

IMPLEMENTATION CASE STUDY

Modernizing the VAB Petition Workflow:

A Process Transformation at Manatee County

Manatee County Clerk's Office · Bradenton, Florida · Equity Bridge Pro Implementation

KEY OUTCOMES AT A GLANCE

3 hrs

per petition — prior process

2,000+

petitions managed per season

~80%

of petitioners filing online

½ hr

per petition — with EBP

OVERVIEW

The Value Adjustment Board (VAB) petition process is one of the most operationally intensive workflows a Florida Clerk of Court manages. Governed by Florida Department of Revenue, it involves petition intake, fee processing, Special Magistrate scheduling, property appraiser coordination, evidence management, hearing notices, and final order documentation — all under strict statutory deadlines.

For Manatee County Clerk of the Circuit Court & Comptroller, managing this workflow through a general-purpose case management platform created significant operational friction. The platform was well-suited to its core purpose — court case tracking — but lacked the fields, automation, and reporting structures the VAB process requires. Staff compensated with spreadsheets, manual data entry, and multi-step workarounds that consumed thousands of hours each petition season.

This case study documents the transition to Equity Bridge Pro (EBP), a purpose-built SaaS platform designed exclusively for Florida VAB petition management. It captures the process changes, efficiency gains, and organizational impacts experienced by Manatee County's VAB operations team and IT department.

Vicki

VAB Department Lead

21 years with Manatee County Clerk's Office

Greg Brown

IT Project Manager

20+ years in county government technology

Hannah Bishop

VAB Clerk

4 years · Primary process implementation contact

This case study draws on recorded interviews with all three contributors, reflecting both the operational and technical dimensions of the implementation.

SECTION 1 — THE VAB WORKFLOW CHALLENGE

How a General-Purpose Platform Creates VAB-Specific Friction

Value Adjustment Board work does not map cleanly onto court case management. The parties, workflows, deadlines, documents, and reporting requirements are fundamentally different from a standard court proceeding. When VAB petitions are managed inside a platform architected for court cases, staff must adapt every step of the process to fit a system that was not designed for it.

At Manatee County, that adaptation took the form of creative repurposing: parcel identification numbers entered in fields intended for court case identifiers, Special Magistrates added as judges, petition communications routed through workarounds not built for VAB correspondence. The system held the data — but it could not organize, automate, or report on it the way VAB operations require.

"It was not built for Value Adjustment Board. It was built strictly for case management. So we had to fit Value Adjustment Board into it."

— Vicki, VAB Department Lead

The result was a workflow that functioned — but only through significant manual effort. Key limitations of managing VAB through a general case management platform included:

- ▶ No bulk petition intake or batch scheduling — every petition processed individually
- ▶ No VAB-specific fields — parcel IDs, petition types, hearing blocks, evidence deadlines required workarounds
- ▶ No automated petitioner communications — confirmation emails, hearing notices, and evidence reminders all sent manually
- ▶ No duplicate petition detection — staff had to identify and resolve conflicting filings manually
- ▶ No direct property appraiser data connection — parcel data re-keyed manually from a separate system

- ▶ Reporting for state submissions required external data requests rather than built-in VAB reporting
- ▶ Special Magistrate scheduling maintained in spreadsheets outside the system
- ▶ Petitioners accessed their filings through court case screens not designed for self-service VAB review

The cumulative impact was measurable. Processing a single petition from intake through final confirmation — excluding the hearing itself — required an estimated three hours of staff time. With more than 2,000 petitions per season, and the bulk of filings arriving in the final two days before the statutory deadline, the operational burden was substantial.

"From beginning to end, excluding the actual hearing, we could put in up to three hours per petition. And to multiply that by 2,000 — it was taking up so much time."

— Vicki, VAB Department Lead

SECTION 2 — PROCESS TRANSFORMATION

From Manual Steps to Integrated Workflow: The Full Process Change

The following table maps each major stage of the VAB petition lifecycle — showing how the process worked previously and how it operates with Equity Bridge Pro. Changes are documented as observed and described by Manatee County Clerk VAB staff.

