



**PRESENTATION
TO
BOARD OF COUNTY COMMISSIONERS**

**2011 Revaluation Action Plan
Status Report
February 5, 2013**

Goals of Revaluation Action Plan

- ✓ Provide Accurate and Equitable Assessments
- ✓ Deliver Well-Executed and Timely Revaluation
- ✓ Develop a Strong Culture of Customer Service
- ✓ Restore Trust and Confidence in AO and BER

Mecklenburg County Organizational Vision:

To be the best local government service provider.

Assessor's Office Mission:

To **discover, list, and appraise** all real and **personal property** in Mecklenburg County in accordance with North Carolina General Statutes. The Assessor's Office provides **accurate** and **timely** information to internal and external **customers** while **fostering good relations** with those customers and the community.

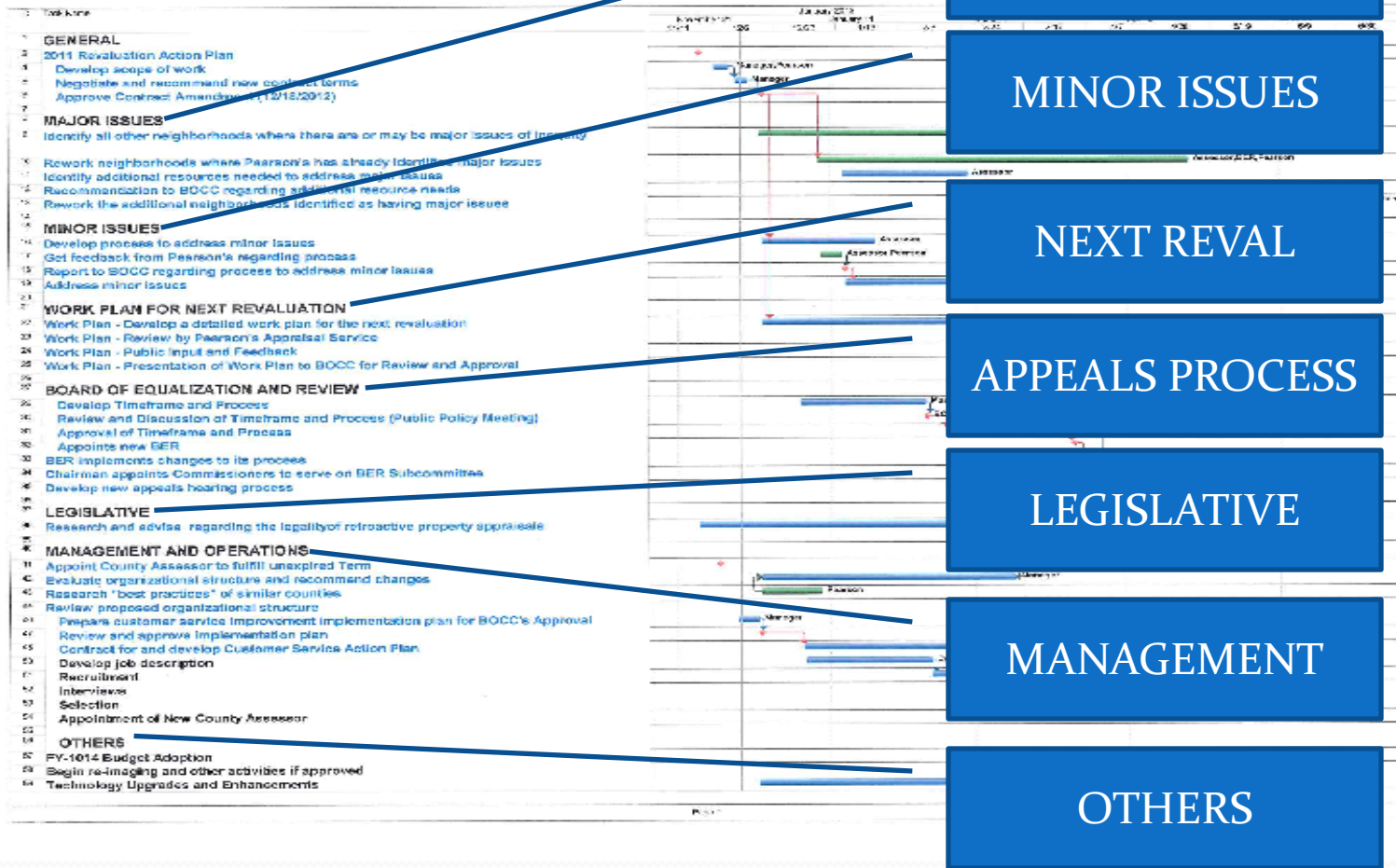
Summary of Key BOCC Dates

- 11/27/12 – Adopted PAS Report & Action Plan
- 12/04/12 - Appointed County Assessor (Interim)
