



# Finance Department Business Plan

**Fiscal Years: 2010 and 2011**  
(10/1/09 through 9/30/11)

Plan Date: December 3, 2009

Approved by:

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Carter Hammer, Finance Director

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Howard Piper, Special Assistant

## DEPARTMENT PURPOSE/MISSION

### The Finance Department Delivers Accurate and Timely Financial Services to Support Customer Needs and for Sound Management Decision-Making.

Additional departmental information can be found in the Departmental Profile (Attachment 1).

## STRATEGIC ALIGNMENT

I. The Department's efforts align with the following Miami-Dade County Strategic Plan Goals:

- ES8: Ensure the financial viability of the County through sound financial management practices.

*Additional Goals Supported by the Finance Department:*

- ED4: Create a more business-friendly environment in Miami-Dade County

II. Department-related Strategic Plan Outcomes, Departmental Objectives, and Programs & Initiatives:

- ES8-1: Sound asset management and financial investment strategies (priority outcome).
  - Maintain Safety and Adherence to Investment Policy.(ongoing)
  - Maximize Earnings on County Investments (ongoing)
  - Maintain or Improve Bond Ratings (ongoing)
  - Maintain Bond / Loan Issuances (ongoing)
  - Develop Multiyear Budget Control (ongoing)
  - Formulate Debt Policy (FY10)
  - Monitor Debt Issuances (ongoing)
  - Establish debt management database Phase I Design (FY10)
  - Maintain the Standard and Poor rating on County investments (ongoing)
- ES8-3: Compliance with financial laws and generally accepted accounting principles.
  - Complete Annual Financial Audit (03/31/10\* dependent upon timely submission of departmental audits.)
  - Complete Report to Bond Holders (06/01/10)
  - Maintain a Sustainable Record Retention Program for Finance Department (ongoing)
  - Align Accounting and Reporting Staff to Strategic Areas County-wide (FY11 and ongoing) \* dependent upon appropriate budget approval.
- ES8-4: Cohesive, standardized countywide financial systems and processes (priority outcome).
  - Enhance Customer Service Through New Web Offerings (ongoing)

## Departmental Business Plan and Outlook

Department Name:

Fiscal Years: 2009-10 & 2010-11

**ES8: Ensure the financial viability of the County through sound financial management practices.**

➤ **Economic and financial market uncertainties**

Instability of certain market sectors (asset backed securities) may impact the County's ability to invest in certain security instruments limiting investment options resulting in lesser returns. We continuously monitor the marketplace in consultation with the investment adviser to place investments in prudent instruments.

The volatility of the financial markets may impact the County's ability to issue debt. Investigate other debt instruments such as swaps or commercial paper programs.

Continued downturn in the real estate market may affect taxpayers' ability to pay real estate taxes, which will result in additional tax certificates for purchase. This combined with the instability in the financial markets could reduce the number of investors willing to participate in our tax certificate sale resulting in higher interest rates and or unsold tax certificates. We continue to expand public awareness of available alternative payment programs, important deadlines and discount periods. We also work with entities like the National Tax Lien Association in order to showcase Miami Dade County's creditworthiness and efficient redemption process.

**ES8-3: Compliance with financial laws and generally accepted accounting principles.**

Document Storage Retrieval. The Finance Department deals with problems related to document storage and retrieval as a result of antiquated systems and very large databases. Cross-referencing information and required research is tedious and slow. The degradation of document quality along with the deterioration of current media will eventually result in non-compliance with mandated document retention schedules. A centralized EDMS system will save costs on browser software, reduce voluminous paperwork and improve workflow.

**ES8-4: Cohesive, standardized countywide financial systems and processes (priority outcome).**

Countywide Financial Systems. The County's general ledger system, Financial Accounting Management Information System (FAMIS), is a mainframe legacy system first implemented over 30 years ago. It is used by over 50 Departments with over 3,000 users. The majority of the County's accounting transactions are processed in the system including vendor payments. The information is used in the preparation of the County's Comprehensive Annual Financial Report (CAFR) and all other State required financial reporting.

The budget system interfaces to the general ledger to enable budget control at various organizational levels. The County's Procurement Systems (ADPICS) is integrated with FAMIS; the systems share the same chart of accounts and vendor file, and vouchers originate in the ADPICS Accounts Payable subsystem. The Payroll system also interfaces with FAMIS.

Although the FAMIS Suite of modules has been upgraded and its functionality enhanced throughout the years, its limited reporting capabilities restrict it as a tool to help managers meet the County's changing and growing financial information needs.

## Departmental Business Plan and Outlook

Department Name:

Fiscal Years: 2009-10 & 2010-11

### 3 to 5 YEAR OUTLOOK

Many of the Finance Department's projects scheduled to take place in FY09-10 will extend into FY10-11 as well. Some of the key projects expected to begin or continue in FY09-10 include:

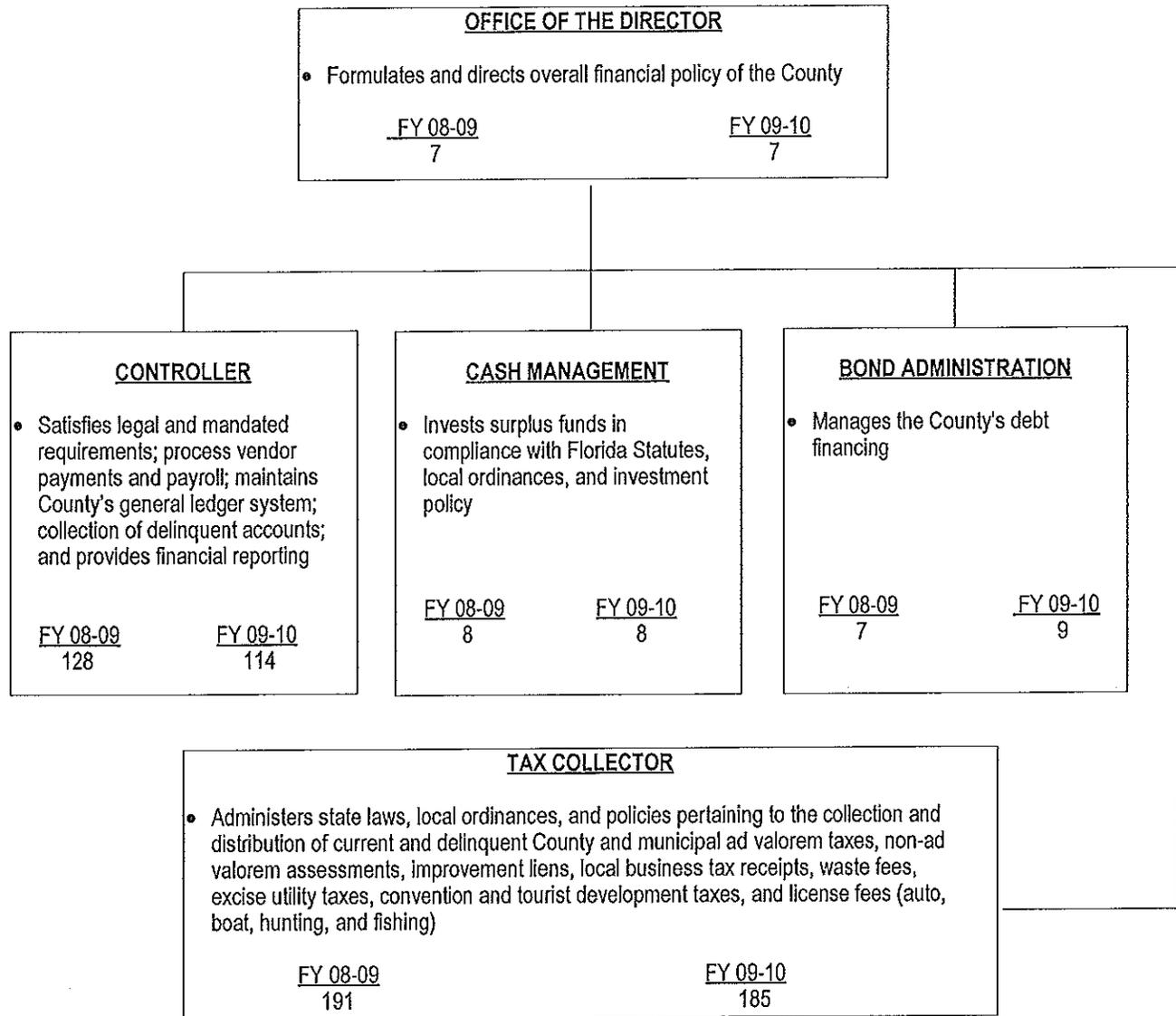
- Procurement and implementation of a new, state of the art Tax Collection and Billing system to replace the current outdated and inefficient legacy based system. A new system would allow for more efficient processes including payment, research and refunds.
- Support a Countywide financial management system.
- Expand use of electronic document management technology to improve processing time for research requests and reduce backlog.
- Expand web inquiry and service capabilities for customers, County vendors, and loans.
- Monitoring, tracking, and promotion of on-line services and payment activities.
- Improve financial oversight by strategic area to provide better day-to-day management information.
- Continue to expand public awareness of available alternative payment programs.
- Continue issuance of general obligation bonds.
- Research, Design, Procure, and Commence Implementation of Accounts Payable Shared Services Workflow.

