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Subject: All Staff Update - All Hands meeting on Tuesday, Nov. 10th
Date: Friday, November 6, 2020 11:04:53 AM

Dear Colleagues –

We are excited to be with you at 1pm on Tuesday at our All-Hands meeting. The information is in your Outlook invitation. You can use the Zoom hyperlink to access via your browser window or via the Zoom application if you have it. You can also use your browser to view and call in to hear. If easier, there is also a Zoom app available for phones. Of course, remember to mute, so background noise is not heard.

To make the meeting a more interactive, we will be conducting some live polls as well as real-time Q&A that are answered anonymously. Expect technology issues and laugh through it. If you want to be prepared, we will be using <https://www.menti.com/> for the live polls.

If you have a functioning camera, please come prepared to turn it on, so we can see you.

Happenings

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Much has happened since our last officewide update. Here are some of the highlights:

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- We have launched our new property tax system and generated our first Secured Roll with that system.
- We prepared and/or signed dozens of contracts and accepted the 20-21 Budget.
- We returned to working on collections for MTA and Dept of Public Health as well as initiated a new project with MTA to support installment payments.
- Nearly all the legislation supported by our Financial Justice Project was signed by Governor Newsom; thus making California one of the most responsive and equitable states in the nation for some of our most vulnerable people.
- Our SF residents are reaching out to our Smart Money Coaches when they receive their PPP checks to receive guidance on financial planning during the pandemic and kindergarteners started school virtually and received their Kindergarten to College initial contribution.
- Audits have continued to bring in significant revenue and Tax Collector determinations are being issued.
- TPA is rolling out new technology to enable taxpayers to schedule telephone calls with them to address matters not easily answerable via 311 tickets/emails; thus increasing our customer contact during a time when many are shrinking that service.
- Our communications to businesses and property owners has increased significantly as we actively work to make compliance less burdensome during these trying times as well as encouraging them to mail or pay online to keep themselves and us safe.
- We have also increased promotion of penalty waivers for businesses who have been hurt by the COVID-19 pandemic.
- Most recently, we went live with our new Account Update application.

There is so much more to detail and we hope that you are all proud of what is being accomplished.

Retirement

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Kindergarten to College started in 2011 staffed by Carol Lei. Carol retired on Sept 30, 2020. While many of you may not have had the privilege to work with her, you hopefully received one of her warm smiles. The program has blossomed under her care, and we will all miss her.

Staffing Change – Reorganization

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Recognizing the continual push for customer and taxpayer service and continuous improvement of staff's satisfaction through reduction of repetitive tasks and increased work ownership, we are reorganizing key components of the organization. The desired outcome is multi-fold:

- Full life cycle of care (decreasing hand-offs from one section to another) in key high-touch services
- Decreasing the amount of rote high-volume work tasks to rapidly decrease them and improve services to taxpayers
- Centralizing competencies to better serve each other and taxpayers

The changes are as follows and effective November 19. Key staff will be transitioned based on work and/or seniority.

Account Services

Recognizing the collaborative nature of much of business tax work as well as the existing mutually-responsible roles to achieve key tasks, segments of work performed by Account Services will be shifted to other sections along with relevant staff.

Account Services will move from reporting directly to David Augustine, Tax Collector, to reporting to Greg Kato, Director, Compliance & Audits. This change will enable improved connection of business tax issues with Audit and Investigations. Account Services will continue in the core areas of: tax

claims; Board of Supervisor reports related to Business Taxes; Third-party tax administration and reporting; CPI/Tax rate compliance; refunds over \$10,000 and refunds requested via paper applications; all business tax workflow queues; Certificates of Authority for Third-party taxes; and reports that are not related to revenue projections.

Detailed below is a division of how other assignments currently managed by Account Services will be shifted.

Remittance & Cashiering

- Building upon the annual assignment of inputting the automated refunds that are generated from the Annual Business Tax filing (ABT) and Registration Renewal (RG), Remittance & Cashiering will be responsible for all automated refunds that are generated from ABT and RG.
- BDR adjustments for all tax types will be completed by Remittance & Cashiering. Currently, adjustments after the closure date are entered by Remittance & Cashiering. This will be expanded to adjustments for all tax types.

Taxpayer Assistance

- Businesses are consistently reaching out to understand their responsibilities and a key area of interaction is licenses based on permits issued by the Public Health, Entertainment, Police and Fire Departments. License management will transition to TPA in order to provide more comprehensive service to businesses. The improved automation of license transfers will quickly inform our sister departments of transfers that can be approved or denied.
- Given the synergies with license management and Account Update, TPA will also manage the queue work related to Account Update and New Business Application (NBA)
- Alarm registration and False alarm administration will also move to TPA; Legal section will continue to work on Alarm appeals and claims.
- The ABT and RG processes have significant volume and diversity of communication on multiple platforms and mediums, as well as video production. TPA will develop and implement the communications for ABT and RG. This will include QA in partnership with Product Management. All other roles for the ABT and RG mailing will continue -- including IT pulling extracts, and Product Management facilitating the determination of extract criteria .

Bureau of Delinquent Revenue

- The increase in data and the ability to aggregate data from multiple sources has proven to be critical in our efforts. To further this knowledge bank, data analytics related to identification of high-value and other critical accounts for collections will be transitioned to the Data Analytics team within the Compliance section.
Determinations will be moved to BDR, which will include data entry of Third-party Determinations

Production Management

- As owners and managers of the tax applications and the weekly Business Tax Meeting, the Production Management section will continue its role as well as add new projects to further automate efforts. The efforts include items already in the works – License Transfer, versioning Account Update and NBA applications, and weekly Business Tax refunds files. They will add projects related to workflow queues across sections to move work more seamlessly and with greater tracking.

Data Analytics

- The Data Analytics team within Compliance section will Increase its role by supporting data analytics for BDR
- The team will also function as a knowledge center for data by advising on criteria for ABT and RG communications.

We know this is a lot. We have attempted to provide rational and context but there is not enough space to detail everything. We will be initiating a working group to manage this transition and we

seek your patience and sensitivity as we make these changes. Finally, we recognize adjustments and finessing will be required as we wade through the daily realities. We seek to learn and improve.

This is a purpose driven change to enable improved focus, greater service, and expeditious delivery.

If you have questions that you want addressed at the All Hands meeting, please feel free to send them in advance to any of us (David, Amanda, Dianna or myself).

We look forward to talking with you all on Tuesday and hearing your thoughts on these or other topics.

José, David, Amanda and Tajel

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