

**Quality and Productivity Commission  
34<sup>th</sup> Annual Productivity and Quality Awards Program  
"Leading with Excellence"**

**2021 APPLICATION**

Title of Project (Limited to 50 characters, including spaces, using Arial 12-point font):

**NAME OF PROJECT: EMPOWERING TAXPAYERS WITH OPERATION SELF-SERVICE**

**DATE OF IMPLEMENTATION/ADOPTION:** JUNE 30, 2017

(Must have been fully implemented for a minimum of at least one year - on or before July 1, 2020)

CHECK HERE IF THIS PROJECT IS BEING SUBMITTED FOR THE COVID-19 IMPACT AWARD ONLY. (Projects must be implemented on or before December 31, 2020. **Note:** Projects implemented less than one year ago will not be eligible for any other PQA awards. In addition, once a project is submitted, you cannot submit the same project for awards consideration in subsequent years).

**PROJECT STATUS:** XX Ongoing     One-time only

**HAS YOUR DEPARTMENT PREVIOUSLY SUBMITTED THIS PROJECT?**     Yes XX No

**EXECUTIVE SUMMARY:** Describe the project in 15 lines or less using Arial 12 point font. State clearly and concisely what difference the project has made.

1 Five years ago, the Treasurer and Tax Collector (TTC) launched its "Operation Self-  
2 Service" initiative - a fundamental shift in service delivery philosophy from telephone  
3 and in-person service, to online self-service. This shift was driven by gradual increases  
4 over time of routine inquiries that increased call volumes and resulted in longer hold  
5 times for taxpayers with more complex inquiries. Operation Self-Service allows property  
6 owners to find commonly requested property tax information quickly on our revamped  
7 website. One significant outcome of Operation Self-Service was our ability to process  
8 the momentous increase in Penalty Cancellation Requests (PCRs) submitted by  
9 taxpayers impacted by the COVID-19 pandemic. Historically, we received 2,000 to  
10 3,000 PCRs annually. In 2020, due to the economic impact of COVID-19, our office  
11 received nearly 50,000 PCRs! Based on our improved processes, we were able to  
12 respond efficiently and effectively to tens of thousands of property owners experiencing  
13 an unprecedented financial crisis.

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15

BENEFITS TO THE COUNTY

(1) ACTUAL/ESTIMATED ANNUAL COST AVOIDANCE	(2) ACTUAL/ESTIMATED ANNUAL COST SAVINGS	(3) ACTUAL/ESTIMATED ANNUAL REVENUE	(1) + (2) + (3) = TOTAL ANNUAL ACTUAL/ESTIMATED BENEFIT	SERVICE ENHANCEMENT PROJECT
\$	\$	\$	\$	<input checked="checked" type="checkbox"/>

ANNUAL = 12 MONTHS ONLY

<b>SUBMITTING DEPARTMENT NAME AND COMPLETE ADDRESS</b> Treasurer and Tax Collector 500 West Temple Street, Suite 437, Los Angeles, CA 90012		<b>TELEPHONE NUMBER</b> (213) 974-2130
<b>PROGRAM MANAGER'S NAME</b> Deondria L. Barajas		<b>TELEPHONE NUMBER</b> (213) 974-2077
<b>PRODUCTIVITY MANAGER'S NAME AND SIGNATURE</b> (PLEASE CALL (213) 893-0322 YOU DO NOT KNOW YOUR PRODUCTIVITY MANAGER'S NAME) Matthew Gonzales	<b>DATE</b> 6/23/2021	<b>TELEPHONE NUMBER</b> (213) 974-2130 <b>EMAIL</b> mgonzales@ttc.lacounty.gov
<b>DEPARTMENT HEAD'S NAME AND SIGNATURE</b> Keith Knox		<b>TELEPHONE NUMBER</b> (213) 974-2101

**\*\*ELECTRONIC, WET, OR SCANNED SIGNATURES ARE ACCEPTABLE\*\***

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**1<sup>st</sup> FACT SHEET – LIMITED UP TO 3 PAGES ONLY:** Describe the **challenge(s), solution(s), and benefit(s)** of the project to the County. What quality and/or productivity-related outcome(s) has the project achieved? Provide measures of success and **specify assessment time frame**. Use Arial 12 point font.

