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Memo

DATE: February 4, 2016
TO: Mayor Nickels and the Common Council
FROM: Nic Sparacio
RE: Assessor Transition Plan



Please view this plan as a fluid document. It will very likely require adjustment along the way as we work through the process of determining how to fill the City Assessor function for the future. The feedback of all involved will be crucial in making this transition work.

Assessor Duties and Current Status

Primary duties of the City Assessor during the expected period of transition will need to be covered by existing City staff and through the assistance of our Assessment consultant, Tyler Technologies. The following are the primary tasks that need to be handled in the months ahead.

Tasks	Timing
1. Clerical – distributing forms, retrieving existing files, scheduling appointments, stuffing and mailing, receiving forms	Ongoing
2. Communications – responding to calls, emails	Ongoing
3. Onsite customer service	Ongoing
4. Address and name changes	Ongoing
5. Valuation, inspection, and records update – new construction, sales, splits, annexations	Ongoing
6. Assessment reviews – process and send determinations	Ongoing (as requested)
7. Memo of correction recommendations to Clerk	January – February
8. Low Income Certifications	January – February
9. Personal property – process, update system	January – February
10. Manufacturing notification roll – validate	February
11. Submit Sales Reports to DOR	February and March
12. Sales ratio studies	February – March
13. Reviews – exempt status changes	March
14. Personal property – send letters, process dooamage	March – April
15. Agricultural parcels – review and value	April – May
16. Occupational Tax Report	April – May
17. Provide assessment rolls – balance, prepare, notices	April – May
18. Open Book – prepare all notices and execute, defend values	May – June
19. Board of Review – prepare all notices, conduct meeting, defend assessments, process results	June – July
20. Property listing – review deeds	Ongoing
21. Property listing – assist with database maintenance	Ongoing
22. Legal support – as needed	Ongoing

Typical Customer Contacts

The following information was provided by retired Assessor, Sarah Hoppe. It is important to note that Assessor services are very cyclical, so there can be significant variation from these weekly averages at any given time. Peaks in customer contacts occur in January-February relative to personal property, and again in April-May relative to the Open Book and Board of Review process.

	Phone Calls	Emails	Walk-ins
Clerical	25-50/week	50-100/week	5-8/week
Property Listing	1-2 week	seldom	seldom
Valuation Questions	2-5/week	2-5/week	2-5/week
Weekly Totals	28-57	52-105	7-13

Short Term Transition

The transition plan for the short term (the next 3 to 6 months) is to expand our services agreement with our existing assessor services consultant, Tyler Technologies. This will come at additional cost and at an hourly rate that is greater than the Assessor budget can support. For this reason, the help of existing City staff is requested over the short term to help minimize the work that needs to be sent to Tyler Tech. The following outline provides a strategy for addressing each of the tasks anticipated over that 3 to 6 month timeline.

General

- A few key staff meet bi-weekly for maximum of 30 minutes to communicate and coordinate. Nic Sparacio to set a regular meeting time and facilitate these meetings.
- Daryl Kliment will set up 2 VDI machines for the Tyler Tech team. Tyler Tech will have access to the manitowocassessor@ email account, the O:\ drive, and the CAMA system (CLT).
- Nic Sparacio will notify DOR that Tyler Tech is now the statutory assessor for Manitowoc.
- Community Development staff will review Assessor website and make improvements and updates to better direct customer traffic and directly answer more questions.
- Guiding principles to keep in mind:
 - All valuation of property must be handled by a certified assessor. This includes setting, defending, reviewing, and revising of values.
 - 2016 values are preliminary, confidential, and not to be shared publicly until released by the assessor.

