



Department of Assessor

# Department Business Plan

2014-2017

June 2, 2014

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## **Minneapolis Vision**

*Minneapolis is a growing and vibrant world-class city with a flourishing economy and a pristine environment, where all people are safe, healthy and have equitable opportunities for success and happiness*

## **Department Vision**

*The Minneapolis Assessing Office is a customer service driven department with a professional and responsive staff working together to deliver accurate, impartial and understandable valuations and classifications to taxpayers and elected officials. The Assessor's Office will be recognized as: technologically innovative, having talented, high-performing and engaged employees, committed to continuous process improvement and committed to the right actions for the right reasons. It is an authority on assessment practices and a partner in providing information to support financial and values-based decision making.*

## **Values**

*The Assessor's office values the public's trust and earns that trust by providing high quality customer service and implementing the property tax laws and programs in a professional, accurate and consistent methodology*

## **Department Mission**

*The Minneapolis Assessor's Office serves the taxpayers of the City by valuing and classifying real estate property in an accurate, ethical, equitable and defensible manner as prescribed by state law*

# Department character and environment

## 1. Valuation and Classification of Real Estate Property

Perform the assessment function for all real estate and appropriate personal property and share this information with Hennepin County.

- a. *Valuation* – The annual estimation of value for all taxable and non-taxable real property per state law.
  - i. Per Minnesota statute 273.01, one-fifth or 20% of the taxable properties in Minneapolis must be viewed and appraised annually.
  - ii. Inspect and update property records for all new construction and significant remodeling, modifications and demolitions
- b. *Classification* – the annual classification and recording of parcels by ownership, property use and property type
  - i. Evaluate new exempt applications and verify existing exempt organizations
  - ii. Administer and enforce all property tax programs and laws
  - iii. Process existing and new real estate divisions and combinations

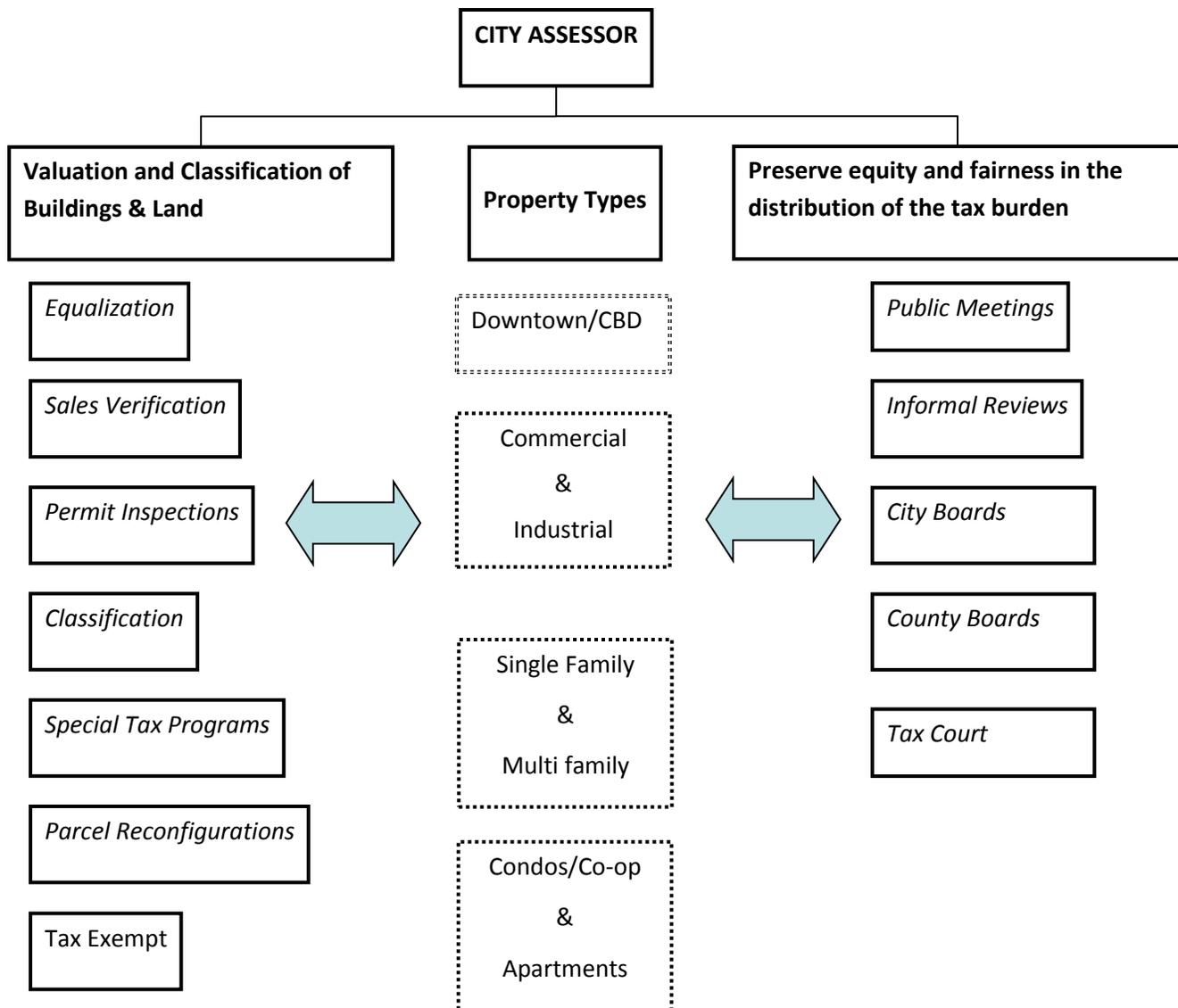
## 2. Preserve Equity and Fairness in the Distribution of the Tax Burden

