



Work and Performance Plan FY2019 (OTC)

Neal Dixon, Office of the Tax Collector



DEPARTMENT KEY INITIATIVES

Key Initiative #1 -- Increased Customer Engagement

Link to Strategic Business Plan:

Yes

Description:

Redesign the Office of the Tax Collector's (OTC) website homepage, market Notify Me (Gov Delivery) to OTC's customers via OTC website and insert with tax bills/notices, and increase service delivery of OTC mailings by utilize eStatements allowing taxpayers to opt-in to receive bills/notices electronically via email through an existing vendor.

Rationale:

By redesigning the OTC's homepage, marketing Notify Me to taxpayers, and utilizing eStatements via an established vendor, the OTC will be able to engage with customers in new ways. The OTC believes these efforts will streamline communication to our customer base and provide our customers with new options to engage with the OTC.

Completion Date:

The expected completion date is Q4 FY 2019.

Updates/Project Milestones:

- Q1: Market Notify Me on inserts included with property tax bills and notifications
- Q2: Lunch redesigned homepage
- Q4: Implement eStatements through existing vendor

Outcomes/Measures:



Key Initiative #2 -- Relocation to Valerie Woodard Center

Link to Strategic Business Plan:

Yes

Description:

In preparation for the Office of the Tax Collector's (OTC) move to the Valerie C. Woodard Center (VCW), the OTC will need to develop a transition plan to effectively manage the move. The transition plan will consist of the following deliverables/tasks: a communication plan to customers; a review of business processes including but not limited to: money handling, mail delivery, customer flow; seat/office locations for employees; the logistics of the move, including packing up documents and office supplies located at Bob Walton Plaza and Hal Marshall Center; and completing the Enterprise Content Management (ECM) Expansion Project to reduce the amount of paper moved.

Rationale:

To effectively manage the move to VCW and minimize disruptive impact(s) to our customers.

Completion Date:

At time of move, estimated date of Q3 FY 2019.

Updates/Project Milestones:

- Q1: Develop plan and establish tasks/milestones/deliverables
- Q2: Develop communication plan
- Q2: Develop new/change business processes
- Q2: Assign seat/office locations
- Q3: Pack up documents/supplies located at both current locations
- Q3: Complete ECM Expansion Project

Outcomes/Measures:



Key Initiative #3 -- Utilization of Tax Foreclosed Property for Affordable Housing

Link to Strategic Business Plan:

Yes

Description:

Partner with organizations and other government agencies to use foreclosed property for affordable housing purposes. This will be accomplished by partnering with organizations, such as non-profits, and other governmental agencies whose clients meet specific income and housing need criteria to acquire and transfer property to meet housing needs using the foreclosure process. This is an experimental pilot program.

Rationale:

The foreclosure strategy presents a unique opportunity to partner with organizations and agencies to use foreclosed property for affordable housing. The County is empowered by law to take actions for the purpose of providing affordable housing to people in need of it.

Completion Date:

The building of the affordable housing initiative framework will be completed by the end of Q4 FY 2019.

Updates/Project Milestones:

- Q1: Finalize Strategy and Funding Source
- Q2: Define Qualifying and Screening Criteria
- Q3: Craft Grant Agreement and Deed Restriction Terms and Documents
- Q4: Develop Governing Board Processes and Procedures
- Q4: Seek Legal Review and Approval of Policies and Documents
- Q4: Draft and Implement a Communications Plan
- Q4: Develop and Launch Web Pages
- Q4: Develop Program Measures, Tracking Mechanisms, and Reports
- Q4: Develop and Execute an Implementation Plan

Outcomes/Measures:



Key Initiative #4 -- Gross Receipt Tax Discovery Audit Program

Link to Strategic Business Plan:

No

Description:

As part of the contractual agreement with the Office of the Tax Collector's (OTC) gross receipts audit vendor, a discovery audit program will be created and funded to discover businesses that are not remitting gross receipt tax returns and payments. The business could be new or existing businesses, but will consist of first-time filers.

Rationale:

The OTC's gross receipts audit vendor currently performs randomly assigned compliance audits on businesses that have filed tax returns and made tax payments, but does not currently seek to find businesses that have not registered and filing. The program will allow the vendor to provide this missing piece to the overall audit program and could lead to increased compliance and collections of gross receipt taxes.

Completion Date:

The expected completion date is Q4 FY 2019.

Updates/Project Milestones:

- Q1: Hold kick off meeting with vendor
- Q1: Develop plan and define scope
- Q2: Vendor begins performing discovery tasks and the associated audits
- Q4: Conclude program

Outcomes/Measures:



Key Initiative #5 -- Gross Receipts Tax System Replacement

Link to Strategic Business Plan:

No

Description:

The legacy gross receipts tax system has been approved for replacement. The Request for Proposal (RFP) process was completed and a contract with a vendor has been approved. The project began in Q1 of FY 2016. The project is scheduled to end in FY 2019.

Rationale:

This initiative is a continuation from FY 2018. Approximately \$110 Million is collected annually through the thirteen-year-old legacy system. Due to the complexity of the current system, it requires daily support by a developer to maintain the system. It is supported by one full-time contractor. The legacy system does not interface well with current software such as Windows7, GIS Tax Collections System, Advantage Finance System, and others. A new system is expected to remedy the issues that have developed as the legacy system nears the end of its lifecycle.

Completion Date:

The expected go-live date for the new gross receipts tax system may change dependent on vendor progress.

Updates/Project Milestones:

- Execute public relations outreach to affected taxpayers.
- Complete user testing and training (UAT).
- Go live.
- Completion of project implementation services.

Outcomes/Measures: