

The seal of the City of Richmond is a circular emblem. It features a central figure of a person standing on a pedestal, holding a staff or scepter. The figure is set against a blue background with several white stars. The outer ring of the seal contains the text "CITY OF RICHMOND" at the top and "ESTABLISHED 1731" at the bottom. The seal is rendered in a light gray, semi-transparent style.

**MODERNIZING THE FINANCE
REVENUE DIVISION**

PURPOSE

Discuss the following:

- Update on Real Estate Rebate and Mailing Remediation
- Modernization Efforts
 - Consultant's Report
 - Personal Property Improvements
 - Business Portal
 - On the Horizon

2025 2ND HALF REAL ESTATE BILLING

Recap

- Total number of bills = 75,905
- 42,635 bills sent to owners
- 33,270 bills were mailed to owners instead of the lenders.
- Bills were correct, but the mailing process did not follow the usual process.

REMEDIATION

What we did to correct the issue:

- ✓ Updated Standard Operating Procedure (SOP).
- ✓ Retrained staff
- ✓ Outreach to impacted taxpayers and Mortgage Servicers/Lenders

IDENTIFYING DUPLICATE PAYMENTS

✓ We are receiving and processing refund request daily

And we are in the process of:

- Querying real estate payments received to identify duplicates
- Analyzing those accounts
- Contacting the taxpayer
 - Refund
 - Credit

CUSTOMER SERVICE IMPROVEMENTS



2020 - 2024 BUILDING THE FOUNDATION

Where We Were

- Required disclosures due to history of late external audit
- Numerous significant external audit findings since 2015
- Non-Compliance with Virginia Department of Transportation reporting requirements
- ERP out of support (no technical support and out of extensions on contract)
- MUNIS out of support since 2017 (no technical support)

Where We Are

- No disclosure requirements maintained (5 years)
- Removed numerous outstanding significant external audit findings (4 years)
- Compliance with Virginia Department of Transportation reporting requirements (2 years)
- ERP current version and regular maintenance
- MUNIS upgraded to current version
- RVA Pay live for Personal Property

2024 - 2025 ORGANIZATIONAL DEVELOPMENT

Where We Were

- Unrecorded Business Filings
- Paper based records
- Manual processes
- Intermittent system outages
- Little to no Standard Operating Procedures
- Little to no policy adherence
- No line of sight for performance management
- No line of sight to measure customer experience
- No formalized training or professional development

Where We Are

- Filings recorded timely
- Paperless systems being developed
- Automation of manual processes
- Stable systems
- 71 SOPs created
- Line of sight to Policy adherence
- Direct line of sight for performance management
- Direct line of sight to measure customer experience
- Formalize targeted job training and professional development

ANNE SEWARD CONSULTING LLC

- The engagement spanned from March of 2024 until June 2025
- Final report was delivered on July 9
- Services included
 - Management tools of which 10 out of the 11 have been implemented
 - Recommendations for major process redesign to improve customer service delivery and leverage automation
 - Leadership support and staff augmentation
 - Business Portal lead
 - Annual Personal Property Billing lead

MANAGEMENT TOOLS

- ✓ Restructuring of division and clearly defined roles and responsibilities
- ✓ Gantt Chart – work “line of site” to deadlines
- ✓ Workplans – all units (communicate focus, work, lead staff, deadlines, notes)
- ✓ Metric tracking (cumulative daily ticket reports, ticket closure reports, customer service)
- ✓ Staffing plans (focus resources, monitor productivity, develop due dates)
- ✓ Weekly Leadership meetings – Review workplans & assess risk
- ✓ Daily team stand-ups
- ✓ Unit teams tax chat channels

IMPROVEMENTS TO DATE

- Using 311 call surveys to improve experience
- Counter service experience survey (easy access by QR code)
- Bookings for scheduling on-line and in-person appointments
- Retrained staff
- All inquiries are tracked by a ticket
- Community outreach
 - District/Civic meetings
 - Community events
 - Social media
 - Media campaign
 - Targeted communication by email

GANTT OF DIVISION FOR LINE OF SITE OF DUTIES

Richmond Tax Revenue Division GHANT Chart																																																							
Last Update: 5/29/2025																																																							
Legend Color: Admin Business PPT Cash Ops																																																							
Real Estate Del Col. Tax Enf.																																																							
Row #	UNIT	JANUARY				FEBRUARY				MARCH				APRIL				MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER				DECEMBER									
7	8	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4	week 1	week 2	week 3	week 4										
1 BUSINESS																																																							
1a	Annual BPPT Filing, Billing	filing form notice email								filing due 3/1								payment due 6/5																																					
1b	Annual BPOL Renewal	filing form notice email								payment due by 3/1; Statutory Assessment Invoices Mailed																																													
1c	RVA Portal BPOL License Print	Provisionals system emailed pending Official Feature in RVA Portal														Official via Portal email				Official via Portal email				Official via Portal email				Official via Portal email				Official via Portal email				Official via Portal email				Official via Portal email				Official via Portal email				Official via Portal email							
1d	Monthly ATOM Coupon Filing	coupon book print/mail by 1/1	coupon filing due by 20th			coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th				coupon filing due by 20th													
1e	Annual Bank Franchise Filing															self reported filing/ payment due 4/30																																							
1f	Daily Rental Annual Registration/ Asset Filing/ Qurthly Coupons	Annual Recertification Due 1/1	quarterly filing due 20th					filing due by 3/1				invoice print/mail by 4/15				quarterly filing due 20th				payment due 6/5				quarterly filing due 20th								quarterly filing due 20th																							
1g	Business License File to Web	Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal				Upload to Open Portal													
1h	Beginners Adjustments & Credit Refunds																																											BEGINNER ADJUSTMENTS & CREDITS											
2 PERSONAL PROPERTY																																																							
2a	PPTRA % Calculation & Council Approval	Prepare Council Ordinance																																																					
2b	Annual PPT Billing					DMV Data Import of VNS as of 1/1; VIN Count for PPTRA % Calculation				Data Analytics				Pre-Billing Actions Begin				invoice print/mail by 4/15 (includes Feb & March DMV File Submits)				payment due 6/5																																	
2c	Annual PPT Delinquent Billing																	invoice print/mail by 7/5				payment due 8/5																																	
2d	DMV File Download/Upload/Run (Prior Month/Week Activity)	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file	Monthly by 7th; weekly file	weekly file	weekly file	weekly file										
2e	Monthly PPT Supplemental Billing (Prior Month)	Jan DMV File (Dec activity) invoice print/mail by 15th	payment due 15th					Feb & March DMV File (Jan-Feb activity) Run with Annual Bills				April & May DMV File of Submits invoice print/mail by 15th				invoice print/mail by 15th				payment due 15th				invoice print/mail by 15th				payment due 15th				invoice print/mail by 15th				payment due 15th				invoice print/mail by 15th				payment due 15th				invoice print/mail by 15th				payment due 15th			
2f	Annual Posting of Property Tax File to Web																							Upload to Open Portal																															
3 REAL ESTATE																																																							
3a	Annual Tax Relief Program Applications	application print/mail by 1/30																reminder mailing to applicants																reminder mailing to applicants																application due by 12/31					