**Departmental Business Plan and Outlook**

**Department Name:**

**Fiscal Years: 2009-10 & 2010-11**

**Table of Organization**



**SCORECARD DETAIL-Finance Department**

Details - Base View

None Initiatives Processes

Base

**1.0 Customer**

Name	As of Date	Actual	Business Plan Goal	FYTD Actual	FYTD Goal
<u>Ensure Timely Payment of Vendor Invoices</u>					
<u>Timely Payment of Invoices (45 days) (ATTACHMENT)</u>	FY10 Q3	<input checked="" type="checkbox"/> 93 %	90 %	<input checked="" type="checkbox"/> 93 %	90 %
<u>Timely Payment of Invoices (30 days) (ATTACHMENT)</u>	FY10 Q3	<input checked="" type="checkbox"/> 76 %	70 %	<input checked="" type="checkbox"/> 76 %	70 %
<u>Enhance customer service through new web tools and systems</u>					
<u>Procure a new Tax Collection system</u>	FY10 Q3	<input checked="" type="checkbox"/> 100 %	100 %	n/a	n/a
<u>Acceptance of Major Credit Cards for Payment of Property Taxes</u>	Jun 2010	<input checked="" type="checkbox"/> 80 % Complete	100 % Complete	n/a	n/a
<u>Auto Tag WebMail for Customer Assistance</u>	FY10 Q3	<input checked="" type="checkbox"/> 172	600	<input checked="" type="checkbox"/> 692	1,700
<u>Vendor Payments Website Visits</u>	FY10 Q3	2,614	n/a	n/a	n/a
<u>Improve Facilities to Enhance Customer Services</u>					
<u>Relocate the Tax Collector's Office to a New Facility</u>	FY10 Q3	<input checked="" type="checkbox"/> 32 %	90 %	n/a	n/a
<u>Increase Customer Awareness of Tax Collector Services</u>					
<u>Tax Bill Printing Process</u>	FY10 Q3	<input checked="" type="checkbox"/> 100 %	100 %	n/a	n/a
<u>Enhance Tax Collector Customer Service</u>					
<u>Tax Collector Customer Satisfaction Surveys</u>	Jun 2010	<input checked="" type="checkbox"/> 100 %	90 %	<input checked="" type="checkbox"/> 99 %	90 %
<u>Acceptance of Major Credit Cards for Payment of Property Taxes</u>	Jun 2010	<input checked="" type="checkbox"/> 80 % Complete	100 % Complete	n/a	n/a
<u>Auto Tag Customer Relations Call Center Report</u>	Jul 2010	<input checked="" type="checkbox"/> 8,509	8,600	<input checked="" type="checkbox"/> 104,590	86,000
<u>Review Auto Tag Administrative Orders and Ordinances</u>	FY10 Q2	100 %	n/a	n/a	n/a
<u>Auto Tag WebMail for Customer Assistance</u>	FY10 Q3	<input checked="" type="checkbox"/> 172	600	<input checked="" type="checkbox"/> 692	1,700
<u>Procure a new Tax Collection system</u>	FY10 Q3	<input checked="" type="checkbox"/> 100 %	100 %	n/a	n/a

**2.0 Financial**

Name	As of Date	Actual	Business	FYTD	FYTD Goal
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Cohesive, standardized countywide financial systems and processes - Finance

<u>Support ERP implementation effort in the County (ATTACHMENT)</u>	FY09 Q2	70 %	70 %	70 %	70 %
<u>Implement a Financial Data Warehouse - Phase I</u>	FY10 Q1	85 %	n/a	85 %	n/a

Improve the refund process for property tax payments; Value Adjustment Board (VAB) refunds in particular

<u>Number of Value Adjustment Board refunds processed monthly</u>	Jul 2010	8,540	n/a	16,861	n/a
<u>Tax Collector's Office Value Adjustment Board refund processing time</u>	Jul 2010	9 days	n/a	7 days	n/a
<u>Total Value Adjustment Board tax refund processing time</u>	Jul 2010	52 days	30 days	21 days	57 days

Streamline internal payment processing methods

<u>Ad Valorem Exceptions as a % of in-house mailed transactions</u>	Jun 2010	0.73 %	5.00 %	5.08 %	5.00 %
<u>Auto Tag Exceptions % of Mailed Vehicle &amp; Vessel Registrations</u>	Jun 2010	0.23 %	2.00 %	0.24 %	2.00 %
<u>Number of Exception Tax Bills Printed</u>	Jun 2010	6,072	7,912	64,557	74,713
<u>LBT Exceptions as a % of in-house mailed items</u>	Jul 2010	10 %	20 %	n/a	n/a

Use Technology to Improve Payments Processing Systems

<u>Procure a new Tax Collection system</u>	FY10 Q3	100 %	100 %	n/a	n/a
<u>Monitor Online Auto Tag Registration Renewals</u>	FY10 Q3	94,095	107,216	305,809	340,899
<u>Monitor Online Ad Valorem Tax Payments (in thousands)</u>	Jul 2010	\$490 K	\$333 K	\$439,777 K	\$450,721 K
<u>Monitor Online Local Business Tax Renewals</u>	FY10 Q3	7.5 %	n/a	12.3 %	n/a
<u>Develop Auto Tag Revenue Distribution System</u>	Jul 2010	100 %	n/a	n/a	n/a
<u>Implement New Electronic Data Management Systems</u>	Jul 2010	100 %	n/a	n/a	n/a

**4.0 Learning and Growth**

Name	As of Date	Actual	Business Plan Goal	FYTD Actual	FYTD Goal
<u>Diversity Reports</u>					
<u>Bond Administration</u>	FY10 Q3	9	n/a	8	n/a

College/University Enrollment

<u>Supervisory Courses</u>	FY10 Q3	4	n/a	n/a	n/a
<u>Non-Supervisory Courses</u>	FY10 Q3	2	n/a	n/a	n/a

Monitor Interview Panel/RFP Selection Committee Participation

<u>Interview Panel Participation (hours)</u>	FY10 Q2	0	n/a	0	n/a
<u>RFP Selection Committee</u>	FY10 Q2	31	n/a	51	n/a

**Scorecard Exception Report    Business Plan Reports**

**Scorecard Owners:** Cespedes, Graciela Padron, Blanca Casamayor, Fernando Hill, Chris Gonzalez, Mariela Hammer, Carter

**Linked Objects**

Hide All

**Child Scorecards**

**Owners**

Controller's Division

Cespedes, Graciela  
Hammer, Carter  
Padron, Blanca  
Teintze, Jurgen

Tax Collector

Cam, Peter  
Casamayor, Fernando  
Hammer, Carter

Bond Administration

Hammer, Carter  
Maresma, Liliana Monzon-Aguirre, Lidia

Cash Management

Gonzalez, Mariela  
Hammer, Carter Hill, Chris

**Parent Scorecards**

**Owners**

ACM Scorecard - Torriente, Susanne

Fernandez, Margarita  
Torriente, Susanne

**Objectives**

**Owners**

Ensure Timely Payment of Vendor Invoices

Padron, Blanca  
Suarez, Dennise

Enhance customer service through new web tools and systems

Hammer, Carter  
Suarez, Dennise

Improve Facilities to Enhance Customer Services

Cam, Peter  
Casamayor, Fernando  
Gomez, Gerardo  
Hammer, Carter  
Suarez, Dennise  
Teintze, Jurgen

(ES8.5.5) Increase Customer Awareness of Tax Collector Services

Cam, Peter Chuck, Paulette  
Hammer, Carter  
Suarez, Dennise  
Teintze, Jurgen

<u>Research, Design, Procure and Commence Implementation of Accounts Payable Shared Services Workflow</u>		09/30/2009		n/a	In Progress	<u>Garcia, Hilda</u>
<u>RFP for External Independent Audit Services</u>		06/30/2009		5%	In Progress	<u>Garcia, Hilda</u>
<u>Create Branch Auto Tag Agency Online Payment Application</u>		09/30/2009		100%	Complete	<u>Frow, Sylvia</u> <u>Casamayor, Fernando</u> <u>Galea, Chuck</u> <u>Wheeler, Eulyne</u>
<u>Implement Sorties in Business Taxes and Licenses Unit. 2 in fy 2007, 3 in fy2008, at least 2 in fy2009</u>		09/30/2009		100%	Complete	<u>Teintze, Jurgen</u> <u>Frow, Sylvia</u> <u>Cam, Peter</u> <u>Suarez, Dennise</u> <u>Millet, Matty</u> <u>Casamayor, Fernando</u>
<u>Finance Department's Accountant I - Internship Program</u>		n/a		n/a	n/a	<u>Padron, Blanca</u>
<u>Received the 2006 National Association of Counties Achievement Award for the Vendor Payment Inquiry Website</u>		n/a		n/a	n/a	<u>Padron, Blanca</u> <u>Hammer, Carter</u>

**Processes**

There are no processes linked at this time.

