

The seal of the City of Richmond is a circular emblem. It features a central figure of a person standing and pointing upwards with their right hand. The figure is set against a blue background with several white stars. The entire seal is encircled by a grey border with a rope-like texture. The words "CITY OF RICHMOND" are written in white capital letters along the top arc of the border, and "ESTABLISHED 1731" is written along the bottom arc. A red horizontal band is visible at the very bottom of the seal.

# MODERNIZING THE FINANCE REVENUE DIVISION

# PURPOSE

## **Discuss the following:**

- Recent Events Related to 2025 Tax Season
- Real Estate Mailing Remediation
- Personal Property Improvements
- Modernization Efforts

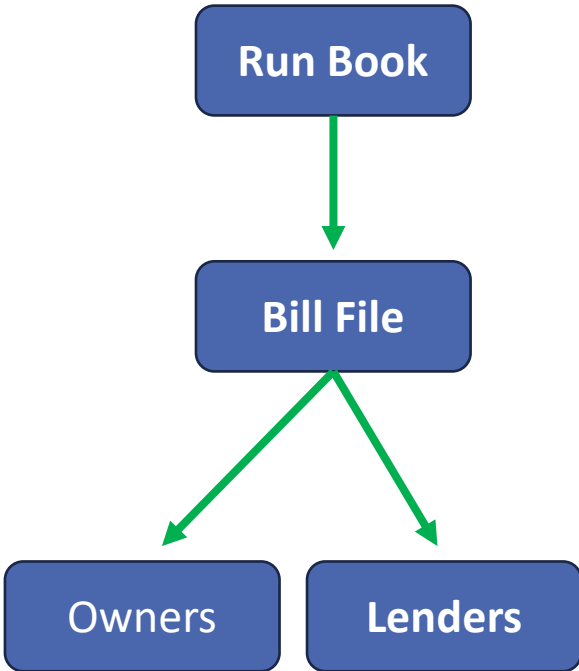
# 2025 2<sup>ND</sup> HALF REAL ESTATE BILLING

## What happened?

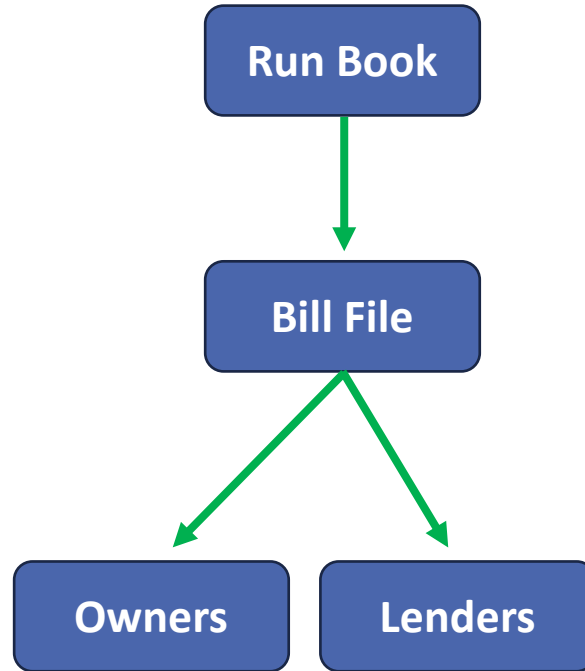
- Total number of bills = 75,905
- 42,951 bills sent to owners
- 33,270 bills were mailed to owners instead of the lenders.
- Bills were correct, but the mailing process did not follow the usual process.