**The Challenge:** One of the TTC's statutory mandates is to print, mail, and account for the County's 2.5 million property tax bills. Secured Property Tax Bills are payable in two installments. The first installment payment is due November 1<sup>st</sup> and becomes delinquent and subject to a 10% penalty if payment is not received or postmarked by the United States Postal Service on or before December 10<sup>th</sup>. The second installment payment is due February 1<sup>st</sup> and becomes delinquent and subject to a 10% penalty and a \$10 cost if payment is not received or postmarked on or before April 10<sup>th</sup>. California statute grants the TTC limited authority to cancel late payment penalties. Taxpayers frequently do not understand the limits of this authority and believe that the TTC has broad discretion. For example, the TTC does not have the authority to consider a taxpayer's prior good history of paying timely.

Prior to January 2017, we received PCRs in person, by telephone, fax, email, and written correspondence, which resulted in cumbersome processing and duplicative requests. TTC staff tracked and annotated the status of PCRs manually, causing additional complications, and processing delays. We also lacked a comprehensive record of PCR volumes, which made it difficult to forecast workload and monitor productivity. This all contributed to a less than optimal customer experience, processing delays, and confused taxpayers.

**The Solution:** Operation Self-Service was launched to create more robust self-service options on our website, which is accessible to taxpayers 24 hours a day, 7 days a week, in lieu of calling, emailing, or visiting our offices. Operation Self-Service created multiple, new self-service initiatives, but none have been more impactful than our new PCR application.

We analyzed internal data (i.e., webpage hits, phone line business codes, and email keywords) to determine the reasons taxpayers were calling our offices, especially after property tax deadlines, and realized that approximately one-third of our daily contacts are related to PCRs. Given that the TTC has limited authority under the law to cancel penalties, we determined that our new PCR application needed educational and operational components to better inform taxpayers and guide them through the submission process.

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The new PCR process also improved internal planning and decision-making, including allocation of staff during peak periods. Additionally, gathering statistics on the statutory section taxpayers use to request penalty cancellation helps us improve the customer engagement experience, such as developing and posting FAQs on our website.

Due to COVID-19, the application received 50,000 PCRs during the 2020 calendar year. With the support of the Board of Supervisors, we provided assistance and relief to taxpayers as allowed under State law. In addition, we partnered with other County departments to create digital maps noting concentrated pockets of PCRs filed throughout the County. These collaborative efforts enabled our County partners to focus economic relief programming to those specific impacted areas.

**Other Operation Self-Service Applications:** Operation Self-Service resulted in several self-service initiatives that were created to allow property owners to find commonly requested information quickly on our website through automated processes. Our goal is to enable taxpayers to quickly get the information they need when they need it. Common call center inquiries include: 1) Requests to provide the amount of past payments (often for income tax reporting purposes). 2) Requests to confirm receipt of property tax payments. 3) Requests for duplicate property tax bills because the bill was not received, misplaced, or mailed to a former address. - We solved each of these through the following Operation Self-Service applications:

- a) Secured Property Tax Payment History – this application provides property owners with the ability to view the last three years of their payment history.
- b) Property Tax Management System – this application allows users to create property lists to store parcel information and to pay (single or multiple) bills online with ease. After a user sets up an account, he/she no longer needs a tax bill to make a payment or the personal identification number (PIN) that is located on a tax bill, because the tax bill information and PIN are stored and available for future use. The user can create property lists (i.e., a permanent shopping cart of properties) with a single parcel or multiple parcels. It is also extremely easy to reset a password so a lost or misplaced property tax bill will not prevent a user from making an online payment. A user may even use this application to verify payment status.

**The Benefits:** The PCR application has been well-received by the public and has made the process for requesting PCRs transparent and efficient. Having implemented this application well in advance of COVID-19, we perfected our

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operating procedures and met our response metrics. The application provides proof of submission to the taxpayer for future reference, so further contacts with our office related to the same PCR can be easily referenced, and the taxpayer has confirmation of their PCR submitted to our office. Many County residents have been impacted economically, and through our PCR application, have received relief from property tax penalties.