**REFERENCE CENTER**

Action Items				<a href="#">Show Details</a>
Due Date	Status	Action		Owners
No Action Items to Report				
	Open		Overdue	

Comments		
Author/Date	Comment	<a href="#">Show All</a>
There are no comments at this time.		

<b>External Links</b>	<b>Attached Documents</b>
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# Finance Department Business Plan Reports

Run Date: 8/23/2010

[Show Comments](#)

## Customer Perspective

Objective Name	Owner(s)
Ensure Timely Payment of Vendor Invoices	Blanca Padron Dennise Suarez

Initiatives Linked To Objective	Owner(s)	GrandParent Objectives

Parent Objectives

Measure	Owner(s)
Timely Payment of Invoices (45 days) (ATTACHMENT)	Blanca Padron

Percentage of invoices paid within 45 days

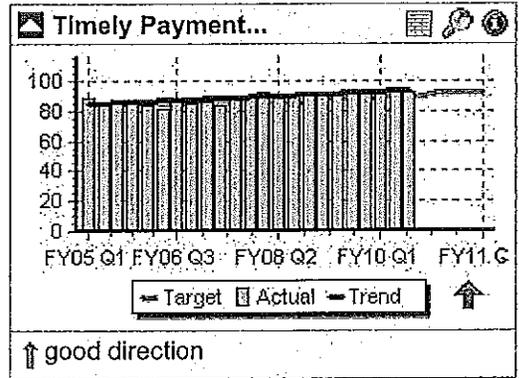
Performance				
Ind	Actual	Target	Variance	Date

<input checked="" type="checkbox"/>	93 %	90 %	3 %	FY10 Q3
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Initiatives Linked To Measure	Owner(s)

Child Measures Linked To Measure				
Ind	Name	Actual	Target	Date

<input checked="" type="checkbox"/>	Accounts Payable (Emergency Checks)	404	1,000	FY10 Q3
<input checked="" type="checkbox"/>	Accounts Payable (Checks Issued)	37,704	37,000	FY10 Q3
<input checked="" type="checkbox"/>	Accounts Payable (Vouchers)	146,751	n/a	FY10 Q3
<input checked="" type="checkbox"/>	ACH Payments (% of Dollars) (ATTACHMENT)	79 %	50 %	FY10 Q3
<input checked="" type="checkbox"/>	Purchasing Card Program	\$584,708	\$500,000	FY10 Q3
<input checked="" type="checkbox"/>	Travel Card Program	\$281,752	\$200,000	FY10 Q3



**Objective Name**

**Owner(s)**

Enhance customer service through new web tools and systems

Carter Hammer Dennise Suarez Finance

**Initiatives Linked To Objective**

**Owner(s)**

Received the 2006 National Association of Counties Achievement Award for the Vendor Payment Inquiry Website

Carter Hammer  
Blanca Padron

Create Branch Auto Tag Agency Online Payment Application

Fernando Casamayor  
Sylvia Frow  
Chuck Galea  
Eulyne Wheeler

**GrandParent Objectives**

**Parent Objectives**

**Measure**

**Owner(s)**

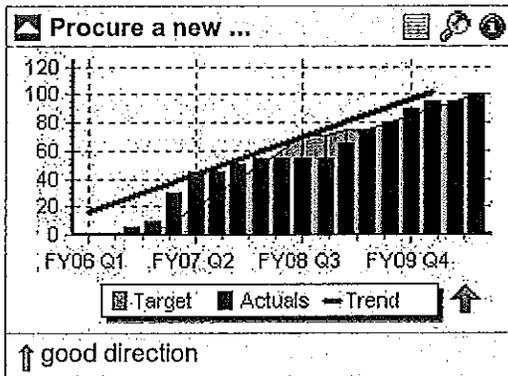
Procure a new Tax Collection system

Carter Hammer Peter Cam Fernando Casamayor Gerardo Gomez  
Dennise Suarez Jurgen Teintze

Procure a replacement for the aging legacy tax system to include Ad Valorem, Tangible Personal Property, Local Business Taxes and Convention and Tourist Taxes.

**Performance**

Ind	Actual	Target	Variance	Date
☑	100 %	100 %	0 %	FY10 Q3



**Initiatives Linked To Measure**

**Owner(s)**

Timeline to Procure a New Tax System

Peter Cam  
Fernando Casamayor  
Dennise Suarez

RFP Proposal Submission by Vendors

Peter Cam  
Fernando Casamayor  
Gerardo Gomez

Vendors Proposals Evaluation and Selection

Peter Cam  
Fernando Casamayor  
Gerardo Gomez

Vendor Protest Period

Peter Cam  
Fernando Casamayor  
Gerardo Gomez

Budget Planning & Sustainability Committee and BCC Contract Approval

Peter Cam  
Fernando Casamayor  
Gerardo Gomez

**Child Measures Linked To Measure**

**Ind Name Actual Target Date**

Measure	Owner(s)
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Vendor Payments Website Visits

Hilda Garcia Dennise Suarez

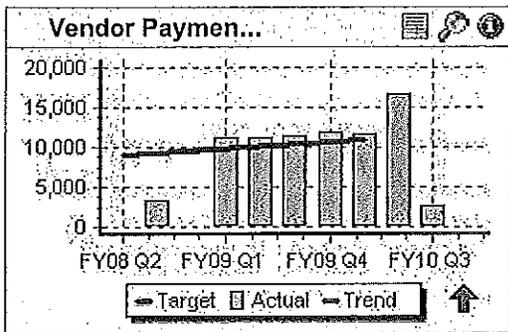
Performance				
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Ind	Actual	Target	Variance	Date
	2,614	n/a	n/a	FY10 Q3

Initiatives Linked To Measure	Owner(s)
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Child Measures Linked To Measure			
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Ind	Name	Actual	Target	Date
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Objective Name	Owner(s)
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Increase Customer Awareness of Tax Collector Services	Peter Cam Paulette Chuck Carter Hammer Dennise Suarez Jurgen Teintze
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Increase customer awareness of Tax Collector Services by enhancing customer information including tax collector office brochures in several languages, web page revision and by improving official forms, notices and bills.

Initiatives Linked To Objective	Owner(s)	GrandParent Objectives
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Expand outreach and availability of information	Peter Cam Fernando Casamayor Paulette Chuck Gerardo Gomez Dennise Suarez Jurgen Teintze	
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		(ES8) Ensure the financial viability of the County through sound financial management practices
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Enhance on-line tax payment services	Peter Cam Fernando Casamayor Sylvia Frow Gerardo Gomez Dennise Suarez Jurgen Teintze	
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Parent Objectives
(ES8.5) Effective County tax collection and property appraisal process

Develop Tangible Personal Property Website	Peter Cam Fernando Casamayor Sylvia Frow Gerardo Gomez Carter Hammer Dennise Suarez Jurgen Teintze	
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Acceptance of tax payments in local Wachovia branches	Peter Cam Fernando Casamayor Sylvia Frow Gerardo Gomez Dennise Suarez Jurgen Teintze	
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Relocate downtown Tax Collector's Office operation in the forthcoming Overtown 2 complex	Peter Cam Fernando Casamayor Sylvia Frow Gerardo Gomez Jurgen Teintze	
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Public Awareness Campaign	Peter Cam Fernando Casamayor Paulette Chuck Sylvia Frow Gerardo Gomez Jurgen Teintze	
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Measure	Owner(s)
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Tax Bill Printing Process	Maresa Cain Peter Cam Gerardo Gomez Dennise Suarez Fernando Casamayor
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The Ad Valorem tax bill printing and mailing process is a year round activity comprising of several printings and mail outs. The largest and most complex of these is the annual real estate tax bill which is mailed on November 1st each year. Customers on the quarterly payment plan receive a quarterly bill and tax payers who have not paid their tax bill receive a reminder in April. The processes are measured below.

Performance	Initiatives Linked To Measure	Owner(s)
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Ind	Actual	Target	Variance	Date	Initiatives Linked To Measure	Owner(s)
■	100 %	100 %	0 %	FY10 Q3	Tax Bill Process - November - May 2010	Peter Cam
					Tax Bill Process April - June 2009	Peter Cam
					Tax Bill Process - July 2009	Peter Cam
					Tax Bill Process - August & September	Peter Cam

Tax Bill Printing...

**Objective Name****Owner(s)**

Enhance Tax Collector Customer Service Peter Cam Fernando Casamayor Carter Hammer Dennise Suarez Jurgen Teintze

Continue to enhance customer service by improving internal procedures and processes such as automating payments processing, managing customer inquiries via email and phone, reducing processing errors and continuing to work with our private auto tag agencies on initiatives to improve the services they provide the public.