# HOW DID WE GET HERE?

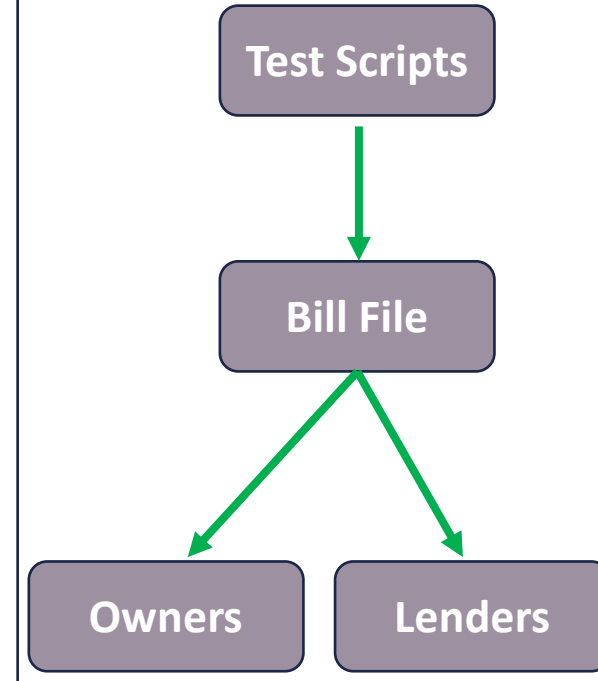
1  
2024 2<sup>nd</sup> Half



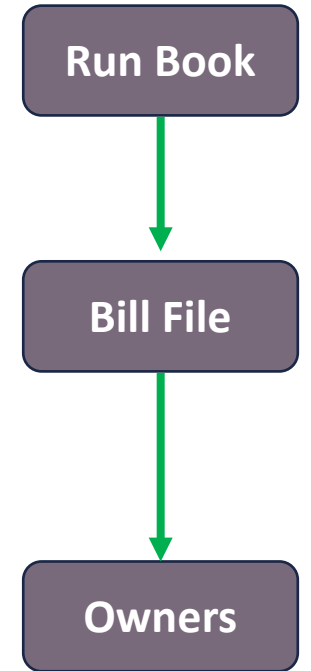
2  
2025 1<sup>st</sup> Half



3  
**Upgrade Testing**



4  
2025 2<sup>nd</sup> Half



**Old Version**

**New Version**

# REMEDIATION

## **What we did to correct the issue:**

- Updated Standard Operating Procedure (SOP).
- Retrained staff
- Outreach to impacted taxpayers and Mortgage Servicers/Lenders
  - Press release
  - RVA.gov
  - 311 responses
  - Integrated Voice Response (IVR)
  - Call campaign for lenders

# IDENTIFYING DUPLICATE PAYMENTS

## How will we identify duplicate payments:

- Queries to identify duplicates
- Account analysis
- Contact taxpayer
  - Refund
  - Credit

# 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 <sup>rd</sup> party print vendor prints the bills and Finance staff reviewed paper bills for accuracy	Over 200 queries created to identify issues
7	Mailing	3 <sup>rd</sup> party vendor to print, upload to Invoice Cloud and mail	3 <sup>rd</sup> 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

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	

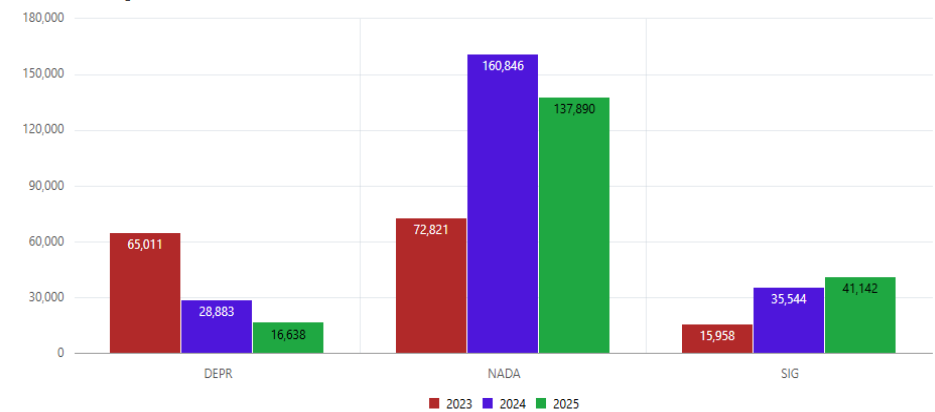
[Download](#) | [Print](#)

row(s) 1 - 6 of 6

Home	Bill Summary	VIN (Yr over Yr)	VIN % Comparison	VIN Facet	Bill Facet	Analysis	DMV	
------	--------------	------------------	------------------	-----------	------------	----------	-----	--