- 12/18/12 – Status Report
- **02/05/13 – Status Report (On tonight's agenda)**
- **02/12/13– Appeals Process (Public Policy Meeting)**
- **02/19/13– Receive Minor Issues Report**
- **04/02/13- Appoint new Board of Equalization & Review**
- **05/07/13- Approve next Revaluation Process**
- **06/04/13- Appoint new County Assessor**

Status Report

- **Legislative** (Board Action Item #8)
- **Management** (Board Action Item #2)
- **Next Revaluation** (Board Action Item #5)
- **Appeals Process** (Board Action Items #6 & 7)
- **Minor Issues** (Board Action Item #4)
- **Major Issues** (Board Action Items #1 & 3)

Proposed Work/Rework Plan



LEGISLATIVE

Immediate Board Action Item #8

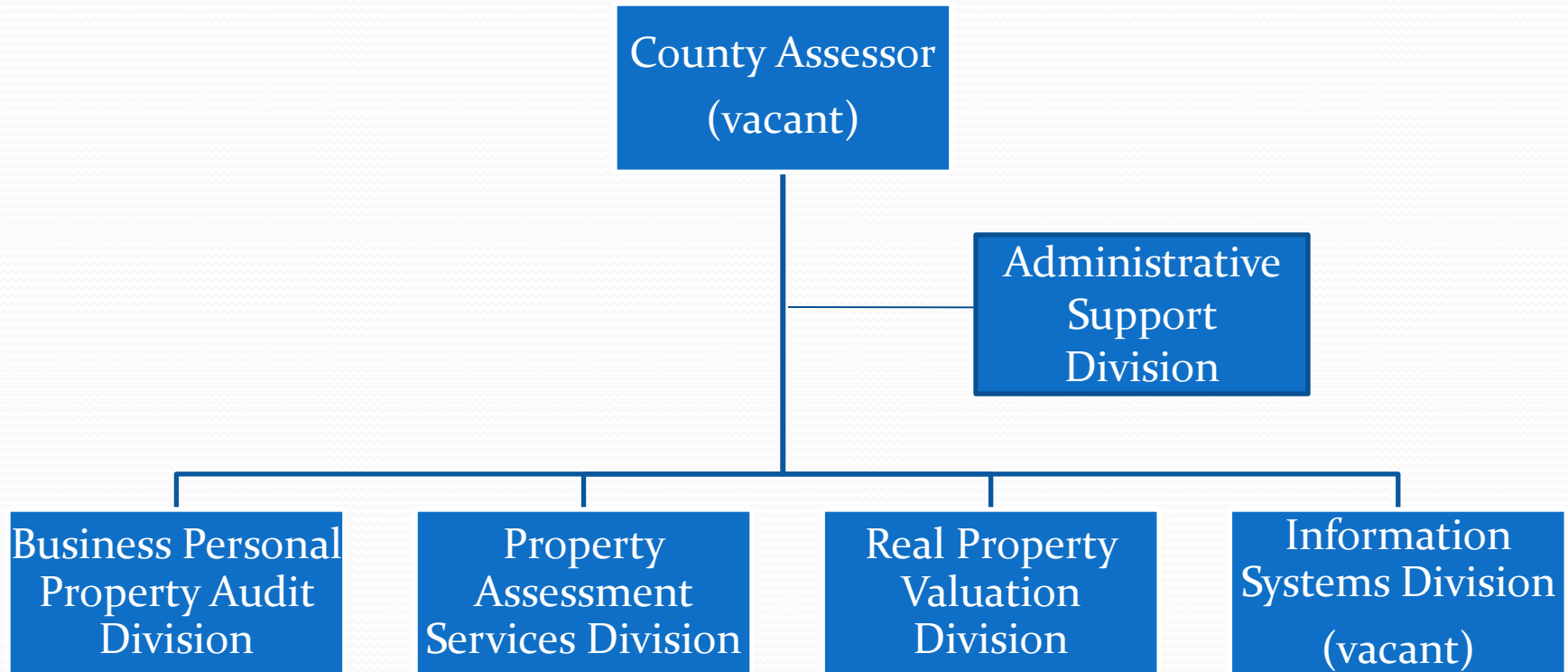
- Main Issue - Addressed by County Attorney
(2011 Reval retroactive reimbursements and levies)
- Secondary Issue
(Application of NCGS § 105-287)
 - Implication of Minor Issue Adjustments
 - Implication of Major Issue Adjustments