**Initiatives Linked To Objective****Owner(s)****GrandParent Objectives**

(ES8) Ensure the financial viability of the County through sound financial management practices

**Parent Objectives**

Enhance customer service through new web tools and systems

(ES8.5) Effective County tax collection and property appraisal process

**Measure****Owner(s)**

Tax Collector Customer Satisfaction Surveys Maresa Cain Peter Cam Fernando Casamayor Chuck Galea Gerardo Gomez

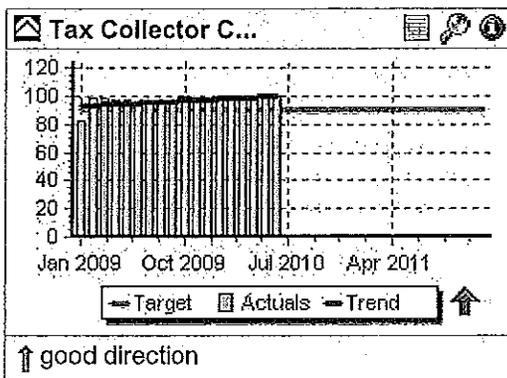
The Tax Collector is constantly striving to provide the best possible level of customer service available. By utilizing Customer Service Satisfaction Surveys in the Downtown and SDGC Public Service Offices (PSO), the Tax Collector will be able to measure and monitor the quality of to ensure the customer's expectations have been met.

**Performance**

Ind	Actual	Target	Variance	Date
☒	100 %	90 %	10 %	Jun 2010

**Initiatives Linked To Measure****Owner(s)****Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
	SDGC Customer Service Satisfaction	n/a	n/a	Jul 2010
☒	Ad Valorem Customer Service Satisfaction	98 %	90 %	Jul 2010
☒	Auto Tag PSO Customer Service Satisfaction	99 %	90 %	Jul 2010



**Measure**

**Owner(s)**

Review Auto Tag Administrative Orders and Ordinances

Fernando Casamayor Sylvia Frow Chuck Galea Gerardo Gomez

Review all Auto Tag Administrative Orders (4-83 & 4-108) and provisions in the County Code which govern private auto tag agencies to ensure the these authorizing polices are up to date and in compliance with County and State regulations.

**Performance**

Ind	Actual	Target	Variance	Date
	100 %	n/a	n/a	FY10 Q2

**Initiatives Linked To Measure**

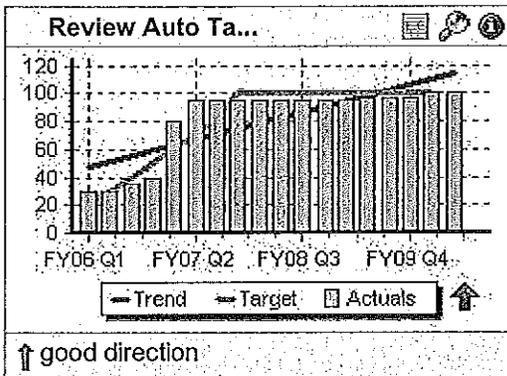
**Owner(s)**

Review and Clean up of A.O.s and County Code

Fernando Casamayor

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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**Measure**

**Owner(s)**

Auto Tag WebMail for Customer Assistance

Fernando Casamayor Sylvia Frow Chuck Galea Gerardo Gomez Eulyne Wheeler

The Auto Tag web mail program was developed to assist with the increasing volume of incoming customer requests for information regarding vehicle/vessel titles and registrations. The program was Implementation in 2006 and to date the average majority of all incoming auto tag emails are reviewed and closed within a 48-hour period.

**Performance**

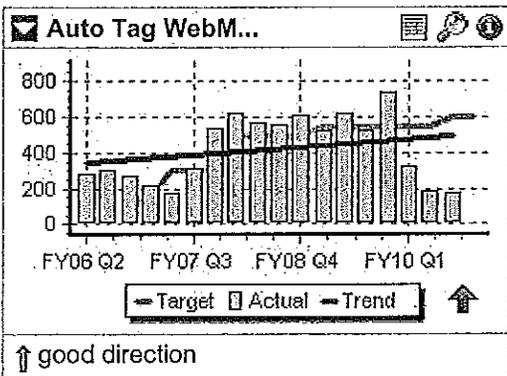
Ind	Actual	Target	Variance	Date
☑	172	600	(428)	FY10 Q3

**Initiatives Linked To Measure**

**Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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# Financial Perspective

Objective Name	Owner(s)
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Compliance with Regulatory Requirements	Carter Hammer Dennise Suarez
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Initiatives Linked To Objective	Owner(s)
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Annual Financial Audit	Hilda Garcia Blanca Padron Maria Rivero
Annual Financial Audit	Blanca Padron

GrandParent Objectives
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Parent Objectives
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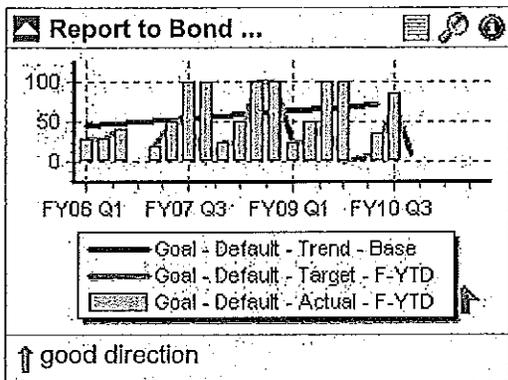
Measure	Owner(s)
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Report to Bond Holders (SEC)	Liliana Maresma Lidia Monzon-Aguirre
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Electronic Filing of the County's annual report to bond holders by June 1st and distribution of the printed report (the Bond Book) subsequently.

Performance
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Ind	Actual	Target	Variance	Date
▣	85 %	75 %	(10) %	FY10 Q3



Initiatives Linked To Measure	Owner(s)
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Annual Report to Bondholders FY 06-07	Liliana Maresma Lidia Monzon-Aguirre
Annual Report to Bondholders FY07-08	Liliana Maresma Lidia Monzon-Aguirre
Annual Report to Bondholders FY08-09	Liliana Maresma Lidia Monzon-Aguirre
Annual Report to Bondholders FY-09/10	Liliana Maresma Lidia Monzon-Aguirre

Child Measures Linked To Measure
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Ind	Name	Actual	Target	Date
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**Objective Name****Owner(s)**

Sound asset management and financial investment strategies - Finance

Carter Hammer Lilliana Maresma Lidia Monzon-Aguirre Finance

**Initiatives Linked To Objective****Owner(s)****GrandParent Objectives****Parent Objectives****Measure****Owner(s)**

Bond Ratings Evaluation by Moody's

Lilliana Maresma Lidia Monzon-Aguirre

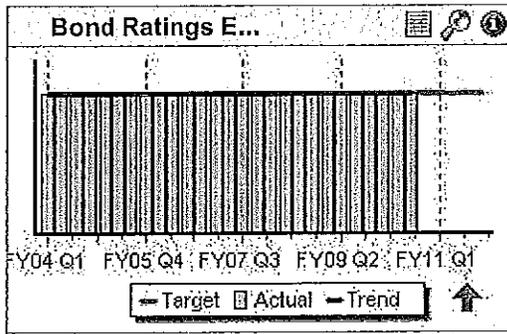
Miami-Dade County bond ratings from Moody's

**Performance****Initiatives Linked To Measure****Owner(s)**

Ind	Actual	Target	Variance	Date
<input checked="" type="checkbox"/>	Aa3	Aa3	n/a	FY10 Q3

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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Projects (Closed  
9/09))

	Public Facilities (Jackson Memorial) Series 2009 \$83M (Closed 9/09)	100	35	FY09 Q4
	Aviation Revenue Bonds Series 2010 (Closed 1/28/10)	100	100	FY10 Q2



Objective Name	Owner(s)
Collection of Key Taxes	Dennise Suarez

Initiatives Linked To Objective	Owner(s)

GrandParent Objectives

Parent Objectives

Measure	Owner(s)
Total Auto Tag Revenue Collected Countywide	Peter Cam

These figure show the total State and County Auto Tag related fees collected by the Tax Collector's Office and all 25 private tag agencies throughout Miami-Dade County. 2009-10 target figures were set flat to 2008-9 revenue.