Chart YoY Assessment Used per Billing

\*2023 Partial Billing in RVAPAY due to conversion



Annual Bill Analysis

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

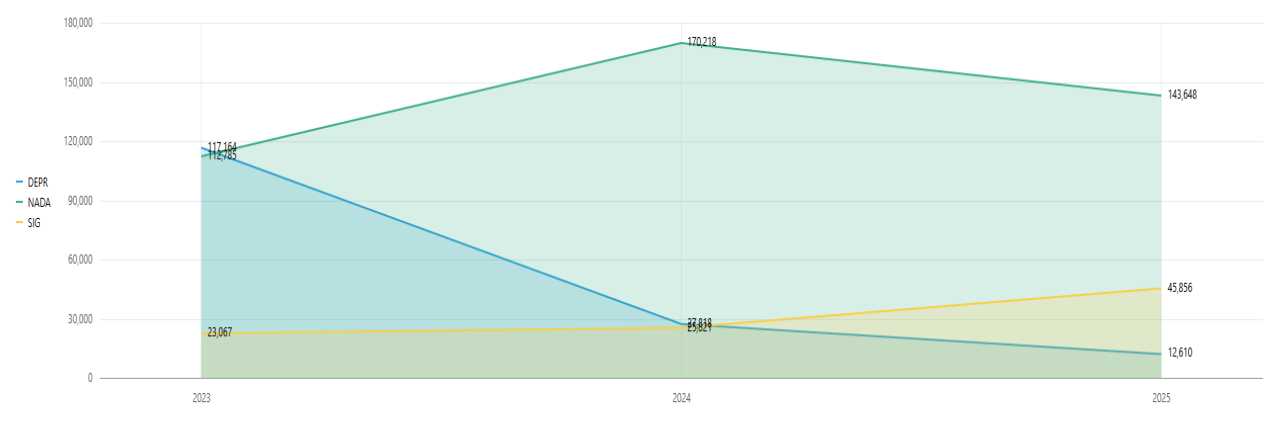
Chart YoY Assessment Used per Billing Chart YoY Assessment Used per Billing Yr Veh Assessment per Billing [Top Make / Models Billed](#) MIN / MAX Assessments Median Assessments

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

Chart Assessments by Year/Type Trend [Chart-Assessments by Year/Type](#) Avg Age of Vehicle Assessed-NADA #Vehicles Assessed by Yr of Vehicle-NADA Assessment AVG by Source Avg NADA Value Median Assessments

