



Office of the Tax Collector Business Plan

Fiscal Years: 2023 and 2024*
(10/1/2022 through 9/30/2024)

Approved by:

A blue ink signature of Peter Cam, written in a cursive style.

Peter Cam,
Tax Collector

02-08-2023

Date

A blue ink signature of Edward Marquez, written in a cursive style.

Edward Marquez,
Chief Financial Officer/Finance Director

4/9/23

Date

Plan Date: February 8, 2023

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DEPARTMENT OVERVIEW

Department Mission

“A commitment to respond to our community’s needs by providing a welcoming service that is efficient and transparent in the collection and distribution of taxes and fees.”

The Office of the Tax Collector facilitates the collection and distribution of current and delinquent real estate, personal property, local business, and convention and tourist taxes, as well as special assessments for all local taxing authorities. Additionally, the Office of the Tax Collector acts as an agent on behalf of the State of Florida to issue automobile, vessel, and mobile home registrations and titles, as well as hunting and fishing licenses and disabled parking placards. Under the Tax Collector’s purview is also the operation of twenty-five privately owned and operated Private Auto Tag Agencies (PTA’s), serving the motoring public of Miami-Dade County with vehicle, vessel, and mobile home tag and title services.

Our Customers

The services offered to the taxpayers of Miami-Dade County are accessible, inclusive, timely and wide-ranging to suit customer needs and demands, including online, mail-in, escrow payable, bank payable and in-person over-the-counter services that are convenient and efficient. Our focus is to be outstanding and responsive to our tax-paying public, county departments, and external agencies.

The Tax Collector works with (66) Tax Collector colleagues throughout the State of Florida (members of the Florida Tax Collector’s Association, (FTCA)), to learn about and implement new technologies, improve tax collection methods and automate processes, share information, legislative updates, and discuss new statutory proposals and changes, participate in ongoing Department of Revenue (DOR) education sessions to maintain integrity and transparency, support our tax-paying customers and employees, establishing trust in local government.



Table of Organization

<p><u>OFFICE OF TAX COLLECTOR</u></p> <p>Formulates and directs Office of the Tax Collector policy, provides leadership and direction of departmental operations</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">17</td> <td style="text-align: center;">17</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	17	17
<u>FY 22-23</u>	<u>FY 23-24</u>			
17	17			
<p><u>FINANCE, BUDGET, AND ADMINISTRATION DIVISION</u></p> <p>Provides administration of departmental activities and responsible for all Office of the Tax Collector accounting functions</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">48</td> <td style="text-align: center;">47</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	48	47
<u>FY 22-23</u>	<u>FY 23-24</u>			
48	47			
<p><u>FAST PAYMENT PROCESSING DIVISION</u></p> <p>Provides fast payment services for all tax types and auto tag transactions, and mail processing services for the Office of the Tax Collector</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">20</td> <td style="text-align: center;">22</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	20	22
<u>FY 22-23</u>	<u>FY 23-24</u>			
20	22			
<p><u>AUTO TAG DIVISION</u></p> <p>Administers state laws, local ordinances and policies pertaining to auto tag services and private agency oversight</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">27</td> <td style="text-align: center;">28</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	27	28
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27	28			
<p><u>TAXPAYER SERVICES AND AD VALOREM DIVISION</u></p> <p>Administers state laws, local ordinances and policies pertaining to the collection and distribution of current and delinquent County and municipal ad valorem taxes and non-ad valorem assessments</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">37</td> <td style="text-align: center;">38</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	37	38
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37	38			
<p><u>BUSINESS TAXES</u></p> <p>Administers state laws, local ordinances, and policies pertaining to the collection and distribution of current and delinquent County Tangible Personal Property, Local Business and Convention and Tourist Development Taxes</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">35</td> <td style="text-align: center;">34</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	35	34
<u>FY 22-23</u>	<u>FY 23-24</u>			
35	34			
<p><u>BUSINESS SYSTEMS</u></p> <p>Plans, coordinates, and provides support for implementation of various Office of the Tax Collector business solutions, including logical and state systems</p> <table style="margin-left: auto; margin-right: auto;"> <tr> <td style="text-align: center;"><u>FY 22-23</u></td> <td style="text-align: center;"><u>FY 23-24</u></td> </tr> <tr> <td style="text-align: center;">6</td> <td style="text-align: center;">6</td> </tr> </table>	<u>FY 22-23</u>	<u>FY 23-24</u>	6	6
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The FY 2023-24 total number of full-time equivalent positions is 192.