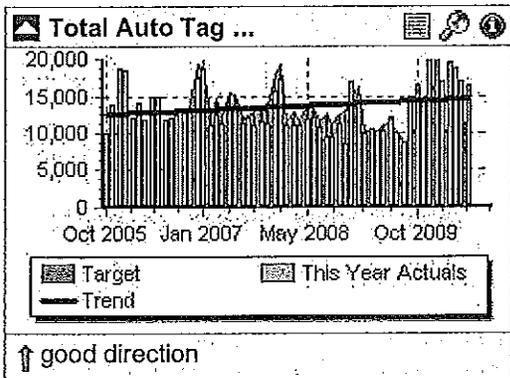
Performance
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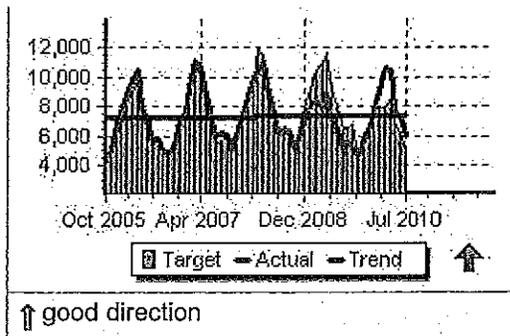
Ind	Actual	Target	Variance	Date
▲	\$16,527 K	\$11,981 K	\$4,546 K	Jun 2010

Initiatives Linked To Measure	Owner(s)

Child Measures Linked To Measure
----------------------------------

Ind	Name	Actual	Target	Date
▲	Monitor Cumulative Auto Tag Fees Collected Countywide	\$167,434 K	\$104,468 K	Jun 2010





Delinquent Returns	\$554 K	\$477 K	Jul 2010
Homeless and Domestic Violence Tax on Sale of Food and Beverages	\$1,279 K	\$1,196 K	Jul 2010
Professional Sports Tax Revenues (PST 1%)	\$508 K	\$405 K	Jul 2010
Tourist Development Room Tax Revenue (TDT 2%)	\$1,016 K	\$809 K	Jul 2010
Tourist Development Surtax (Hotel/Motel Food and Beverage)	\$340 K	\$301 K	Jul 2010



<input checked="" type="checkbox"/>	Local Business Tax Field Enforcement Collections	\$39 k	\$55 k	Jun 2010
	Tangible Personal Property Tax Collect (current)	\$1,314 k	n/a	Jun 2010
	Open Accts for Enforcement	n/a	n/a	

**Objective Name**

**Owner(s)**

Meet Budget Targets (Finance) (ATTACHMENT for all divisions)

Fernando Casamayor Carter Hammer Dennise Suarez

**Initiatives Linked To Objective**

**Owner(s)**

**GrandParent Objectives**

Planned necessary resources to meet current and future operating and capital needs (priority outcome)

**Parent Objectives**

(ES8.2.1) Meet Budget Targets

**Measure**

**Owner(s)**

Revenue: Total (Finance)

Carter Hammer Peter Cam Fernando Casamayor Hilda Garcia

Total revenue in \$1,000s (from FAMIS)

**Performance**

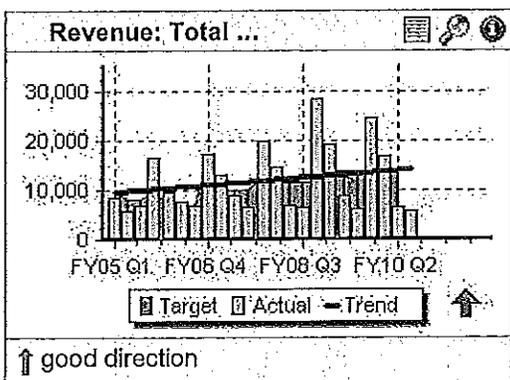
Ind	Actual	Target	Variance	Date
	\$5,556 K	n/a	n/a	FY10 Q3

**Initiatives Linked To Measure**

**Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
<input checked="" type="checkbox"/>	Ad Valorem Fees (in thousands)	\$1,294 K	\$5,633 K	FY10 Q3
<input checked="" type="checkbox"/>	Auto Tag Fees (in thousands)	\$2,236 K	\$2,648 K	FY10 Q3
	Bond Admin Fees and Charges (in thousands)	\$9 K	n/a	FY10 Q3
<input checked="" type="checkbox"/>	Carry Over - Total (in thousands)	\$0 K	\$2,589 K	FY10 Q3
<input checked="" type="checkbox"/>	Cash Management Fees (in thousands)	\$733 K	\$323 K	FY10 Q3
<input checked="" type="checkbox"/>	Credit and Collections Charges (in thousands)	\$374 K	\$391 K	FY10 Q3
<input checked="" type="checkbox"/>	Local Business Tax Revenue to Finance (in thousands)	\$183 K	\$821 K	FY10 Q3
<input checked="" type="checkbox"/>	Tourist Tax Fees (in thousands)	\$727 K	\$493 K	FY10 Q3



Objective Name	Owner(s)
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Budget Implementation FY 09-10 (Finance)	Carter Hammer
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Initiatives Linked To Objective	Owner(s)
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 Close down South Dade Public Service Office and eliminate 8 positions in Tax Collector (FIN-1)	Carter Hammer
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GrandParent Objectives
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Parent Objectives
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Measure	Owner(s)
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Implement a Financial Data Warehouse - Phase I

Blanca Padron Connie White

Phase One will include the setup and Installation of a data warehouse for a couple of pilot departments.

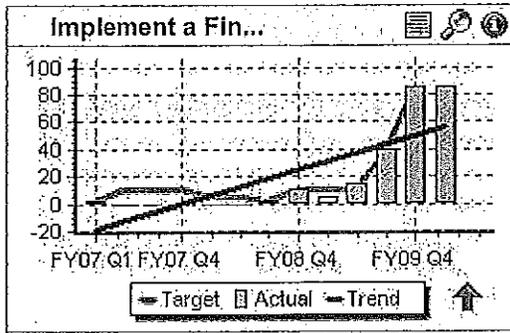
Performance				
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Ind	Actual	Target	Variance	Date
	85 %	n/a	n/a	FY10 Q1

Initiatives Linked To Measure		Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
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**Measure** **Owner(s)**

Tax Collector's Office Value Adjustment Board refund processing time

Maresa Cain Peter Cam Fernando Casamayor Gerardo Gomez Jurgen Teintze

State Statutes require that the Tax Collector's Office takes no more than thirty days to process a Value Adjustment Board (VAB) refund. This chart below shows the average number of days that the refund process takes within the Tax Collector's Office and the Accounts Payable section of the Controller's Office. This excludes the time taken between the VAB decision date and its arrival at the Tax Collector's Office.

**Performance**

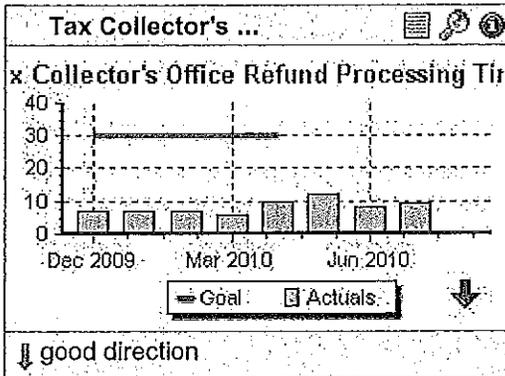
Ind	Actual	Target	Variance	Date
	9 days	n/a	n/a	Jul 2010

**Initiatives Linked To Measure** **Owner(s)**

Value Adjustment Board Refunds by Month Fernando Casamayor

**Child Measures Linked To Measure**

Ind Name Actual Target Date



**Measure** **Owner(s)**

Total Value Adjustment Board tax refund processing time

Maresa Cain Peter Cam Fernando Casamayor Gerardo Gomez Jurgen Teintze

Property tax refunds are required by State Statute to be completed within sixty days from the date that the Value Adjustment Board (VAB) makes the decision to refund the tax payer. This measure shows the average number of days that it takes to process a tax refund from the date of the VAB hearing until the check is issued to the customer. This includes the amount of time taken by the Property Appraiser to notify the Tax Collector of the change in value after the VAB hearing is completed.

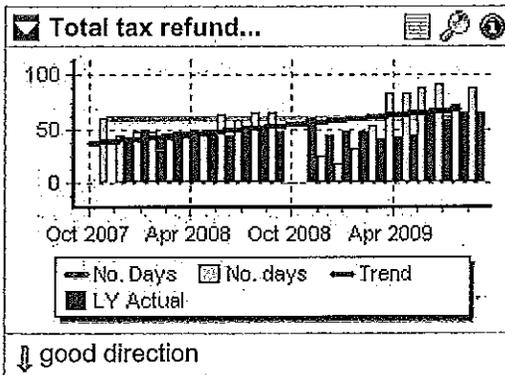
**Performance**

Ind	Actual	Target	Variance	Date
<input checked="" type="checkbox"/>	52 days	30 days	(22) days	Jul 2010

**Initiatives Linked To Measure** **Owner(s)**

**Child Measures Linked To Measure**

Ind Name Actual Target Date



Measure	Owner(s)
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Auto Tag Exceptions % of Mailed Vehicle & Vessel Registrations

Fernando Casamayor Peter Cam Gerardo Gomez

Exceptions are those payments that cannot be processed on the high speed payments processor. Most of these initial rejects are now processed within the FPPU. However, others are more complex. These are the main types of Auto Tag "exceptions" payments which are now being processed by the FPPU: 1. Personalized plate applications. 2. Disabled parking permit applications. 3. Items rejected to customers or vehicle stops. 4. All items that have incorrect amounts. Reducing the percentage of exception payments through system improvements and programming will further automate payments processing, thereby increasing overall processing efficiency.