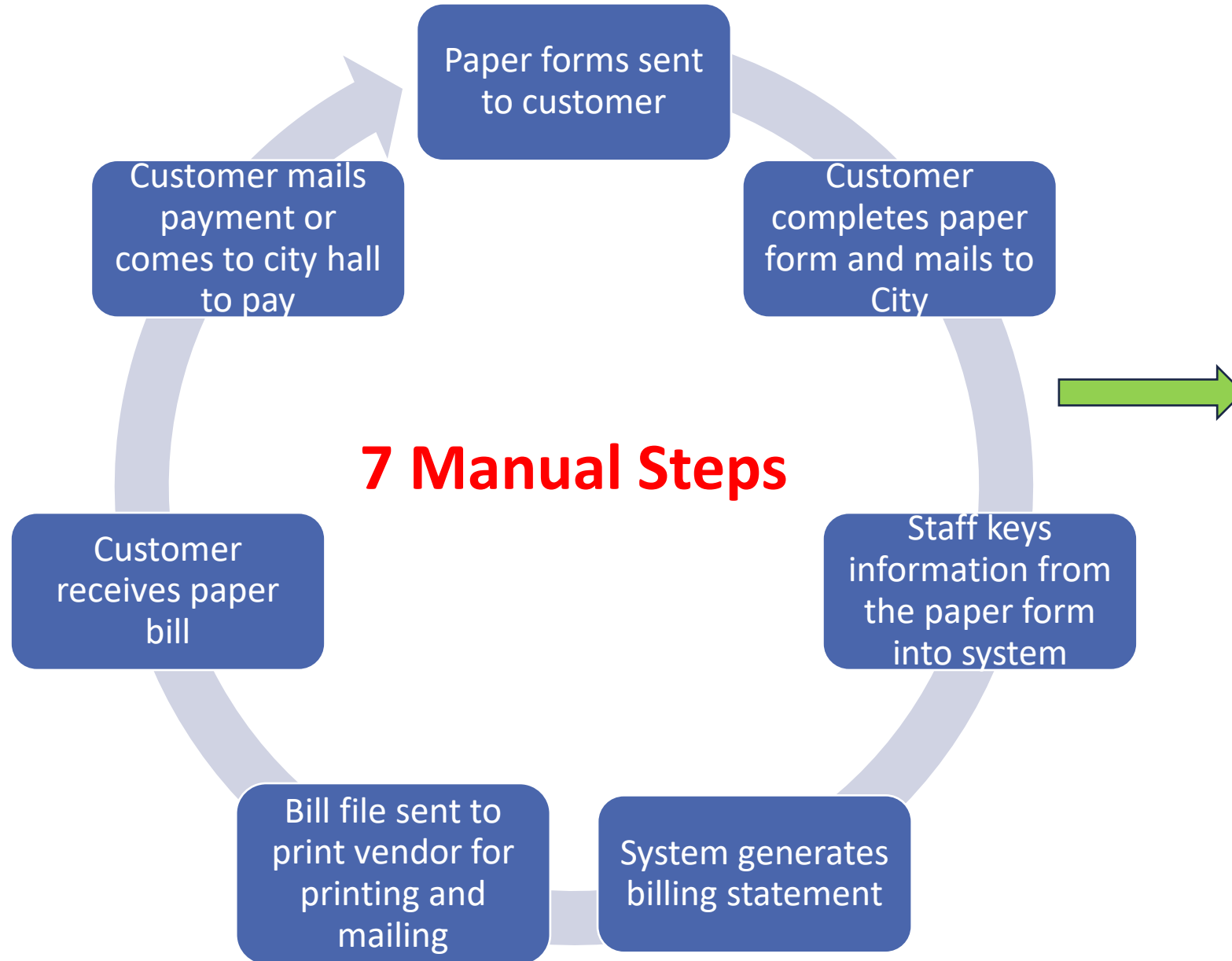
Chart-Assessments by Year/Type



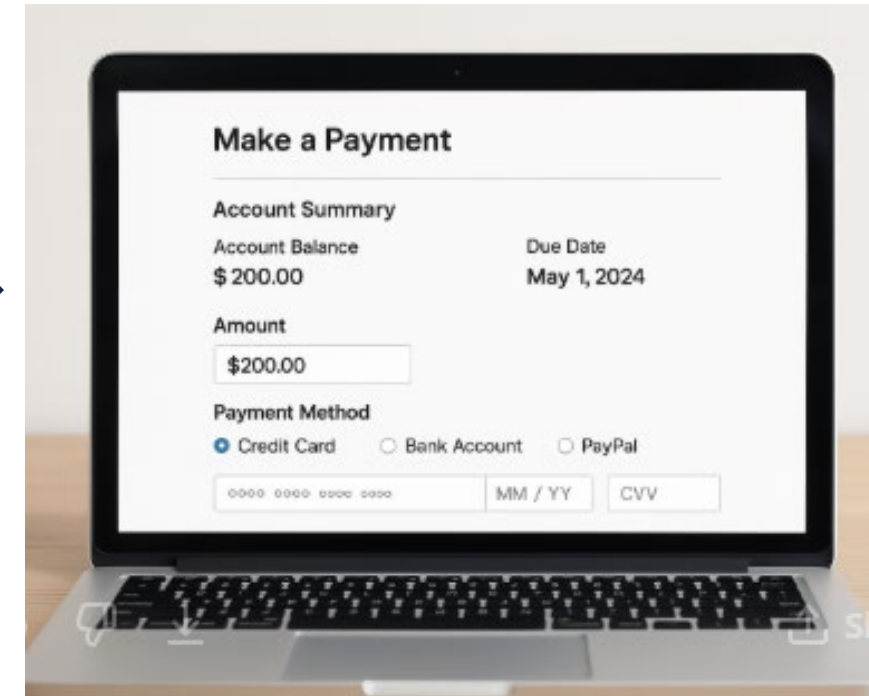
# RVA BUSINESS PORTAL



# 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

# CUSTOMER SERVICE IMPROVEMENTS





# 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

# DAILY METRIC REPORTS TO MANAGE CUSTOMER SERVICE

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

<b>Tax Season Goals:</b>		Average Number of Days Outstanding - 7		Percentage of Tickets in SLA - 80%	
<b>Revenue Standards:</b>		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%
<b>Total</b>	<b>3009</b>	<b>1631</b>	<b>189</b>	<b>20.28</b>	<b>46%</b>

