on how the system worked, and not as much on how each person



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would incorporate new computer routines into his or her daily job. It was quickly realized that there is a need for a balance between systems training, tax law training and process, policy and procedure information. Each of these components is closely related and it was difficult in the beginning of the project to see how connected these areas really were. We learned many lessons from this and now provide on-going change management and training programs as each new SUNTAX module is introduced. As employees experience the power and flexibility of SUNTAX most skeptics are now avid advocates.

Training: With no expertise on the SAP application, the project team began SAP training in 1999. It became evident as more taxes were incorporated, that systems expertise beyond the project team had to be developed. Over the last four years, the Workforce Transition team has been cultivating a strong support and training network. There are over 185 local site support team members who help provide training, support and communication to the end user. Additionally, there are 18 Process and Regional SUNTAX Representatives who serve as critical liaisons to the overall project team. Entities that consider developing such systems should anticipate and budget for needed training and support modules.

Staffing issues: Retaining experienced DOR staff continues to be an issue -- as staff becomes proficient, private sector opportunities (i.e., higher pay scales and options) draw some away. DOR's partnership with SAP and Deloitte contracted employees continues to be key to the success of this project.

DOR management has been proactive in raising Florida legislative awareness about the measurable efficiencies afforded by SUNTAX and the associated expanded job scope experienced by employees as new tax modules are integrated together into one system. In fact, the Florida Legislature approved a technology-based pay package of \$1.95 million that provided 10% pay increases to approximately 550 employees. Employees who experienced major changes to their work environment and at the same time were able to increase productivity and sustain quality service were tangibly recognized.

Incrementally implementing SUNTAX within a public sector annual budgeting cycle has presented some challenges. The Florida Legislature and Governor control all state agency budget allocations. In the early 1990's, line item funding for SUNTAX raised policy makers' awareness and expectations but early planning and development stages didn't have much to show for all the effort. Florida's Governor and legislature had numerous examples of past IT efforts that failed to meet legislative expectations. On-going and credible communication has been key to procuring SUNTAX funding. DOR's Executive, Budget and GTA Directors spent many hours meeting with the Governor and Appropriations Chairmen and making committee presentations to explain the SUNTAX concept and anticipated future ROI benefits. As Florida's policy makers' understanding of the multi-year schedule and originality of SUNTAX grew, so did the credibility of the project. We closely tracked expenditures and increases in revenue attributed to SUNTAX technology. And, DOR reduced staff while increasing revenue collections and staff productivity. SUNTAX is now included in DOR's base budget; the Florida Legislature has acknowledged the impressive return on investment figures.