

COOS COUNTY ASSESSOR'S OFFICE

Adam Colby, Assessor




Strategic Plan

January, 2010

Table of Contents

	Page
Executive Summary	4
Office Staff - FY 2009-10	5
Budget Information	6
Assessment Information	7
Current Situation	8, 9, 10
Evolutions -1/2009 to 1/2010	11, 12
Implementation	13, 14
Moving Forward - Focusing on the big picture	15, 16
Success Benchmarks - We'll know it when we see it	17



There is at least one point in the history of any company when you have to change dramatically to rise to the Next Level of performance. Miss that moment —and you start to decline.

~Andrew S. Grove

Executive Summary

- The Coos County Assessor's Office is comprised of 18 professionals, including the elected assessor, Adam Colby, who took office on January 5, 2009.
- The team maintains the assessment data, pursuant to Oregon law, for 54,878 accounts in support of the County's 78 taxing districts, which provide funding for the local government entities.
 - There are currently 21,283 Residential (improved) dwellings on record in Coos County.
- 2008 U.S. Census Bureau data, states that Coos County's population is 63,453, and represents approximately 1.7% of Oregon's 3.7 million population.
- Coos County was created on December 22, 1853, from parts of Umpqua and Jackson Counties.
 - It was named after a local Indian tribe.
- The County has 1,042,767 acres.

Office Staff – FY 2009-10

- 17.80 full-time equivalent (fte) employees
 - 8 are licensed appraisers
 - 3 are currently working toward their appraisal licenses
- Bargaining Unit – 13.80 fte
 - Appraisal – 6
 - Cartography – 3
 - Assessment – 4.80
- Non-Bargaining Unit – 4.00 fte
 - Administrative – 1
 - Management – 2
 - Assessor (Elected) - 1

Budget Information

- 2009-2010 - \$1,164,922
 - Compensation and benefits 92%

- Funding Sources
 - County General Fund 63%
 - County Assessment Function Funding Assistance Grant (CAFFA) 22%
 - Misc. Fees, etc. 15%

- 2008-2009 - \$1,165,181

Assessment Information

- Accounts – 54,878

- 2009-2010
 - RMV - \$7,142,513,272
 - TAV - \$4,357,897,925
 - Levied - \$57,333,177.83

- 2008-2009
 - RMV – 8,235,439,507
 - TAV – 4,200,775,475
 - Levied - \$56,404,657.22

Current Situation

- The assessor's office is a department within the larger Coos County government.
- The elected assessor entered office with a political agenda to operate the day to day operations like a business, including a philosophy of treating the taxpayers as valued customers.
- In short, the assessor is committed to meeting all statutory requirements regardless of current, or future budget constraints, because it is in the best interests of the valued customers.
- Employee attrition during the latter part of 2008, through 2009, has created a positive opportunity to successfully recruit and hire a core group of exceptional candidates with strong professional experience to help move the office forward.
- 3 of the 4 personnel recently hired to work in the appraisal section hold advanced college degrees, in addition to their professional accomplishments.

Current Situation (cont.)

- The assessor also hired the members of his management team to assist with the committed effort to run the office like a business.
- Numerous account errors surfaced as a result of customer complaints, which prompted a closer review by the assessor, and ultimately influenced his decision in June, 2009 to request an ODOR audit of the office records with the goal of helping to accomplish the following:
 - Estimate the numerical amount of errors.
 - Determine what systemic practices are causing the errors, coupled with recommendations toward providing better, more accurate service.

Current Situation (Cont.)

- The assessor's office has made necessary adjustments to help meet statutory requirements.
- The competition for diminishing financial resources has created opportunities and challenges for private and public entities. Thus, the assessor's office is not unique.
- Assessor's office employees simultaneously contend with the stress of concerned taxpayers in the bear market, and their own employment as it relates to the potential financial insolvency of the County government.

Evolutions -1/2009 to 1/2010

- The assessor has already implemented the following evolutionary changes in 2009:
 - Multiple office and website upgrades to create a more transparent environment.
 - Re-classified three positions to meet the changing dynamics.
 - Implemented incentive program, including employee of the month, and year.
 - Implemented employee work oversight, including the creation of team leaders within the bargaining unit staff.
 - Implemented staff cross-training.
 - Prepared for 135 Board of Property Tax Appeals (February, 2009), a 66% increase from the prior year.
 - Successfully relocated appraisal staff from basement office space to provide quicker customer service, and team unity.

Evolutions -1/2009 to 1/2010 (Cont.)

- Inter-county department teamwork between planning and the assessor's office.
- Hired accomplished professionals to help continue moving the office in a positive direction.
- Started the migration process to the Oregon Counties Assessment and Tax computer system (ORCATS), scheduled to go live on July 1, 2010.
- Implemented outgoing correspondence oversight and consistency.
- Started conversion of paper records into a digital format.
- Implemented flexible scheduling for employees, which includes staggering lunch schedules to keep the office open to the public between 12-1pm, a time when the doors have traditionally been closed.
- Catching up on backlogged work.

Implementation

- Commitment to teamwork, and getting the job done right the first time.
- Managerial/team leader oversight and accountability.
- Accounts will continue to be carefully reviewed.
 - Errors will be analyzed to determine if the statutory authority exists to correct.
 - The customer will receive a written explanation of the discovered error, coupled with what available options exist to correct.

Implementation (cont.)

“If we weren't still hiring great people and pushing ahead at full speed, it would be easy to fall behind and become a mediocre company.”

- Bill Gates

■ Support

- Provide the technology resources to increase work product accuracy and overall productivity.
- Increase and maintain a positive, forward thinking, customer focused attitude amongst the staff.

■ Training

- Utilize the technical educational opportunities available through ODOR, and IAAO.
- Interoffice cross training.
- Staff networking with experts from ODOR and other county offices.

■ Hiring.

- Continue to recruit and hire smart, accomplished people when the opportunity arises.

Moving Forward – Focusing on the big picture

- Continue increasing a positive public perception of the assessor's office.
- The public are valued customers, first; taxpayers, second.
- Our collective, productive attitudes will increase service, and create a consistent positive customer response.
- Accuracy and timely completion of work.
 - Continued implementation of managerial/team leader oversight of all work products will increase accuracy, and employee confidence, while saving time and money over the long-term.

Moving Forward – Focus on the big picture (cont.)

- Greet every customer with enthusiasm.
 - Let the customer catch you working.
 - Fortune is in the follow-up.
 - Promptly answer every phone call with the uniform greeting, before it goes to voice mail.
 - Promptly acknowledge receipt of every piece of written correspondence with a courtesy phone call, or e-mail.
 - Let the customer know that their request/inquiry is important, and that you're working on it.
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- **FOLLOW-UP = INCREASED TAXPAYER CONFIDENCE!**

Success Benchmarks - We'll know it when we see it

- Accountability and transparency
 - Increased public record information converted to a digital format and made available on the office website.
- Employees are enthusiastic about the high level of service they provide.
 - The public will notice and voice their appreciation.
- Accuracy and timeliness.
 - Tasks are accurate while being completed in a timely manner, with managerial/team leader oversight and support.
- The long view.
 - Pulling together to learn and grow professionally during challenging times means staying together for the long haul.
- Collective commitment.
 - Our jobs are no longer about the individual person, but an ongoing collective effort toward serving the customer well.