

DRAFT- FOR DISCUSSION PURPOSES ONLY
County Assessor's Office
Independent Consultant

Consultant: Debbie King
Reports to: Dena Diorio, Assistant County Manager

Scope of Work

1) Implement Recommendations in Internal Audit Report dated April 26, 2013

Purpose: Ensure that all recommendations are fully implemented

Tasks:

- Prepare status report of implementation of recommendations to date
- Pursuant to Issue #1 in the report, ensure that documented policies and procedures exist for key business activities for RMV valuations, property appeal processes and information system access
- Pursuant to Issue #2 in the report, validate and document that procedures related to routine reviews of appeals and supporting documentation ensure compliance with the Machinery Act
- Pursuant to Issue #3 in the report, validate and document that the pre-billing edit process for RMV is effective. Validate and document the revised procedures have been developed in response to the changeover to the State Vehicle Tax System (VTS)
- Pursuant to Issue #4 in the report, document and validate that the revised reconciliation procedures for ensuring all assessed registered motor vehicles are processed for billing. Validate and document the revised procedures have been developed in response to the changeover to the State Vehicle Tax System (VTS)
- Pursuant to Issues #5 & #8 in the report, collaborate with the IT Program Manager to develop and implement an IT Security Policy for all the systems in the Assessor's Office
- Pursuant to Issue #6 in the report, validate and document that the review and approval of property valuation changes are properly documented
- Prepare weekly status reports for the Board of County Commissioners

Deliverables:

Implementation Plan
Weekly Status Reports
Documented Policies & Procedures for key business activities
Training Plan for staff on policies and procedures
IT Security Plan

2) Prepare Implementation Plan for Recommendations in the Customer Service Solutions Report

Purpose: Ensure that there is a documented strategy & plan for implementing

recommendations

Tasks:

- Prioritize recommendations based on input from Assessor's Office staff
- Categorize recommendations based on ease of implementation
- Prepare a detailed project plan that assigns accountabilities, tasks and timetables for completion
- Develop internal & external communication plans. This includes strategies for communicating internally, and with other County departments including the Office of the Tax Collector, Public Information and 311
- Develop customer service survey and document process for tabulating & reporting results
- Document key business processes
- Recommend key performance indicators (KPI's) tied to key business processes
- Develop recommendations for applying customer service strategies across the Assessor's Office and the Office of the Tax Collector
- Prepare weekly status reports for the Board of County Commissioners

Deliverables:

Implementation Plan

Weekly Status Reports

Documented procedures for key business processes

Communication plans

Customer Service Survey

Cross departmental customer service recommendations

3) Preparation for Implementation of HB 200

Purpose: Ensure the Assessor's Office has a documented plan for successful implementation of the legislation

Tasks:

- Prepare a detailed project plan that assigns accountabilities, tasks and timetables for completion
- Review documentation received from Pearson's Appraisal Service that the four conditions stipulated in the legislation have been met
- Prepare RFP documents for the procurement of services from qualified appraisal companies. RFP will include a detailed scope of work, minimum qualifications of proposers, appraisal methodology to be followed and timetables. Develop evaluation criteria and matrix for evaluating proposals.
- Develop and document procedures for tracking the results of the review and reporting to the Board of County Commissioners
- Develop and document procedures for tracking and reporting changes in value and forecasting assessed valuation for the FY2015 budget

- Prepare weekly status reports for the Board of County Commissioners

Deliverables:

Project Plan and updates as needed

Weekly Status Reports

RFP for Appraisal Services

Documented procedures for tracking and reporting the results of the review

Documented procedures for tracking and reporting changes in value