1. Clerical

- Consisting of: distributing forms, retrieving existing files, scheduling appointments, stuffing and mailing, receiving forms
- Timing: Ongoing
- Plan: These duties will be temporarily covered by existing City staff as assessment credentials are not needed to complete these tasks. Lisa Mueller, Community Development Assistant, will be the primary point person, and with the guidance of Nic Sparacio, will direct traffic as needed to ensure timely response to customers. Lisa is not expected to personally handle every item that comes up, but it is important that we have one individual as a point of contact. Additional support will be provided by Public Infrastructure staff (Lisa Rezach, Sonja Birr, and Jill Erickson) and staff in the Clerk's

office. Laurie Braun will be the point of contact for the Clerk's office, though others could be trained to handle some of these items as well. Specific tactics include:

- Signage should be redirected to send walk-in customers to Building Inspection counter first. Clerk's office could help during times when Building Inspection counter is closed. Many customers will still need to go to Public Infrastructure (because files are located there), but primary point of contact should be simplified.
- Forms will be available at both the Building Inspection and Engineering counters.
- As mailings come up, the assistance of any available administrative staff may be needed based on the size of the job.
- Determine protocol in cooperation with Tyler Tech as to where to place incoming forms (Personal Property, Request for Assessment Review) and communicate with all assisting administrative staff.
- An Outlook calendar will be set up for scheduling appointments. City staff will coordinate with Tyler Tech to establish days of onsite service, and administrative staff

2. Communications

- Consisting of: responding to calls, emails
- Timing: Ongoing
- Plan: These duties will be temporarily covered by existing City staff and by Tyler Technologies where assessment credentials are needed to respond. The goal is to get a handle on incoming calls and emails over a 2 week period, and then direct all of these to Tyler Tech if possible. Specific tactics include:
 - Email account shoppe@ directed to Lisa Mueller for maximum of 2 weeks. Will then be closed.
 - Email account manitowocassessor@ directed to Tyler Technologies and will remain open.
 - Nic Sparacio to be copied on all email correspondence related to assessor functions.
 - Phone #6970 maintained as a phone tree. Redirect "none of the above" option to Lisa Mueller.
 - IT to confirm that voicemails at this number are being forwarded to the manitowocassessor@ email
 - Phone #6971 rarely used, so it should be deactivated for now.

The intended result of this approach after a 2 to 3 week stabilization is that the City will be screening most incoming phone calls, and Tyler Tech will be screening most incoming emails. For inquiries that need to be addressed by a qualified appraiser or assessor, City staff will direct those customers to contact Tyler Tech directly or will set up an appointment for in-person assistance.

3. Onsite customer service

- Consisting of: opportunities to meet in person with certified assessor/appraiser related to various other work tasks addressed in this plan
- Timing: Ongoing

- **Plan:** This is a Tyler Tech work task, as it requires assessor credentials. The amount of onsite service we will request will be driven by the cost that will be charged by the consultant. Once the schedule is known, City staff can assist as addressed in Clerical tasks above. An Appraiser level person will likely be able to handle 90% of inquiries, and a certified Assessor 2 can be available via conference phone. This will help manage the cost of the onsite service.
4. **Address and name changes**
 - **Consisting of:** Receive and process potential changes for parcel records, tax bills, and other City databases
 - **Timing:** Ongoing
 - **Plan:** Jill Erickson will be the point person for address and name changes for the short term. Jill is not expected to personally handle every item that comes up, but it is important that we have one individual as a point of contact and oversight. Assistance from Lisa Mueller and the Clerk's office may be needed at times. The forms will be available at all counters on first floor. We will seek the assistance of MPU where the changes are related to utility bills.
 5. **Valuation, inspection, and records update**
 - **Consisting of:** Fielding, valuing, and updating records for new construction, sales, splits, annexations
 - **Timing:** Ongoing
 - **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech. City staff will assist by helping to screen these inquiries and weed out any clerical tasks that do not require consultant work (and fees).
 6. **Assessment reviews**
 - **Consisting of:** process and send notices of determinations
 - **Timing:** Ongoing
 - **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech. City staff will assist by helping to screen these inquiries and weed out any clerical tasks that do not require consultant work (and fees).
 7. **Memo of correction recommendations to Clerk**
 - **Consisting of:** Compilation of all correction (omitted or rescind) recommendations and inclusion into the 2015 assessment roll
 - **Timing:** January – February
 - **Plan:** Sarah state that Clerk has all current correction recommendations. Not sure what the next steps are here. Tyler Tech continues to compile for 2016?
 8. **Low Income Certifications**
 - **Consisting of:** Annual review and notify property owners.
 - **Timing:** January – February
 - **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech. City staff will assist by helping to retrieve any information needed by consultant to complete this task.

