

2011 Revaluation Review Work Plan

Task Name	Scheduled Start	Scheduled Finish	Resource Names	Status Update for June 18, 2013
GENERAL				
<input checked="" type="checkbox"/> 2011 Revaluation Action Plan	11/27/12	11/27/12	BOCC	11/27/12 - BOCC approved actions.
<input checked="" type="checkbox"/> Amend Pearson's Contract	12/3/12	12/18/12		12/18/12 - BOCC authorized the County Manager to execute a contract amendment with Pearson's Appraisal Service, Inc.
<input checked="" type="checkbox"/> Develop scope of work	12/3/12	12/7/12	Manager, Pearson	
<input checked="" type="checkbox"/> Negotiate and recommend new contract terms	12/10/12	12/13/12	Manager	
<input checked="" type="checkbox"/> Approve Contract Amendment (12/18/2012)	12/18/12	12/18/12	BOCC	
MAJOR ISSUES				
Identify all other neighborhoods where there are or may be major issues of inequity	12/18/12	4/22/13	Pearson	Desk reviews of all residential neighborhoods are 77% complete; field reviews of residential neighborhoods are 22% complete. Scheduled completion - October 2013.
Rework neighborhoods where Pearson's has already identified major issues	12/19/12	4/23/13	Assessor, BER, Pearson	Pearson's rework of 5,500 parcels is 70% complete. Pearson's has completed: - 2,000 parcels (100%) in Lake Norman area - 1,350 parcels (45%) in Myers Park/Eastover - 500 parcels (100%) in miscellaneous neighborhoods Scheduled completion - July 15, 2013.
Identify additional resources needed to address major issues	1/15/13	2/25/13	Assessor	Identification of additional resources deferred pending anticipated legislative action.
Recommendation to BOCC regarding additional resource needs	3/5/13	3/5/13	Manager	
Rework the additional neighborhoods identified as having major issues	3/6/13	6/18/13	Assessor, Consultant	

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MINOR ISSUES				
<input checked="" type="checkbox"/> Develop process to address minor issues	12/19/12	1/25/13	Assessor	2/19/13 - BOCC approved the process for addressing and resolving the minor issues identified by Pearson's Appraisal Services during its review of the Mecklenburg County 2011 Revaluation as recommended by staff.
<input checked="" type="checkbox"/> Get feedback from Pearson's regarding process	1/8/13	1/14/13	Assessor, Pearson	
<input checked="" type="checkbox"/> Report to BOCC regarding process to address minor issues	1/15/13	1/15/13	BOCC - Public Policy	
Address minor issues	1/16/13	4/9/13	Assessor, Consultant	Identification of minor issues is in process. Desk reviews of all residential neighborhoods are 77% complete; field reviews of residential neighborhoods are 22% complete. Scheduled completion - October 2013. Any minor issues not identified through this process will be addressed during next revaluation or as required by legislative action.
WORK PLAN FOR NEXT REVALUATION				
Work Plan - Develop a detailed work plan for the next revaluation	12/19/12	5/24/13	Manager, Assessor	Development of work plan for next revaluation deferred pending anticipated legislative action and appointment of permanent Assessor.
Work Plan - Review by Pearson's Appraisal Service	4/8/13	4/16/13	Pearson	
Work Plan - Public Input and Feedback	4/17/13	5/6/13	Stakeholders	
Work Plan - Presentation of Work Plan to BOCC for Review and Approval	5/7/13	5/7/13	Manager, BOCC	
BOARD OF EQUALIZATION AND REVIEW				
<input checked="" type="checkbox"/> Timeframe and process for removing current BER and appointing new BER	1/1/13	4/2/13	Manager	2/12/13 - BOCC received a presentation regarding the timeline and process for appointing the 2013 Board of Equalization and Review (BER) and discussed a recommended appeals and review process.
<input checked="" type="checkbox"/> Develop Timeframe and Process	1/1/13	2/11/13	Manager	
<input checked="" type="checkbox"/> Review and Discussion of Timeframe and Process (Public Policy Meeting)	2/12/13	2/12/13	BOCC - Public Policy	
<input checked="" type="checkbox"/> Approval of Timeframe and Process	2/19/13	2/19/13	BOCC	