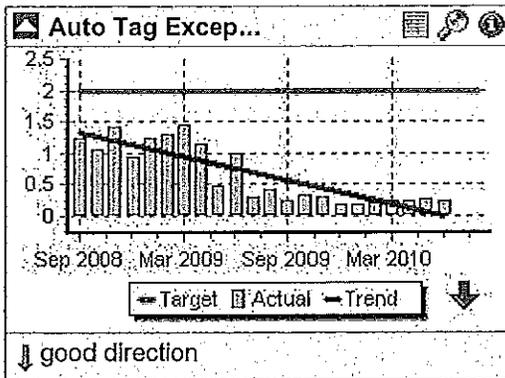
Performance				
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Ind	Actual	Target	Variance	Date
<input checked="" type="checkbox"/>	0.23 %	2.00 %	1.77 %	Jun 2010

Initiatives Linked To Measure		Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
	Auto Tag Exceptions	164	n/a	Jun 2010
	Auto Tag Transactions	71,089	n/a	Jun 2010



Measure	Owner(s)
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Number of Exception Tax Bills Printed

Peter Cam Fernando Casamayor Gerardo Gomez Dennise Suarez Jurgen Teintze

The FPPU commenced printing tax bills in October 2007 to reduce the number of payments that could not be fast processed and needed to be taken to another area of the division where a bill would be printed and the payment processed. As FPPU prints more tax bills thereby processing more payments within the unit, fewer exception payments are sent to the Ad Valorem Exceptions unit for further research and finally processing. The more bills that FPPU prints, the more efficient and timely tax payment processing becomes as payments are not moved around the division handled by different employees. The monthly target is a 2% increase in number of bills printed for the same month the previous year.

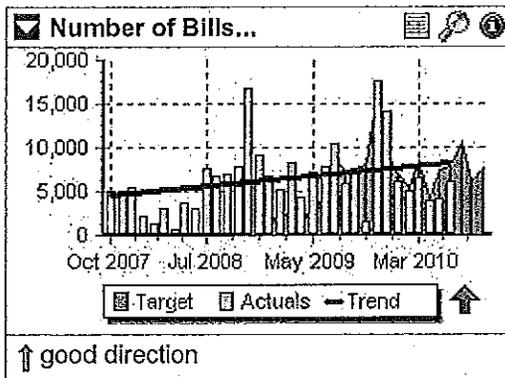
Performance				
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Ind	Actual	Target	Variance	Date
<input checked="" type="checkbox"/>	6,072	7,912	(1,840)	Jun 2010

Initiatives Linked To Measure		Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
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Objective Name	Owner(s)
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Use Technology to Improve Payments Processing Systems	Peter Cam Fernando Casamayor Carter Hammer Carl Strowd Dennise Suarez Jurgen Teintze
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Develop a new tax collection and billing system to replace the aging legacy systems that provide limited reporting capabilities. New systems in our Convention and Tourist Tax, Local Business Tax and Property Tax sections are needed to improve operational efficiency, enhance customer service and improve compliance.

Initiatives Linked To Objective	Owner(s)
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Create Branch Auto Tag Agency Online Payment Application	Fernando Casamayor Sylvia Frow Chuck Galea Eulyne Wheeler
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Tax Certificate Sale Statistics	Maresa Cain Peter Cam Fernando Casamayor
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GrandParent Objectives
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(ES8)Ensure the financial viability of the County through sound financial management practices

Parent Objectives
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(ES8.4) Cohesive, standardized countywide financial systems and processes

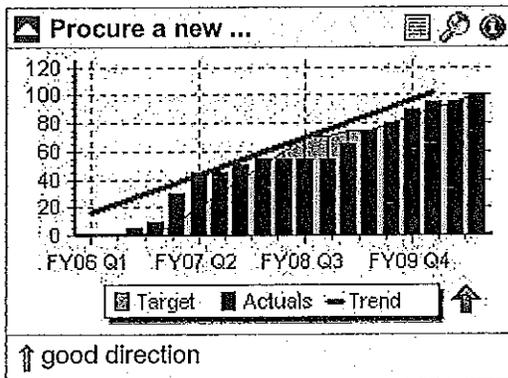
Measure	Owner(s)
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Procure a new Tax Collection system	Carter Hammer Peter Cam Fernando Casamayor Gerardo Gomez Dennise Suarez Jurgen Teintze
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Procure a replacement for the aging legacy tax system to include Ad Valorem, Tangible Personal Property, Local Business Taxes and Convention and Tourist Taxes.

Performance				
Ind	Actual	Target	Variance	Date

▲	100 %	100 %	0 %	FY10 Q3
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Initiatives Linked To Measure	Owner(s)
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Timeline to Procure a New Tax System	Peter Cam Fernando Casamayor Dennise Suarez
RFP Proposal Submission by Vendors	Peter Cam Fernando Casamayor Gerardo Gomez
Vendors Proposals Evaluation and Selection	Peter Cam Fernando Casamayor Gerardo Gomez
Vendor Protest Period	Peter Cam Fernando Casamayor Gerardo Gomez
Budget Planning & Sustainability Committee and BCC Contract Approval	Peter Cam Fernando Casamayor Gerardo Gomez

Child Measures Linked To Measure				
Ind	Name	Actual	Target	Date

**Measure**

**Owner(s)**

Monitor Online Local Business Tax Renewals

Peter Cam Fernando Casamayor Sylvia Frow Jurgen Teintze  
Gerardo Gomez

Online renewals for Local Business Tax receipts is a safe and dependable option. Since its implementation, the number of renewals processed online have continued to increase steadily. The attached chart describes the percentage of online renewals processed compared to all transactions.

**Performance**

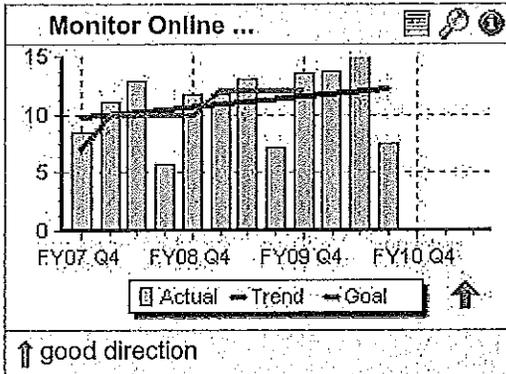
Ind	Actual	Target	Variance	Date
	7.5 %	n/a	n/a	FY10 Q3

**Initiatives Linked To Measure**

**Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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**Measure**

**Owner(s)**

Develop Auto Tag Revenue Distribution System

Sylvia Frow Carl Strowd

This system will automate the input, auditing and reporting of information on revenue collected by 30 private and public Auto Tag Agencies in Miami-Dade County. Microsoft Visual Studio and SQL Server are being used as development tools. Most of the manual data entry currently being done using spreadsheets, etc. will be eliminated, resulting in a significant cost savings.

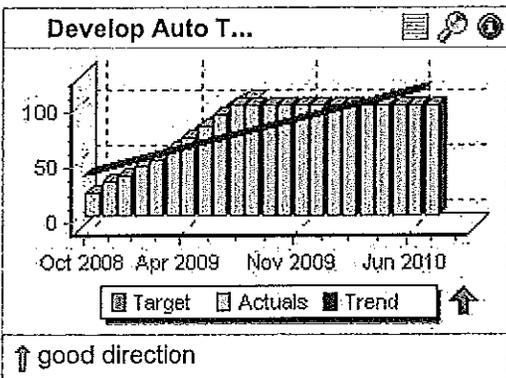
**Performance**

Ind	Actual	Target	Variance	Date
	100 %	n/a	n/a	Jul 2010

**Initiatives Linked To Measure**

**Owner(s)**

Project Planning and Feasibility Study	Sylvia Frow Carl Strowd
Systems Analysis and Requirements Definition	Sylvia Frow Carl Strowd
Systems Design	Sylvia Frow Carl Strowd
Database Implementation	Sylvia Frow Carl Strowd
Application Implementation	Sylvia Frow Carl Strowd
Integration, Testing and Security	Sylvia Frow Carl Strowd
Parallel Testing and Implementation	Sylvia Frow Carl Strowd



**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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# Learning and Growth Perspective

## Objective Name

## Owner(s)

Diversity Reports

Hilda Garcia Blanca Padron Dennise Suarez Finance

Divisional Summaries by Job Groups with additional breakdown by Equal Employment Opportunity Commission (EEOC) groups.

## Initiatives Linked To Objective

## Owner(s)

## GrandParent Objectives

## Parent Objectives

## Measure

## Owner(s)

Bond Administration

Hilda Garcia Blanca Padron Dennise Suarez

Breakdown of Executive, Administrative, Professional, Technical, Office, Clerical, Protective and Service positions by race.