#	Previous Process	With Equity Bridge Pro
1	Petitioner completes paper form; mails or hand-delivers to office	→ Petitioner creates online account and submits petition digitally; paper intake still supported for those who prefer it
2	Staff manually keys all petition data: parcel ID, petitioner info, petition type — cross-referencing property appraiser records separately	→ System connects directly to property appraiser database; parcel data auto-populates from parcel ID entry. Staff review and confirm, not re-key
3	Paper petition physically scanned; file uploaded to separate drive; file manually indexed with custom docket codes	→ Petitioner-submitted documents attach directly to petition record at upload. No separate scanning, indexing, or docket coding required
4	Confirmation email sent manually to each petitioner; staff attached template, confirmed email address, tracked response	→ Petitioners confirm email address during account creation; system auto-generates confirmation. No staff action required
5	Hearing scheduled individually per petition; calendar managed externally; notices	→ Hearings scheduled in bulk by block; system auto-generates and distributes notices of hearing to all assigned petitioners simultaneously

	printed, scanned, indexed, and emailed one at a time		
6	Evidence submission reminders sent manually; petitioners frequently directed evidence to wrong office	→	Automated evidence reminders sent at configured intervals; routing instructions built into communications — misdirected submissions eliminated
7	Duplicate petitions discovered manually after the fact, requiring staff to contact both tax representatives to resolve	→	System detects duplicate parcel filings in real time and blocks submission; no staff intervention required
8	Property appraiser received a batch export of new petitions each evening; no real-time visibility into filings	→	Property appraiser has dedicated portal access with real-time petition data; nightly export still available and configurable
9	Special Magistrate availability tracked in external spreadsheets; schedule not connected to petition records	→	Magistrate scheduling integrated into hearing block workflow; availability tracked within the platform
10	State reporting required external data requests; no native VAB reporting by petition type, status, or category	→	Built-in reporting by petition type, category, and status supports state submission requirements directly from the platform

Observed Efficiency Gains

The following efficiency gains were reported by Manatee County Clerk VAB staff based on their first operational season using Equity Bridge Pro:

BEFORE ~3 hours staff time per petition (intake to confirmation)	→	WITH EBP Fraction of prior time — bulk actions replace sequential manual steps	<i>Estimated 80%+ reduction in per-petition processing time</i>
BEFORE Notices of hearing: printed, scanned, indexed, and emailed individually	→	WITH EBP Auto-generated and bulk-distributed from the scheduling interface	<i>Eliminated multi-step manual notice workflow entirely</i>
BEFORE Confirmation emails sent manually to each petitioner; staff tracked responses	→	WITH EBP Automated at account creation; no staff action required	<i>Full confirmation step removed from staff workflow</i>

BEFORE 10 minutes to manually enter a paper petition (cross-referencing PA records)	→	WITH EBP 2–3 minutes for paper-submitted petitions using PA data integration	<i>Manual entry time reduced by approximately 70–80%</i>
BEFORE ~2,000 petitions requiring individual scheduling actions each season	→	WITH EBP Bulk scheduling assigns entire hearing blocks in a single operation	<i>Scheduling time reduced from hours to minutes per block</i>

"I don't have to carve out four hours for Value Adjustment Board today. It might be a half hour. It's freeing up so much time and so much less stress."

— Vicki, VAB Department Lead

"It's amazing how much we actually did. When you're in the day-to-day, you don't even think or blink about it — you just do it. But when you actually have to think through it, you realize how much was manual."

— Hannah Bishop, VAB Clerk

SECTION 3 — PETITIONER & PARTNER EXPERIENCE

Impact on Petitioners, Property Appraiser, and Special Magistrates

Operational process changes at the Clerk level affect everyone who interacts with the VAB process — petitioners filing appeals, the Property Appraiser's office managing evidence coordination, and Special Magistrates conducting hearings. Manatee County Clerk observed changes across all three groups following the EBP implementation.