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	Unit	Approved	Not Frozen	Filled	Vacant/ No Activity	Vacant But In Recruitment
	Administrative	4	4			
	Control Unit					
	TRS Cash Operations	24	24			
	TRS Delinquent Collection	12	12			
	TRS Tax Enforcement	7	7			
	ASMT Business Operations	15	15		1	Reviewed 143 Invoices on 06/06/2025; Pending Scheduling of Interviews
	ASMT Personal Property	13	13		1	Reviewed 142 Invoices on 06/06/2025; Pending Scheduling of Interviews
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		87	87	0	2	0
2	Training Plans:					
a	Customer Service Ambassador Certification for Front Line (Reynolds Program)	Lauren	M	4/9/2024	10/1/2025	SW to take lead fr Amber to completion CG would like to assist as part of training and development buildout - 4.24: Met 4/23 JA and LK to develop schd May 2 - NT to work w/ WA on customization
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b	Directive: Staff In/Out Boards for Accountability	Amber	H	REOPENED	ongoing	Accountability Required
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d	Directive: Daily Ticket Metric Report, Batch Processing by SME; Productivity Accountability	Unit Spvsr	H	REOPENED	ongoing	Amber will lead daily review and escalate to Jamie for non-compliance or other issues
e	Vacancy Filling	Monte/ SW	H	ongoing	ongoing	
f	Team Leave Calendar Oversight & Compliance	SW	H	9/13/2024	ongoing	Need to enforce RAPIDS approval process
g	SOP: Escalation Oversight	Amber	H	9/13/2024	ongoing	
h	Directive: Use RVAPay/Portal for ticket response: no email/ VM due to issues with monitoring	Team	H	5/29/2025	ongoing	Directed 3 times; SW directed all work to tickets and closure of email access points for customer line of sight
i	Directive: Customer Ticket Entry for Counter Service - ALL customers into a ticket	LPK	H	ongoing	ongoing	Need to enforce this with Spvsr on the Cust Svc Line at all times - SOP update published 6.3.2025 - LK
j	Directive: P&O on the Floor for Oversight	ME	H	ongoing	ongoing	Needs enforcement
k	Directive: Cumulative Daily Ticket Report & Closed Ticket Report	Amber	H	ongoing	ongoing	Needs enforcement
l	Directive: Customer Counter - Supervisor/Manager present @ ALL TIMES	Amber	H	3/1/2025	ongoing	
II PROJECTS TRACKING:						
A ADMIN:						
1	Evaluation Form Alignment & Culture Rollout	AS	H	7/24/2024	6/30/2025	Culture Rolled Out; Anne draft of Eval tool complete; HR approval received; Enneagram tests provided to staff; need leadership settled for rollout of eval tool and culture expectations
2	Audit Comment Close Out - Review and Draft for SW	Jeff C	M	10/18/2024	ongoing	Need to review for close-out Control Group would like to assist as we build out our assessment calendars
B TECHNOLOGY / AUTOMATION:						
1	Work Process Improvements & Automation of Manual Processes					
a	Automation - CAMA updates to MUNIS/RVAPay	Jacque	H	4/4/2024	12/30/2026	Waiting on access to new tax assessor software.
b	Automation - Tax Relief Program Application & Recertification	Jacque	H	4/4/2024	12/30/2026	wait for RVAPay implementation given timing
c	Automation - Daily Rentals (BU MUNIS implementation)	John	M	9/1/2024	10/30/2025	wait for RVAPay implementation given timing
2	Software Implementation RVA Pay (Transition fr MUNIS) - (List below)					
a	RVA Pay PPT Remediations	Anne	H	7/1/2024	8/31/2025	"High" priorities worked; "Med" in process
b	Next Module - Business / ATOM	Anne	M	11/1/2014	10/30/2025	
c	Next Module - Real Estate	TBD	M	1/1/2026	12/30/2026	Estimated dates
d	MUNIS Upgrade to Version 2024.2.0.1199 (current 2024.2.0.730)	ES	H	6/5/2025	6/23/2025	Per Eric: Allows City to maintain Vendor's current software version. Will also correct problems with Delinquent Letter Export function - CG Team needs more info on the upgrade and responsibilities
C TRS - Cash Operations						
1	Interest refund automation functionality in RVAPay	RVA Developers	H	TBD	9/30/2025	SR 13099067 to calculate interest due for refunds
2	Daily Settlement Process SOP - RVAPAY	Heather / Deunaique	H	8/1/2024		Currently in two settlement processes. Needs to be condensed in one. Sent over to Monte to get his input to shorten
3	WPI - Payment Reversal/NSF Process	Monte	H	4/8/2025	10/31/2025	04/09/2025: Presented the slide deck during the 4:30pm Daily RVAPay Meeting to discuss the current workflow and recommended workflow for process improvement/internal controls. UAT Testing with a Production date pending in May 2025; Refunds will be the last module built; cashing has to be finished for all modules to eliminate IATs; 6/18/25: SR to be sent to Michelle/RT by Monte
4	ATOM Payments in VI - educate the taxpayer with filing VA Interactive to pay	Monte / JL	H	2/20/2025	10/1/2025	educate the public to file online with VI (pull a report of taxpayers who pay via manual check); no coupons to be issued in 26; involve large co. early; get OSC involved
5	OPEX Scanner Upgrade	Monte	H	5/15/2025	10/1/2025	working with Heather (Teasury) on a replacement machine
6	WPI for RVA-Munis/Personal Property Lock box Uploads	John/Dominique/Bonita	H	6/11/2025	TBP	Review the workflow to expedite the process to upload lockbox files when a business has not certified and its delaying the posting of payments; Monte to develop the workflow and work with WF (Heather) to have the PPRVA and Munis import files to be separated. Current work around, if items will be internally marked as certified, so payments can post, but list will still be sent to business unit to "whiteglove"
7	WPI - RVAPay - Reversal Access	Monte/Dominique	H	6/12/2025	6/20/2025	Monte to complete the authorization form that will allow Dominique to perform payment reversal; however, with this process, Dominique is not allowed to adjust charges and/or etc to accounts/invoices. We will work with IT to update the business process so receipt reversals are separate from billing/charge adjustment.
D ASMT - Business						
1	Compliance Project - State Accesses to Support Audit/Statutory (IRMS, SCC, ABC, Health) Lookup	John L	M	7/1/2024	TBP	6/17-SCC access available to all IRMS access must be requested. John L. has access as do some in Delinquent Collections. No recent progress on adding more BU staff members. ABC licenses are public. Health Licenses access needs more work. 1/30-JL and ES work with DJ 604 List and LATonya SW authorized stat asmt to be 20% mer.
2	Compliance Project - Air BnB tax remittance status report to SW	John/Prentis	M	10/15/2024	TBP	6/17-Need Description
3	Compliance Project - PPTR Eligibility Verifications (no bus. Use/Uber/Lyft)	JL	M	9/1/2024	TBP	6/17-Need Description
4	Unposted Payments - Suspense Status & Dominion 3 checks unposted	Eric & Dominique	H	5/5/2025	Complete	checks were posted to past due accounts.
5	604 accts. Payment Allocation OIC Closure	Eric	H	3/1/2024	2/28/2025	NO OIGs on the street; 2-5 remaining need to have the information by no later than Friday, June 6, 2025
6	MUNIS Data Scrub & Corrections / KPMG Conversion Work / Credit Refunds	JL	H	5/7/2024	5/30/2025	KPMG taking lead. SCRUB & Research stage completion
a	177 BPP Accounts Requiring Historic Tax Correction	JL	M	1/15/2025	TBP	
b	39 25' New Business Lic. entered to MUNIS not RVAPortal	JL	H	2/20/2025	TBP	
c	25' New Business Lic. set up but no ATOM set up (2/20 email to JL)	JL	H	2/20/2025	TBP	
d	KPMG Result Processing & Credits Resolved	Eric	H	5/15/2025	5/30/2025	MAJOR IMPACT ON RVAPORTAL CUTOVER
e	Credit Balance review, notification, refunds	JL	H	9/26/2024	3/21/2025	6/17-Remove from Workplan Out of Statute. 3.20: Eric to schedule follow-up briefing; updated fr 11-30-24; 1128 credits PRESCRUB with 226 POSTSCRUB for review by Paymnt Albin team, draft letter approved by SW. Need update from Eric
7	RVA Portal QC & UAT	JL	H		TBP	
8	Work Process Development - Credit balance refunding Ordinance Compliance	JL	H	5/13/2024	4/15/2025	3.20: Sweep of accounts after KPMG finishes their audit; John & Eric meeting 12/12/2024 to discuss. Plan in place, will be with refund team. Need to complete SCRUB first. Temps to work on this. 225 total impact. 2/28/25 is initial due date.
9	Work Process Development - RVA & shared zip locality ALM Parcel/Split of Revenue Disbursement	Monte/Zach	H	6/2/2025	9/30/2025	This is a State Code not an agreement and covers all adjacent localities; need list of affected properties for current monitoring; need system solution in Portal build out.

UNIT WORK PLAN

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b	39 25' New Business Lic. entered to MUNIS not RVAPortal	JL	H	2/20/2025	TBP	
c	25' New Business Lic. set up but no ATOM set up (2/20 email to JL)	JL	H	2/20/2025	TBP	
d	KPMG Result Processing & Credits Resolved	Eric	H	5/15/2025	5/30/2025	MAJOR IMPACT ON RVAPORTAL CUTOVER
e	Credit Balance review, notification, refunds	JL	H	9/26/2024	3/21/2025	6/17-Remove from Workplan Out of Statute. 3.20: Eric to schedule follow-up briefing; updated fr 11-30-24; 1128 credits PRESCRUB with 225 POSTSCRUB for review by Paymt Alctn team, draft letter approved by SW. Need update from Eric
7	RVA Portal QC & UAT	JL	H		TBP	
8	Work Process Development - Credit balance refunding Ordinance Compliance	JL	H	5/13/2024	4/15/2025	3.20: Sweep of accounts after KPMG finishes their audit; John & Eric meeting 12/12/2024 to discuss. Plan in place, will be with refund team. Need to complete SCRUB first. Temps to work on this. 225 total impact. 2/28/25 is initial due date.
9	Work Process Development - RVA & shared zip locality ALM Parcel/Split of Revenue Disbursement	Monte/Zach	H	6/2/2025	9/30/2025	This is a State Code not an agreement and covers all adjacent localities; need list of affected properties for current monitoring; need system solution in Portal build out.

TEAM METRICS

Unit	Name	Notes	Day Tickets Completed	Day Hrs Worked	Overtime Tickets Completed	Overtime Hrs Worked	Total Tickets Completed	Total Hrs Worked	Per Hr Rate	SOP Ticket Metric Per Hour	Over/Under Metric
BU	redacted	OOO	0	0			0	0	0.00	3	-3.00
BU	redacted	tickets	18	7.5			18	7.5	2.40	3	-0.60
BU	redacted	training/tickets/BPI	13	7.5			13	7.5	1.73	3	-1.27
BU	redacted	Testing/Escalation	0	7.5			0	7.5	0.00	3	-3.00
BU	redacted	tickets	3	7.5			3	7.5	0.40	3	-2.60
BU	redacted	OOO	0	0			0	0	0.00	3	-3.00
BU	redacted	tickets	15	7.5			15	7.5	2.00	3	-1.00
BU	redacted	OOO	0	0			0	0	0.00	3	-3.00
BU	redacted	OOO	0	0			0	0	0.00	3	-3.00
BU	redacted		4				4	0	0.00	3	-3.00
Business Unit:			53	37.5			53	37.5	1.41	3	-1.59
CU	redacted	BU refunds	0	7.5			0	7.5	0.00	4	-4.00
CU	redacted	BU refunds	0	7.5			0	7.5	0.00	4	-4.00
CU	redacted	Refunds	0	7.5			0	7.5	0.00	4	-4.00
CU	redacted		0				0	0	0.00	4	-4.00
Payment Allocation:			0	22.5			0	22.5	0.00	4	-4.00
DC	redacted	RE Tickets - GAP	16	7.5			16	7.5	2.13	5	-2.87
DC	redacted	tickets	2	7.5			2	7.5	0.27	5	-4.73
DC	redacted	tickets	10	7.5			10	7.5	1.33	5	-3.67
DC	redacted	OOO	0	0			0	0	0.00	5	-5.00
DC	redacted	Front Counter	4	7.5			4	7.5	0.53	5	-4.47
DC	redacted	tickets	1	7.5			1	7.5	0.13	5	-4.87
Delinquent Collections:			17	37.5			33	37.5	0.88	5	-4.12
PP	redacted		11	7.5			11	7.5	1.47	4	-2.53
PP	redacted	QC	12	7.5			12	7.5	1.60	4	-2.40
PP	redacted	QC	0	7.5			0	7.5	0.00	4	-4.00
PP	redacted	tickets	9	7.5			9	7.5	1.20	4	-2.80
PP	redacted	tickets	14	7.5			14	7.5	1.87	4	-2.13
PP	redacted	tickets/front counter	13	7.5			13	7.5	1.73	4	-2.27
PP	redacted	OOO	0	0			0	0	0.00	4	-4.00
PP	redacted	OOO	0	0			0	0	0.00	4	-4.00
PP	redacted	QC	8	7.5			8	7.5	1.07	4	-2.93
PP	redacted	Front Counter	17	7.5			17	7.5	2.27	4	-1.73
Personal Property:			84	60			84	60	1.40	4	-2.60
RE	redacted	OOO	0	0			0	0	0.00	5	-5.00
RE	redacted	front counter/ticket	11	7.5			11	7.5	1.47	5	-3.53
RE	redacted	OOO	0	0			0	0	0.00	5	-5.00
RE	redacted	OOO	0	0			0	0	0.00	5	-5.00
RE	redacted	tickets	14	7.5			14	7.5	1.87	5	-3.13
RE	redacted	tickets	15	2.5			15	2.5	6.00	5	1.00
RE	redacted		0				0	0	0.00	5	-5.00
Real Estate:			56	17.5			40	17.5	2.20	5	2.70

DAILY METRIC REPORTS TO MANAGE CUSTOMER SERVICE

City of Richmond - Finance Department Cumulative Daily Ticket Report - 05/30/25

Tax Season Goals:	Average Number of Days Outstanding - 7	Percentage of Tickets in SLA - 80%
Revenue Standards:	Average Number of Days Outstanding - 2	Percentage of Tickets in SLA - 99%

Unit	Total Outstanding	Outside of Service Level Agreement	Penalty & Interest Tickets	Average Number of Days Outstanding	Percentage of Tickets in SLA
Personal Property	994	664	91	20.35	33%
Real Estate	1510	631	58	15.42	58%
Business	126	48	8	9.38	62%
Cash Operations	30	21	4	18.70	30%
Delinquent Collections	56	24	20	9.34	57%
Tax Enforcement	0	0	0	0.00	100%
Payment Allocation	275	225	8	53.42	18%
Other	18	18	0	30.78	0%
Total	3009	1631	189	20.28	46%

Going Out of SLA

Business	Delinquent Collections	Personal Property	Cash Operations
5/31/2025 3	5/31/2025 6	5/31/2025 42	5/31/2025 2
6/1/2025 0	6/1/2025 1	6/1/2025 9	6/1/2025 1
6/2/2025 0	6/2/2025 1	6/2/2025 7	6/2/2025 0
6/3/2025 0	6/3/2025 2	6/3/2025 12	6/3/2025 0

Real Estate	Payment Allocation	Tax Enforcement	Other
5/31/2025 45	5/31/2025 12	5/31/2025 0	5/31/2025 0
6/1/2025 3	6/1/2025 0	6/1/2025 0	6/1/2025 0
6/2/2025 1	6/2/2025 0	6/2/2025 0	6/2/2025 0
6/3/2025 6	6/3/2025 0	6/3/2025 0	6/3/2025 0

Daily Ticket Activity					
Unit	Start of Day	Added	Closed	End of Day	OOSLA
PP	926	145	107	964	634
RE	1371	130	28	1473	566
BU	117	41	28	130	66
CO	26	1	0	27	12
DC	61	18	28	51	22
TE*	0	0	0	0	0
PA	267	6	0	273	176
Total	2768	341	191	2918	1476

End of Day	Waiting On:			Notes:
	Refund Check	Customer	Team	
964			964	
1473			1473	
130			130	
27			27	
51			51	
0			0	
273			273	
2918	0	0	2918	



CULTURAL TRANSFORMATION

ter by Closed Date, Owner Group, Department, Service Type, or Overall Satisfaction. Table below graph provides detailed responses for each survey.

late

- 2018
- 2019
- 2020
- 2021
- 2022
- 2023
- 2024
- 2025

Owner Group

- Business Unit
- Delinquent Collections
- Finance - Internal Support Request
- Finance-Shared
- Payment Allocation Unit
- Personal Property
- Real Estate

Department

- CS
- DOF
- DPR
- DPU
- DPW
- DSS
- OADS
- PDR

Service Type, Subtype

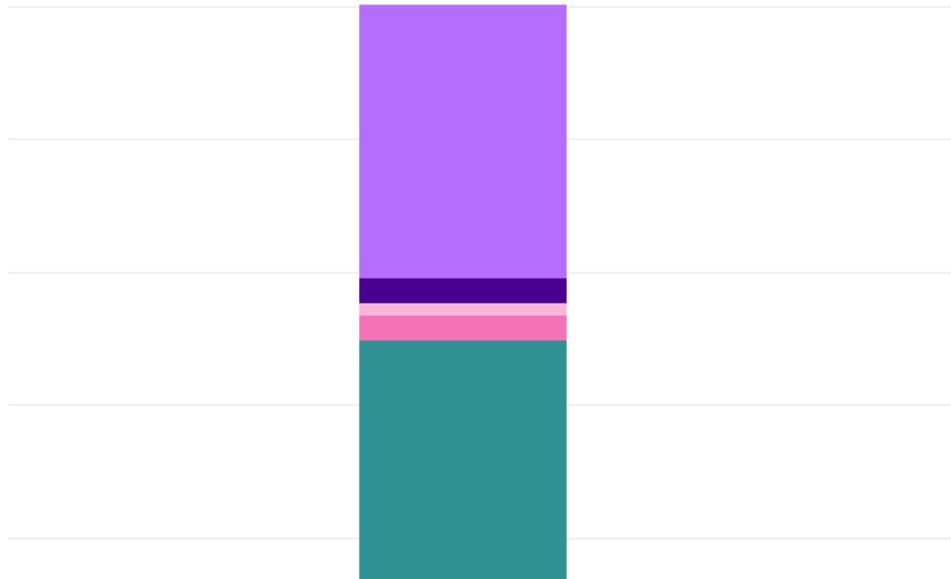
- Admissions Transient Occupancy and Meals
- Business Personal Property and Manufacturing & Tool
- Business Professional and Occupational Licenses
- Delinquent Collections
- Finance Bill Upload Request
- Finance Mail Scan Tickets
- Finance Payment Allocation Special Projects
- Finance Team Internal Support

Overall Satisfaction

- 1
- 2
- 3
- 4
- 5

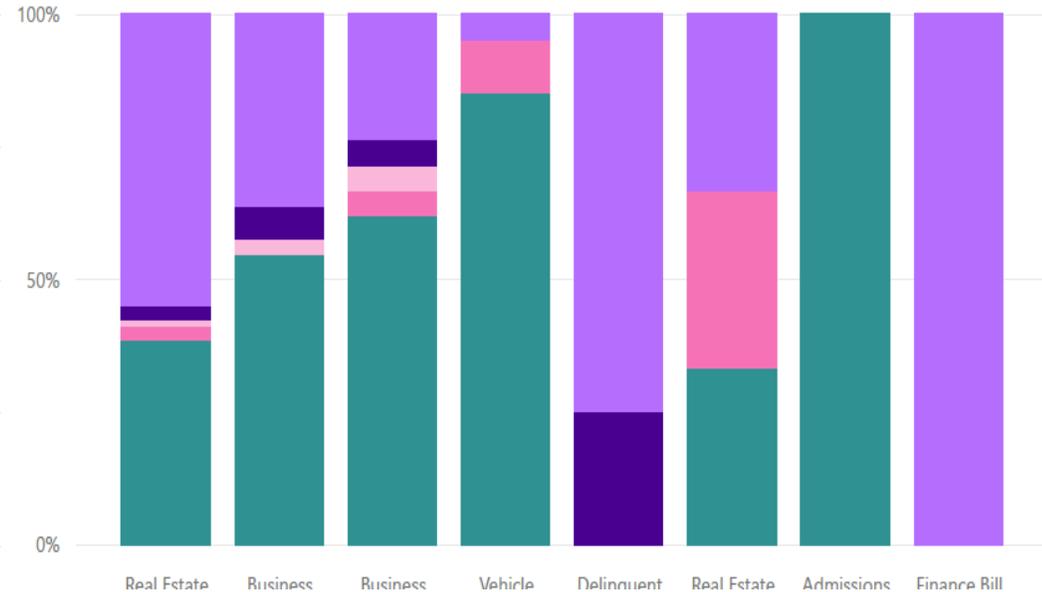
f Overall Satisfaction by Department

isfaction ● 1 ● 2 ● 3 ● 4 ● 5



Count of Overall Satisfaction by Service Type

Overall Satisfaction ● 1 ● 2 ● 3 ● 4 ● 5



EMPIRICAL DATA ON THE CUSTOMER SERVICE EXPERIENCE

Survey Report

2024

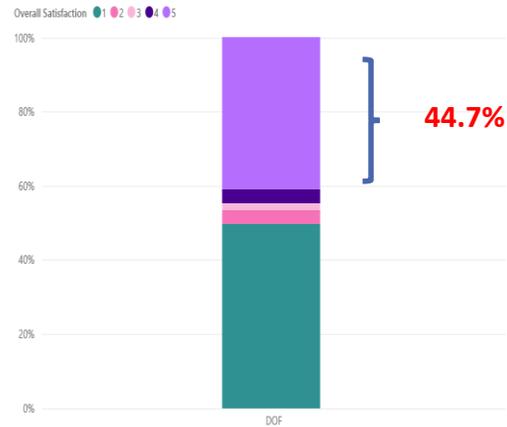
Reset Filters

Summary: Distribution of survey ratings based on overall satisfaction (1-5) for a selected date range.

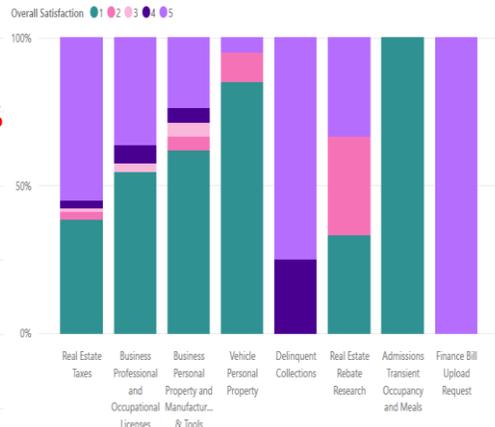
Detail: Filter by Closed Date, Owner Group, Department, Service Type, or Overall Satisfaction. Table below graph provides detailed responses for each survey.