## 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
<b>Total</b>	<b>2768</b>	<b>341</b>	<b>191</b>	<b>2918</b>	<b>1476</b>

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



# CULTURAL TRANSFORMATION

## Performance Metrics Trend

### Difficult Decisions

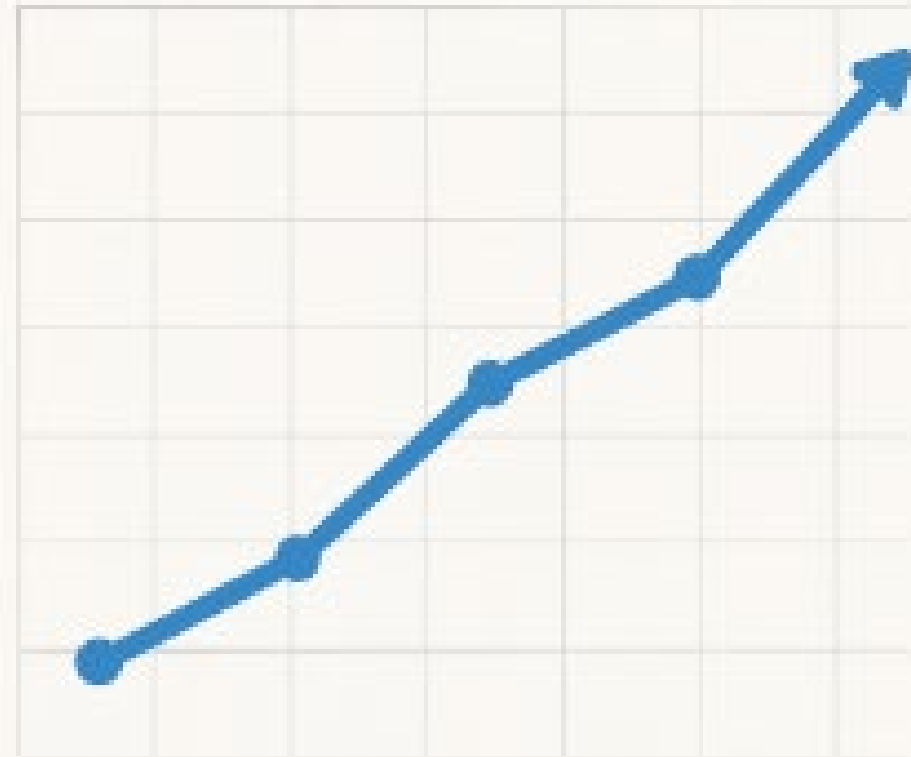
Addressing poor performance and negativity

### Courage Required

Taking risks to implement necessary changes

### Results

More positive, performance-oriented culture emerging



# 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
- 70 SOPs created (Total of 76 identified)
- 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

