

Taxation's Retirement Planning

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June 3, 2002

Recognition of Problem

- ✚ Started project in February of 1997.
- ✚ Originally thought there might be a problem
 - Confirm there was a problem.
 - Identify where the problem was.
 - Develop the steps necessary to keep experienced employees on-board at all times.

Informational Database

✚ Employee database started in May of 1997.

✚ Consisted of:

- Employee Name
- Social Security Number
- Title
- Activity
- Location
- Date of Birth
- Hire Date



Database “Key Activities”

✚ Identify number of employees in key activities that would be eligible for retirement.

- Ascertain the number of employees that were:
 - Between the age of 45 and 49
 - Between the age of 50 and 55
 - 56 years or older
- Determine how many employees were in each individual Activity/Branch/Work Unit.

Statute and regulation oriented activity that would necessitate several years of experience to keep expert employees on staff.

Division Retirement

In the Division's case, we had 57% of our staff eligible for retirement within 10 years.



Retirement Percentage Examples

- ✚ Property Administration
 - Local Assessment Compliance at 92%
 - Local Property Tax Field Assistance at 81%
 - Local Property Tax Policy and Planning at 77%
- ✚ Field Audit at 57%
- ✚ Field Investigations at 57%
- ✚ Special Procedures at 71%
- ✚ Inheritance Tax at 77%



How Do We Get Bodies In Here?

- ✚ Space Consideration
- ✚ Administrative Support
- ✚ Budget Strategies
- ✚ Personnel Strategies



Space Consideration

- ✚ Determine the new staffing levels.
- ✚ Prepare for the loss of our expert employees.
- ✚ Overstaff the Key Activities to pass on expertise.



Administrative Support

- ✦ Need the approval for rehire.
- ✦ Submitted analysis with the cost versus benefit details.
 - It took over one year to convince the administration that there was a problem.



Program Highlights

- ✦ Established an FTE in FY1999 of 1,246 and granted the Division the authority to automatically backfill to that level.
- ✦ FTE increased to 1,350 within five years (by FY2003) and held at that level for three years (until FY2006).
- ✦ Precluding programmatic changes, the FTE would attrition down to approximately 1,250.
- ✦ Additional funding would be required to add the 31 positions in each fiscal year from FY2000 through FY2003.

Budget Strategies

- ✚ Gain support from Fiscal to assist in the process.



Personnel Strategies

- ✚ Work with Department of Personnel to develop a recruitment strategy.
- ✚ Work with Human Resources to prepare for the hiring process.
- ✚ The recruitment and hiring process needed to be condensed to provide greater flexibility than normal.

Department of Personnel Support

- ✦ Two new ideas for recruitment:
 1. Auditor Accountant Trainee Title.
 2. Other Trainee Title.



Auditor Accountant Trainees

- ✦ This was the hardest title to recruit for because of the need of 21 credits in accounting. Additionally, these employees are in a highly competitive position with the private sector.
- ✦ Recruitment started in February 2001.
- ✦ We needed to:
 - Allow this title to be a non-competitive title for 6 months;
 - Make the job offers immediately;
 - Hire without tests or lists;
 - Change salary structure to compete with the private sector;
 - Have the trainee making low to mid 40's after the first year.

Other Professional Trainees

- ✦ Recruitment and interviews started in February 2001 and took place over a 2 month period.
- ✦ We needed to:
 - Have on campus recruitment and interviews;
 - Allow the interviews to become the test score (using broad band scoring); and
 - Allow large groupings in which any individual could be selected. (This eliminated the rule problem).

Actual hire date was June 4, 2001





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