

## Betty Burrell

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**From:** Betty Burrell  
**Sent:** Tuesday, June 14, 2016 6:16 AM  
**To:** Bill Letteri  
**Subject:** RE: Accomplishments

Good morning, Bill.

- While Vision isn't fully implemented yet, we are near the "Go Live" cut-over point (July). Staff involved in this project who aren't eager to learn the new system will hang on to Tom's wording, so let's be precise on how he talks about this topic.
- We had another successful debt issuance last fall - again, we have triple-AAA rated credit.
- We had quite a few staffing transitions, including several internal promotions.
- We held the Business community training in February, a partnership between Revenue Administration and Purchasing.
- We handle a massive volume of transactions throughout the year without recurring complaints: employees and vendors are paid on time and accurately, property owners are assessed fairly and taxpayers are treated courteously, even those who are irate.

Thanks!

sent from remote email  
Betty J. Burrell  
Director of Finance  
Albemarle County, VA

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**From:** Bill Letteri  
**Sent:** Monday, June 13, 2016 8:53 PM  
**To:** Betty Burrell  
**Subject:** Accomplishments

Betty,

Tom asked me about a few major accomplishments of the finance department, so that he could mention them tomorrow. A few items I mentioned were

- Implementation of vision software; allow greater access/interaction with citizens;
- GFOA award for CAFR; Staff prepared CAFR inhouse;
- Assistance with Health Care Fund;
- Revenue Team
- Improved Cash Management Programs
- Improved "push reports" to departments on monitoring budget, expenditures and balances;
- Enhanced revenue collection related to fines for out of state vehicles;

Anything else you think he should mention?

Thanks,  
Bill

**William M. Letteri**  
**Deputy County Executive**

## Betty Burrell

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**From:** Betty Burrell  
**Sent:** Tuesday, June 14, 2016 4:27 PM  
**To:** Finance Department – EMPLOYEE USE ONLY  
**Subject:** FY17 Goals and Objectives  
**Attachments:** FY17 Goals and Objectives FINAL.docx

Good afternoon,

Thank you all for actively participating in our staff meetings today. Attached are our FY17 goals and objectives that the Finance Leadership Team and I developed. Remember, we're asking each of you to consider which of these objectives you could take a leadership role in ensuring the goal is completed, or ask for help if one or more of these objectives is your responsibility and you need assistance in completing it. Also, if you have recommendations for additions or changes to these goals and objectives, please let me know.

Thanks, again.

Betty J. Burrell  
Director of Finance  
Albemarle County, VA  
(434) 296-5855 Option 1 (ext 3037)  
*Do what is right the right way; let the consequences follow.*

**Department of Finance**  
**FY17**  
**Mission, Vision, Values, Goals, Objectives**

**VISION:** To be the standard of excellence in the development and implementation of innovative programs and processes based on sound financial principles and practices while providing exceptional customer service by professional, competent, and courteous staff.

**MISSION:**

To be responsible for management of the County's finances guided by the fiscal policies adopted by the Board of Supervisors while promoting excellence, quality, and efficiency of operations by enhancing the ability of our employees to serve our internal and external customers in an outstanding manner.

**VALUES:**

Integrity, Innovation, Stewardship, Learning

**DESCRIPTION:** The Department of Finance is responsible for the County's overall financial management including: financial reporting, assessment and collection of all local revenues, cash management, debt management, risk management, and financial systems management functions. Finance provides services to the public and local government entities, including Albemarle County Joint Entities, and Public Schools. Services provided include: payroll; accounts payable; procurement; capital financing; general accounting, quarterly and annual financial reporting; economic vitality monitoring and reporting; and, revenue forecasting for County budgeting purposes.

***GOAL 1: Enforce fiscal policies that ensure a financially strong and effective County government.***

1. Hold Quarterly Investment Committee meetings-
2. Maintain the County's credit ratings
  - 2017 - work with Davenport on Line of Credit for CIP
3. Continue to provide periodic and informative financial reporting;
  - Complete bank reconciliations by the 10<sup>th</sup> of each month
  - Close each month by the 15<sup>th</sup> of each month
  - Monthly analyses of revenue projections - ongoing
  - Enhanced Revenue Reporting -
  - Quarterly financial reports to the Board of Supervisors - ongoing
  - FY16 CAFR final draft to auditors by 10/31/16
  - Improve number and dollar value of P-card purchases vs. BSO
4. Maintain high collection rates on current and delinquent taxes
  - Increase revenues from judicial sales and TACS collections; reduce allowance for bad debt - ongoing
  - Improve collection of miscellaneous accounts receivables -
  - Business tax audit activity - ongoing
5. Develop, document, enhance, disseminate, train on, and enforce administrative financial policies, department operating policies/standard operating procedures- ongoing

6. Maintain appropriate sales to assessment ratios - ongoing
7. Ensure post issuance compliance through following/ updating procedures, training, and active reporting - ongoing
8. Update department's five year resource needs plan, including personnel -