Petitioner Experience

The prior process required petitioners to navigate court case screens to locate and review their filings — a multi-click path not designed for self-service VAB access. With EBP, petitioners have a dedicated account dashboard that shows their petition status, upcoming hearing information, document uploads, and any notes from the office in a single view.

Approximately 80% of petitioners in Manatee County's first EBP season filed entirely online. The office placed QR codes on counters and deployed courthouse kiosks for walk-in filers, and those who prefer paper submission can still be accommodated with staff-assisted entry — now significantly faster than before due to property appraiser data integration.

"They can see everything on one page. They feel they have a little more control over it now — they can see their documents, their hearing info, notes from us. It answers a lot of questions before they even pick up the phone."

— Vicki, VAB Department Lead

Property Appraiser & Magistrate Coordination

The Property Appraiser's office previously received batch petition data via a nightly report export. With EBP, the office has real-time access through a dedicated portal, allowing staff to view petition filings as they occur. The configurable nightly extract remains available for offices that rely on it for downstream processes.

The transition initially prompted questions from the Property Appraiser's team about continuity of their existing workflows. After implementation, feedback from their staff has been positive — the combination of real-time access and continued export availability addressed their core concerns.

Special Magistrate scheduling, previously maintained in external spreadsheets disconnected from petition records, is now integrated into the platform's hearing block workflow — reducing coordination overhead for the VAB office.

SECTION 4 — STAKEHOLDER & PARTNER ADOPTION

Bringing the Property Appraiser and Special Magistrates Along

Transitioning to a new VAB platform is not a decision the Clerk's office makes in isolation. The Value Adjustment Board process involves active participation from the Property Appraiser's office, which coordinates evidence submission and reviews petition filings, and Special Magistrates, who conduct hearings and require access to scheduled case materials. Any change to the Clerk's platform directly affects how these partners interact with the VAB process.

For Manatee County, managing the transition with both external stakeholders was a deliberate part of the implementation. Each group had established habits, existing workflows, and legitimate questions about how the new system would meet their needs.

Property Appraiser's Office

The Property Appraiser's office had a well-established routine built around the prior system: a nightly batch export of petition data delivered each evening, which staff used to review new filings and track petition activity. That routine had been in place for years, and continuity of that workflow was a primary concern when the transition was announced.

"They've been receiving the information from us the same way for so many years. For them it was a bit of the fear of the unknown — are we going to be able to do the same things we were able to do before?"

— Vicki, VAB Department Lead

The EBP implementation addressed this concern in two ways. First, the configurable nightly export was preserved — the Property Appraiser's office could continue receiving petition data in the same format and on the same schedule they relied on. Second, the platform gave them something new: a dedicated portal with real-time visibility into petition filings as they occurred, rather than waiting for the end-of-day batch.

The combination of continuity and expanded access proved effective. Initial trepidation gave way to positive feedback once the Property Appraiser's staff began working with the platform.

"At first they were a little trepidatious, but now they have embraced it as well. There have been staff members over there who've told us — "This is great, we really appreciate it.""

— Vicki, VAB Department Lead

"The notification system is outstanding. It cuts out a lot of communication that was done by phone or email or people dropping off paperwork. Now it's all in one system — someone updates something, a rule fires, and the right alert goes to the property appraiser or back to the petitioner automatically."

— Greg Brown, IT Project Manager

Special Magistrates

Special Magistrates operate independently from the Clerk's office, conducting VAB hearings as contracted neutrals. Their need is straightforward: clear visibility into scheduled hearing dates, assigned petitions, and case materials — delivered in a way that does not require navigating a system built for someone else's workflow.

In the prior process, Magistrate scheduling was maintained entirely in external spreadsheets, disconnected from petition records. There was no portal or shared view where Magistrates could independently check their schedules or review assigned cases. All coordination happened through the Clerk's office, adding communication overhead to an already manual process.