# 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

# 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

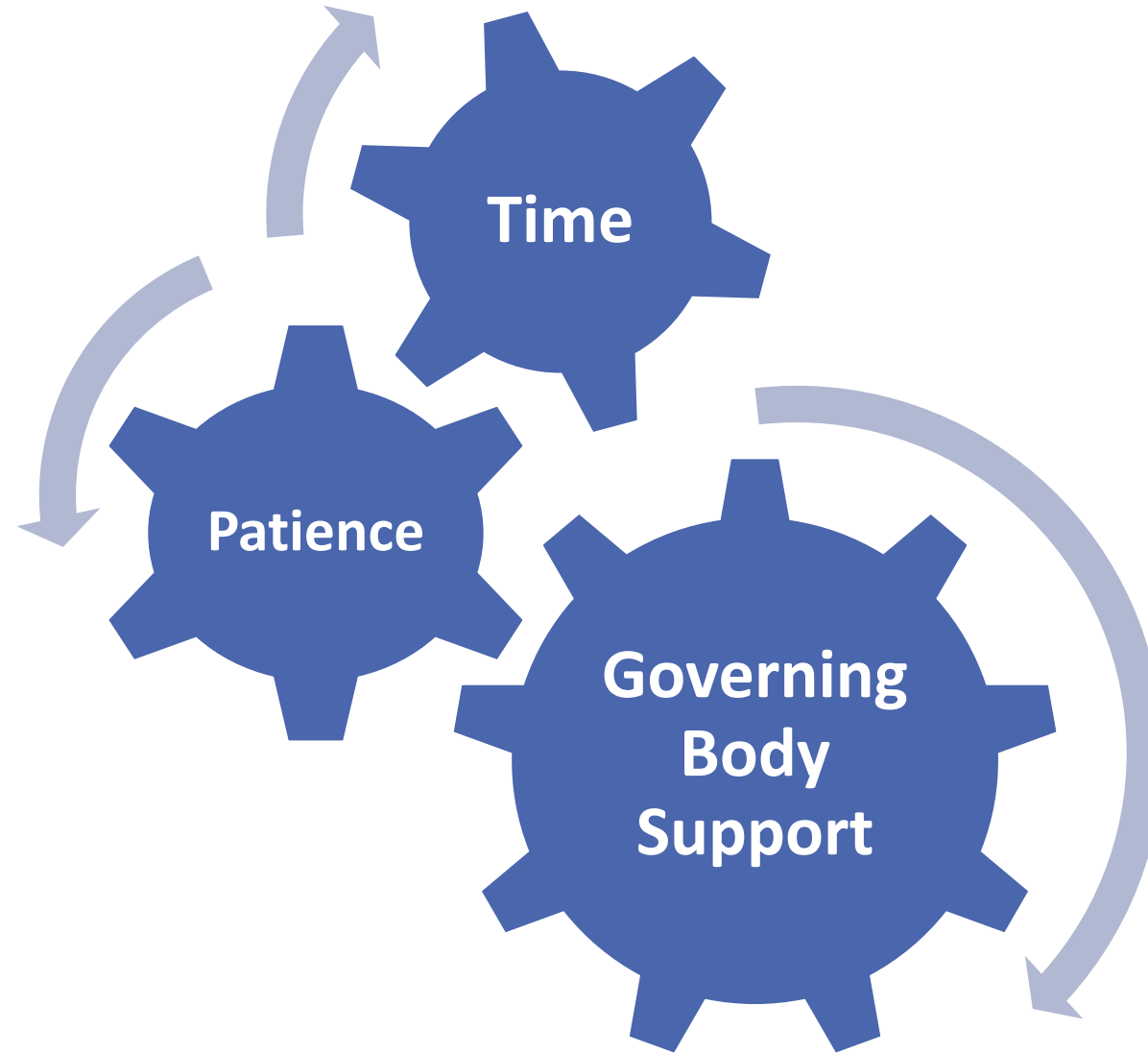
## Present

- Cohesive team environment on 10<sup>th</sup> 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