**GOAL 2: *Deliver cost effective and high-quality services to external and internal customers.***

1. Five-Year Risk Management Plan;
  - Develop plan toward self-funding - ongoing
  - Document and test business continuity plans - ongoing
  - Document safety plans and compliance catalog - ongoing
2. Continue "Source to Settlement" procurement and payment efficiency analyses and improvements,
  - P-cards enhancements - ongoing
  - Continue to pursue efficiency and cost savings via electronic payments - ongoing
  - Increased online services utilization - contingent upon funding
  - Purchasing process enhancements including expansion of use contracts, aggregate requisitioning and user change order management - ongoing
  - Improved vendor management and purchase information for enhanced purchasing capabilities - ongoing
3. Continuous business process improvements - ongoing
4. Address Quasar Group priorities; five year systems' plan- ongoing
5. Continue Vendor and Business Outreach program - annually
6. Succession and Resource Allocation Planning to advance the Department's Mission

**Goal 3: *Develop employee training plans that support staff development and succession planning, and encourage membership in professional organizations.***

1. Obtain continued funding for professional training opportunities, including online, on-site, and off-site sessions.
2. Obtain continued funding for memberships in appropriate professional organizations -
3. Develop mentoring opportunities and more formalized Onboarding of new hires - - ongoing
4. Continue cross-divisional training sessions among Finance managers including Division of Analytics - ongoing

**Goal 4: *Increased leveraging of online capabilities for improved internal and external customer service in the following business areas:***

1. Real Estate (Vision CAMA application)
  - Implement and calibrate - ongoing
  - Five year assessment plan for entire population of properties; monthly LU revalidation reporting; BOE reporting; monthly supplement/ exoneration reporting -
2. Financial Accounting (GP2015 application) - by January 31, 2017
3. Information accessibility and availability (Finance Sharepoint site) - ongoing with semi-annual reviews
4. Purchasing (BSO application upgrade)
  - Continue to look at further enhancements to allow strategic contracting -
  - Continue to look at further enhancements to involve more electronic communication to our vendors - ongoing
5. Comprehensive Payables - ongoing
6. AGA "The Page" report by 12/31/16 -

**Goal 5: *Ensure that best practices are followed to safeguard the County's assets.***

1. Maintain and enhance Internal Controls; implement the WFA hotline after adopting policies, procedures, and guidelines; monthly payroll "surprise" audits; develop surprise audits for P-Card usage; enhance PCI training - ongoing
2. Review areas where additional compliance may be warranted (OSHA visits for example) and work towards policies. - ongoing
3. Continue to obtain Certificate of Achievement for Excellence in Financial Reporting Award – ongoing
4. Increase use of electronic invoice submission and electronic payments - ongoing
5. Analyze assessment data through various filters other than just sales to assessment ratios – Establish and maintain ratio studies that insure uniform and equitable valuation levels as mandated by the Commonwealth, the County and professional standards - ongoing

**Goal 6: *Foster an environment of continuous process improvement and prudent innovative changes.***

1. Use techniques to discern the root-cause of operational problems, create and test quality solutions, disseminate information pertaining to resulting process changes to end users - ongoing
2. Annual review of business processes to ensure up-to-date best practices are being used- ongoing
3. Post detailed annual work plans on Sharepoint and in each Division; update annually- ongoing
4. Continue Finance Communication Committee efforts - ongoing
5. Routine reporting of reassessment status by state class codes including year-over-year variances and LU revalidation status reporting - ongoing

**Goal 7: *Continuous collaboration and presence between the Finance Department employees and our partnering departments and schools.***

1. Increased participation in training sessions and provide more routine training to end users (continue and enhance Finance Forum) -- ongoing
2. Assess our relationship with our clients (other departments, divisions, agencies) to better understand their business needs, to better explain pending changes to our financial operations, and to consider potential impacts before changes are enacted - - ongoing

**Goal 8 *Continue efforts to reduce the use of paper, as appropriate.***

1. Seek opportunities to reduce the need for filing paper, for requiring paper for internal and external customers, and to work with the County's Records Management Division.

## Erika Castillo

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**From:** Betty Burrell  
**Sent:** Tuesday, February 09, 2016 11:42 AM  
**To:** Jonathan Kern; Rocio Lamb  
**Subject:** RE: PCI Delinquent Collections Module/RBS Upgrade

Please proceed. We are expected to increase delinquent collections revenue and this is but one of the various and sundry processes/tools that we must use in order to meet and exceed expectations. Time is of the essence.

Thanks.

Betty J. Burrell  
Director of Finance  
Albemarle County, VA  
(434) 296-5855 Option 1 (ext 3037)  
*Do what is right; let the consequences follow.*

**From:** Jonathan Kern  
**Sent:** Sunday, February 07, 2016 4:13 PM  
**To:** Betty Burrell <bburrell@albemarle.org>; Rocio Lamb <rlamb@albemarle.org>  
**Subject:** PCI Delinquent Collections Module/RBS Upgrade  
**Importance:** High

Please find attached the proposal from PCI for implementation of the Delinquent Collections Module and general RBS upgrade. I am presuming that you Betty, would like to move ahead with this, and Rocio, you are in agreement. Betty, your schedule was fairly packed so if you all would like to meet about this, do you mind doing the scheduling? I will wait for a confirmation from you both before notifying PCI to go forward.

Thank you

Jonathan Kern  
Manager, Financial Systems/Business Processes  
(434) 296-5884

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