50,000 PARCELS IN ASSESSMENT ANALYST... AND COUNTING

Tironda Dixon
Canvass Supervisor
Maricopa County Assessor’s Office
Population

Maricopa County has nearly 4 million people (2010).
It is the 4th most populous county in USA.
Land Size

9,226 square miles
14th largest County in size in USA
4th largest assessment Jurisdiction in USA
1,552,841 parcels noticed for 2014
143,500 Bus. Property Acc’ts for 2013

25 Cities and Towns
58 School Districts and
1,813 Special Districts are
Located within borders
Business Statistics

Home to major players like:

- Amazon
- Apple
- AVNET
- Intel
- Boeing

READ MY BIO
Maricopa County Assessor
Assessor Staff

17 Administration
16 Litigation
30 Information Technology
40 Property Ownership\Mapping
222 Appraisal\CAMA\Valuation Relief Programs
Budget & FTE’s
Assessor Budget History by FY

Eliminated 41 FTEs
Closed 5 Satellite Offices

Paul D. Petersen
ASSESSOR
Staff Size

Maricopa County:
1 staff member for 5,126 parcels\accounts
.21 staff per 1,000 parcels

According to IAAO 2013 Benchmark Survey:

For Counties in USA > 28,800 parcels :
1 staff member for 3,100 parcels
.86 staff per 1,000 parcels
Staff Budget

Maricopa County: $13.83 per parcels\accounts

According to IAAO 2013 Benchmark Survey:

For Counties in USA > 28,800 parcels:
$20.53 per parcels
Real Property Types

- Single Family Residential/Condo: 1,228,066 (79%)
- Vacant Land: 167,902 (11%)
- Commercial: 70,966 (5%)
- Mobile Unit: 36,590 (2%)
- Apartment: 29,261 (2%)
- Agriculture: 15,025 (1%)
Appeals (Real & Personal) By Tax Year
Other Workload Measures

Ownership Changes (sales) 271,260

Parcel Splits (new creates) 2,000

New Subdivision creates 345
Other Workload Measures

Organizational Exemptions 3,901
Senior Freeze Applications 7,244
Personal Exemptions (Widow.,Dis.) 2,386
STAR Center calls 116,000
Direct phone calls 2,618
Counter visits 14,416
Web emails returned 8,431
Skype help 205
Historic Applications 168
Combines Applications 305
Mail address changes 10,994
Research room assists 118
Data Requests processed 440
Property Owner Re-Check 1,070
Other Workload Measures

Properties Canvassed  ?

Hmm.........
The Solution?

Series of meetings with appraiser managers and supervisors

Research other jurisdictions

Look for technological advantage (RFP)
The Solution
The Solution

Realign Appraisal Division to create a dedicated team of seven (7) staff members to use Assessment Analyst tool and standard appraisal techniques to capture data in CAMA system for 2016 roll (Az. cannot go to back years for tax collections)
The Solution
Team Selection is Critical
The Solution
Training
The Pilot Project
The Pilot Project
Methodology

27 Central Phoenix Mtn. Corridor   .804   .136

5 Central Scottsdale\PV   .814   .109

6 N. Central Phoenix   .806   .128

7 N. Scottsdale\Fountain Hills   .805   .109
Implementation

Project Started: January 13, 2014
Residential Properties: 47,237
Commercial Properties: 2,806
Total Parcel Count: 50,043

Start Commercial Properties: March 17, 2014
Completion Date: December 19, 2014
Implementation
(expect issues in a project)
Implementation

Completed as of February 21, 2014
11,537 residential properties

Averaging 11 minutes per review by the appraisers

43 properties reviewed by each appraiser per day
480 minutes/11 = 43 reviews

258 properties per week
43 x 6 appraisers = 258 reviews

Projected working days to complete 194 days
50,043/258 = 194 days
Initial Statistics

11,537 Parcels Reviewed

Average FCV increase: $5,181
Median FCV increase: $2,000

Total estimated FCV added to 2016 Roll: $59.8 million
Net “New Construction” LPV added to 2016 Roll $38.7 million
Initial Statistics

11,537 Parcels Reviewed

1,112 Parcels Decreased
1,483 Parcels No-changes
7,597 Parcels < 10 percent FCV
  (796 Rule B, > 5% Isqft increase)
1,345 Parcels > 10 percent FCV
  (all Rule B)
Initial Statistics

Types of Changes found:

- 52 Second Stories added, 5 deleted
- 3 Basements added, 11 deleted
- 449 AC units added
- 117 Pools added, 106 deleted
- 72 Detached Garages added, 1 deleted
- 18 Attached Garages added, 34 deleted
- 3,677 Livable areas added to homes, 1,048 deleted
RULE B on LPV for 2016 Tax Roll

2,141 of the 11,537 parcels reviewed to date met the criteria of:

Change caused a 10 percent increase in Full Cash Value (172 parcels)

The Livable square footage of property increased more than 5 percent (796 parcels)

Both criteria met (1,173 parcels)
RULE B on LPV for 2016 Tax Roll

Of the 2,141 parcels reviewed that received a LPV Rule B:

1,767 increased in Value over regular LPV - $41.2 million

374 decreased in Value over regular LPV– ($2.5 million)

Total LPV Change over regular LPV - $38.7 million

This is considered “New Construction” to Tax Jurisdiction for purposes of calculating levy limits
Net **New Construction** at a 10 percent assessment ratio for “primary residences” yields $3.87 million increase in Net Assessed Value.

Net Assessed Value times the Tax Rate (2013 of 12.3227 percent per 100 Net Assessed Value) in study area equals approximately $476,400 in new taxes for **ALL** tax jurisdictions based on two year old tax rates.
Estimating the effect on all 50,000 parcels in the pilot study based on the results of the first 11,537 parcels (maintaining the same Rule B ratio and tax rate) would return an estimated $2,064,600 for ALL tax jurisdictions based on two year old tax rates.

This is a 5 to 1 ROI for the Assessor on this new investment.
Take Aways

Maricopa is big jurisdiction, they had a problem

After research, found an organizational and technological solution

Assessment Analyst (AA) provides a methodology for canvassing\revaluation

AA uses CAMA data, orthophotography with sketch verification, oblique and street-front imagery and workforce analytics

Pilot project paid for itself, results are projected 5:1 ROI

All sizes of jurisdictions can use AA
THANK YOU

Tironda Dixon
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