Our PCR Application has not only improved the administration of an existing county government program, but it has also offered a new service to our taxpayers, creating an improved customer experience amid a worldwide pandemic. In conclusion, without this PCR application, and considering the constraints of employees teleworking due to COVID-19, we would not have been able to deliver our Department's expectation for an excellent customer experience in a critical time of need.

We have shared our processes and lessons learned with other members of the California Association of County Treasurer and Tax Collectors. We believe that our innovative application fills gaps in service, contributes to the understanding of government programs, and demonstrates that we have set the benchmark for this process.

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**Linkage to the County Strategic Plan – 1 page only.** Which County Strategic Plan goal(s) does this project address? Explain how. Use Arial 12-point font.

These online self-service and customer service process improvements support **County Strategic Plan Goal III – Realize Tomorrow's Government Today**, particularly, **County Strategic Plan Goal III.2.3 – Prioritize and Implement Technology Initiatives That Enhance Service Delivery and Increase Efficiency**, and **County Strategic Plan Goal III.4 – Engage and Share Information with Our Customers, Communities and Partners.**

The TTC utilized information technology applications to modernize and improve service delivery for routine property owner contacts, thereby allowing Call Center staff to better serve the more time-sensitive and complex taxpayer inquiries. In addition, the TTC is educating the public to increase awareness of important property tax information and services through improved outreach materials and website content.

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**COST AVOIDANCE, COST SAVINGS, AND REVENUE GENERATED (ESTIMATED BENEFITS TO THE COUNTY):** If you are claiming cost benefits, include a calculation on this page. Please indicate whether these benefits apply in total or on a per unit basis, e.g., per capita, per transaction, per case, etc. You must include an explanation of the County cost savings, cost avoidance or new revenue that matches the numbers in the box. Remember to keep your supporting documentation. Use Arial 12-point font

**Cost Avoidance:** Costs that are eliminated or not incurred as a result of program outcomes. Please indicate whether these are costs to the County or to other entities.

**Cost Savings:** A reduction or lessening of expenditures as a result of program outcomes. Please indicate whether these were expenditures by the County or by other entities.

**Revenue:** Increases in existing revenue streams or new revenue sources to the County as a result of program outcomes.

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**FOR COLLABORATING DEPARTMENTS ONLY**

*(For single department submissions, do not include this page)*

**DEPARTMENT NO. 2 NAME AND COMPLETE ADDRESS**

**PRODUCTIVITY MANAGER'S NAME AND SIGNATURE**

**DEPARTMENT HEAD'S NAME AND SIGNATURE**

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DEPARTMENT NO. 3 NAME AND COMPLETE ADDRESS**

**PRODUCTIVITY MANAGER'S NAME AND SIGNATURE**

**DEPARTMENT HEAD'S NAME AND SIGNATURE**

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DEPARTMENT NO. 4 NAME AND COMPLETE ADDRESS**

**PRODUCTIVITY MANAGER'S NAME AND SIGNATURE**

**DEPARTMENT HEAD'S NAME AND SIGNATURE**

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DEPARTMENT NO. 5 NAME AND COMPLETE ADDRESS**

**PRODUCTIVITY MANAGER'S NAME AND SIGNATURE**

**DEPARTMENT HEAD'S NAME AND SIGNATURE**

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DEPARTMENT NO. 6 NAME AND COMPLETE ADDRESS**

**PRODUCTIVITY MANAGER'S NAME AND SIGNATURE**

**DEPARTMENT HEAD'S NAME AND SIGNATURE**

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_

**DEPARTMENT NO. 7 NAME AND COMPLETE ADDRESS**

**PRODUCTIVITY MANAGER'S NAME AND SIGNATURE**

**DEPARTMENT HEAD'S NAME AND SIGNATURE**

EMAIL: \_\_\_\_\_

EMAIL: \_\_\_\_\_