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 - Finance Payment Allocation Special Projects
 - Finance Team Internal Support
- Overall Satisfaction**
 - 1
 - 2
 - 3
 - 4
 - 5

Count of Overall Satisfaction by Department



Count of Overall Satisfaction by Service Type



Survey Report

2025

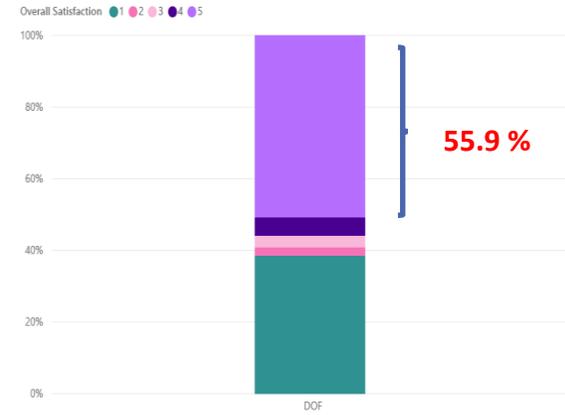
Reset Filters

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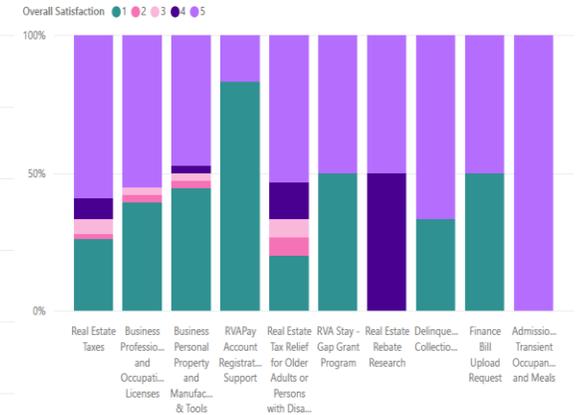
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 - Delinquent Collections
 - Finance - Internal Support Request
 - Finance-Shared
 - Payment Allocation Unit
 - Real Estate
 - RVAPAY Support
- Department**
 - CS
 - DOF
 - DPR
 - DPU
 - DPW
 - DSS
 - HSD
 - OADS
- Service Type, Subtype**
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 - Business Personal Property and Manufacturing & Tool
 - Business Professional and Occupational Licenses
 - Delinquent Collections
 - Finance Bill Upload Request
 - Finance Mail Scan Tickets
 - Finance Payment Allocation Special Projects
 - Finance Team Internal Support
- Overall Satisfaction**
 - 1
 - 2
 - 3
 - 4
 - 5

Count of Overall Satisfaction by Department



Count of Overall Satisfaction by Service Type



EMPIRICAL DATA ON THE CUSTOMER SERVICE EXPERIENCE

Front Counter Customer Service Survey Results

Department of Finance

Through the period ending July 14, 2025

Was your issue resolved to your satisfaction?	Count	Avg. Score: My issue was resolved in a timely manner (1 to 5 scale; 5 highest)	Avg. Score: The representative was friendly and professional while assisting me (1 to 5 scale; 5 highest)
No	35		
Yes	338		
Grand Total	373	4.57	4.73

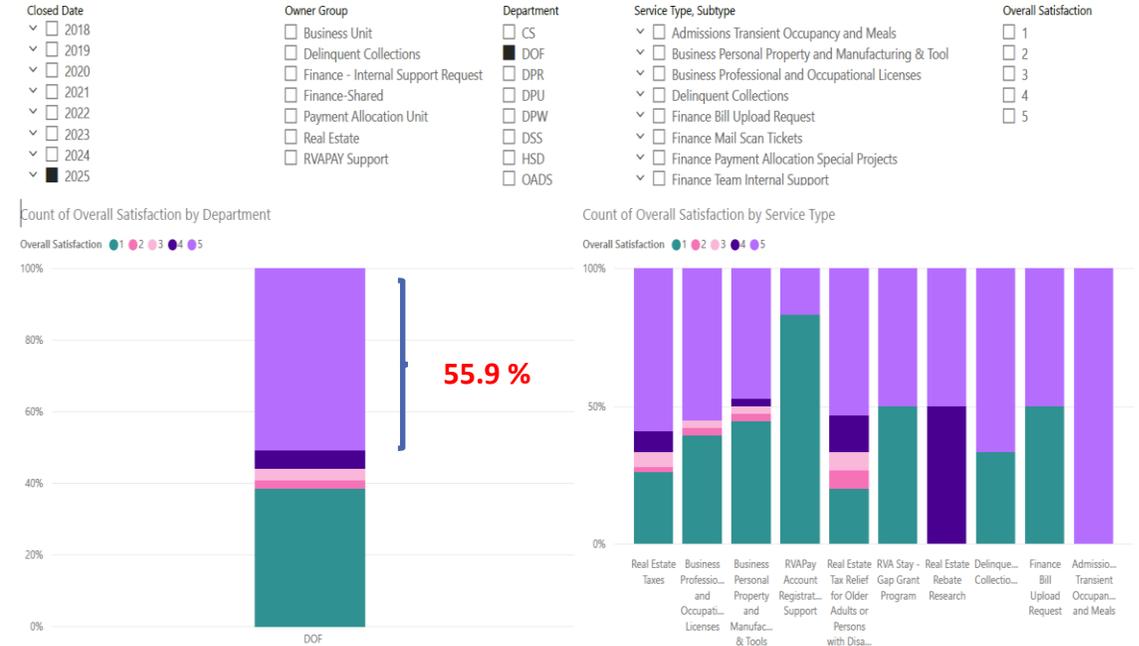
2025

Survey Report

Summary: Distribution of survey ratings based on overall satisfaction (1-5) for a selected date range.

Detail: Filter by Closed Date, Owner Group, Department, Service Type, or Overall Satisfaction. Table below graph provides detailed responses for each survey.

Reset Filters



PERSONAL PROPERTY



BILLS PRODUCED BASED ON INPUTS

Assessment Sources:

- Roll forward from prior year in system
- Department of Motor Vehicles (DMV) records

Valuation Sources:

- JD Power - National Automobile Dealers Association (NADA)
- Depreciation
- Significant Older Vehicles (SIG)

IMPROVEMENTS TO PERSONAL PROPERTY BILLING PROCESS

- 2021-2023: Building and implementing RVA Pay
- 2023: Converted data from MUNIS into RVA Pay
- 2024: First annual billing in RVA Pay
- 2025: Refined the system and data
 - Data cleansing with DMV (ongoing)
 - Automated integration of DMV files and valuation sources
 - Assessments tied actual vehicle VIN at specific feature level
 - Built dashboards for quality control and performance monitoring

AUTOMATING THE PROCESS

#	Step	Past	Present
1	Roll forward data	Export from previous year into Excel	Automated roll forward within RVA Pay
2	DMV data	Merge Flat file from DMV with roll forward data file	DMV file integrated into RVA Pay directly from DMV File Transfer Protocol (FTP)
3	Assessment	NADA flat file updates to data in the file with roll forward and DMV records)	Application Programming Interface (API) for direct integration into RVA Pay
4	Upload revised data	Import revised data into MUNIS	Eliminated
5	Billing	Create bills	Automated and posted to RVA Pay Portal instantaneously.
6	Quality Control	3 rd party print vendor prints the bills and Finance staff reviewed paper bills for accuracy	Over 200 queries created to identify issues
7	Mailing	3 rd party vendor to print, upload to Invoice Cloud and mail	3 rd party vendor to print and mail
8	Credit card fees	Applicable	Eliminated

DMV INTEGRATION - ADDS/DELETES PER YEAR



Before: Complex Excel files, manual tracking, late billings, frequent errors



After: Push-button operation, automated assessments, timely billing



Bonus Achievement: Major data scrub updated vehicle ownership records



ROI: Time savings, accuracy improvements, revenue recovery

INTERNAL MONITORING OF KEY PERFORMANCE INDICATORS

Annual Bill Analysis

Home | **Bill Summary** | VIN (Yr over Yr) | VIN % Comparison | VIN Facet | Bill Facet | Analysis | DMV | Metrics

Chart YoY Assessment Used per Billing | Chart YoY Assessment Used per Billing | Yr Veh Assessment per Billing | **Top Make / Models Billed** | MIN / MAX Assessments | Median Assessments

Top Make / Models Billed

Veh Make	Veh Model	Overall Avg Assessment	Total Vin Count	2025 Vin Count	2024 Vin Count	2023 Vin Count	2025 Avg Assessment	2024 Avg Assessment	2023 Avg Assessment
HONDA	CIVIC	\$6,303.13	6,005	3,751	4,762	3,269	\$6,325.30	\$6,430.41	\$6,097.10
TOYOTA	CAMRY	\$8,297.98	5,741	3,840	4,498	2,971	\$8,488.15	\$8,129.31	\$8,311.93
HONDA	ACCORD	\$6,839.02	5,286	3,308	4,154	3,002	\$6,952.09	\$6,940.26	\$6,580.68
TOYOTA	COROLLA	\$8,939.69	4,459	3,084	3,651	2,122	\$8,624.72	\$8,787.55	\$9,643.83
NISSAN	ALTIMA	\$6,729.23	4,046	2,446	3,180	2,575	\$6,400.61	\$6,577.61	\$7,221.23
TOYOTA	RAV4	\$19,147.98	3,680	2,781	3,049	1,556	\$19,343.90	\$18,897.04	\$19,294.28
HONDA	CR-V	\$12,592.34	3,557	2,590	2,932	1,505	\$12,544.36	\$12,930.98	\$12,022.04
FORD	F150	\$17,009.79	3,250	2,350	2,473	1,701	\$16,239.24	\$17,549.30	\$17,262.60
FORD	ESCAPE	\$8,402.66	3,056	2,026	2,377	1,626	\$7,894.85	\$8,286.46	\$9,192.60
HYUNDAI	ELANTRA	\$7,703.66	3,008	1,799	2,414	1,636	\$6,905.49	\$7,590.53	\$8,741.08
CHEVROLET	SILVERADO	\$17,489.39	2,866	2,088	2,141	1,579	\$17,510.63	\$17,516.64	\$17,424.00

Annual Bill Analysis

Home | **Bill Summary** | VIN (Yr over Yr) | VIN % Comparison | VIN Facet | Bill Facet | Analysis | DMV | Metrics

Chart YoY Assessment Used per Billing | Chart YoY Assessment Used per Billing | Yr Veh Assessment per Billing | **Top Make / Models Billed** | MIN / MAX Assessments | Median Assessments