## Performance

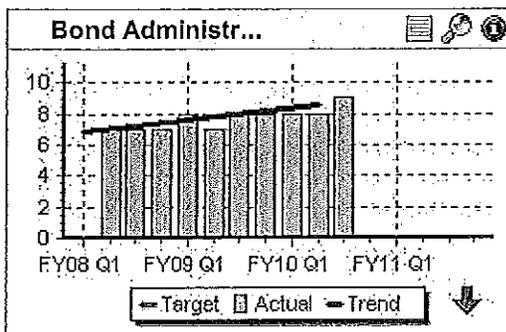
## Initiatives Linked To Measure

## Owner(s)

Ind	Actual	Target	Variance	Date
9		n/a	n/a	FY10 Q3

## Child Measures Linked To Measure

Ind	Name	Actual	Target	Date
	Black	2	n/a	FY10 Q3
	Hispanic	5	n/a	FY10 Q3
	Other	0	n/a	FY10 Q3
	White	2	n/a	FY10 Q3



**Measure** **Owner(s)**

Director's Office

Hilda Garcia Blanca Padron Dennise Suarez

Breakdown of Executive, Administrative, Professional, Technical, Office, Clerical, Protective and Service positions by race.

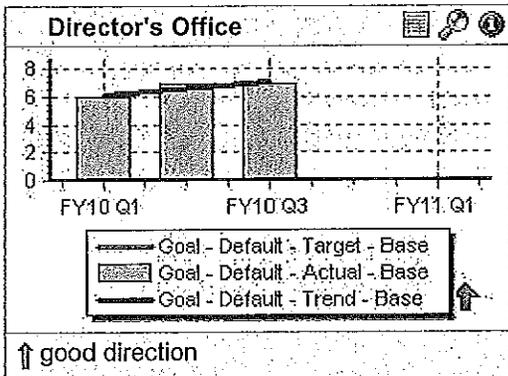
**Performance**

Ind	Actual	Target	Variance	Date
7		n/a	n/a	FY10 Q3

**Initiatives Linked To Measure** **Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
	Black	2	n/a	FY10 Q3
	Hispanic	3	n/a	FY10 Q3
	White	2	n/a	FY10 Q3
	Other	0	n/a	FY10 Q3



**Measure** **Owner(s)**

Tax Collector

Hilda Garcia Blanca Padron Dennise Suarez

Breakdown of Executive, Administrative, Professional, Technical, Office, Clerical, Protective and Service positions by race.

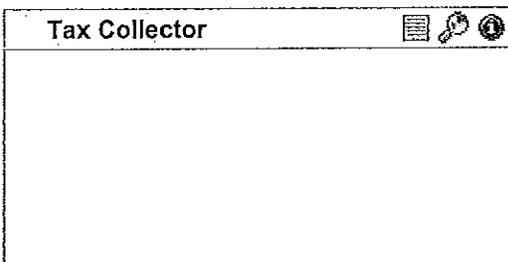
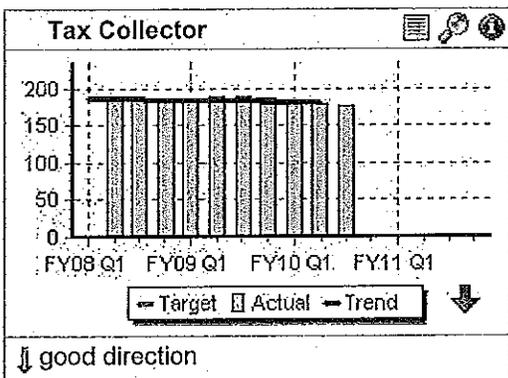
**Performance**

Ind	Actual	Target	Variance	Date
177		n/a	n/a	FY10 Q3

**Initiatives Linked To Measure** **Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
	Black	80	n/a	FY10 Q3
	Hispanic	80	n/a	FY10 Q3
	Other	2	n/a	FY10 Q3
	White	15	n/a	FY10 Q3



Measure	Owner(s)
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Finance Department

Hilda Garcia Dennise Suarez

Departmental breakdown of Executive, Administrative, Professional, Technical, Office, Clerical, Protective and Service positions by race.

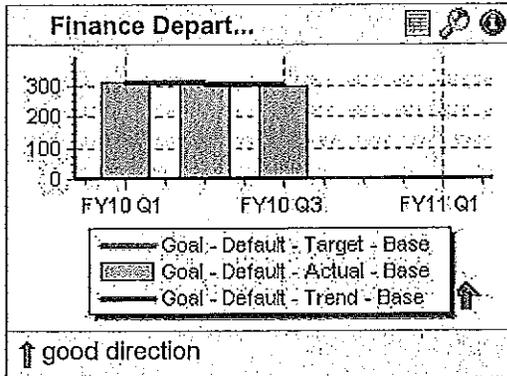
Performance				
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Ind	Actual	Target	Variance	Date
	301	n/a	n/a	FY10 Q3

Initiatives Linked To Measure				Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
	Executive/Administrative	19	n/a	FY10 Q3
	Protect/Serve	18	n/a	FY10 Q3
	Office/Clerical	150	n/a	FY10 Q3
	Technical	6	n/a	FY10 Q3
	Professionals	108	n/a	FY10 Q3



Measure	Owner(s)
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Temporary positions (Finance)

Blanca Padron

Actual number of temporary positions at the end of each quarter

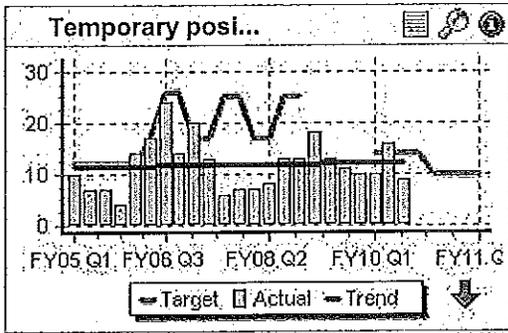
Performance				
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Ind	Actual	Target	Variance	Date
■	9	14	5	FY10 Q3

Initiatives Linked To Measure				Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
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Measure	Owner(s)
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Turnover rate - Finance Department

Blanca Padron

Employee turnover rate is computed by dividing the number of separations divided by the total number in the Workforce. Employees may leave an organization for a variety of reasons, including Retirement, Resignation, Dismissal, Layoff, Disability, Leave of Absence, or Death.

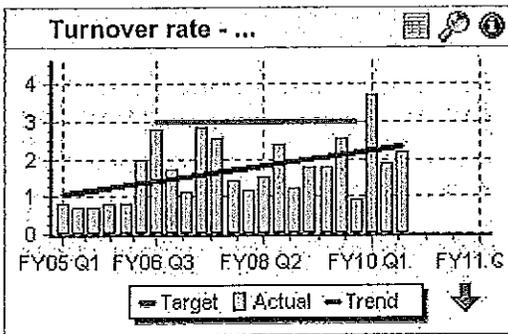
Performance				
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Ind	Actual	Target	Variance	Date
	2.2 %	n/a	n/a	FY10 Q3

Initiatives Linked To Measure				Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
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**Objective Name****Owner(s)**

Monitor Training/Seminars Participation

Blanca Padron Dennise Suarez Finance

**Initiatives Linked To Objective****Owner(s)**

Hurricane Preparedness Training

Carter Hammer  
Dennise Suarez**GrandParent Objectives****Parent Objectives****Measure****Owner(s)**

Countywide Financial and FEMA Systems Training

Blanca Padron

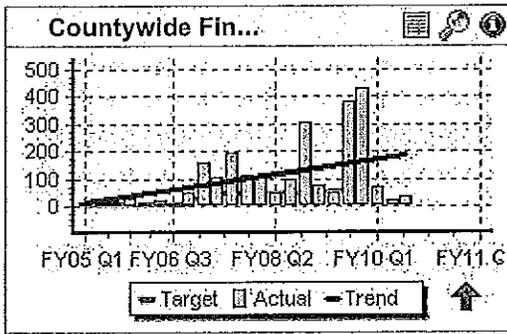
Number of users trained in the County's Financial system (FAMIS) and the FEMA system

**Performance**

Ind	Actual	Target	Variance	Date
	38	n/a	n/a	FY10 Q3

**Initiatives Linked To Measure****Owner(s)****Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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Measure	Owner(s)
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Monitor Seminar Attendance

Carter Hammer Peter Cam Blanca Padron

Total Number of employees who attended a seminar within the quarter for the Finance Department

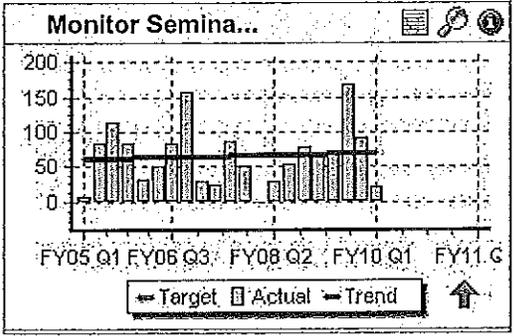
Performance				
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Ind	Actual	Target	Variance	Date
	20	n/a	n/a	FY10 Q1

Initiatives Linked To Measure				Owner(s)
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Child Measures Linked To Measure				
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Ind	Name	Actual	Target	Date
	Seminar Attendance - Miami-Dade County (In-House)	9	n/a	FY10 Q2
	Seminar Attendance - Educational (Local)	12	n/a	FY10 Q1
	Seminar Attendance - Educational (Travel)	2	n/a	FY10 Q1
	Seminar Attendance - Vendor Sponsored (Local)	4	n/a	FY10 Q2
	Seminar Attendance - Vendor Sponsored (Travel)	0	n/a	FY10 Q1
	Seminar Attendance - Web-Seminar	5	n/a	FY10 Q2



**Measure** **Owner(s)**

Baynanza Biscayne Bay Cleanup Day

Dennise Suarez

Number of employees participating in the annual Baynanza Biscayne Bay Cleanup Day. The goal of Biscayne Bay Cleanup Day is to educate our community about the impact of litter on the delicate shoreline and spoil islands of Biscayne Bay.