9. **Personal property**
 - Consisting of: process incoming reports, update system
 - Timing: January – February
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech. City staff will assist through related Clerical and communication functions above.

10. **Manufacturing notification roll**
 - Consisting of: review DOR information and validate
 - Timing: February
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech.

11. **Submit Sales Reports to DOR**
 - Consisting of: All related work for preliminary and final reports
 - Timing: February and March
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech.

12. **Sales ratio studies**
 - Consisting of: All related work
 - Timing: February – March
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech.

13. **Reviews of exempt status changes**
 - Consisting of: All related work
 - Timing: March
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech.

14. **Personal property dooamage accounts**
 - Consisting of: send letters, process dooamage
 - Timing: March – April
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech.

15. **Agricultural parcels**
 - Consisting of: review and value
 - Timing: April – May
 - Plan: As this work requires assessor credentials, these functions must be directed to Tyler Tech.

16. **Occupational Tax Report**
 - Consisting of: all related work
 - Timing: April – May

- **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech.

17. Provide assessment rolls

- **Consisting of:** balance, prepare, notices
- **Timing:** April – May
- **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech. City will assist with IT support.

18. Open Book

- **Consisting of:** prepare all notices and execute, defend values
- **Timing:** April – May
- **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech. City staff will assist through related Clerical and communication functions above.

19. Board of Review

- **Consisting of:** prepare all notices, conduct meeting, defend assessments, process results
- **Timing:** May – June
- **Plan:** As this work requires assessor credentials, these functions must be directed to Tyler Tech. City staff will assist through related Clerical and communication functions above. As in years past, City will also coordinate the meeting logistics and ensure attendance by Board members.

20. Property listing – deeds

- **Consisting of:** review of deeds being recorded at County ROD
- **Timing:** Ongoing
- **Plan:** City staff will continue to perform this task and identify documents that relate to Parcels in the City. Jill Erickson does this for property listing purposes, and Paul Braun does this for land division and economic development purposes.

21. Property listing – values

- **Consisting of:** assist with database maintenance
- **Timing:** Ongoing
- **Plan:** Where values need to be adjusted and updated in the assessment and parcel databases, these functions must be directed to Tyler Tech. Jill Erickson, Nic Sparacio, and Tyler Caulum will coordinate on work that needs to be forwarded to Tyler Tech.

22. Legal support

- **Consisting of:** same relationship and support as exists today
- **Timing:** Ongoing
- **Plan:** City attorney (and contracted assistance) will continue to provide all legal support.

Long Term Transition

As soon as possible, a permanent solution will be implemented for restoring assessor functions to properly qualified individuals or consultants and for correcting any excessive burdens placed on City staff during the short term transition. Work will begin immediately toward this end, however, it may take up to 6 months to obtain required approvals, select a consultant, negotiate a contract, hire any staff, and make any needed software transitions. Anticipated tasks in the long term transition include the following.

1. Obtain Council approvals as needed
 - This plan
 - Request for Proposals document and process
 - Consultant selection
 - Consultant contract
 - Any changes to job descriptions, department structure, and related hiring
2. Conduct consultant procurement; RFP to include:
 - Multiple models for providing assessor services
 - Option: Staff Assessor with consultant support
 - Option: Staff Appraiser with consultant as Statutory Assessor
 - Option: Entire operation outsourced to consultant
 - Multiple models for complete revaluation
 - Option: Intensive revaluation project over 1 to 2 year period
 - Option: More aggressive annual maintenance to avoid major revaluation
3. Execute consultant contract
 - If consultant other than Tyler Technologies is selected, provide 30 day notice and exit the existing contract
4. Hire any needed staff
5. Execute software transitions
 - Convert databases to new formats as needed
 - Implement new CAMA software if necessary
 - Coordinate CAMA software with tax billing/collection package software changes