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<input checked="" type="checkbox"/>	Appoint new BER	4/2/13	4/2/13	BOCC	4/16/13 - BOCC approved the Ad Hoc Appointment Committee's recommendations for appointments to the Board of Equalization and Review.
<input checked="" type="checkbox"/>	BER implements changes to its process	4/3/13	4/30/13	BER, Pearson, Manager	5/20/13 - BER adopted new Rules of Procedure.
<input checked="" type="checkbox"/>	Chairman appoints Commissioners to serve on BER Subcommittee	4/15/13	4/23/13	BOCC Chairperson	3/11/13 - 4/8/13 - Revaluation Review Committee held four meetings, provided recommendations to the new BER and created a draft taxpayer guide to the BER appeals process.
<input checked="" type="checkbox"/>	Develop new appeals hearing process	4/24/13	5/7/13	BOCC Subcommittee, Pearson, Manager	5/20/13 - BER adopted new Rules of Procedure. BER will begin hearing cases on 8/6/13.
LEGISLATIVE					
<input checked="" type="checkbox"/>	Research and advise regarding the legality of retroactive property appraisals	11/28/12	2/19/13	County Attorney	2/19/13 - BOCC voted to agree "in concept, with legislation authorizing retroactive property appraisals back to January 1, 2011 necessary to eliminate inequities identified by in the report by Pearson's Appraisal Services...."
MANAGEMENT AND OPERATIONS					
<input checked="" type="checkbox"/>	Appoint County Assessor to fulfill unexpired Term	12/4/12	12/4/12	BOCC	12/4/12 - BOCC appointed General Manager Bobbie Shields as Mecklenburg County Assessor to complete the unexpired term.
<input checked="" type="checkbox"/>	Evaluate organizational structure and recommend changes	12/19/12	3/13/13	Manager	2/5/13 - BOCC received a status report on the 2011 Revaluation Review Work Plan that included the new high-level organizational structure for the Assessor's Office.
	Research "best practices" of similar counties	12/19/12	1/7/13	Pearson	Process scheduled for July - October 2013.
	Review proposed organizational structure	3/13/13	3/20/13	Pearson	Review deferred pending appointment of permanent Assessor.

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<input checked="" type="checkbox"/>	Customer Service Improvement Plan	12/11/12	6/18/13	Manager	
<input checked="" type="checkbox"/>	Prepare customer service improvement implementation plan for BOCC's approval	12/11/12	12/17/12	Manager	12/18/12 - BOCC authorized the County Manager to negotiate an agreement with Customer Service Solutions to develop a customer service improvement plan for the Assessor's Office.
<input checked="" type="checkbox"/>	Review and approve implementation plan	12/18/12	12/18/12	BOCC	
<input checked="" type="checkbox"/>	Contract for and develop Customer Service Action Plan	1/2/13	6/18/13	Consultant	05/28/13 - BOCC received report on the Assessor's Office Customer Service Assessment conducted by Customer Service Solutions, Inc., whose staff conducted the assessment between January and May 2013.
HIRE AND APPOINT NEW COUNTY ASSESSOR					
<input checked="" type="checkbox"/>	Develop job description	1/3/13	2/13/13	County HR	2/5/13 - BOCC received a status report on the 2011 Revaluation Review Work Plan that included the recruitment brochure for the Assessor position.
<input checked="" type="checkbox"/>	Recruitment	2/14/13	3/27/13	County HR	2/13/13 - Search process kicked off. Recruitment occurred February - April 2013.
<input checked="" type="checkbox"/>	Interviews	3/28/13	4/16/13	Manager, Stakeholders	5/16/13 and 5/20/13 - Interviews conducted.
	Selection	5/7/13	5/7/13	BOCC	
	Appointment of New County Assessor	6/18/13	6/18/13	BOCC	
OTHER ACTIONS					
	FY14 Budget Adoption	6/4/13	6/18/13	BOCC	
	Begin re-imaging and other activities if approved	6/18/13	6/18/13		
ACCOMPLISHMENTS IN ADDITION TO ORIGINAL WORK PLAN					
<input checked="" type="checkbox"/>	Establish the Assessor's Office as a separate department				5/21/13 - Assessor's Office presented as a separate department in the FY14 Manager's Recommended Budget.
<input checked="" type="checkbox"/>	Hire Assessor's Office Business Manager				5/1/13 - Start date of new business manager.
	Hire Assessor's Office Information Technology Program Manager				6/13/13 - Interviews completed.