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# Tax Department

**NEW STRATEGY FOR THE FUTURE**

**11/7/2017**



# Summary

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- Background
- Overview of approach
  - Phase I, II, and III
- Conclusions
- Recommendation to Board





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# Background



# County-wide Changes

- Buncombe County Government is implementing a reorganizational strategy based on **foundational principles** set by the County Manager.
- The Chief Financial Officer was tasked with **evaluating the Tax Department**.
- This responsibility included **aligning Tax** with these core values.

## PRINCIPLES

TRANSPARENCY

ACCOUNTABILITY

DIVERSITY &  
EQUITY

COMMUNITY  
ENGAGEMENT



## Why now?

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**Buncombe County Tax Department has a track-record of success!**

*So why is there a need for change?*

- Key Personnel Have Retired
- Major system/process implementations (AssessPro, NCPTS)
- New County Manager reorganizational strategy
- Stronger emphasis on internal audit and avoiding potential conflicts
- Chief Financial Officer and Interim Tax Director recognize importance of protecting Tax Department performance for the future



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# Overview of Approach



# Overview of Approach

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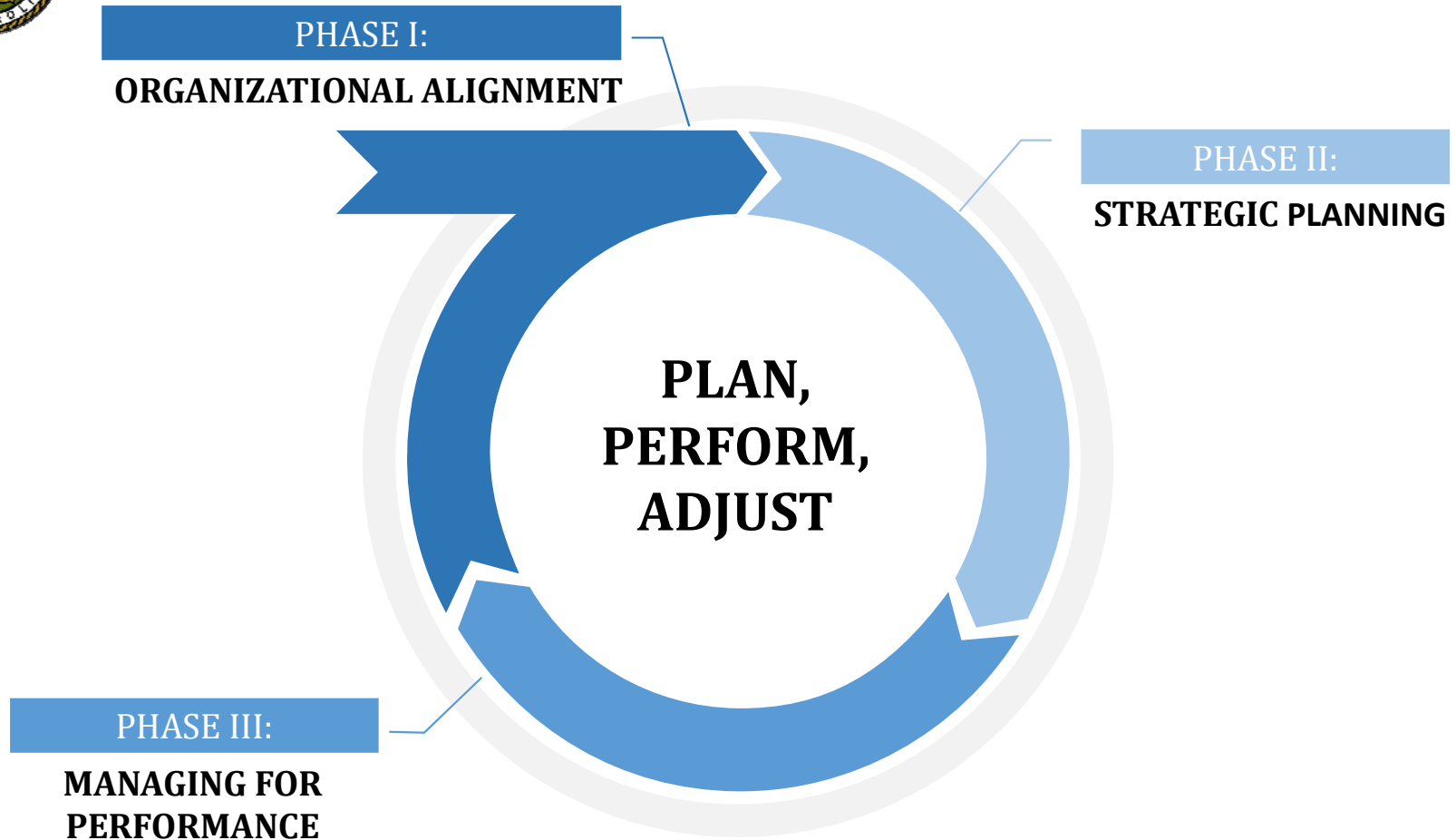
Three-phase approach to building a Tax Department strategy for the future:

- **Phase I – Organizational Alignment:** Short-term actions recognized as high-priority and foundational for Phase II.
- **Phase II – Strategic Planning:** Execute long-term strategic planning driven by the Tax Department staff and supported by County management.
- **Phase III – Managing for Performance:** Utilize the strategic planning as a framework for monitoring performance metrics and adapting people, processes, and technologies to achieve goals.



