



Mecklenburg County

Process for identifying and resolving
minor issues

February 19, 2013



Immediate Board Actions

4. Direct the assigned General Manager, with the advice and assistance of Pearson's to develop and oversee a process to address the minor issues Pearson has identified or will during the extended period of Pearson's service to the County in a manner that is consistent with Pearson's recommendations. The process developed by the General Manager for addressing minor issues shall be brought to the Board within 60 days for review and approval prior to implementation. Pearson's Appraisal Service shall be asked to provide feedback to the Board on the effectiveness of the minor issue corrective measures recommended by the General Manager prior to Board consideration of approval



Goals

- To approve the process for addressing minor issues.
 - Part One: Statistical Analysis
 - Part Two: Public Feedback
 - Part Three: Field Reviews
- To review options for implementing minor changes.
 - Prior years.
 - Current year.
 - Future revaluation year.

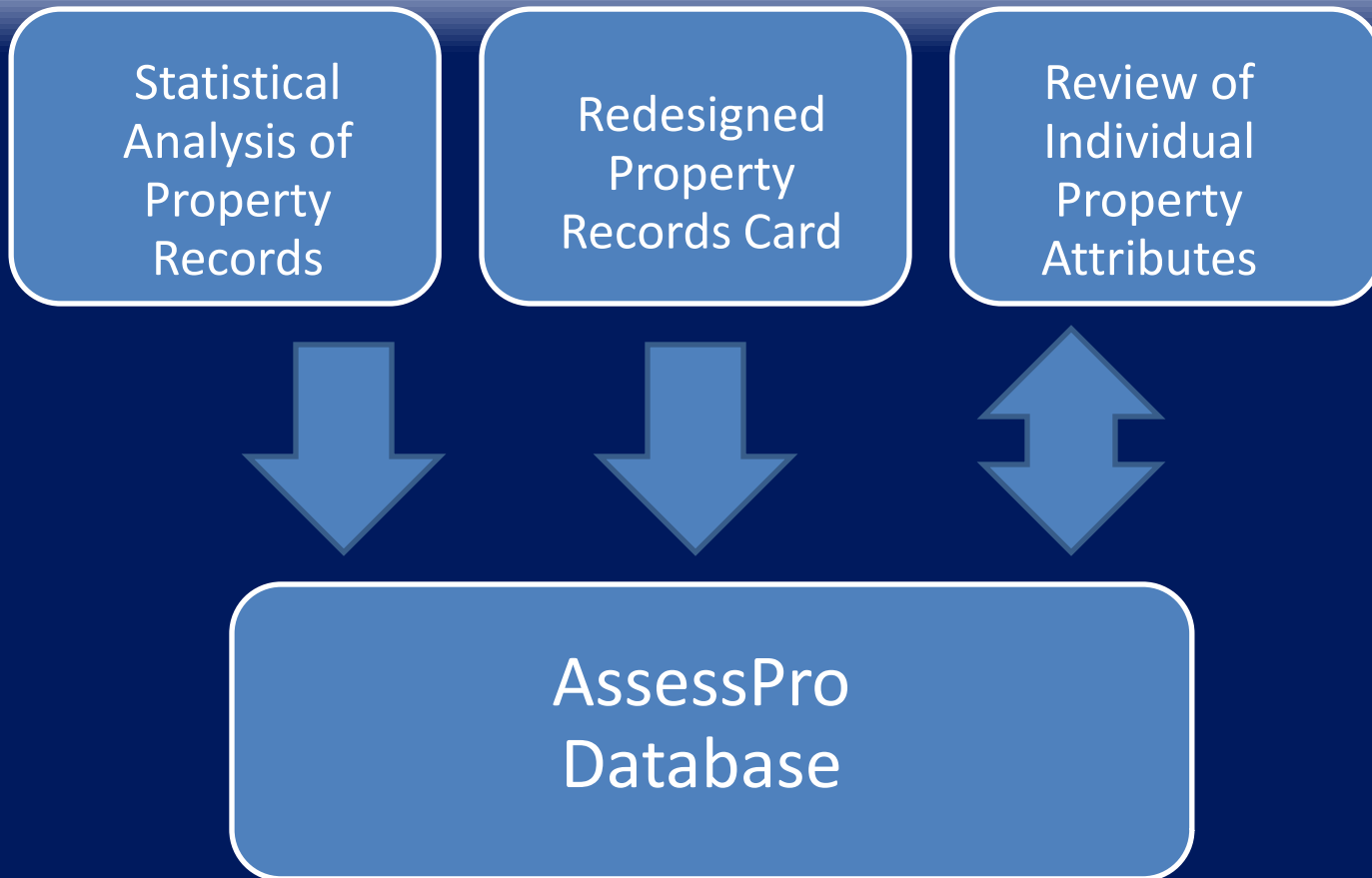


Minor Issues-Definition

Minor issues are defined as inaccurate property data or variables. These are quantified as individual or a limited number of individual errors that do not impact the overall quality or assessments in a given neighborhood. This process is designed to improve the overall data integrity in the database for the next real property revaluation.



Process Steps





Part One: Statistical Analysis

Advanced analytical tools will be used to analyze the database and identify inconsistencies. For example:

roof_material			
Value	Frequency	Percent	Cumulative %
'ASPHALT/COMPOSITION SHINGLE'	172	71.369	71.369
'METAL'	2	0.83	72.199
'WOOD/ARCHITECTURAL SHINGLE'	67	27.801	100
Total:	241		

NUM_BEDROOMS			
Value	Frequency	Percent	Cumulative %
0	1	0.415	0.415
1	1	0.415	0.83
2	22	9.129	9.959
3	170	70.539	80.498
4	43	17.842	98.34
5	4	1.66	100
Total:	241		



Part Two: Public Feedback

Property record information will be designed in a clearer/user friendly format that taxpayers can review. This would include items that they are familiar with such as # of baths, bedrooms, heating type, etc. This will be placed on a County website (and available in the Assessor's Office) including links from commonly used County applications such as POLARIS and RELookup. A mechanism will be in place in which taxpayers will be able to provide feedback on inaccuracies pertaining to their properties.