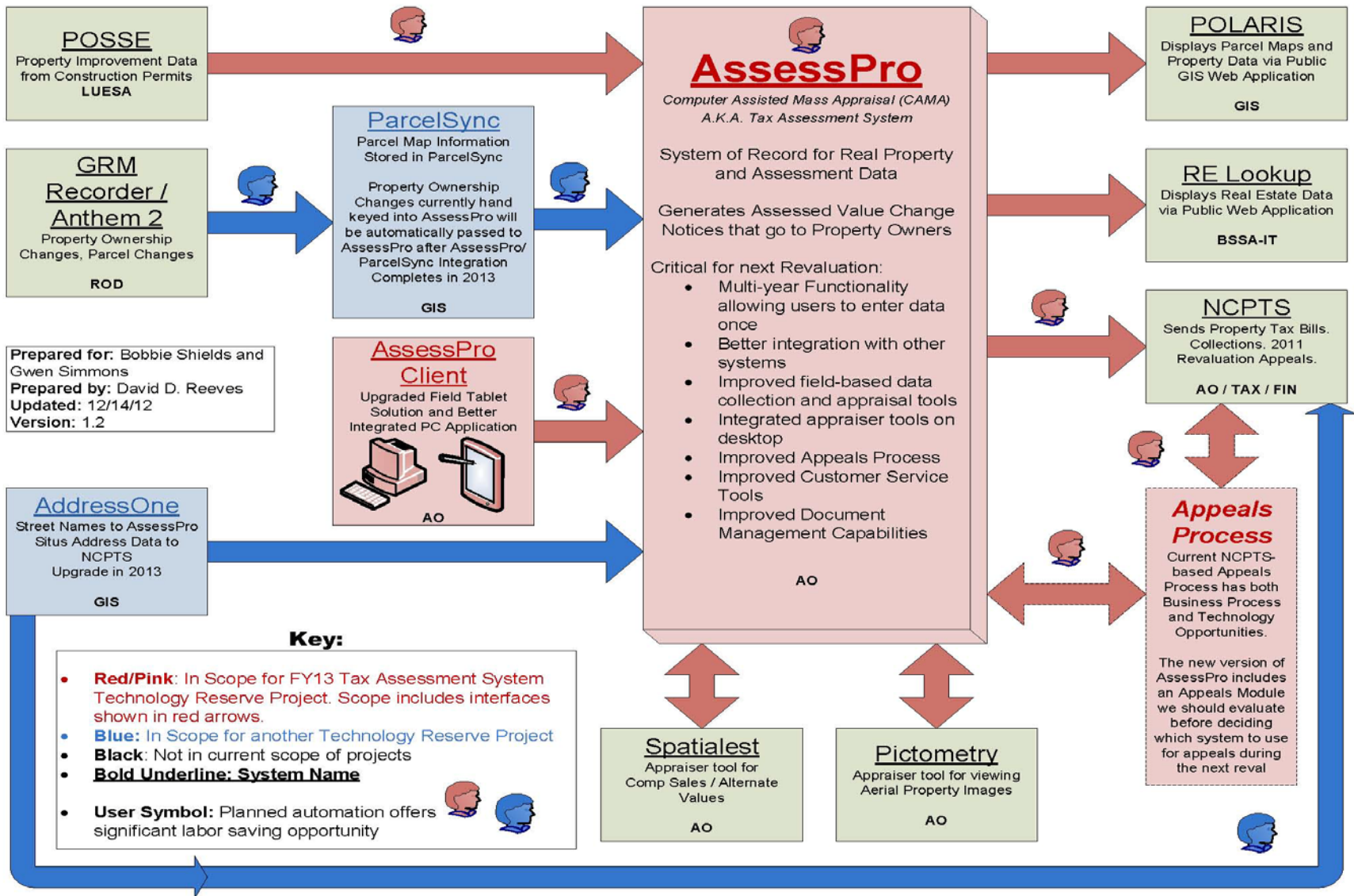
MANAGEMENT AND OPERATIONS

Immediate Board Action Item #2

- **Customer Service Assessment**
- **Management Structure**
 - **Recruitment and Hiring New Assessor**
- **Technology Enhancements**

COUNTY ASSESSOR'S OFFICE





POSSE
Property Improvement Data
from Construction Permits
LUESA

GRM Recorder / Anthem 2
Property Ownership
Changes, Parcel Changes
ROD

Prepared for: Bobbie Shields and
Gwen Simmons
Prepared by: David D. Reeves
Updated: 12/14/12
Version: 1.2

AddressOne
Street Names to AssessPro
Situs Address Data to
NCPTS
Upgrade in 2013
GIS

ParcelSync
Parcel Map Information
Stored in ParcelSync

Property Ownership
Changes currently hand
keyed into AssessPro will
be automatically passed to
AssessPro after AssessPro/
ParcelSync Integration
Completes in 2013
GIS

AssessPro Client
Upgraded Field Tablet
Solution and Better
Integrated PC Application

AO

AssessPro
*Computer Assisted Mass Appraisal (CAMA)
A.K.A. Tax Assessment System*

System of Record for Real Property
and Assessment Data

Generates Assessed Value Change
Notices that go to Property Owners

Critical for next Revaluation:

- Multi-year Functionality allowing users to enter data once
- Better integration with other systems
- Improved field-based data collection and appraisal tools
- Integrated appraiser tools on desktop
- Improved Appeals Process
- Improved Customer Service Tools
- Improved Document Management Capabilities

AO

POLARIS
Displays Parcel Maps and
Property Data via Public
GIS Web Application
GIS

RE Lookup
Displays Real Estate Data
via Public Web Application
BSSA-IT

NCPTS
Sends Property Tax Bills.
Collections, 2011
Revaluation Appeals.
AO / TAX / FIN

Appeals Process
Current NCPTS-
based Appeals
Process has both
Business Process
and Technology
Opportunities.

