

2011 Office of Assessor-Treasurer Achievements Report

Appraisal & Statistics Division by Deputy Assessor-Treasurer Alberto Ugás

1. **52,472** residential and commercial Physical Inspections conducted in 2009. These include 15,316 Physical Inspections from 2008 that had not been completed. As of the end of the 2009 revaluation cycle, approximately 23% of the county had been Physically Inspected.
2. **64,779** residential and commercial Physical Inspections conducted in 2010. As of the end of the 2010 revaluation cycle, approximately 43% of the county had been Physically Inspected.
3. **63,356** residential and commercial Physical Inspections conducted in 2011. As of the end of the 2011 revaluation cycle, approximately 63% of the county had been Physically Inspected.
4. **25,678** residential Physical Appraisals conducted so far in the 2012 cycle. As of today, approximately 71% of the county has been Physically Inspected.
5. **5,126** 2009 residential and commercial real property valuation appeals made to the Board of Equalization and to the State Board of Tax Appeals responded to in cycle year 2010.
6. Received a letter dated December 17, 2010 from the State Department of Revenue, whereby it states: *"We are encouraged by your effort to complete the documented revaluation requirements as mandated by Washington State law and in the approved modified revaluation plan."*
7. Pierce County's assessment performance from 2009 to the present ranks as one of the top in the State of Washington. This ranking is based on metrics published by the State Department of Revenue and the Office of Program Research at the State House of Representatives, designed to measure appraisal performance using statistical standards.
8. The Assessor-Treasurer office has embraced a number of new technologies and processes designed to increase the efficiency and productivity from field and office staff. We continually seek new ways to increase efficiencies and minimize costs.
9. In 2011, the Assessor-Treasurer administration worked collaboratively with the county's IT department to develop an electronic application for the reporting of assets from the county's largest Trended Investment accounts. These accounts, although few in number, represent a significant portion of the county's total assessed value base and a large portion of the Assessor-Treasurer office's appeal workload. The automation of this process will provide significant cost savings and will enhance the integrity and transparency of the process.

Administration & Tax Division
by Administrative Officer Billie O'Brien

1. The Assessor-Treasurer administration continues to find ways to streamline processes, maximize the use of technology and improve customer service and business processes.
2. In 2011 the Assessor-Treasurer administration implemented Levy Training workshops, inviting staff from 42 taxing districts to participate. Training was held in 5 separate workshops over 3 days with 46 people representing 23 districts in attendance. The workshop concentrated on levies from the district perspective and was designed to help district personnel understand the due dates, required documentation, timelines, statutory limitations and the need for, and wording, of the ordinance/resolution, among other things. This training has already had the effect of cutting down on district calls to the levy area requesting help or information. Feedback provided by attendees was 100% positive.
3. The Assessor-Treasurer administration collaborated with the Auditor's office staff to ensure that all special use programs would continue to be handled efficiently as the Auditor moves into the new software for e-filing REET. Their system is now programmed to send e-mails to 3 staff members when there is input needed from this office on the filing of sale documents for parcels in any of the special use programs. Staff in the ATR can electronically sign off on the sale, eliminating the need for paper excise affidavits to be submitted for REET e-file customers.
4. The Assessor-Treasurer administration worked with IT to institute a personal property permit system to allow full capture of leasehold improvements that most likely were missed in the past. Commercial appraisers are now marking permits that have tenant improvements not picked up as real property. Through a query built by in house IT staff, personal property personnel are researching and adding the improvements to the personal property record.
5. The Assessor-Treasurer administration also worked with our in-house IT staff to enhance lien holder input for parcels in the foreclosure process. This has allowed for the easier and quicker input of lien holders, which has streamlined a cumbersome statutorily required process. Our reporting ability and our ability to create notification letters has also been enhanced.
6. The Assessor-Treasurer administration collaborated with the county's Public Works department to help implement new legislation that required deferral liens on property. By working together we found the best way to

