



**PRESENTATION
TO
BOARD OF COUNTY COMMISSIONERS**

2011 Revaluation Action Plan

December 18, 2012

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.

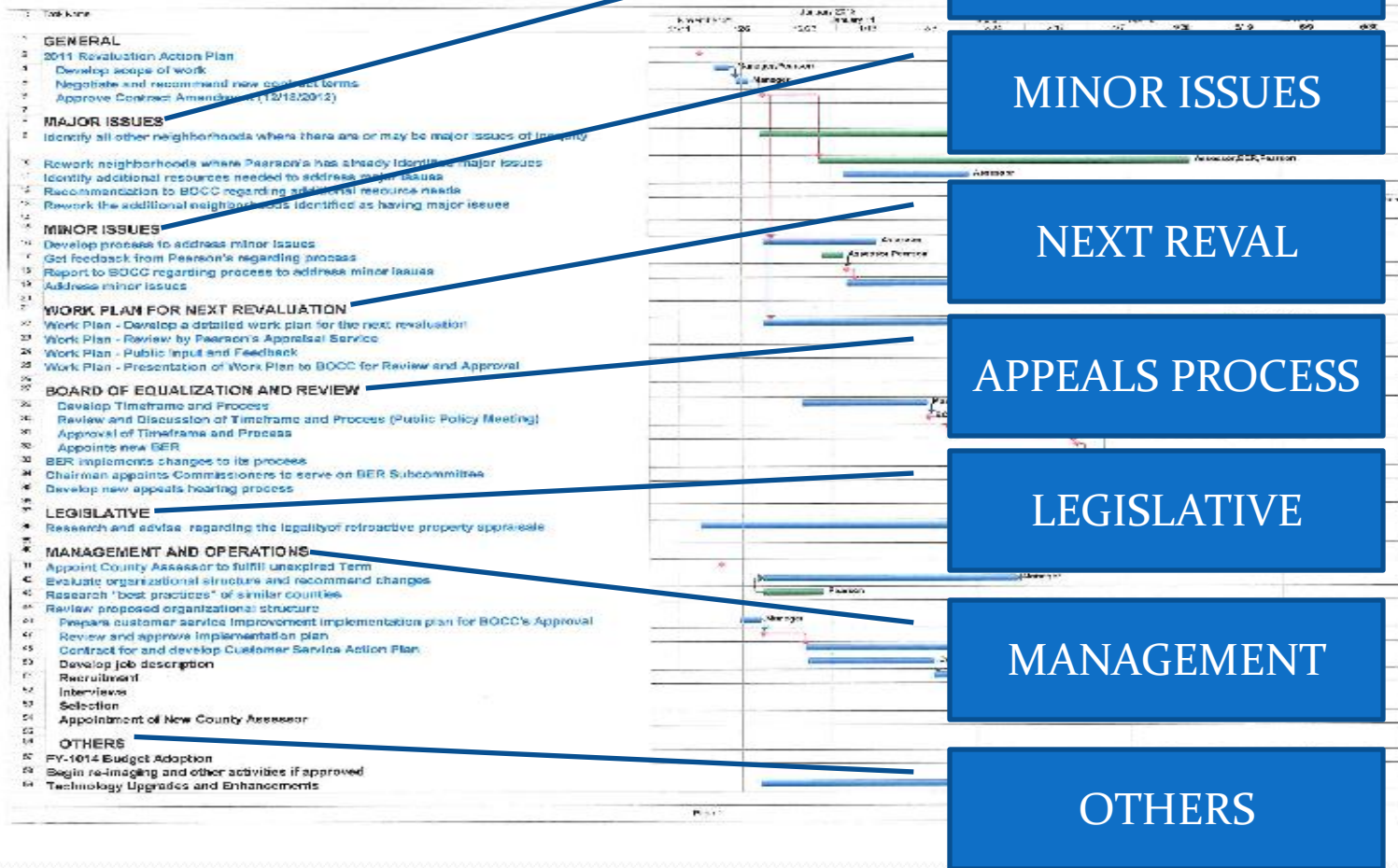
Assessor's Office Mission:

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

Status Report

- **2011 Revaluation Work Plan with emphasis on “Immediate Board Action Items” (1-8)**
- **Proposed Contract with Pearson’s Appraisal Services**
- **Proposed Contract with Customer Service Solutions**
- **Key dates for BOCC Action**

Proposed Work Plan



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**

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**

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**

APPEALS PROCESS

Immediate Board Action Item #6 & #7

- **Timeframe/process for reviewing BER operations**
 - **Develop Timeframe and Process**
 - **Review Timeframe and Process (Public Policy Meeting)**
 - **Approval of Timeframe and Process**
- **Appoints new BER**
 - **New BER recommends revisions to process**
- **BOCC Chair appoints Board BER Subcommittee**
- **BOCC approves new appeals hearing process**

LEGISLATIVE

Immediate Board Action Item #8

- **Research and advise regarding the legality of retroactive property appraisals – assigned to County Attorney**
- **Possible Changes to Machinery Act:**
 - **Clarify/Simplify appeals filing schedule**
 - **New options to correct certain clerical errors and to expedite refunds**
 - **Uniformity in forms and notification process**

MANAGEMENT AND OPERATIONS

Immediate Board Action Item #2

- **Evaluate organizational structure and recommend changes**
- **Research "best practices" of similar counties**
- **Prepare customer service improvement proposal for BOCC's Approval (on tonight's agenda)**
- **Contract for and develop Customer Service Improvement Plan**

OTHERS

- **Hire and Appoint New County Assessor**
 - Develop job description
 - Recruitment
 - Interviews
 - Selection /Appointment
- **Technology Enhancements**

Summary of Resource Needs

- Pearson's Consulting Service - \$ 1.1M – \$ 1.7M
- Customer Service Solutions - \$ 23K
- Technology Improvements - \$ (to be determined)
- Assessor's Office Resources - \$ (to be determined)

Summary of Key BOCC Dates

- 11/27/12 - Adopted PAS Report & Action Plan
- 12/04/12 - Appointed County Assessor (Inter.)
- 12/18/12 – (On tonight's agenda)
 - 2011 Revaluation Work Plan Proposal
 - Pearson's Appraisal Services Contract Proposal
 - Customer Service Solutions Contract Proposal
- 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 Revaluation Process
- 06/04/13- Appoint new County Assessor

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QUESTIONS ?