

Phase II - Project Charter

Internet Filing of Petitions and Claims for Refund

Project Information	
Project Name:	Internet Filing of Petitions and Claims for Refund
Project Number:	
Executive Sponsor:	James E. Speed
Program Sponsor:	Ramon J. Hirsig
Technology Sponsor:	Bob Austin
Project Manager:	To Be Determined
Program Manager:	
Contract Manager:	N/A
Charter Version #:	1
Revised By:	Jeff McGuire
Revision Date:	3/21/02
Approved By:	
Approval Date:	
Legislative Mandate:	None

Start Date:	
Estimated End Date:	

Project Background

At the July 31, 2001 Customer Service and Administrative Efficiency Committee meeting Executive Director Jim Speed recommended that BOE pursue a study on the feasibility of developing a BOE Internet e-services portal. The Board approved the recommendation and this charter is the second phase recommended by staff as part of the long-term implementation plan for developing e-services for BOE tax and fee payers. Currently tax and fee payers at BOE can only file petitions or claims for refund through the mail.

Business Problem/Opportunity

Business Problem/Opportunity Description:

A single BOE Internet portal with petition and claim for refund filing for all BOE tax and fee programs will not only improve options and services for taxpayers but will reduce some of the manual processing currently performed by staff.

Project Purpose

Develop an FSR to implement free Internet filing of petitions and claims for refund through a single portal for all BOE tax and fee programs and submit for Board Member approval.

Project Objectives

Expand customer service options for taxpayers related to Filing of Petitions and Claims for Refund.

Reduce manual processing by staff.

Project Approach/Methodology

- Form a team of representatives from each of the tax program areas and the Technology Services Division.
- Document current procedures/steps.
- Identify improvements.
- Research available technology.
- Develop estimated costs.
- Draft FSR.

Project Deliverables:

An FSR recommending an implementation plan that utilizes the best available mix of in-house development, use of consultants as well as a blend of resources.

Major High-Level Milestones

Milestone	Planned	Actual
1. Approval by Board Members to develop FSR	4/17/02	
2. Establish Project Team	8/1/03	
3. Draft FSR for Management Approval	TBA	
4. Deliver FSR to Board Members	TBA	

Core Team Members

Team Member	Role
TBA	SUTD Representative
	Property Taxes Rep.
	Special Taxes Rep.
	Administration Rep.
	ISAD Representative
	Technology Services Rep.

Customers/Stakeholders

Customers: Tax and Fee payers, Board staff.

Stakeholders: Project managers/team members, BOE management and staff, Board members, DOF, DOIT and LAO.

Customer Benefits:

Assessment of the feasibility of the project to protect the expenditure of taxpayer funds and assure the best use of the available monies.

Successful Completion Criteria:

Development of an FSR approved by management to submit to the Board members.

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Strategic Fit

Issue I – Provide Quality Services and Best Value
 Issue II – Tax Administration External Stakeholders
 Issue III – Tax Administration Internal Stakeholders
 Issue V – Capitalizing on Technology

High Level Issues:

- 3 percent budget reductions impacting both staff resources and funding.
- RDC project.
- Dependent projects.

Project Trade-off Matrix:

Resources:	L	Select a different flexibility letter for each constraint. Flexibility letter choices are: L = Least Flexible S = Somewhat Flexible M = Most Flexible
Schedule:	S	
Scope:	M	

Resource Requirements

Personnel Requirements	Project Team members from TSD and each of the tax program departments for a total of approximately 175 hours.
Equipment and Software Requirements	Standard PC equipment (already available).
Space/Facilities Requirements	Will utilize existing space in HQ.

Budget

Source of Funding: No funding required for development of FSR. FSR will contain funding recommendation

Project Budget: \$0

Expended to Date: N/A

Dependent Projects:

- RDC
- Internet Service Phase I – completion of the e-client transaction processing database.

Project Scope

In Scope: Development of FSR for Internet filing of petitions and claims for refund.

Out of scope: Other Internet e-services

Assumptions and Constraints

Assumptions: Approval by Board Members to pursue development of FSR.

Constraints: Staff resource limitations due to budget cuts and resources allocated to RDC project.