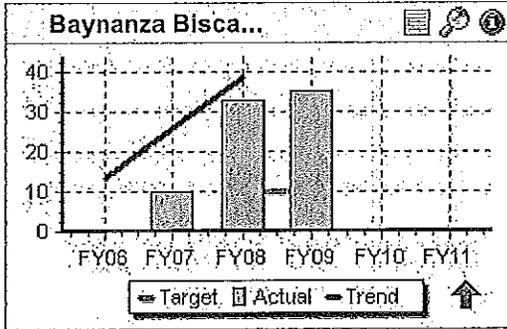
**Performance**

Ind	Actual	Target	Variance	Date
■	35	10	25	FY09

**Initiatives Linked To Measure** **Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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**Measure** **Owner(s)**

Contribution to Animal Services Department

Total dollar amount in purchased items for the Animal Services Department

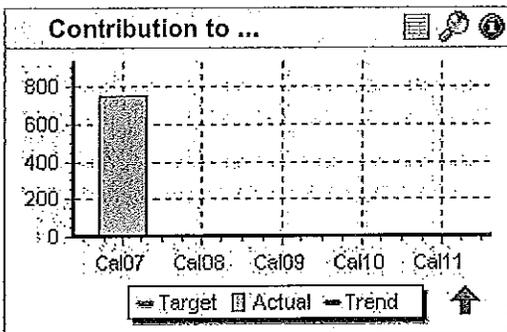
**Performance**

Ind	Actual	Target	Variance	Date
	n/a	n/a	n/a	Cal08

**Initiatives Linked To Measure** **Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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**Measure****Owner(s)**

Prevent Blindness Sight Savers Promotions

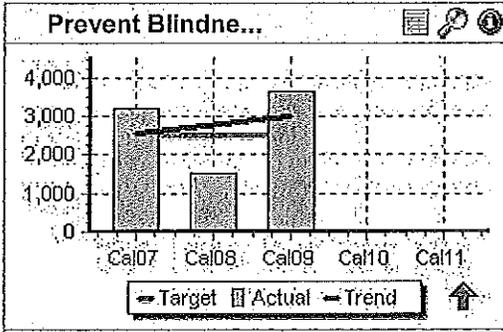
Dennise Suarez

**Performance**

Ind	Actual	Target	Variance	Date
☒	\$3,614	\$2,500	\$1,114	Cal09

**Initiatives Linked To Measure****Owner(s)****Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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**Measure****Owner(s)**

Strides Against Breast Cancer

Peter Cam

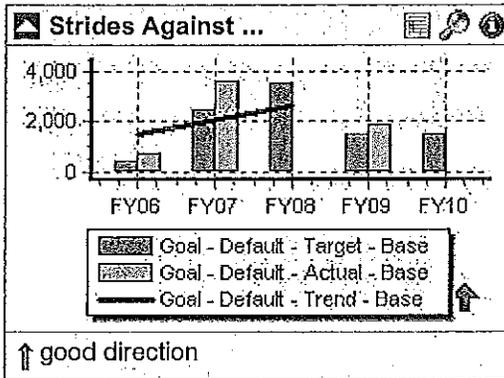
This campaign runs annually commencing October 7, 2007 will be the third year that the Finance Department has been collecting and donating funds for this cause.

**Performance**

Ind	Actual	Target	Variance	Date
☒	1,880	1,500	380	FY09

**Initiatives Linked To Measure****Owner(s)****Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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Objective Name	Owner(s)
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Diversity Initiative

Hilda Garcia Dennise Suarez

Breakdown of employees by various categories



Initiatives Linked To Objective	Owner(s)
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Finance Diversity Matters eLearning  
Program Schedule

Hilda Garcia

GrandParent Objectives
------------------------

Parent Objectives
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**Objective Name** **Owner(s)**

College/University Enrollment

Hilda Garcia

Monitoring employee class enrollment in a college or university

**Initiatives Linked To Objective** **Owner(s)**

**GrandParent Objectives**

**Parent Objectives**

**Measure** **Owner(s)**

Supervisory Courses

Hilda Garcia

Monitoring employees enrolled in supervisory courses.

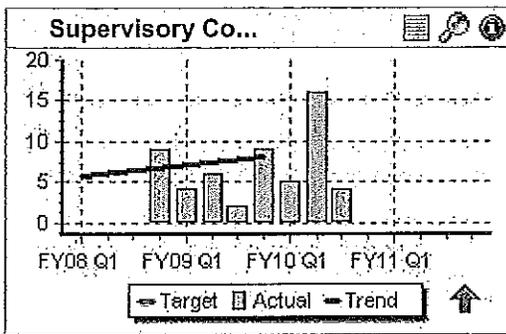
**Performance**

**Initiatives Linked To Measure** **Owner(s)**

Ind	Actual	Target	Variance	Date
	4	n/a	n/a	FY10 Q3

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
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**Objective Name** **Owner(s)**

Monitor Interview Panel/RFP Selection Committee Participation Hilda Garcia

**Initiatives Linked To Objective** **Owner(s)**

**GrandParent Objectives**

**Parent Objectives**

**Measure** **Owner(s)**

Interview Panel Participation (hours) Hilda Garcia

Participation of Finance employees in interview panels in Finance or other departments.

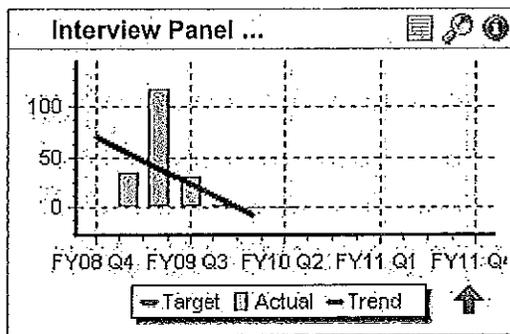
**Performance**

Ind	Actual	Target	Variance	Date
	0	n/a	n/a	FY10 Q2

**Initiatives Linked To Measure** **Owner(s)**

**Child Measures Linked To Measure**

Ind	Name	Actual	Target	Date
	Internal Participation	0	n/a	FY10 Q2
	External Participation	0	n/a	FY10 Q2



**Initiatives Linked To Scorecard**

	Type	As Of	\$	📄	✓	🕒	🎯	%	Status	Owners
<u>Research, Design, Procure and Commence Implementation of Accounts Payable Shared Services Workflow</u>	📄	09/30/2009	📄	📄				n/a	In Progress	<u>Garcia, Hilda</u>
<u>RFP for External Independent Audit Services</u>	📄	06/30/2009	📄	📄				5%	In Progress	<u>Garcia, Hilda</u>
<u>Create Branch Auto Tag Agency Online Payment Application</u>	📄	09/30/2009	📄	📄				100%	Complete	<u>Frow, Sylvia</u> <u>Casamayor, Fernando</u> <u>Galea, Chuck</u> <u>Wheeler, Eulyne</u>
<u>Implement Sorties in Business Taxes and Licenses Unit. 2 in fy 2007, 3 in fy2008, at least 2 in fy2009</u>	📄	09/30/2009	📄	📄				100%	Complete	<u>Teintze, Jurgen</u> <u>Frow, Sylvia</u> <u>Cam, Peter</u> <u>Suarez, Dennise</u> <u>Millet, Matty</u> <u>Casamayor, Fernando</u>
<u>Finance Department's Accountant I - Internship Program</u>	📄	n/a						n/a	n/a	<u>Padron, Blanca</u>
<u>Received the 2006 National Association of Counties Achievement Award for the Vendor Payment Inquiry Website</u>	📄	n/a						n/a	n/a	<u>Padron, Blanca</u> <u>Hammer, Carter</u>

**Open Action Items For Scorecard**

Due Date	Action	Status	Owner(s)

