

ITS Strategic Roadmap – FY16

Tax Application

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Background

Property taxes are a primary source of revenue for the Metropolitan Government. According to the Metro Budget, in Metro's Fiscal Year 2015, property tax collections are expected to exceed \$925 million dollars or 49% of total revenues. It is the constitutional responsibility of the Davidson County Trustee's Office to manage property tax collection.

The Tax Application is the system and processes that maintains and supports property tax billing and collection. This system is managed by ITS's Enterprise Applications group and includes custom written procedures and jobs as well as the TaxMan software (Thompson Reuters) used by the Trustee's office for billing and collection.

ITS supports this application through:

- Software upgrades for TaxMan
- Management of the daily interface between TaxMan and Metro's Land management system (Cityworks) to provide current owner and address information
- Multiple appraisal/assessment loads from the Assessor into the Land system throughout the year
- The load of annual taxes into TaxMan
- Creation of the tax rolls, files and tax reports for Davidson County, Belle Meade, Goodlettsville, Ridgeway, and the Industrial Development Board.

Stakeholders include the Metro departments and agencies of Trustee, Assessor, Planning Mapping, and Public Works; current vendor Thomson Reuters; Metro Government satellite cities named above; and Metro's Citizens who receive tax bills.

Current Strategic Drivers

1. **Technology Change: New Land Management system** (Game Changing) – The Kiva system is replaced by the Cityworks PLL (Permits, Licensing, and Land) system in early 2015.
2. **Regulatory Compliance Obligations: State Tax Deadlines** (High) – By law, property taxes are due the last day of February, with January and February being a critical high-volume time for the Trustee's Office.
3. **Customer Demand: Exceptional Customer Service** (High) – Our customers, whether Metro employees, elected officials or members of the public, have an expectation of service that is consistent, accountable, knowledgeable, and empathetic.



4. **Open Data (High)** – Based on Mayor Dean’s Executive Order 046, departments and agencies are asked to evaluate data of high value to make it available to the public through the open data portal.

On the Horizon Strategic Drivers

1. **Technology Change: New Tax System (Game Changing)** – The Trustee’s office is working on an RFP to replace the current TaxMan system . This would affect both the daily and annual tax interfaces.
2. **Customer Demand: Mobile self-service (Game changing)** – Citizens today demand the ability to access Metro services at any time from any device, as they are familiar doing with their personal banking, investing and shopping online sites and mobile apps.

Short Term Goals (0-6 months) 7/1/15 – 12/31/15

#	Goal/Objective	Est. Start	Est. Duration
1	2015 Annual Tax Work from new Land system	7/15	4 months
2	Assist in evaluation of TaxMan replacement RFP and mobile options	7/15	TBD

Medium Term Goals (6-18 months) 1/1/16 – 12/31/16

#	Goal/Objective	Est. Start	Est. Duration
1	Make prorated appraisals current in Land	1/16	2 weeks
2	Tax Payment Deadline	1/16	8 weeks
3	TaxMan Replacement and Interface Testing	TBD	TBD
4	Assist in creation of Open Data files	4/16	1 month
5	Assessor’s Appraisal load into Land	5/16	2 weeks
6	2016 Annual Tax Work	7/16	4 months
7	Review and update Disaster Recovery Plan	10/16	2 weeks

Long Term Goals (18-36 months) 1/1/17 – 6/30/18

#	Goal/Objective	Est. Start	Est. Duration
1	Make prorated appraisals current in Land	1/17	2 weeks
2	Tax Payment Deadline	1/17	8 weeks
3	Re-Appraisal Year – Multiple Assessor Appraisal loads into Land	4/17	2 months
4	2017 Annual Tax Work	7/17	4 months

Related Roadmaps

- Databases
- Land (CityWorks)

