

# Strategic Plan

City of Chesapeake

Office of the Real Estate Assessor

# Office of the Real Estate Assessor Strategic Plan

## Background Perspective

In February 2003, William L. Rice was appointed by City Council as Chesapeake's Real Estate Assessor. He immediately moved in a direction to run the department efficiently and responsibly, with a leadership team assembled to develop and implement the strategies for doing so. Of the team members, only the Systems Analyst had extensive experience in their current position. The Assessor, Deputy Assessor and three Appraisal Supervisors had served only two years or less in their respective roles. Furthermore, leadership changed again in 2004 with the Deputy retiring and replaced by an Appraisal Supervisor, and subsequently a new Supervisor hired. Nevertheless, the Assessor challenged the team to identify the critical short term demands facing the department and develop a strategy to meet those needs. With the shift from caretaker management to Leadership Governance, the focus from process oversight changed to outcomes management for producing measurable results, and to be more adaptable in addressing emerging challenges and opportunities alike. Following are some of the short range (One to Three Years) objectives identified at that time and the results achieved beginning in 2003.

- *Objective:* Encourage a culture of vertical and horizontal communication within the department.
- *Achievement:* Instituted regular Leadership Team meetings, regular Staff meetings, open door policy, and effective team building and cross-training of employees.
  
- *Objective:* Create policy and procedural manuals and technical guidelines for the department.
- *Achievement:* Commercial and Residential Procedural Manuals were developed to provide appraisal staff with direction in regard to job expectations. Office Policy Manual was developed and the Systems Analyst created technical guidelines to assist with mainframe applications.
  
- *Objective:* Re-design existing labor intensive valuation process for residential condominiums.
- *Achievement:* Successfully converted condominium valuation from a manual process to the automated residential cost structure.
  
- *Objective:* Develop a comprehensive and accountable approach to property sales verification for appraisal staff.
- *Achievement:* Instituted uniform procedures for sales verification, created verification questionnaire and incorporated results into the data base, the mainframe and property record card.
  
- *Objective:* Diversify and automate the approach to Income & Expense requests for analyzing income producing properties.
- *Achievement:* Successfully automated process for tracking requests and responses from income producing properties, and created specific questionnaires for numerous special property types.

- *Objective:* Set defined benchmarks for successful completion of the annual reassessment within established time frames.
- *Achievement:* Prior to 2003, the Real Estate Assessor's office routinely incurred more than 1,500 hours of compensatory and overtime each year in completion of the annual reassessment. By 2004 practically all overtime was eliminated.
  
- *Objective:* Explore potential to refine and expand upon existing Building Sketch capabilities that are very antiquated and limited in size.
- *Achievement:* Secured approval for funding and began dialogue with Engineering firm having experience and familiarity expanding similar applications.
  
- *Objective:* Complete a comprehensive analysis of the mainframe cost tables and develop a plan to bring the existing tables up to current industry standards.
- *Achievement:* Successfully worked with Information Technology to develop a complete replica of current cost tables in a test environment, obtained a similar complete set of cost tables from another jurisdiction, and analyzed cost tables from a nationally recognized vendor. Conducted an extensive comparison and contrast of all three sets of cost tables in a test environment and subsequently established new values to be implemented. A 3-year plan was outlined to accomplish the massive task of converting almost 74,000 residential properties from the existing value structure to the new cost figures. In 2006 the plan was implemented and as staff took ownership of the process, outcomes exceeded expectations and conversion of all residential properties to the new valuation tables was completed in less than 11 months.\*

\*NOTE: Mass Appraisal of real estate utilizing mainframe computers had its origins in the late 1950's and early 1960's. In the 1970's, Chesapeake was in the forefront of the CAMA (Computer Assisted Mass Appraisal) revolution in Virginia by acquiring a comprehensive package system for property record collection, description, valuation and statistical measurement of real property throughout the city. These systems automate tasks such as calculating land, building, and other property characteristic values in conjunction with sketch capabilities to draw building footprints and calculate square foot of building area. The objective is to apply uniform measurement and to equitably value all properties in the jurisdiction. While the City invested in an excellent system in the 1970's, by the 1990's the cost valuation tables were seriously outdated and were requiring considerable factoring to maintain optimal performance measures. The colossal task to upgrade the most critical element of the system, the cost tables, has extended the relevance of the current system. Furthermore, mechanisms have been developed to ensure the cost tables continue to reflect current market value, and will remain viable for as long as the mainframe exists as an operating platform.