Top Make / Models Billed

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HYUNDAI	ELANTRA	\$7,703.66	3,008	1,799	2,414	1,636	\$6,905.49	\$7,590.53	\$8,741.08
CHEVROLET	SILVERADO	\$17,489.39	2,866	2,088	2,141	1,579	\$17,510.63	\$17,516.64	\$17,424.00
SUBARU	FORESTER	\$13,935.86	2,829	2,167	2,447	1,062	\$13,354.37	\$14,218.01	\$14,458.29
HYUNDAI	SONATA	\$6,890.85	2,661	1,572	2,085	1,536	\$6,356.30	\$6,727.25	\$7,643.70
NISSAN	SENTRA	\$6,819.28	2,635	1,654	2,078	1,558	\$6,192.46	\$6,681.40	\$7,648.63
TOYOTA	TACOMA	\$17,388.00	2,632	1,946	2,157	1,223	\$17,435.47	\$17,957.73	\$16,317.37

Annual Bill Analysis

Home | **Bill Summary** | VIN (Yr over Yr) | VIN % Comparison | VIN Facet | Bill Facet

Dashboard

Support Ticket Counts-TS | Tickets by Year with YoY Changes-TS | Tickets by Year with YoY Changes-TS

Tickets by Year Detailed by Type

Tickets by Year with YoY Changes-FY

Type	2024	2025	YoY Change %
Correction of Tax Record (moved, Sold, Missing Vin)	2,901	1,739	-40.1
Delinquent Account Support	768	643	-16.3
Payment Research, P&I Waiver Request	5,159	4,621	-10.4
Refund, High Mileage Assessment	3	228	7500
Routine Requests for Access, Info Update, bill copy	2,014	1,072	-46.8
	4,695	2,583	-45
Report Total:	15,540	10,886	

Download | Print

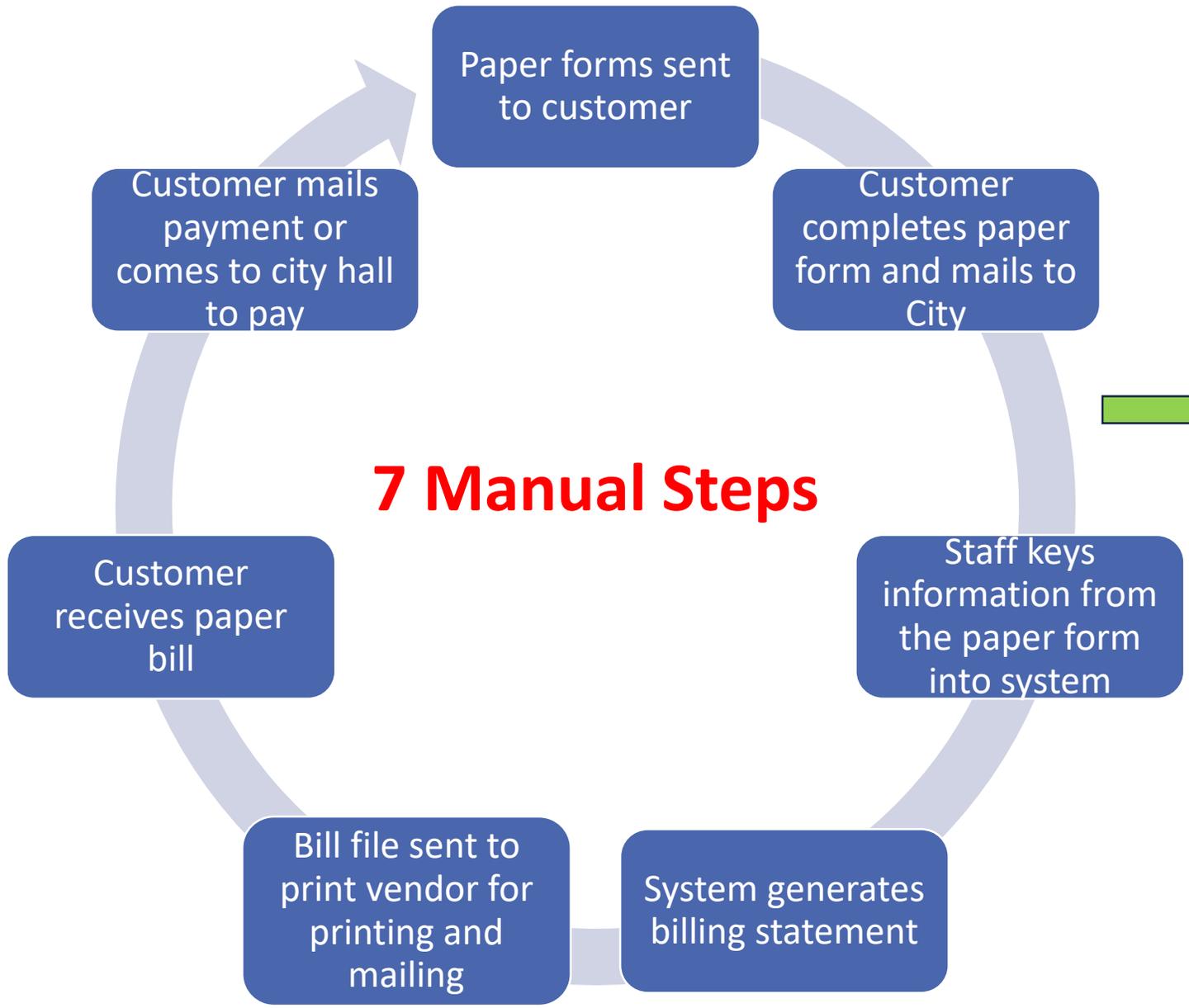
row(s) 1 - 6 of 6



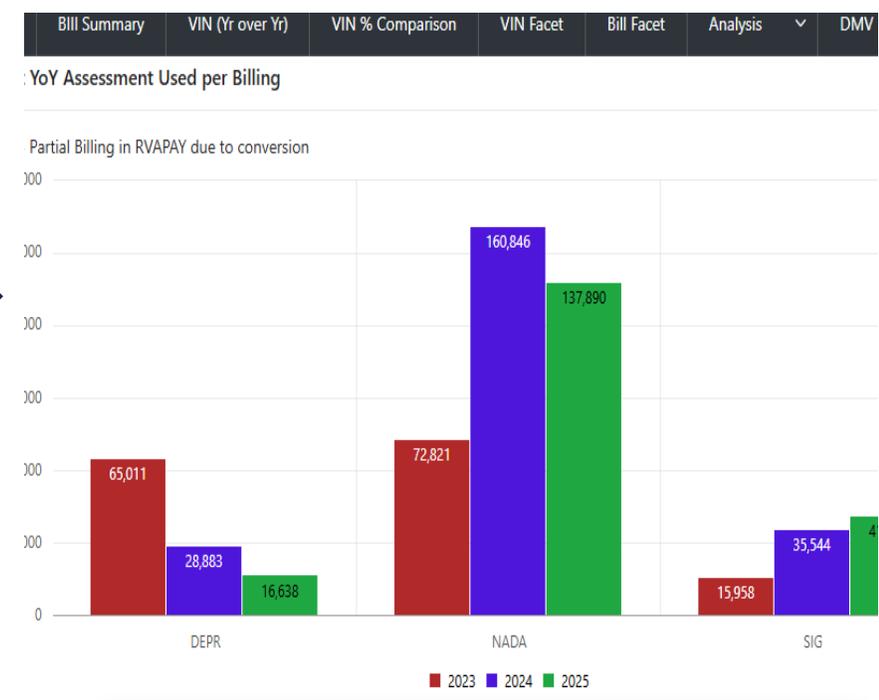
RVA BUSINESS PORTAL



EVOLUTION FROM PAPER TO PAPERLESS IN 4 MONTHS



Single-Point Processing



RVA BUSINESS PORTAL CUSTOMER JOURNEY

Old Experience

No Visibility
Manual Renewals
Payment Challenges
Credit Card Fees
Call, Email, or Visit



New Experience

Self-Service Portal
Real-Time Account Access
Multiple Payment Options
No Credit Card Fees
White Glove Service
Book an Appointment

Competitive Advantage

Many cities still struggle with
basic infrastructure

Customer Satisfaction

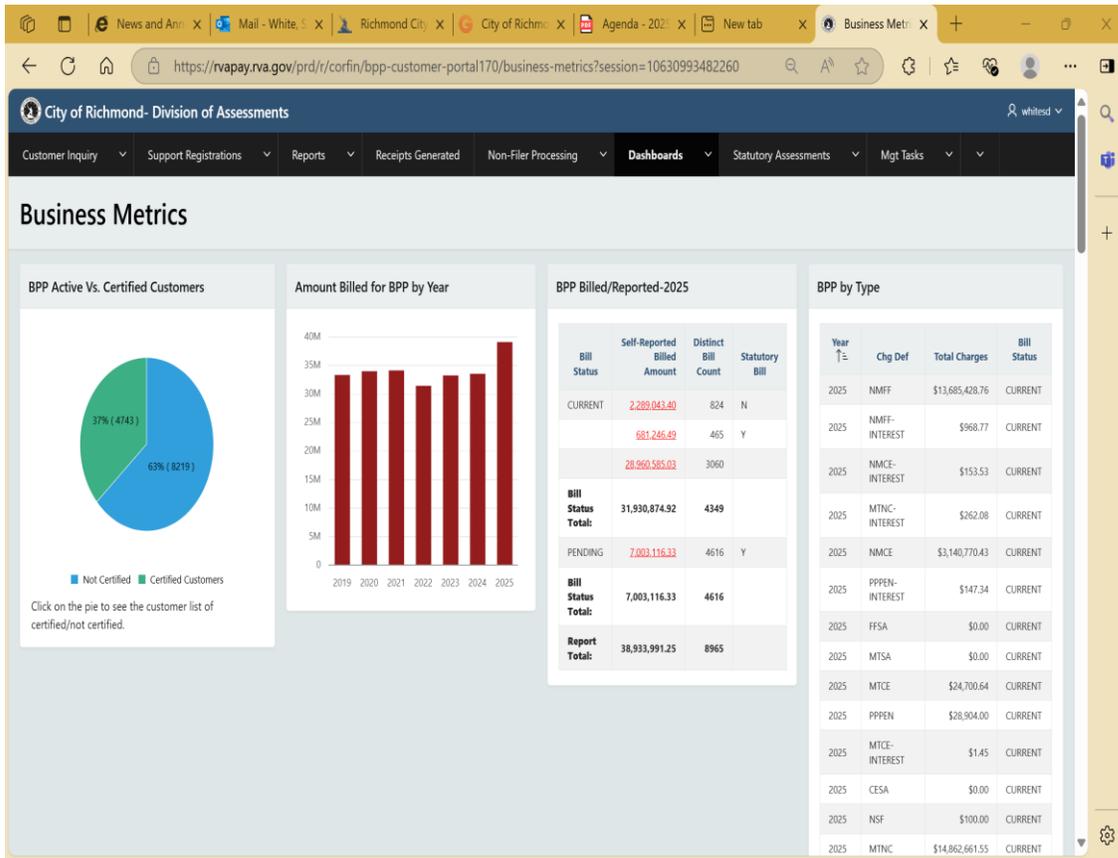
Measurable improvements in
service delivery