Strategic Alignment, 4E, and Thrive305 Summary

General Government

GG1: Accessible, Equitable, transparent, and responsible government

- GG1-1-Support a customer-focused organization by providing convenient access to information and services, and by ensuring processes are easy to navigate*
 - *Provide easy access to tax related information and services*
 - Continue to implement new technology solutions to improve services to the community
 - Update tools and procedures to provide secure and easy to use processes
- GG1-2 Facilitate community outreach and engagement to promote better decision-making in County government*
 - *Promote discount payment options and services information*

GG2: Excellent, engaged, and resilient workforce

- GG2-2 Promote employee development and leadership
 - *Ensure employees have needed skills and leadership development opportunities*
 - Increase employee training and ensure knowledge transfer, to proactively address succession planning needs
 - Continue to support work life balance initiatives to augment employee engagement and retention
- GG2-1 Attract and hire new talent to support operations
 - *Ensure Tax Collector is properly staffed to support operations and meet customers' needs*
 - Continue talent acquisition efforts to recruit new employees whose skill set, and experience enable us to address business evolution, new technology solutions, and succession planning

GG3: Optimal internal Miami-Dade County operations and service delivery

- GG3-1 Deploy effective and reliable technology solutions that support Miami-Dade County services
 - *Leverage technology to provide efficient and effective services*
 - Implementation of Artificial Intelligence (“digital employees”) to facilitate decision-making through faster and more consistent services and improve customer satisfaction
- GG3-2 Ensure security of systems and data
 - *Protect Tax Collector operational and taxpayer information*
 - Maintain PCI (Payment Card Industry) compliance by reviewing and enhancing controls, monitoring processes, and providing mandated annual training to all employees involved in payment processes
 - Continuously monitor and enhance controls, processes, policies, and procedures to maintain a secure environment for customer data

GG4: Effective leadership and management practices

- GG4-1 Provide sound financial and risk management
- GG4-2 Effectively prioritize, allocate, and use resources to meet the current and future operating and capital needs for all our residents*



Selected Measure Name	4E (Environment, Equity, Economy, or Engagement)	Thrive 305 Priority or Action
Total dollar value of Tax Collector web-enabled transactions completed online using the online services portal	Engagement/Economy	Action 1.1/1.3/12.1
Total Value of Tax Distributions	Economy	

KEY ISSUES

- Given the coming implementation of the new constitutional office of Tax Collector, it is imperative that proper staffing decisions are made, such as ensuring key administrative posts are filled. – **Economy**
- To augment modernization that will enhance taxpayer satisfaction and engagement, the implementation of a new Artificial Intelligence (“digital employees”) functionality will be critical to expedite processes, services, and responses to all inquiries. - **Engagement, T305 #1**
- Increasing the efficiency of high-speed payment processing and enhancing the timely access to information are critical to tax operations. The identification and implementation of new technology solutions for the Fast Payment Processing Division (FPPU) will be essential to accomplish these goals. – Engagement, T305 #1
- The continuous refinement of business processes within the tax collection and billing system (TaxSys) will be essential to maintain efficient payment processing and customer service delivery. - **Engagement, T305 # 1**
- Increasing the use of online payment functionality is essential to minimize paper usage, which will address the global responsibility to become resilient to climate stressors. - **Environment, T305 # 1,9, 11, 12**
- To ensure the future growth and proficiency of the Office of the Tax Collector, it is critical that Department of Revenue (DOR) certification (CFCA) training continues to be scheduled as an investment in personnel development and empowerment. - **Economy, T305 #12**
- The implementation of recommendations by the Office of Management and Budget (OMB) and the Office of the Tax Collector, following efficiency studies, will be key to improve the efficiency of the Local Business Tax (LBT), Tangible Personal Property (TPP), and Convention and Tourist Tax areas. - **Economy**