## Current Perspective

From 2003 to the present, the Office of the Real Estate Assessor has been building on governance strategies and establishing a foundation for continual evaluation of short range objectives and long range vision. By utilizing classic SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis, employee surveys, historic trends, defining mission, vision and value statements; clarifying purpose and identifying governance and core values; the following Strategic Plan was developed. This Strategic Plan is viewed as a living document subject to change as circumstances dictate. Strategic planning is an ongoing process and dynamic by nature. The Leadership Team is responsible for monitoring the Strategic Plan on an annual basis, evaluating outcomes, adapting to challenges, and exploiting opportunities as conditions warrant.

## Mission Statement

- To provide fair and equitable appraisal of real estate for assessment purposes to the citizens and property owners of Chesapeake through effective professional personnel, innovative technology and application of reliable, consistent procedures.

## Vision Statement

- To be a recognized leader by all, for providing fair and equitable mass appraisal of real estate, along with accurate and comprehensive information on real property to the citizens and taxpayers of Chesapeake in a preeminently accountable, effective and efficient manner.

## Organizational Value Statements

- Service to Customers: Provide superior service and accountability to customers via equitable, fair, and professional appraisal principles.
- Productivity through People: Accomplish a high degree of competence through sound organization, planning, teamwork and professional development.
- Performance Measures: To provide accurate, uniform, and transparent market value assessments of real property in Chesapeake.
- Employee Relationships: Promote and maintain employee trust, motivation, and morale.
- Image: Achieve recognition as a professional, ethical, high quality and knowledgeable organization that contributes to the local community in a positive way.
- Growth & Innovation: Stay at the forefront of technology through innovation, education, individual challenge and involvement.

## Core Purpose

The Real Estate Assessor's Office administers all laws pertaining to the assessment of real estate, which includes annually appraising all real estate in the City of Chesapeake in a fair and equitable manner for ad valorem (according to value) tax purposes in accordance with State Law and City Code. The office performs appraisals of real property, analyzes the real estate market, inspects property, and searches public records of sales, leases, etc., to establish market value. The office administers the Land Use Program, verifies properties requesting tax exempt status, annually notifies property owners of any assessment change, maintains and prints the Landbook, maintains and updates property identification maps, and provides real estate related information to other departments and the public.

- Maintain inventory of all real property in the City.
- Meet legal requirements by assessing all real estate uniformly and equitably.
- Administer the Land Use Program.
- Provide public information of assessment records.
- Maintain, update and provide the City's tax maps.
- Continue to deliver quality customer service through dedicated, competent staff.

## Organizational Governance Strategies

Governance best practices are necessary to ensure that the Office of the Real Estate Assessor operates independently, impartially, and objectively; while maintaining a culture of continuous improvement and alignment around shared goals within the department. The goals and objectives should address the business fundamentals of leadership including: Human Resource management, communication, strategic planning, productivity, market conditions, and information technology. These strategies are most effective when practiced on an ongoing basis within the organization.

- Continue building upon synergies developed between specialized working groups within the department.
- Continue encouraging innovation and creative problem solving, with a workplace culture that welcomes it.
- Continue to refine the organizational chart to facilitate cross-training and expanding areas of expertise.
- Continue a recruitment policy that includes a thorough panel interview, selecting people who are most likely suited for a position in regard to job duties, the department, and the city workforce.
- Continue to improve on existing technology, involving staff in identifying ways that information technology can maximize efficiency, productivity and the effectiveness of the overall operation.
- Continue encouragement of vertical and horizontal communication via leadership meetings, staff meetings, one-on-one meetings, and an open door policy from upper management.
- Continue to empower employees to make decisions and express ideas at all levels, thereby increasing innovation, motivation, quality and productivity throughout the organization.

