

# Unclaimed Property Interactive Web Site

State of Florida  
Division of Accounting & Auditing  
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## 1. Provide a brief description of the project, including project objectives.

The project is a web site that delivers unclaimed property information to the general public, holders, and locators. Holders are private and public businesses, which are in possession of unclaimed property. Locators are businesses, which claim funds from the state for a fee on behalf of the owner or the heir. The legacy mainframe of the state feeds data to the site. Currently, the project consists of the following applications:

- *General Public* — which allows the users to search the database for funds and answers frequently asked questions regarding unclaimed property on a "self-service" basis.
- *Holders* — which allows private and public businesses to download forms and instructions, and answers frequently asked questions regarding unclaimed property on a "self-service" basis.
- *Locators* — which allows the users to logon to the site thus allowing key information to be retained and used throughout the session. This site allows the users to request appropriate documentation, which allows them to conduct business with the state and answers frequently asked questions regarding unclaimed property on a "self-service" basis.

The primary objectives of this initiative are to promote:

- *Improved information access* — Web access makes the state's unclaimed property information available to anyone anywhere. More important, the information is updated weekly and available on demand, 24 hours a day, 7 days a week.
- *User Maintenance* — Complex and difficult technical architectures developed in the agency and maintained by personnel in MIS sections are common hurdles to maintaining useful and up-to-date web applications. Creating the site using an application that allows the users to be in control eliminates these barriers.

## 2. What improvement(s), new functionality, or business application did the project address?

Before the project, information on unclaimed property held by the state was difficult to find and available only during business hours. Upon location of the unclaimed property, the general public, holders, and the locators found it difficult to obtain the proper forms or information. In addition, the current web site was stale due to the lack of current information. This was caused by a lack of knowledge of the language used to develop the current web site, thus no updates were made because no one knew how. The project streamlines and simplifies this process by providing an intuitive web front end. The

applications empower interested parties to find out answers on their own by allowing them to develop their own queries on-line. For example, "Are there any funds held by the state for John Smith in Anytown?" The general public is no longer limited to the state's regular business hours to search and begin the process to recover their funds. Holders now may obtain information and file reports with the agency via the site. Locators were limited to calling or being onsite to request the required paperwork to conduct business. Now, at any time, locators can request claim forms on behalf of their clients. The site will pass the information to the legacy mainframe and nightly print the forms to be mailed the following morning.

### **3. Describe the schedule of the project's design, development, and implementation.**

The goal was to build a simple but effective application for users and build a workable prototype that could utilize and/or manipulate mainframe data via a web front end. One of the key components was to provide the Unclaimed Property Office with the ability to update any information on the site without assistance from MIS programmers and also without extensive technical training.

- First month - No outside bids were solicited due to the decision to hire the current web programmer to work out of his home during off-hours using a laptop provided by the Unclaimed Property Office with dialup connectivity. This allowed for a reduced cost and utilized the worth and value of an internal employee. It was also believed and found to be true that a current employee would be more receptive to changes and problems than an outside vendor.
- Second month - The project's staff was selected consisting of one programmer and one liaison from the Unclaimed Property Office. The internal programmer was hired as dual employment with the agency at an hourly salary and a laptop was purchased. The liaison was designated within the Unclaimed Property Office. These resources were familiar with the state's systems thus saving time and money from the project.
- Third month - A group session was held with the current employees of Unclaimed Property to determine which functionality that would be the most helpful to provide using the system. At the same time, the programmer and liaison finalized the application to be used.
- Fourth month - The technical analysis and detailed designs were completed as the programmer and the liaison worked together to finalize the look, feel, and functionality of the site.
- Fifth month - The development of the site began in earnest, and a testing plan was implemented.
- Sixth month - The majority of the pages were finished and the search engine was developed. The user administration page was started.
- Seventh month - The user administration page was finished and the testing was completed. A demonstration was provided to management.
- The system went live in July 1999 and continues to be enhanced.

**4. What did the project accomplish? Who are the current and potential beneficiaries? Were other public sector entities, like component units or local governmental entities, or private sector entities able to participate and, if so, how did this add value to the development and outcome of the project?**

As well as improving access, service, and user maintenance, the project is about technology with emphasis on proving the suitability of a web application to government services and information. Server-side certificate security, legacy-to-web translation and access, web-to-legacy translation and access, dynamic document creation, and distributed systems integration were proven in the project.

Government's efforts to provide useful information to the global community, citizens, and employees are hard to accomplish. The project responds to this business need by utilizing technology to facilitate delivery of information efficiently and effectively.

**5. What were the levels of personnel on the project team and how did participation on the team enhance the skills of those personnel?**

The project was developed through a partnership using existing resources and innovative ideas regarding the use of employees outside their normal workday. State managers provided invaluable input on the project's functionality. In addition to full management support from upper management, the team included a project manager and a system analyst. The project manager provided the general design of the site and worked with the unclaimed property staff to ensure functionality of the site. The system analyst coordinated the resources in MIS to ensure the transfer of data and the actual programming of the site. The team gained proficiency in the software used in the project (i.e., Cold Fusion, DB2 Connect, and DB2). Lastly, the team utilized project management practices and team building skills.

**6. List the funding source(s) (indicating those that would be innovative), costs incurred, benefits derived, and return on investment (factoring in hard and soft dollar savings).**

The project was funded by current budget and was completed for under \$10,000. In quantitative terms, project is considered a success due to a measurable increase in the number of searches and emails received at the site. Recently, the email address was limited because the large number of emails received exceeded the existing resources available to respond. In addition, the project eases public service requirements placed on state employees who must regularly respond to the general public, holders, and the locators. In one example, a locator was requesting over one hundred forms a day thus consuming valuable personnel resources through manual processes. In qualitative terms, the return on investment will be measured over the long term in the promotion of transparency and trust from citizens, and improved quality and timeliness of information provided to management for decision-making purposes.

**7. What measurements have been established to monitor the continued success and benefits of the project?**

Detailed statistics are being collected for monitoring the usage of the site including: number of hits, number of user sessions, top entry and exit pages, whether users are from the US or abroad, traffic, paths, and much more. Via email, the team is collecting user impressions from a feedback form on the site, and responding to users' questions and concerns. This information will be used to fine tune and expand the applications. In addition, an ongoing dialogue is taking place with the staff, to assess the functionality and ideas to reduce workload.

**8. How replicable in other areas of the public sector or other states do you consider this project to be? In discussing replicability, please address the following questions. What obstacles or problems might other states encounter in trying to implement this or a similar project? Specifically, how was this project communicated statewide? Were there cultural business barriers to overcome? If yes, please elaborate. Was training involved from the central project team? Were consultants involved in the project? If yes, what was their role?**

The project is replicable wherever there is a need to make legacy information available to the general public or businesses or to strengthen the worth and value given to internal employees, or to make web sites database driven. We have already been approached by other states and have shared our data models and experiences. Our team encountered and overcame challenges in the area of data replication. Developing a method to download, replicate, process, and access the huge quantities of data necessary to populate the site in short turnaround time was difficult, but was achieved. The project was publicized statewide through a variety of channels: newspaper inserts; links at other states' web sites; communications to TV, radio, and newspaper sources; and public service announcements. We do not anticipate barriers to the project, as it represents an alternative, additional level of service, not an exclusive source of the data.