2025 - 2026 DATA ACCURACY AND AUTOMATION

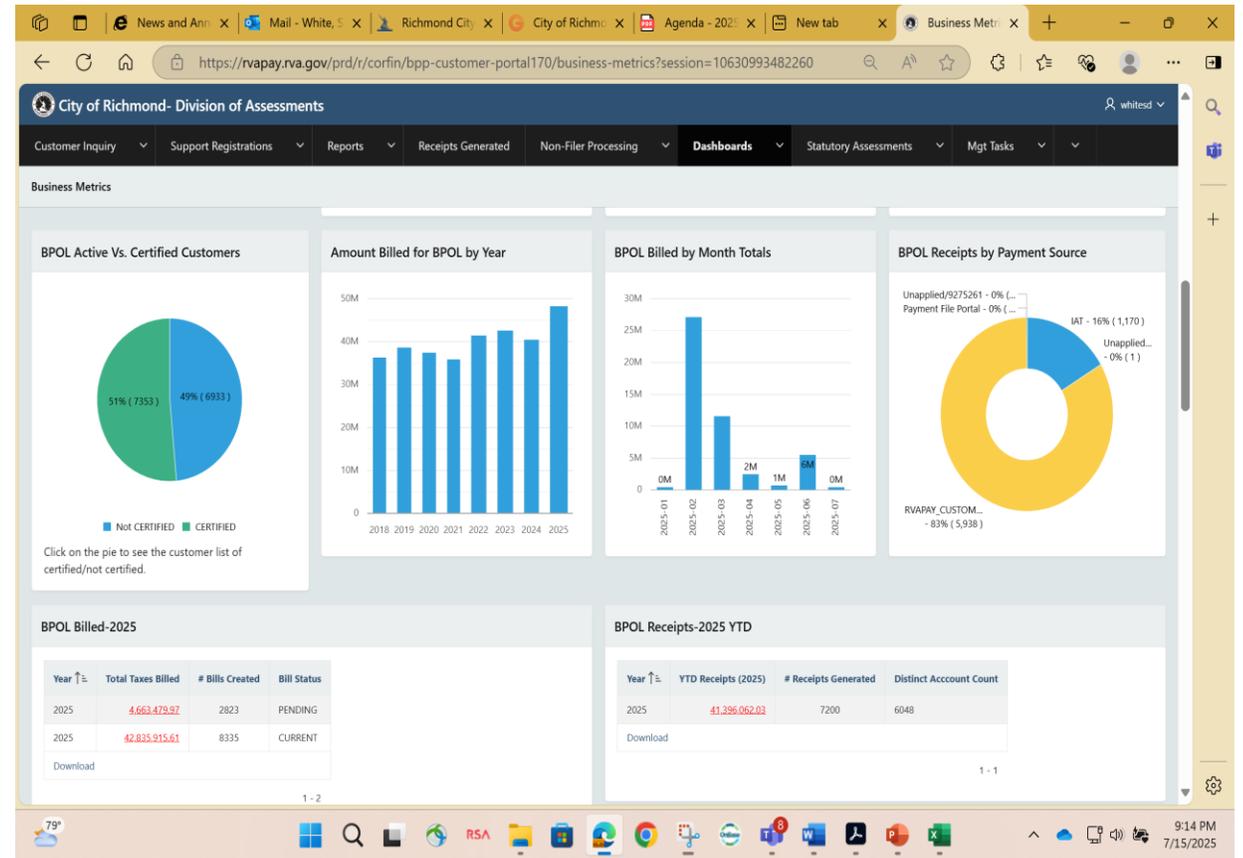
- KPMG contracted to perform a forensic audit of all business accounts
 - Forensic audit complete
 - Implementation of recommendations in process
- Build out RVA Pay Business Portal features
 - Business Personal Property (BPP),
 - Business, Professional and Occupational License (BPOL),
 - Admissions, Transient Lodging, Occupancy, and Meals Tax (ATOM)
- Design, develop, and implement remaining RVA Pay modules:
 - Real Estate
 - General Billings

RESULTS

Business Personal Property



Business Professional Occupational License



CULTURE: PAST, PRESENT, AND FUTURE

Past

- Fear of and Resistance to change
- Competency challenges
- Passing the blame
- Reliving past failures
- Lack of training
- Lack of professional development
- Accountability
- Cliques
- Secrecy and sabotage
- Silos of information
- Diminished professionalism
- Lack of urgency
- Personality based work completion

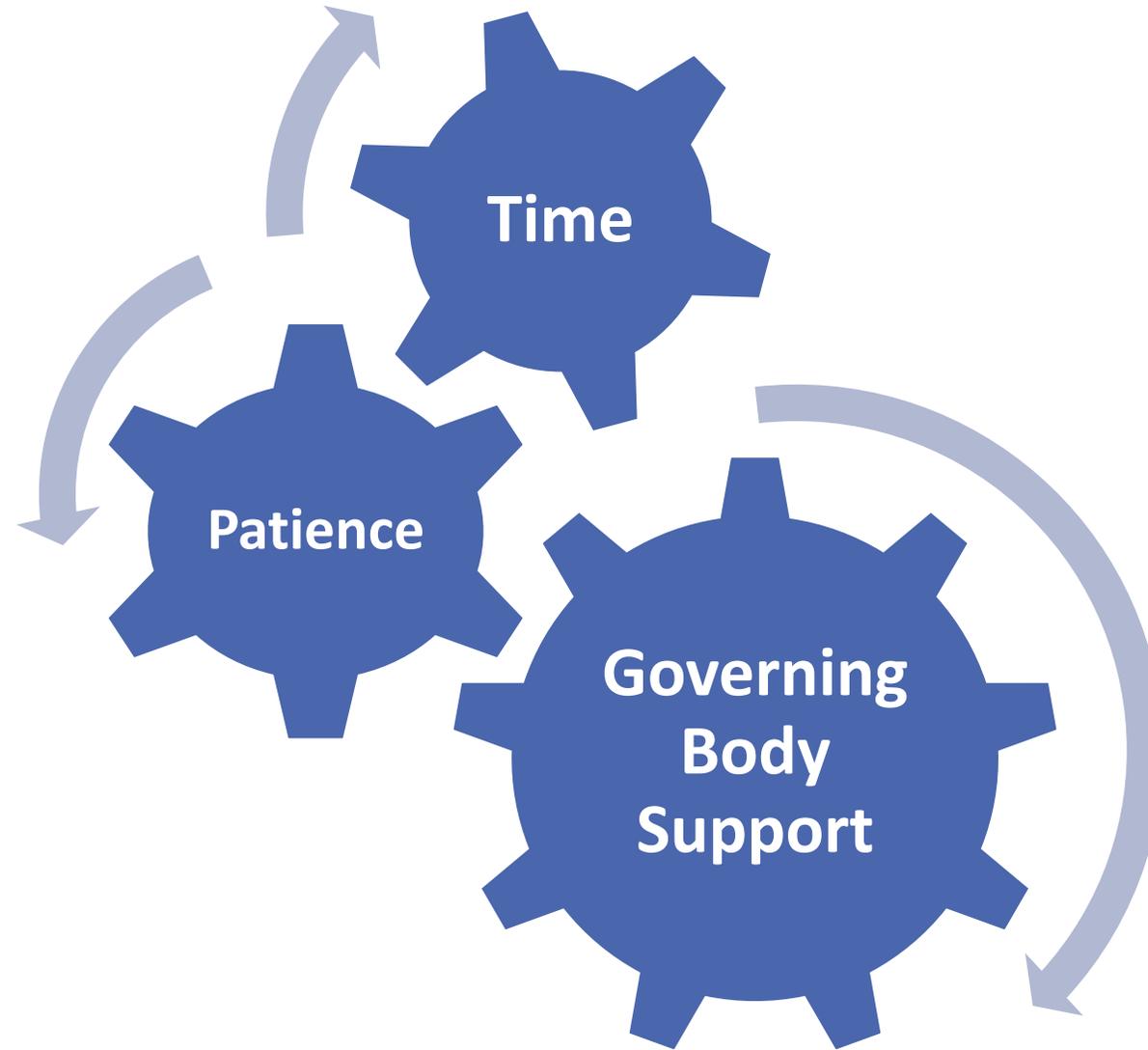
Present

- Cohesive team environment on 10th floor
- Continued challenges in competency in Revenue Administration
- Job specific training provided
- Professional development provided
- Minimized silos of information
- Standard of professionalism communicated and expected
- Customer focused work
- Performance and issue resolution time is monitored
- Performance issues addressed timely
- Pockets of resistance to adherence of core values
- Pockets of cliques still exist
- Pockets of secrecy and sabotage

Future

- Continue to build digital solutions
- Complete RVAPay
- Culture of excellence adhered to by all employees
- Highly competent and trained staff
- Certified offices by the Commissioner of Revenue and Treasure's Associations
- Team environment
- Right people in the right seats