- Continue to provide leadership, direction and vision; while cultivating employees that are self-motivating and largely self-directing.
- Continue to promote a workplace environment where conflict is resolved in a timely and productive manner with all relevant facts and opinions expressed.
- Continue to find ways to change/restructure the physical workplace environment to improve and enhance the quality of work life.
- Continue to provide information, training, resources, and continuing education to further the professional development of staff.
- Continue productive interaction and affiliation with professional appraisal organizations, other public agencies, private entities and other resources, to remain current with industry trends and market conditions.
- Continue established standards of professional conduct with compliance to the industry recognized code of ethics, the Uniform Standards of Professional Appraisal Practice (USPAP).
- Continue to promote transparency by providing comprehensive reports detailing all aspects of the department's functions and responsibilities, thus going far beyond traditional competencies involved in the preparation, communication, and defense of assessments.

### **Short-Range Objectives (One to Three Years)**

- Achieve final installation, testing and implementation of the new building sketch program.
- Achieve migration of all sales/assessment statistical analysis from independent "Applications System", to user friendly mainframe application (maintenance cost savings \$26,544 annually).
- Successful migration from unsupported VAG system to advanced application system EGL.
- Develop mechanisms and institutional structure for leadership succession planning.
- Upgrade and improve current department website in conjunction with GIS (Geographic Information Systems) to exploit the technology we have for optimal and timely delivery of information to customers, making efficient and effective use of resources.
- Develop annual survey and scanning process of staff and leadership for strategic assessment.
- Continued status as one of the leading jurisdictions in the state in regard to performance as measured by the State Taxation Department's annual sales ratio studies.
- Maintain sufficient staff to insure compliance with Code of Ordinances; City of Chesapeake and Code of Virginia Title 58.1.

## Long-Range Objectives (Three years and beyond)

- Upgrade and improve current department website in conjunction with GIS technology to rival or exceed those of similar sized jurisdictions.
- Achieve and sustain status as *the* leading jurisdiction in the state in regard to performance as measured by the State Taxation Department's annual sales ratio studies.
- Build on successful conversion of cost tables, new sketch abilities and enhanced statistical applications to prepare department for eventual migration from mainframe platform to a 21st Century CAMA system.

## Core Values

The Office of the Real Estate Assessor is committed to serve the City of Chesapeake through competent application of mass appraisal techniques for valuing real property in a fair and equitable manner; with a professional, educated staff employing innovative technologies and established procedures, governed by core values.

- Leadership: Defining the mission, vision, and organizational values of the department; setting clear goals and objectives, and articulating the organization's direction in a way that motivates staff's desire to participate and contribute.
- Management: Establishing a leadership team making clear and informed decisions, ensuring trust through fairness and transparency, while recognizing employee achievements and contributions.
- Employees: Promoting job satisfaction by keeping employees motivated, focused, and productive while promoting an environment in which they can grow personally and professionally.
- Policies and Procedures: Providing structure and direction by developing in-house policy manuals, procedural manuals, and technical guidelines to foster continuity and consistency in the workplace.
- Service: Providing superior service to customers and the community in a courteous, concerned, and professional manner.
- Communication: Providing clear, comprehensive and transparent reporting of the outcomes and functions of the department that demonstrates assessment policy is administered in a fair and professional manner.
- Continuous Improvement: Constantly adapting to new challenges by using new information, technologies, and expertise, while evaluating changes for effectiveness and efficiency.
- Education: Commitment to continuing education to keep staff current with market trends, new technologies, new methodologies and changes in best practices.
- Training: Providing training for employees to increase understanding of their duties and responsibilities in relation to current best practices and sound industry standards.
- Accountability: Demonstrate competency, accuracy, fairness, uniformity and equity with application of mass appraisal principles and communicate results in a clear, honest and transparent manner taking responsibility for our actions.
- Change: Continue to champion organizational change, to explore alternate solutions to problems and challenge the status quo.