# Overview of Approach

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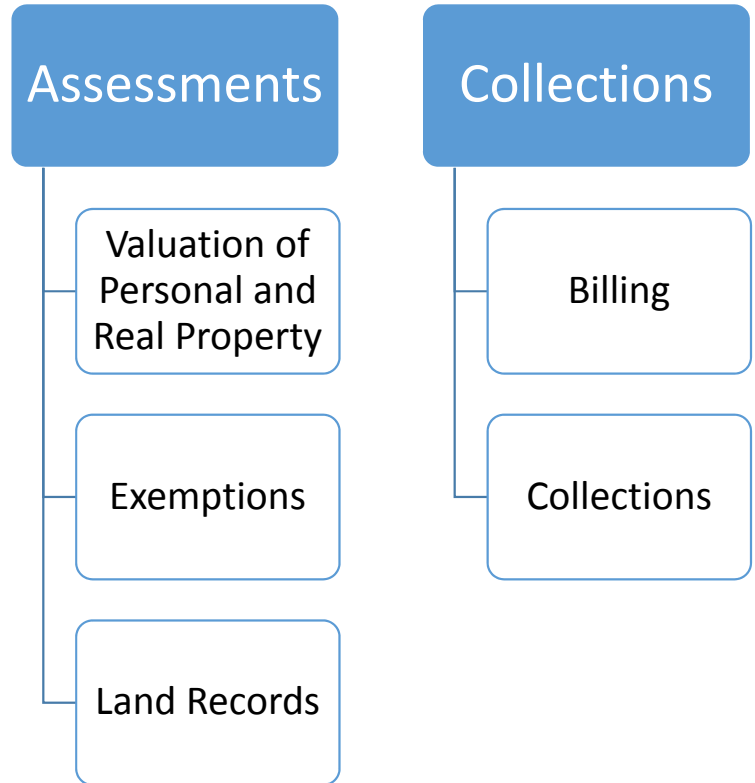




# Phase I: Organizational Alignment

## Established Assessments and Collections as independently managed divisions

- Having the Tax Assessor and Tax Collector be the same person was recognized as a cause of *potential* conflicts. The Assessor is required to perform duties without regard to collections.
- The functions and roles of each division are outlined to the right.
- Recognize the critical need for the Assessor and Collector to communicate clearly and efficiently.





# Phase I: Organizational Alignment

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## Collections Manager Hired

- Position was posted for 3 weeks and panel interviews conducted
- Jennifer Pike was selected as Collections Manager



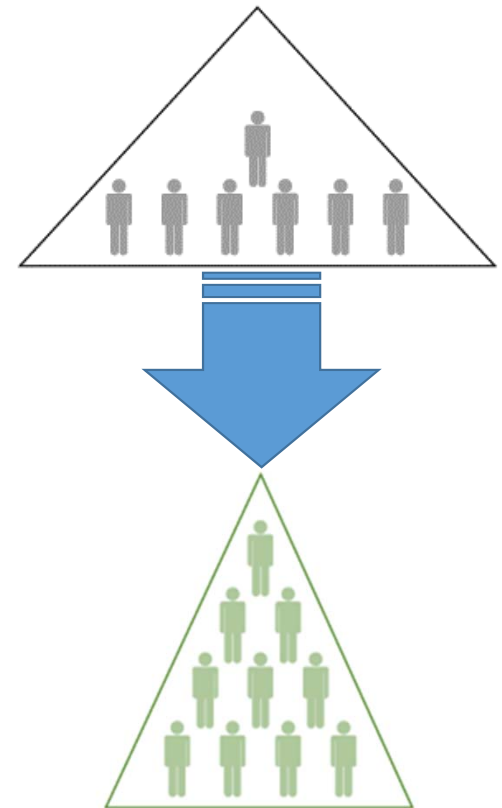


# Phase I: Organizational Alignment

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## Leadership structure built under Assessments and Collections divisions

- Several changes made to create a leadership structure within the divisions.
- This reduces the number of direct reports and formalizes many existing lead/informal supervisory relationships.





## Phase II: Strategic Planning

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With organizational alignment actions completed, strategic planning began with the purpose to:

- **Define Mission Statements**
- **Outline goals and objectives**
- **Develop strategies and plans to meet goals and objectives**
- **Select key performance metrics**



## Phase III: Managing for Performance

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- **Track and adapt performance metrics**
- **Make data-driven decisions**
- **Ongoing strategic planning for the future**



# Conclusion

- The Tax team has strong leadership and an experienced, hard-working staff
- New ways identified to improve service to our community
  - Accessibility
  - Communication
  - Efficiency
- Tax management team have embraced philosophy of strategic planning and continuous improvement





# Recommendation

## Recommend that the Buncombe County Commissioners:

- Appoint **Keith Miller** as **Tax Assessor**

- Has worked for Buncombe County Tax Department since 1996
- Over 21 years experience managing real estate assessment, land records, county-wide reappraisals, and property tax administration
- Certified County Assessor and Certified NC Real Estate Appraiser, Level III

- Appoint **Jennifer Pike** as **Tax Collector**

- Has worked for Buncombe County since 2000
- Experience both in Tax and Finance Departments
- Currently finishing up a Masters in Public Affairs from WCU

## Appointment includes approving two new job classifications





**Questions?**