EBP integrates Magistrate scheduling directly into the hearing block workflow. Scheduled hearings, assigned petitions, and hearing details are visible to Magistrates through the platform, reducing back-and-forth with the Clerk's office and giving Magistrates an accurate, real-time view of their docket.

Partner	Initial Concern	How EBP Addressed It
Property Appraiser	Loss of established nightly data feed; disruption to existing review workflow	Nightly export preserved and configurable; new real-time portal provides additional visibility beyond prior capability
Property Appraiser	Uncertainty about petition data accuracy and format continuity	Configurable extract format matches prior data structure; testable in interface before go-live
Property Appraiser	Communication process changes — how will we know what's new?	Rule-based notification system automatically alerts PA staff on relevant petition events in real time
Special Magistrates	Scheduling visibility — how do we see our docket without the spreadsheet?	Integrated portal provides Magistrates direct access to scheduled hearings and assigned petitions
Special Magistrates	Hearing coordination — reliance on Clerk's office for schedule updates	Real-time platform access reduces dependency on manual communication for schedule changes

SECTION 5 — INTERNAL TEAM ONBOARDING & CROSS-TRAINING

Preparing Staff Across Experience Levels for a New Way of Working

Introducing a new platform to an office is only part of the transition. The more consequential challenge is preparing staff — with varying tenure, varying comfort with technology, and deeply ingrained process habits — to adopt a fundamentally different way of doing work they have done the same way for years.

Manatee County's VAB team ranged from a staff member with 39 years of institutional experience to employees in their first year. The team had built significant procedural muscle memory around the prior process — a process that, despite its inefficiencies, was familiar and predictable. Getting that team to embrace change required the right approach to training and the right platform to train them on.

Training Format & Approach

Manatee County Clerk conducted staff training in a single session, held in a dedicated training room with the full VAB team present. Vicki led the session with narration while Hannah drove the platform — a deliberate pairing that gave staff both operational context and a live system walkthrough at the same time.

The format allowed the team to see the complete petition lifecycle from intake to scheduling, ask questions in real time, and observe how the platform handled scenarios they recognized from their daily work. The live walkthrough also served as a de facto process review — surfacing questions and edge cases the team had not anticipated during the configuration phase.

"I had a day where we brought our staff up to the training room. I talked, Hannah drove — and they were so impressed. Seeing it from all those perspectives, everyone had a positive outlook. That was so comforting to me, because you don't want to add any extra stress to your staff."

— Vicki, VAB Department Lead

Adoption Across Experience Levels

One of the most notable outcomes of the training session was uniform adoption across staff with very different tenure profiles. Staff who had worked under the prior process for decades approached the new system with the same openness as staff who had only known the prior process for a year or two.

"We had a staff member who's been here 39 years, and new staff members. Seeing it from all those different perspectives — everyone said, "What a game changer." And it really has been."

— Vicki, VAB Department Lead

What Made the Learning Curve Manageable

Hannah Bishop, who served as the day-to-day implementation lead and primary platform trainer for the team, observed that the learning curve was significantly smaller than anticipated. The prior process required staff to move between five or more programs simultaneously to process a single petition. EBP consolidates all of those steps into a single interface.

"Honestly, I didn't feel like there was much of a learning curve. It's just adjusting to: you log in, you don't have to type everything — you're just going in and reviewing to make sure the petition looks right. The system does the rest."

— Hannah Bishop, VAB Clerk

"When you're in the day-to-day of the old process, you don't even think or blink about it — you just do it. But when we actually stopped and walked through it, we realized how much was manual. The new process removed so much of that without us even noticing at first."