- 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



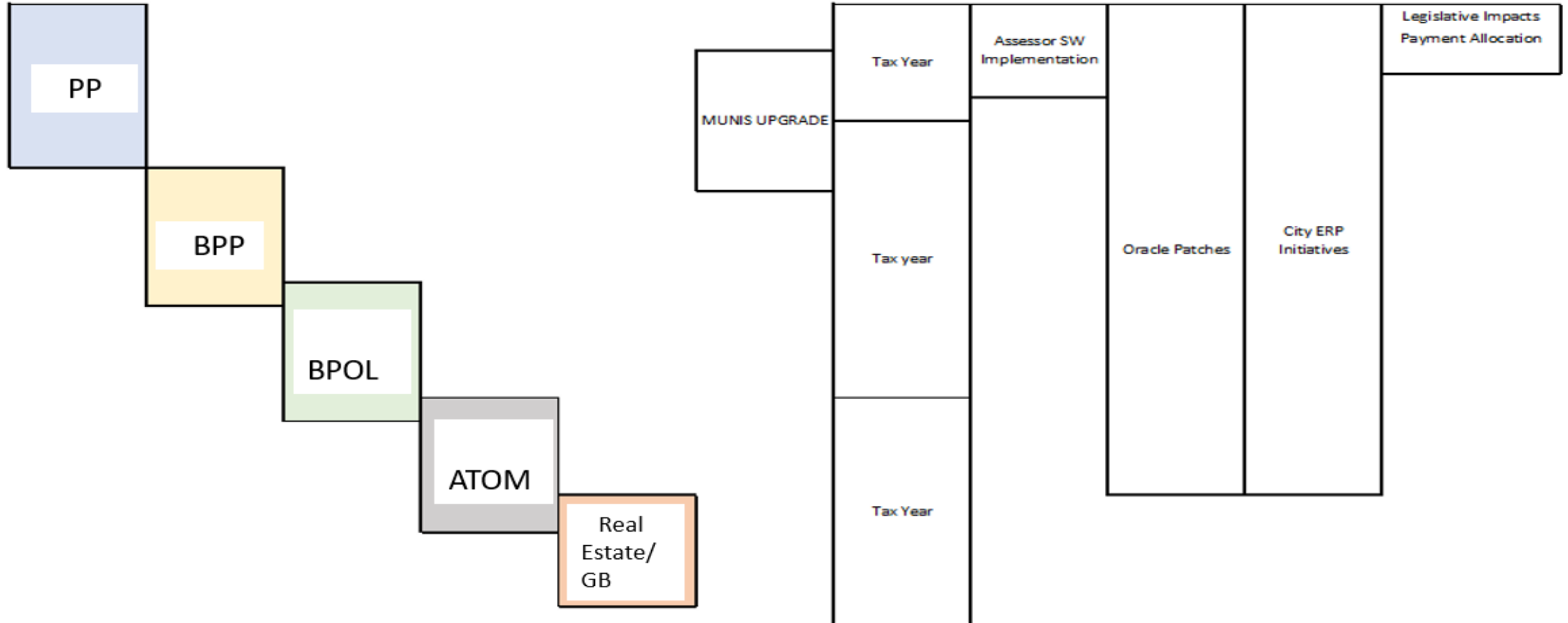


# APPENDIX



# 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	Unit Testing	Unit Testing	Unit Testing	Unit Testing
UAT/Training	UAT/Training	UAT/Training	UAT/Training	UAT/Training
Implementation	Implementation	Implementation	Implementation	Implementation

# CORERP/RAPIDS ROADMAP



[illegible]

# MANAGEMENT & SUPERVISION TOOLS

- ✓ 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 SLA's)
- ✓ Staffing plans (focus resources, monitor productivity, develop due dates)
- ✓ Leadership meetings – Review workplans & assess risk
- ✓ Daily team stand-ups
- ✓ Unit teams tax chat channels

# GANTT OF DIVISION FOR LINE OF SITE OF DUTIES

[illegible]



# 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										
<div><div>To Be Processed</div><div>Completed</div><div>% Complete</div><div>Count / Remaining</div><div>Due Date</div><div>Assigned To:</div><div>SOP Ref Link</div><div>Notes:</div></div>										
Count Personal Property Billing:										
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: 5-27-25		Open Tickets	OOSLA	% SLA Compliant	Waiting On Refund, Transfer or P&I Process	Waiting on Customer Contact	Waiting on Team	Cross Check of Formula		
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:										
Origin Date Due Date Assigned To: Status										
1	Lease Vehicle Accounts Reconciliation (LK assigned to Dan Rhodes SOP)				8/24	TBD	Marlo			
2	SOP Development & Update				6/24	TBD	LK			
3	Penalty and Interest Ordinance change SR				8/24	1/1/2025	Raj / Bonita	Complete		
4	Membership Agreements Admin (JD Power / DMV Access / Game & Inland Fish)				7/24	Annually	PP Supvsr			

# WORK PROCESS IMPROVEMENTS

✓	Policies, SOP's & Quality Controls (mail room, tickets, email/vm shut down, standard communications)
✓	SOP's linked to Unit Workplan Activities
✓	311 Customer Service Ticket Tracking - line of sight to pending work & training needs
✓	Customer Service Standards
✓	White Glove & Ambassador Service Stations
✓	Staff Productivity Metrics
✓	Quality Control Reviews (Q&A, Coms Templates for CustSvc, QC & Documentation Standards)
✓	Technology Upgrades & Development:
✓	Process Automation Is Transformational to Customers & Staff Development
✓	RVAPay Design Build Gives SPEED TO SOLUTIONS
✓	Line of Site into Work with Dashboards
✓	Real Time & Transparent Customer Service
✓	Document Management (Customer Attachments, Scan of mail to Account Tickets, DocuSign Approvals, Digital Forms)
✓	Customer Service Survey Feedback



# DOCUMENTED SUBJECT MATTER KNOWLEDGE SHARING



- 8' LS are mailed 1 time per year NLT 4/22 and due 6/5 for 45 day advance bill requirement per City Code. A write off of \$5 or less is part of process.
9. **MENTAL BILLS** are to be processed monthly after annual billing process and by 15th of month with 45 day advance bill requirement per City Code.
10. **DUPLICATE 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.
11. **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.
12. Taxation **IN STATUTE** is permitted for current calendar year (CY) plus 3 back years (prior than this are OOSTatue unless sent to TACS Collection)
13. A small balance **WRITE OFF** is done for CRedit and DR (debit) balances of -\$5 to +\$5 for billing efficiency.
14. 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.
15. **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.