Property Review Characteristics

Review Property Characteristics			
Building Type	01 - RES	Note:	
Stories	1.5	Note:	
Year Built	2006	Note:	
Bedrooms	3	Note:	
Full Baths	2	Note:	
Half Baths	1	Note:	
Heated Square Foot	3966	Note:	
Foundation	02 - SLAB-RES	Note:	
Grade	2 - Average	Note:	
Fireplaces	1	Note:	
Type of Heat	04 - AIR-DUCTED	Note:	
Type of Heat Fuel	03 - GAS	Note:	
Airconditioning Type	13 - AC-CENTRAL	Note:	
Primary External Wall Finish	10 - ALUM,VINYL	Note:	
Internal Floor Covering	12 - HARDWOOD	Note:	
Interior Wall Material	06 - CUSTOM	Note:	
Roof Covering Material	10 - WD/ARCH SHGL	Note:	
Special Building Features and Yard Items / Out Buildings			
Type of Item	Qty	Units/Size	Cond Year Built Value
88 - DECK	1	31x10	AV 2006 \$3,500
Issue:	None	- Notes:	



Property Review Characteristics

Review Property Characteristics					
Building Type	01 - RES		Note:	<input type="text"/>	
Stories	01 - RES		Note:	<input type="text"/>	
Year Built	02 - MFD HOME-DW		Note:	<input type="text"/>	
Bedrooms	03 - MFD HOME-SW		Note:	<input type="text"/>	
Full Baths	04 - CONDO		Note:	<input type="text"/>	
Half Baths	05 - PATIO HOME		Note:	<input type="text"/>	
Heated Square Foot	06 - CONDO-HI		Note:	<input type="text"/>	
Foundation	09 - TOWNHOUSE		Note:	<input type="text"/>	
Grade	10 - RETAIL		Note:	<input type="text"/>	
Fireplaces	11 - CONV STORE		Note:	<input type="text"/>	
Type of Heat	12A - CAR WSH S-SV		Note:	<input type="text"/>	
Type of Heat Fuel	12B - CAR WSH D-TH		Note:	<input type="text"/>	
Airconditioning Type	12C - CAR WSH F-SV		Note:	<input type="text"/>	
Primary External Wall Finish	13 - DEPT STORE		Note:	<input type="text"/>	
Internal Floor Covering	13A - DRUG STORE		Note:	<input type="text"/>	
Interior Wall Material	14 - SUPERMKT		Note:	<input type="text"/>	
Roof Covering Material	15 - SHOP MALL		Note:	<input type="text"/>	
	16 - SHOP STRIP		Note:	<input type="text"/>	
	17 - OFFICE		Note:	<input type="text"/>	
	1702 - 1702		Note:	<input type="text"/>	
	17B - OFC B		Note:	<input type="text"/>	
	10 - WD/ARCH SHGL		Note:	<input type="text"/>	

Special Building Features and Yard Items / Out Buildings					
Type of Item	Qty	Units/Size	Cond	Year Built	Value
88 - DECK	1	31x10	AV	2006	\$3,500

Issue: - Notes:



Part Three: Field Reviews

As part of their review, Pearson Appraisals contractors will provide feedback on properties they've reviewed that require specific data corrections. In addition, in-house staff performing their normal operations will continue making corrections to increase the accuracy of the database and data integrity.

NBHD	Started	Finished	Parcels	Informal	BER	PTC	FinalDetermination
C761	8/29/2012	1/30/2013	22	1	1	0	Acceptable
C908	8/29/2012	1/30/2013	169	5	1	1	Acceptable
C914	8/29/2012	1/30/2013	120	3	3	0	Acceptable
C922	2/7/2013	2/7/2013	255	33	6	1	Acceptable
C923	8/30/2012	1/30/2013	96	8	8	0	Acceptable
N525	8/28/2012	1/30/2013	120	13	2	1	Minor Issues
N714	8/28/2012	1/30/2013	310	3	1	0	Major Issues
C928	8/30/2012	1/30/2013	135	9	3	0	Acceptable
S702	8/28/2012	1/29/2012	82	38	10	2	Minor Issues
T111	8/28/2012	1/30/2013	139	2	2	0	Minor Issues
C938	8/30/2012	1/30/2013	42	2	2	0	Acceptable
C943	8/30/2012	1/30/2013	92	1	1	0	Acceptable
W510	8/28/2012	1/30/2013	218	6	6	0	Minor Issues
CR76	9/7/2012	1/30/2013	231	30	10	0	Acceptable
D116	9/10/2012	1/30/2013	45	5	5	0	Acceptable
D122	9/7/2012	1/30/2013	120	4	4	0	Acceptable
D315	2/5/2013	2/5/2013	11	3	3	0	Acceptable



Implementing Minor Changes

- **Prior Years** Under current legislation, “minor” changes can only be made to properties that are under appeal, i.e., pending hearings before the 2011 PTC or the 2012 BER.
- **Current Billing Year** Changes can be made to properties not under appeal in 2013 and succeeding years. Changes that result in value adjustments (up or down) will generate Notices of Value to owners, and are subject to appeal.
- **Future Year** Changes could be identified and held in a database to be applied to the next real property revaluation [requires legislative change].



FEEDBACK FROM PEARSON'S APPRAISAL SERVICE

Presented by: Emmett Curl



Questions?