— Hannah Bishop, VAB Clerk

Key Factors in Successful Staff Adoption	
Group training session with full team present	Ensured consistent understanding across all staff; surfaced questions in a shared context rather than individually
Live platform walkthrough — not slides or documentation	Staff saw the real system processing real petition scenarios; built confidence before independent use
Trainer pairing: subject matter expert narrates, experienced user drives	Combined process knowledge with hands-on demonstration; allowed narration to track the system actions in real time
Platform consolidation reduces retraining surface area	Five-plus programs replaced by one; staff had fewer new interfaces to learn, not more
Process simplification, not just process digitization	Many manual steps were eliminated entirely — staff did not have to learn a digital version of a task they would no longer perform
Responsive vendor support during go-live period	Fast issue resolution and feature turnaround during initial operation reduced staff anxiety about encountering problems

SECTION 6 — PLATFORM CONFIGURABILITY & IT ADMINISTRATION

Designed to Fit Your County — Maintained Without Heavy IT Overhead

A consistent concern when evaluating any new SaaS platform is the balance between configuration flexibility and administrative burden. Equity Bridge Pro was architected from the outset around two principles: Clerk offices should be able to make the platform their own without vendor intervention, and IT departments should be able to run it without dedicated ongoing resource allocation.

Greg Brown, Manatee County's IT Project Manager, led the technical side of the implementation and has managed the platform since go-live. His observations reflect both the implementation experience and the day-to-day reality of operating a hosted VAB solution.

"The configurability was great — it's all right there in the menu. It doesn't take a lot of cognitive load to figure out. You're just like, oh, I just change this — and that's what I wanted."

— Greg Brown, IT Project Manager

Workflow Configuration

Notification rules, hearing block structures, petition type settings, and user access levels are all managed through the interface — no code, no vendor ticket required.

User & Role Management

Staff roles, access permissions, and external portal access for the Property Appraiser and Special Magistrates are configured directly by the Clerk's office or IT.

Data Access & Reporting

VAB data is accessible to the Clerk's office at any time. Reporting for state submissions, audit requests, and internal review runs natively from the platform.

Configurable Data Exports

Outbound data feeds — including the nightly extract to the Property Appraiser — are configured within the interface. Format, destination, and schedule all adjustable without developer involvement.

Hosted & Maintained by EBP

The platform runs in the cloud with all infrastructure, backups, database maintenance, and updates managed by Equity Bridge Pro. No server maintenance, patch management, or disaster recovery burden on county IT.

Minimal Ongoing IT Footprint

After go-live, ongoing IT involvement is minimal. System updates, feature releases, and infrastructure management are handled on the EBP side.

"I do next to nothing as far as maintenance. We don't do backups, database restores — none of that. I can't even imagine a large county needing a full-time IT resource to handle this."

— Greg Brown, IT Project Manager

The hosted model also addresses a common concern among county IT teams: control over VAB data. All petition data belongs to the Clerk's office and is accessible on demand. Bulk exports are available at any time, and the platform's data architecture ensures that each county's data is isolated and portable.

"Anything we've needed out of the system, you've been able to provide really quickly. The extract to the property appraiser — we had to tweak it here and there, and it was done immediately. That's all configurable and testable right in the interface."

— Greg Brown, IT Project Manager

IT Consideration	On-Premises / Self-Managed	Equity Bridge Pro (Hosted)
Infrastructure & Server Management	County IT responsibility	Fully managed by EBP
Backups & Disaster Recovery	County IT responsibility	Handled by EBP infrastructure
Software Updates & Patches	Scheduled and managed by IT	Deployed automatically by EBP
VAB Data Ownership	County holds data on-premises	County owns data; exportable on demand
Configuration Changes	Often requires vendor or developer	Self-service in the admin interface
User & Role Management	IT-managed user provisioning	Manageable by Clerk's office directly
Ongoing IT Resource Requirement	Varies; often significant	Minimal — implementation-focused, not ongoing

SECTION 7 — IMPLEMENTATION EXPERIENCE

Process Mapping, Onboarding, and Go-Live

EBP's implementation approach begins with structured process discovery — documenting the current-state VAB workflow in detail before configuring the platform. For Manatee County, this phase served both as a configuration foundation and as an opportunity to re-examine workflows that had been carried forward from earlier manual processes without deliberate review.

