TRD’s Property Tax Division Business Modernization Project

Project Certification
Initiation Phase
May 25, 2016

Presenters:
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Mike Baca, Chief Information Officer
PTD Mission and Organization

Mission:

In collaboration with New Mexico’s thirty-three county assessors, PTD is responsible for administering the State’s “Ad Valorem” property tax programs. As defined in State statute, PTD’s supervisory duties are designed to support assessors to comply with various provisions of the Property Tax Code.

Division Bureaus:

- **Appraisal Bureau**
  - Ensure all county assessors are in compliance with the New Mexico Property Tax Code.

- **Delinquent Property Tax Bureau**
  - Collection of taxes on real properties referred to the State from all 33 counties for property tax delinquency.

- **State Assessed Property Tax Bureau**
  - Valuation of approximately 600 multi-county property taxpayers representing industries including: telecommunications, railroads, oil and gas pipelines and refineries, and electrical utilities.
PTD Business Modernization

Goals and Objectives

- **Delinquent Property Tax Bureau**
  ... Develop and deploy workflows and web maps for the administration of delinquent properties auctions and sales.

- **Appraisal Bureau**
  ... Develop and deploy a system that stores and manages real property data contained within the appraisal and mapping systems of thirty-three New Mexico county assessor offices.
  ... Develop and deploy workflows to automate the administration of the assessor evaluation and audit process.

- **State Assessed Property Tax Bureau**
  ... Develop and deploy workflows and applications to automate the State Assessed Properties tax administration program.
Benefits

- **Delinquent Property Tax Bureau**
  - Increase sales of delinquent properties in all thirty-three counties
  - Query, report, and publish delinquent property account status and trends as needed.

- **Appraisal Bureau**
  - Report county evaluation and audit status results and trends as needed.
  - Report training and educational status for assessor staff by individual, group, and county.

- **State Assessed Property Tax Bureau**
  - Increase accuracy and efficiency of taxpayer reporting transactions.
  - Increase accuracy and efficiency of business property certification.
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A map enabled statewide property tax system...

... will dramatically improve the Division’s ability to model the impact of policy performance and inform legislative inquiries.
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Previous Accomplishments

Gap / Needs Analysis... completed December, 2015

- “Existing Processes Report”
  ... This report documents the organizational structure and existing staffing, processes, workflows, data sources, and business process timelines for each of the Division’s three bureaus.

- “Proposed Processes Report”
  ... This report proposes and defines automated workflows and processes designed to reduce clerical workloads and allow specialized PTD staff to focus on the Division’s operational missions.
  ... Identifies and documents the specific needs to optimize staff time and provide enhanced information products for PTD, TRD executive leadership, legislators, and New Mexico county assessors.
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Initiation Phase tasks

- **Project Management**
  - Identify and select appropriate vendor for project management

- **Draft and publish Request for Proposals (RFP)**
  - Identify and select appropriate vendor for RFP support

- **Business Requirements Development**
  - Following completion of RFP

- **Independent Validation and Verification**
  - Identify and select appropriate vendor for IV & V
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Initiation Phase tasks

<table>
<thead>
<tr>
<th>Major Project Deliverable and Performance Measure</th>
<th>Budget</th>
<th>Due Date</th>
<th>Project Phase</th>
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</thead>
<tbody>
<tr>
<td>Needs/Gap Analysis</td>
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<td>Initiation</td>
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<td>Writing/Management of RFP</td>
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Budget

Laws 2016, Chapter 11, Section 7, Item (6)

$2,000,000...

“To modernize the property tax business system. The appropriation is from the delinquent property tax fund.”

Funds authorized through June 30, 2018
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Timeline

June 2016 – June 2018

Initiation  Planning  Implementation  Closeout
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Summary

PTD’s business modernization project will enable the Division to significantly improve its operations to the benefit of Bureau staff, executive leadership, the legislature, county elected officials, and most importantly, the State’s taxpayers.

PTD is seeking approval to release $140,000 to begin project initiation.
Thank You and...

Questions