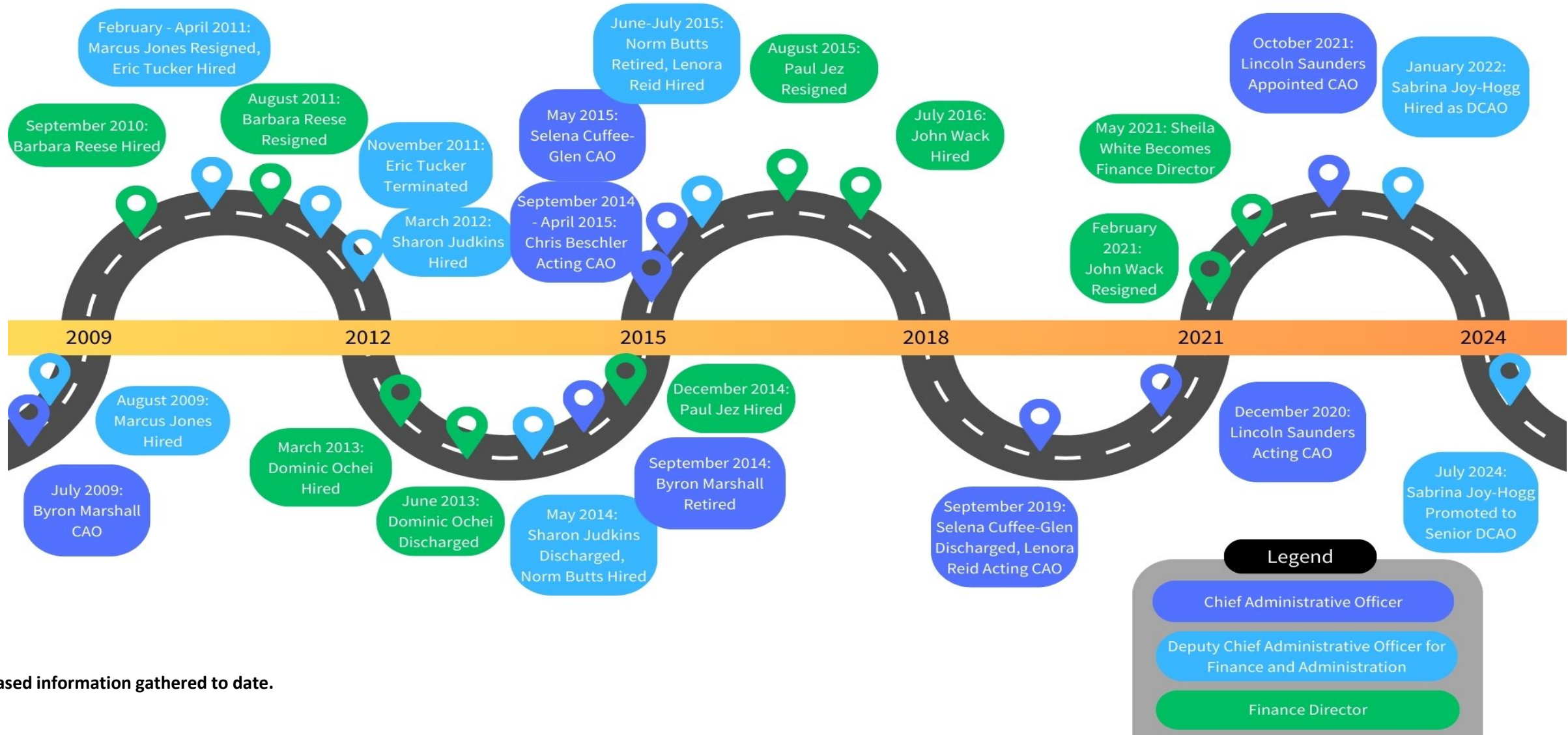
## Delinquency:

- 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

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



Based information gathered to date.