The new version of
AssessPro includes
an Appeals Module
we should evaluate
before deciding
which system to use
for appeals during
the next reval

Spatiallest
Appraiser tool for
Comp Sales / Alternate
Values
AO

Pictometry
Appraiser tool for viewing
Aerial Property Images
AO

Key:

- **Red/Pink:** In Scope for FY13 Tax Assessment System Technology Reserve Project. Scope includes interfaces shown in red arrows.
- **Blue:** In Scope for another Technology Reserve Project
- **Black:** Not in current scope of projects
- **Bold Underline: System Name**
- **User Symbol:** Planned automation offers significant labor saving opportunity

NEXT REVALUATION

Immediate Board Action Item #5

- Next Revaluation Work Plan
 - Develop a detailed work plan for the next revaluation
 - Review by Pearson's Appraisal Service
 - Public Input and Feedback
- Review and Approval by BOCC

**Must get technology issues resolved
and
stabilized**

APPEALS PROCESS

Immediate Board Action Item #6 & #7

Scheduled for next week's Public Policy Meeting

3:00 p.m.

CMGC Room 267

Draft Agenda

Review and Appeals of Listings and Valuation

MINOR ISSUES

Immediate Board Action Item #4

- Develop process to address minor issues
- Get feedback from Pearson's regarding process
- Report to BOCC regarding process to address minor issues
- Resolve minor issues

Scheduled for February 19th regular BOCC Meeting

6:00 p.m.

CMGC Meeting Chamber

MAJOR ISSUES

Immediate Board Action Item #1 & #3

- Identify all major issues neighborhoods
- Rework previously identified neighborhoods
- Identify additional resource needs
- BOCC Action regarding resources needs
- Rework additional neighborhoods

**Receive status report from
Emmett Curl, Project Manager
Pearson's Appraisal Services**



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QUESTIONS ?