PRIORITY INITIATIVES

1. Continue preparations for the transition to the constitutional Office of the Tax Collector in 2025, which will include the following:
 - a. Fund new positions in new areas never previously in existence or funded.
 - b. Begin transition planning, or alternative, for the Local Business Tax and Convention and Tourist Tax operations, if required.
 - c. Leverage and implement new technology solutions to enhance engagement with members of the community, grow an inclusive economy, and promote a more sustainable economy.
 - d. Train additional personnel in anticipation of the transition of the Department of Highway Safety & Motor Vehicles (DHSMV) responsibilities from the State of Florida to the Constitutional Office of the Tax Collector.
2. Continue plans to address succession planning efforts for the Office of the Tax Collector, focusing on talent development through cross-training to ensure knowledge transfer. 10% of OTC staff are in DROP.
3. Review business processes and enhance employee training to a daily activity, to address technological change, innovation, and additional functions such as Passports issuance, Birth Certificate Issuance, Concealed Weapons Permits issuance, and modernization of processes from manual to automated.
4. Work with other County departments to address our evolving working environment (ERP PeopleSoft modernization, Work at Home, etc.) to identify opportunities for improvement in processes and procedures that will increase efficiency while maintaining appropriate levels of controls.
5. Reconfiguration of current office layout to provide a more efficient workspace while addressing personnel growth to cater for additional TC functions as a fully functional Constitutional Office.
6. Expansion of the Public Service Office (PSO) functionality to facilitate taxpayer access to Tax Collector services provisions, increase community outreach connectivity, reduce wait times, and provide wider ranging information sources to our customers that is provided by other county departments.



FUTURE OUTLOOK

The Office of the Tax Collector continues to provide existing and enhanced services to the taxpaying residents of Miami-Dade County as well as the visiting public from other Florida counties, as we continue our transition to a constitutional office.

The Office of the Tax Collector is embarking on a series of major enhancements to the services it provides to the Miami-Dade community, to function as a fully funded constitutional office. The Tax Collector will continue to focus upon providing better and more effective services to the public and other County departments, while expanding our technology, cross training of our employees, and proactively managing legislative changes and compliance, staffing levels, and succession planning. Emphasis on new services, innovation and improved efficiency will be key as Tax Collector becomes a constitutional office, absorbing current driver license services currently provided by state operated Local Division of Motorist Services.

Efforts towards refining our rotational remote work program for certain activities, will continue as we seek to recruit, motivate, and retain a talented workforce in today's virtual environment.

ATTACHMENT 1

BUSINESS PLAN REPORT

As Of <= 02/07/2023

Business Plan Report
Office of the Tax Collector (2023)

Perspective Name	Objective Name	Grand Parent Objective Name	Parent Objective Name	Measure Name	Details	As of	VR Flag	Actual	Target	FY2022-23 Annualized Target	FY2023-24 Annualized Target
Customer	Expand Access to County Government by Placing Information and Transactions on-line (Engagement)	GG1: Accessible, equitable, transparent, and responsible government	GG1-1: Support a customer-focused organization by providing convenient access to information and services, and by ensuring processes are easy to navigate	Total Dollar Value of Tax Collector Web-enabled Transactions Completed Online Using the Online Services Portal	⇒	2022	▲	\$2,869,088,344	\$2,400,000,000	n/a	n/a
Finance	Tax Collector Distributions per Florida § 197.383 (Thruve305 #12)			Property Tax Distributions	⇒	Jan '23	▲	1	1	14	n/a
				Convention & Tourist Tax Distributions	⇒	Jan '23	▲	1	1	12	n/a
				Local Business Tax Distributions	⇒	Jan '23	▲	1	1	12	n/a
				Property Tax Installment Distributions	⇒	Jan '23	▲	1	1	4	4
				Bank Interest Distributions	⇒	Jan '23	▼	0	1	4	4

Key: ● - Initiative ● - Featured Objective

