



Work and Performance Plan FY2022 (CAO)

Kenneth Joyner, County Assessor's Office



SECTION 1: DEPARTMENT KEY INITIATIVES

Key Initiative #1 -- 2023 Countywide Reappraisal Implementation, Quality Control, and Communication Strategy

Link to Strategic Business Plan:

No

Description:

Schedule, plan and prepare for implementation of the 2023 countywide reappraisal

Rationale:

Numerous processes and analysis need to be completed as the CAO moves toward the 2023 reappraisal. The final goal being to have a statistically sound reappraisal with customer focus, education and awareness as the top priority.

Completion Date:

Complete initiatives related to the successful implementation of the 2023 countywide reappraisal by June 30, 2022, with additional work related to the reappraisal ongoing throughout the following fiscal year.

Updates/Project Milestones:

The 2023 Countywide Reappraisal implementation includes the following:

- Maintain the 2023 database to the latest costs, rates, models, and factors while purging outdated numeric grades, townhomes, condos, and residential neighborhoods.
- Perform ongoing commercial and residential land analysis, residential delineation, and individual residential neighborhood analysis.
- Send Sales/Income/Cost Qualification Letters for real property transactions that need further information for qualification/disqualification. This will include Section 42 Housing financial requests.
- Enlist the services of third-party vendors for various revaluation-related projects.
- Edit and update the schedule of values.
- Perform residential and commercial new construction, sales analysis, land splits, and canvassing timely.
- Appraisal Staff to complete continuing education requirements.
- Complete ongoing exemptions and new construction data processing.
- Audit letters for exemptions will be sent to comply with NCGS 105-296.
- Collaborate with County Public Information (PI) to schedule community engagement sessions, collect feedback, and participate in media interviews.
- Promote improved communications by updating and developing brochures and handouts to inform external stakeholders about the countywide revaluation, provide public awareness about the assessment processes, offer an outreach to organizations that serve the elderly and disabled to make sure they are aware of exemptions/exclusion, and advertise how online tools may be used by citizens to review property listings.
- Test and implement performance enhancements for the appeals module and Modria.
- Review and evaluate the operational efficiency of the appeals processes to ensure they are customer focused.
- Continued resolution of Board of Equalization of Review and outstanding PTC cases.

The Quality Control and Communication Strategies Includes the following:

- Maintain and redefine quality control practices to ensure best practices in performance and communication throughout the organization.
- Continue trainings that will ensure employees are proficient with all software and provide trainings for employees that is customer service focused.
- Review and verify parcels for listing accuracy based on the International Association of Assessing Officers (IAAO) standards.
- Audit the exemption/exclusion applications to ensure eligibility and proper documentation.
- Implement a QA CAO internal audit program for real property.
- Perform data cleansing and update the assessment manual for new processes..
- Work with Business Process Management (BPM) to evaluate all processes related to the 2023 revaluation with



customer service as a key indicator of success

- Continue the implementation of the paperless initiatives that includes: archive scanning, digital MLS, sales reports, SVQ mailings, and shared files.

Outcomes/Measures:

Director Comments: (Year-end)

Executive Team Comments: (Year-end)



Key Initiative #2 -- Redesign and improvement of operational efficiencies within the Personal Property Division

Link to Strategic Business Plan:

No

Description:

The focus is on resuming the redesign of the Personal Property Team (People) and associated continuous improvement of processes for the Personal Property Division. Reevaluate post-COVID for any potential changes.

Rationale:

Effectively develop defined work processes and process owners, for all valuation processes, and customer support processes to improve efficiency, service delivery, and staff morale. Create a team-centered approach to individual development plans for the personal property teams and managers that provide mentoring opportunities to team leads to allow for continuous ongoing staff development.

Completion Date:

- Collaborate with County ITS, BPM, and the County Tax Collector's Office to test and install updates to the customer service queuing system by 6/30/22.
- Process Improvements will be continuous to ensure that the CAO Personal Property Division is meeting and exceeding expectations from both internal and external customers.

Updates/Project Milestones:

Include the following:

- Incorporate quality assurance testing to ensure personal property assessment values are consistent. Work with the QA team to develop and document metrics and tracking for all employees.
- Engage partners to have an efficient and effective process for both internal and external customers.
- Align processes, document the process workflow, and establish workload expectations with a goal to improve the customer experience and efficiencies within the CAO and the Personal Property Division.
- Encourage, mentor and support team members wanting to attain a designation through either IAAO or NCAAO. This allows staff to grow and increase their knowledge of the assessment and property tax function. Assist staff in building a training plan that meets the department and their personal growth needs.
- Continue testing and improving the queue flow system to enhance customer satisfaction. The system should be functional during the first quarter of FY21, but due to COVID, the volume testing of customers will occur in the 2nd and 3rd quarter of FY2022. The team will perform additional tests to determine if it requires modifications.
- Implement a QA CAO Internal Audit Program for personal property. This will be geared more specifically to Individual Performance for the employees.
- Continuing internal training program delayed due to COVID. Will continue developing and deploying during FY22.
- Include relevant metrics for defined elements of audit and training programs in employee work plans, goals and feedback on performance. Rotate focus as needed.
- Review situs addresses (and other errors that affect valuation) and provide feedback as the goal of having errors move closer to 3% or less.
- Finalize updates to policy and procedure manuals.

Outcomes/Measures:

Director Comments: (Year-end)

Executive Team Comments: (Year-end)



Key Initiative #3 -- Equity and Inclusion Initiative

Link to Strategic Business Plan:

Yes

Description:

Continue the implementation of the County's Equity Action Plan.

Rationale:

Mecklenburg County is committed to addressing its racial inequities through an intersectional analysis. In order to become a more equitable institution, strategies must be implemented and enforced that enhance the work Mecklenburg County has already completed to promote equity and inclusion. The County has partnered with the Government Alliance on Race and Equity (GARE) to create both a racial equity training curriculum for County staff, an Equity Action Toolkit and a three-year enterprise-wide Equity Action Plan. To continue to build the capacity of the organization, it is critical that the County continue to implement the agreed upon action items identified in the Equity Action Plan despite COVID-19.

Completion Date:

This is a multi-year project (FY2020-FY2022).

Updates/Project Milestones:

Continue implementation of the County's Equity Action Plan that were postponed due to COVID-19:

- Continue rollout of "Advancing Racial Equity Training" for all County employees to enhance abilities to advance racial equity.
- Re-establish Department Equity Action Teams (DEAT) for select Departments to begin training and to initiate development of department specific equity action plans (pending further guidance from the County Manager's Office); and
- Provide training on Racial Equity Tool usage to County mid-senior management.

Implementation of FY22 Equity Action Plan items for those departments with specific accountabilities.

Outcomes/Measures:

End of Year Reporting

Director Comments: (Year-end)**Executive Team Comments: (Year-end)**