- provide the necessary information to that department, while allowing little or no additional work to be performed by ATR staff.
7. The Assessor-Treasurer administration researched and implemented software that allows for the intensive search of foreclosure lien holders. This will have the effect of allowing more lien holders or contacts to be found in fewer research hours.
 8. The Assessor-Treasurer administration streamlined the process for properties determined partially exempt from ad valorem tax by the Washington State Department of Revenue. Our segregations staff will no longer be required to value exempt and taxable portions separately; rather an exemption percentage supplied by appraisal staff will be applied in Ascend.
 9. Process improvements continue in the Land Management area with segregations now being worked in Ascend, values finalized in RealWare and immediately mapped in GIS by the same cartographer. The updated parcels are sent to a QC queue where they are promoted by the GIS specialist and available the next day. This process has cut the lag time for display of new parcels in the GIS system and cut process time. We no longer update paper segregation maps and are looking at scanning and archiving them.
 10. The Assessor-Treasurer administration has implemented a new process that allows input in RealWare by appraisal teams prior to the segregation being completed in that system. It allows land characteristics to be updated directly into the CAMA system which significantly cuts the appraiser's input burden.
 11. From January 1, 2011 through September 30, 2011, the Assessor-Treasurer Customer Service staff served 23,394 walk-in customers at the front counter with 7,862 of those in the month of April. Our Customer Service phone operators answered 35,063 calls regarding taxes, values and other issues.
 12. The Assessor-Treasurer Senior/Disabled Persons Exemption team has met with an additional 1,207 taxpayers and responded to 6,386 phone customers. They have processed 1,311 new applications, 2,122 application renewals and 743 status changes.
 13. The Assessor-Treasurer Personal Property staff processed and certified 12,816 personal property affidavits. Numbers of e-filers continue to increase with 18% of accounts using our e-file application in 2011. We will continue to promote the use of e-filing for all accounts. We no longer make paper copies of affidavits when this information is requested by taxpayers.

Instead we point them to the e-file module and give them access to their account information with the hope that this will encourage the use of the e-file process.

14. The Assessor-Treasurer Current Use Program staff counseled 297 taxpayers regarding current use programs. Scanning of documents related to special use properties is on-going and allows ease of access for all staff in the office.
15. The Assessor-Treasurer Foreclosure Department had contact via phone or in person with close to 5,000 customers. We processed mailings of over 4,159 pieces notifying taxpayers, owners and lien holders of the foreclosure process. We began the year in January with 2,542 properties on the delinquency process, approximately 18% more than 2010. By the end of September, we are down to 319 parcels. We mailed to 1,802 lien holders, made easier by process improvements listed above and the use of technology.
16. The Assessor-Treasurer administration continues to serve and educate taxpayers. We created a presentation explaining how the levy process works from the taxpayer perspective. This PowerPoint presentation will be loaded on our website in time for our February 2012 tax statements.
17. The Assessor-Treasurer administration continues to increase the usage of electronic document management in all areas of Administration and Tax processes and to look at all our internal processes in an effort to continue to streamline and cross-train.

**Information Technology Division
by Computer Systems Business Analyst III Michael Johnson**

1. The process that creates sales questionnaires was modified to automatically update the mailing date in RealWare when the questionnaire is generated. This saved staff from having to go into each account and add the mailing data manually.
2. A new application was added to RASCAL to allow the Personal Property department to enter and track permits on Personal Property accounts. Previously, this was being handled with multiple spreadsheets. This new method allows all of the data to be stored in one place, and allows multiple users to access the data simultaneously.
3. Over 30 new tablet PCs were configured and deployed to the field appraisal staff. These new tablets perform significantly faster than the models they replaced.

4. A process was developed to automatically synchronize a parcel's RTSQ between Ascend and RealWare. Since FieldWare locates parcels for check-out by RTSQ, this enables the field appraiser to spend less time tracking down parcels with an incorrect or missing RTSQ.
5. An application was added to RASCAL to allow administrative staff to look up the appropriate land rate for a parcel, thus avoiding the need to contact an appraiser to determine the rate.
6. The department's electronic file storage was successfully migrated from Novell to Windows File System. This provides a more cost effective storage solution that is easier to maintain.
7. The foreclosure process was revamped and streamlined to allow easier input of multiple lien holders for certified and court documents, and for the subsequent reporting ability for those lien holders.
8. An application was created for use by all the commercial appraisers to reduce the time it takes to create their response to commercial appeals. This new tool automatically inserts neighborhood data, neighborhood extension information, and a list of the sales used to support that data from the most recent annual Revaluation Report into the commercial appeal response document.
9. The scanning of all multi-family exemption and historic exemption documents, as well as all current use property record cards was successfully completed. This affords easier and faster access to those documents by office staff.