"It was eye-opening — realizing how much work we actually did. We'd go through phase one, phase two, phase three, and you helped streamline so much. It was cool to just see where the process started and where we were going."

— Hannah Bishop, VAB Clerk

A key mindset shift during the discovery phase was the recognition that the new platform did not need to replicate the old process — it needed to replace it with something better. Several manual steps that had existed in the prior workflow simply ceased to exist in EBP, rather than being digitized.

From a technical standpoint, Greg Brown found the data migration from the prior system and the platform configuration straightforward. EBP's implementation team arrived with deep knowledge of Florida VAB workflows, reducing the amount of explanation and back-and-forth typically required during onboarding.

"It was pretty simple to work with. You already knew most of the process — you had done a lot of analysis ahead of time. You were just buttoning up the ends. The data migration wasn't too difficult, and working with your team was very straightforward."

— Greg Brown, IT Project Manager

SECTION 8 — ONGOING DEVELOPMENT & FEEDBACK

A Platform That Evolves With the Clerks Who Use It

One of the structural advantages of a purpose-built, actively developed platform is the ability to incorporate user feedback into the product roadmap. Because EBP serves only Clerk offices managing Florida VAB workflows, feedback from one county directly improves the platform for all of them.

Manatee County Clerk staff have contributed feedback throughout the implementation and initial operating period. Response times for both issue resolution and feature enhancements have been a notable differentiator in their experience.

"I emailed about a select-all feature while I was in the middle of scheduling — and Janine responded that the developer was already working on it. I was like, were you reading my mind? And it was done."

— Hannah Bishop, VAB Clerk

The feedback-to-feature cycle at EBP operates on a timeline that county IT departments described as significantly faster than typical software vendors — often hours to days rather than months.

"You guys have literally turned things around overnight — major functionality, reworked overnight. Any other vendor I've dealt with, that's months or years. The architecture of the software makes it clear there won't be issues accommodating changes down the road."

— Greg Brown, IT Project Manager

Key Takeaways from the Manatee County Clerk Implementation

Process Fit Matters	A platform purpose-built for VAB workflows eliminates the structural mismatch that occurs when general-purpose systems are adapted to VAB work. The efficiency gains at Manatee County Clerk stem directly from a system that reflects how the VAB process actually works — not how a court case works.
Automation Replaces Manual Volume	The highest-labor steps in the prior process — petition confirmation, notice of hearing generation, evidence reminders, duplicate detection — are now handled automatically. Staff time has shifted from data entry and manual communication to review and oversight.
Bulk Operations Change the Scale Equation	The ability to schedule, notify, and process petitions in bulk — rather than one at a time — changes the operational math of a high-volume petition season fundamentally. Steps that previously took hours per block now take minutes.
Hosted Infrastructure Reduces IT Burden	The cloud-hosted model transfers infrastructure, backup, and maintenance responsibility to EBP. For county IT teams already managing multiple systems, the ability to onboard a new platform without a corresponding maintenance commitment is a meaningful operational advantage.
Configurability Enables County-Specific Workflows	No two counties run their VAB process identically. EBP's configuration layer allows each office to set up workflows, notifications, data exports, and user access in ways that match their specific process — without requiring vendor involvement for routine adjustments.
Petitioner Experience Improves as a Byproduct	When the Clerk's process becomes more organized and automated, the petitioner experience improves as well. Self-service filing, account dashboards, and automated communications give petitioners visibility and reduce inbound inquiries to the office.

About Equity Bridge Pro

Equity Bridge Pro (EBP) is the only SaaS platform purpose-built for Florida Value Adjustment Board petition management. Designed exclusively for Clerks of Court, EBP provides an integrated workflow covering petition intake, hearing scheduling, Special Magistrate coordination, DR-486 documentation, property appraiser connectivity, and Chapter 194 compliance — from the first petition filed to the final order issued. The platform is hosted, maintained, and continuously developed by HutchLee Technologies, LLC.

HutchLee Technologies, LLC • www.equitybridgepro.com • info@equitybridgepro.com • 727-353-8722