FUTURE IS BRIGHT

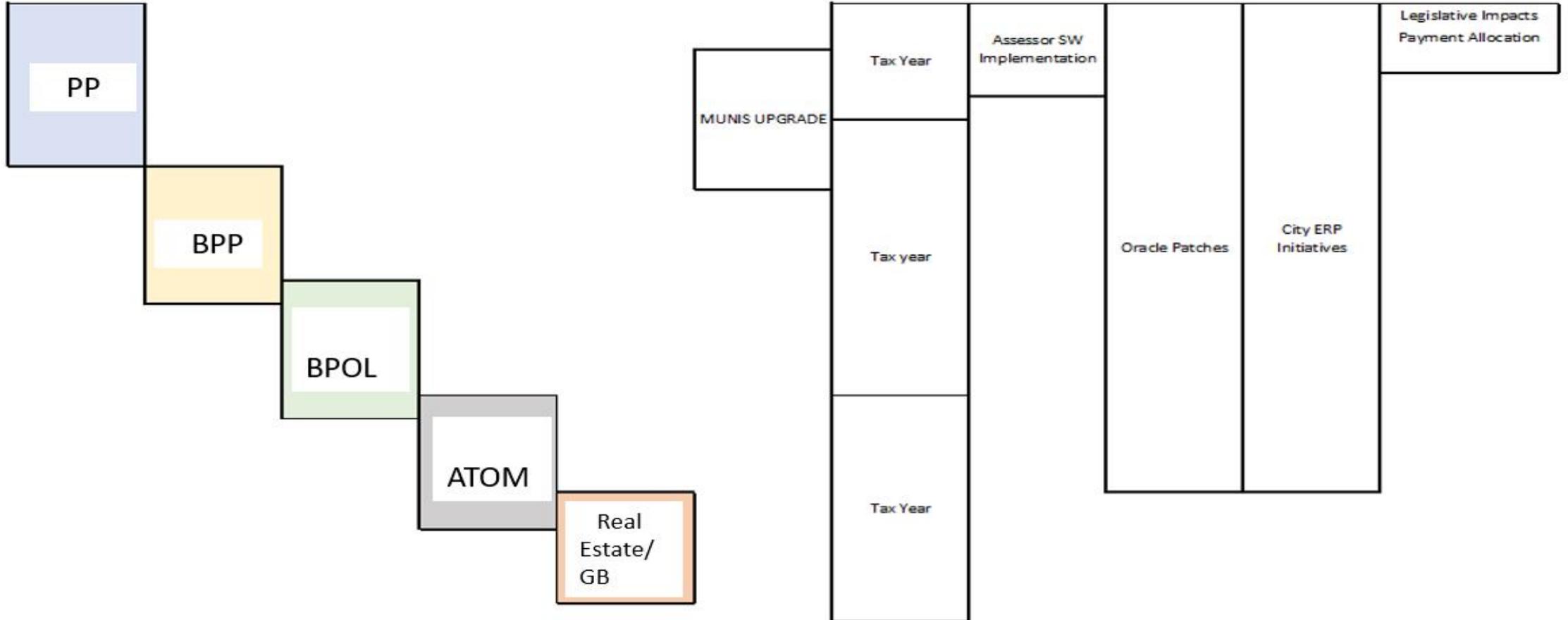


APPENDIX



RVAPAY/RVA BUSINESS PORTAL TIMELINE

2/1/2024
3/1
4/1
5/1
6/1
7/1
8/1
9/1
10/1
11/1
12/1
1/1/2025
2/1
3/1
4/1
5/1
6/1
7/1
8/1
9/1
10/1
11/1
12/1
1/1/2026
2/1
3/1
4/1
5/1
6/1



Real Estate	ALM	BPOL	BPP	General Billing
Requirements	Requirements	Requirements	Requirements	Requirements
Design	Design	Design	Design	Design
Build	Build	Build	Build	Build
Unit Testing				
UAT/Training	UAT/Training	UAT/Training	UAT/Training	UAT/Training
Implementation	Implementation	Implementation	Implementation	Implementation

Personal Property Processing Rules**Dated:** 4/21/2025; Updated 5-7-25**Provided to Team:** 4-21-25 shared with 311 via PDF email; 4-22-25 Reviewed & shared with PP team by Amber Clarke**Billing: (Process is detailed on "PP Billing Calndr & Steps" Tab)**

- 1 **DMV RECORD UPDATES BEFORE BILLING:** DMV provides a weekly (move in's/addresses) and monthly (ALL activity) file for immediate download fr DMV, upload to RVAPay, and run with confirmation by the PP Supervisor of timeliness of actions to the Revenue Manager, Program & Ops Manager. There is an "Exceptions" file that is produced from each DMV upload that requires review by staff to clear and incorporate into the RVAPay data fields (address' not found in GIS lookup, no class code, tax exempt status, lease customer flag, etc.). DMV records should be CURRENT before all billing.
- 2 **ANNUAL BILLS** are mailed 1 time per year NLT 4/22 and due 6/5 for 45 day advance bill requirement per City Code. A billing write off of \$5 or less is part of process.
- 3 **SUPPLEMENTAL BILLS** are to be processed monthly after annual billing process and by 15th of month with 45 day advance bill requirement per City Code.
- 4 **DELINQUENT BILLS** are sent shortly after the original billing due date providing 30 days from mailing date as due date. We suppress for \$20 or less (and never refer to TACS for \$20 or less.) TACS referral occurs 6 months after the DQ bill due date.
- 5 **SPECIAL BILL GENERATION** is performed by restricted access staff members for adjustments only and Bill Type "7" in RVAPay (supplemental) where the customer "cannot" wait for the monthly supplemental bill generation process.
- 6 Taxation **IN STATUTE** is permitted for current calendar year (CY) plus 3 back years (prior than this are OOSTatue unless sent to TACS Collection)
- 7 A small balance **WRITE OFF** is done for CRedit and DR (debit) balances of -\$5 to +\$5 for billing efficiency.
- 8 A "**REDISTRIBUTION**" of CR balances over \$5 is performed from the oldest year consecutively to the CY to reduce any balances due as part of billing. No redistribution of CR balances applies to leased vehicles.
- 9 **BILL MAILING:** A 3rd Party Billing Vendor, DataMatx, is used for bill mailing. They use NCOA to redirect any bad addresses & share impacted address file (post to e-trax) for RVAPay system update notice to development team. These addresses are to be placed into the "temporary address field" for use until a DMV match address appears. Need to automate this as currently requires advisement to developers to process.

Delinquency:

- 1 **TACS** is City 3rd party **DELINQUENT VENDOR**. Customer accounts are flagged (DSO, Bankruptcy, TACS) via parameter selection by DC when referred to TACS. A monthly file is received from TACS to report account payments/status via the payment file portal (Nina in Cash Ops processes). Flag is removed automatically once zero balance is met.
- 2 If the customer accounts is in **DSO**, payment can be made online.
- 3 If the customer account is in **TACS or Bankruptcy**, account holders cannot make payment through the customer portal. At login, customers will find that the Add to payment button is greyed out. They would select "Tab missing" as the 311 ticket category and create a ticket for assistance.
- 4 TACS referral should occur only after original bill + 1 delinquent bill + 6 months.
- 5 TACS referral of \$20 balance due or higher **ONLY**.
- 6 \$30 Admin Fee applies per ACCOUNT (not VIN) per YEAR for delinquency.
- 7 TACS flag reconciliation should be performed annually to confirm status of RVAPay flags.
- 8 1/1 Write Off of Bal Due accounts is to occur for OOSTatue year (unless sent to TACS which SB the case).

Taxation Processing Rules:

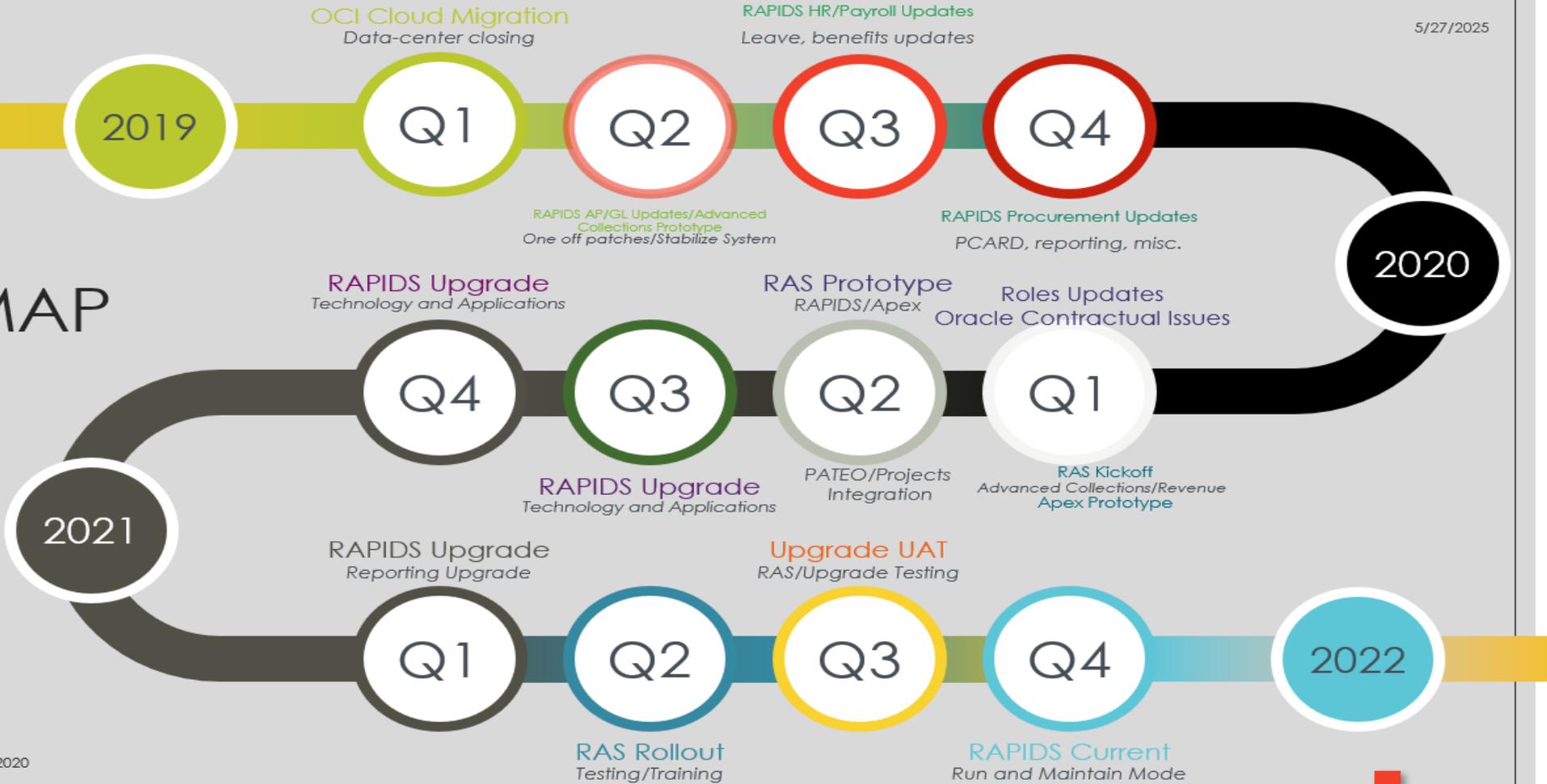
- 1 **DMV DATA IS THE OFFICIAL SOURCE** for billing and account adjustments (address, Move In/Out, Disposition dates, etc.) Customer driven requests must be verified to the DMV system record BEFORE processing any RVAPay edits. **IF the DMV record does not reflect the data advised by the customer, staff must redirect the customer to go to DMV to update their record such that it can be confirmed in the DMV system by staff before the City can make any bill or account adjustment.**
- 2 **DMV RECORD UPDATES:** DMV provides a weekly (move in's/addresses) and monthly (ALL activity) file for immediate download fr DMV, upload to RVAPay, and run with confirmation by the PP Supervisor of timeliness of actions to the Revenue Manager, Program & Ops Manager. There is an "Exceptions" file that is produced from each DMV upload that requires review by staff to clear and incorporate into the RVAPay data fields (address' not found in GIS lookup etc.). DMV records should be CURRENT before all billing.
- 3 **DMV "MOVE DT" & "DISP DT" (DISPOSITION) fields govern** for tax adjustments. **DO NOT USE THE DISPOSAL, PURGE OR CHANGE DATES for tax liability per DMV.** PURGE means the vehicle has not had tags with DMV for 24+ months but situs and ownership has not been impacted. DISPOSAL is not the same as "DISP" (DISPOSITION) and also has many meanings but does not necessarily align to change of ownership. CHANGE Date refers to the date the record was updated last by DMV for any changes. DMV Shana Saunders provided the following legend for various "disposition" detail:

CORERP/RAPIDS ROADMAP

5/27/2025

RAPIDS ROADMAP

2019-2021
3 Year Plan



WORKPLAN TO TRACK PROGRESS AND GUIDE UNITS

City of Richmond - Finance Department, Revenue Division									
Workload Metrics Tracking									
Personal Property Unit									
Last Update: 5-28-25 by AS									
Count	Personal Property Billing:	To Be Processed	Completed	% Complete	Count / Remaining	Due Date	Assigned To:	SOP Ref Link	Notes:
see 25 PP Billing Tab	25' PPTRA Rebate % Rate Calculation	1	1	100%	-	1-Feb	Billing Mngr	#	Provide VIN # & Value after Jan DMV file run to Jeff for PPTRA calc
	25' Tax Year Billing, Mailing & Public Advertisement	1	1	100%	-	15-Apr	Billing Mngr	#	Bill mailing by 4-22 to meet 45 day billing window before 6/5 due date
	25' Delinquent Billing	1	0	0%	1	August	Billing Mngr		Bill in July with 30 day billing window
	24' Delinquent Billing (Remaining VIN's on Billing Calndr tab)	1	0	0%	1	August	Billing Mngr		DMV Scrub Project
	PY Tax Correction Billing (Clean up Billing per Billing Calndr tab)	3	0	0%	3	July	Billing Mngr		DMV Scrub Project
DMV File Download/Upload/Run/ Manual Exclusion Exception Clearing (4 Weekly & 1 Monthly)									
	January (Dec Weekly + Monthly Data) - included in Annual Billing	5	5	100%	-	7th Monthly	Sue / Supvsr		
	February (Jan Weekly + Monthly Data) - Included in Annual Billing	5	5	100%	-	7th Monthly	Sue / Supvsr		
	March (Feb Weekly + Monthly Data) - Included in Annual Billing	5	5	100%	-	7th Monthly	Sue / Supvsr		
	April (March Weekly + Monthly Data) - Included in Annual Billing	5	5	100%	-	7th Monthly	Sue / Supvsr		
	May (April Weekly + Monthly Data)	5	5	100%	-	7th Monthly	Sue / Supvsr		
	June (May Weekly + Monthly Data)	5	2	40%	3	7th Monthly	Sue / Supvsr		
	6 Month June True Up File	1	0	0%	1	July Annually	Sue / Supvsr		
Supplemental Billing & Mailing - DMV Monthly File (Prior Month Data)									
see 25 PP Billing Tab	Feb - April in the Annual Billing (Jan - March Data)	3	3	100%	-	15th Monthly	Billing Mngr	#	
	May (April Data)	1	0	0%	1	15th Monthly	Billing Mngr		
	June (May Data)	1	0	0%	1	15th Monthly	Billing Mngr		
	25' Personal Property Rollbook - Annual Posting	1	0	0%	1	1st of May	Billing Mngr	#	
Revenue Progress									
	As of:	Tax Levy	Budgeted	Collected	Levy Collected	Budgeted Collected			#
	25' Annual Billing	5/28/2025	\$65,025,808	\$43,921,839	\$0	0%	0%		
	25' Supplemental YTD	Date	\$0						
	25' Motor Vehicle Licenses	Date	\$0	\$8,403,000	\$0	#DIV/0!	0%		
	25' Motor Vehicle Licenses YTD (Supplemental)	Date	\$0						
	25' Delinquent Billing	Date	\$0	\$9,890,886	\$0	#DIV/0!	0%		
Ticket Metric Reporting									
	As of:	Open Tickets	OOSLA	% SLA Compliant	Waiting On Refund, Transfer or P&I Process	Waiting on Customer Contact	Waiting on Team	Cross Check of Formula	
	5-27-25								
	In Process	371	356	4%	340	19	12	=	371
	Assigned / Not Started	389	0	100%	0	0	389	=	389
	Total:	760	356	53%	340	19	401	=	760
Other Items Tracking:									
	1 Lease Vehicle Accounts Reconciliation (LK assigned to Dan Rhodes SOP)				Origin Date	Due Date	Assigned To:	Status	
	2 SOP Development & Update				8/24	TBD	Marlo		
	3 Penalty and Interest Ordinance change SR				6/24	TBD	LK		
	4 Membership Agreements Admin (JD Power / DMV Access / Game & Inland Fish)				8/24	1/1/2025	Raj / Bonita	Complete	
					7/24	Annually	PP Supvsr		

DOCUMENTED SUBJECT MATTER KNOWLEDGE SHARING



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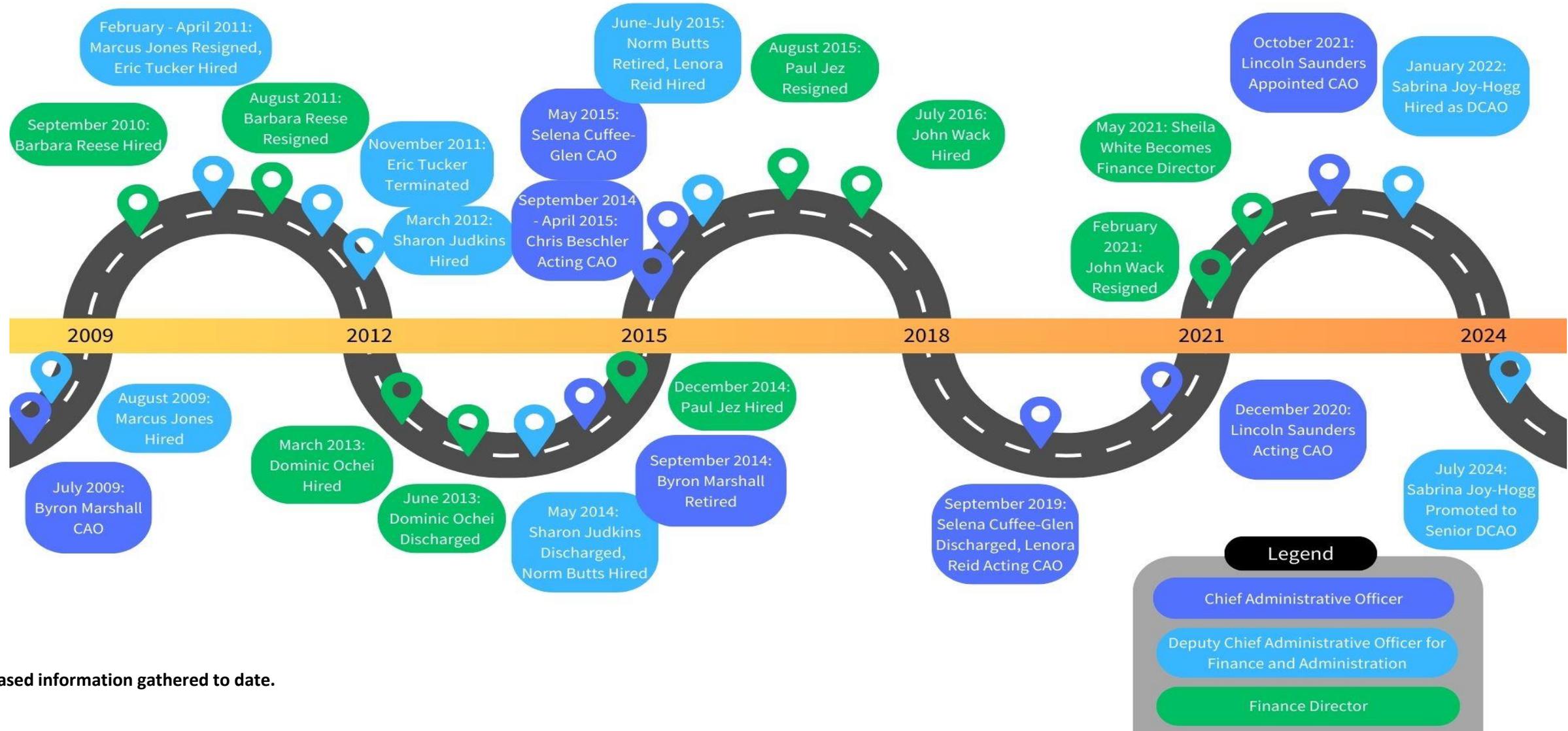
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15 Years of Leadership Turnover (CAOs, DCAOs, and Finance Directors)



Based information gathered to date.