- a. *Appeals and Reviews* – Respond to all informal and formal owner and taxpayer appeals and requests for property reviews. Defend values and classifications at the City and County Boards of Appeal and Equalization hearings
- b. *Tax Court Petitions* – Defend the department’s values and classifications in Minnesota Tax Court

## 3. Challenges and Opportunities

- a. *Staff Retirements* – The department continues to experience a high level of turnover due to retirements by staff appraisers. Forty-two percent of the department’s appraisal staff have been hired since 2010. By 2016, seventy-five percent of the management team will be eligible for retirement. Promoting or hiring skilled and experienced appraisers has been a challenge due to the limited number of available applicants and the marginally competitive wages compared to assessing departments at competing cities and municipalities.
- b. *New Construction and Major Developments* – The Downtown East redevelopment, Target Arena remodel, Block E redevelopment, Hotels, Apartments, Student Housing and the Nicollet Mall redesign all make working in the assessor’s office an exciting place to be, however, the volume and complexity of these projects can be overwhelming and result in a strain on staff resources at times throughout the year.
- c. *Staff Accreditation* – In 2013, the Minnesota legislature mandated that every deputy assessor in Minnesota must be licensed as an **Accredited Minnesota Assessor (AMA)** by July 2019. Currently, 82% of the deputy assessors in the assessor’s office are not accredited and will be working towards their certification over the next 1-5 years. Staff accreditation will require an increase in education and training dollars beginning in 2016.

# Department organizational chart



# Department Goals, Objectives and Tactics

| <b>Strategic Direction</b>  | <b>Department Goal</b>  | <b>Department Objective and Targets</b>  | <b>Department Tactics and Targets</b>  |
|---|---|--|--|
| Residents are informed, see themselves represented in City government and have the opportunity to influence decision-making   | Expand Web Services, provide additional options for educating taxpayers electronically while providing a portal to facilitate other taxpayer transactions | <ul style="list-style-type: none"> <li>● Objective: Real estate information and property tax programs are accessible, easy to understand and empowering to taxpayers and residents in Minneapolis</li> <li>● Target: Taxpayers and residents are able to find and understand the information they are looking for on the assessor's website</li> </ul> | <ul style="list-style-type: none"> <li>● Tactic: Increase the number of downloadable forms, applications and useful guides from the assessor's website</li> <li>● Target: Add at least one new form, application and useful guide to the assessor's webpage annually between 2014-2017</li> <li>● Tactic: Translate relevant information on the website into the top six languages in the city</li> <li>● Target: The assessor's website will be translated into the top three languages by 12/2015 with the remaining three languages by 12/2016</li> <li>● Tactic: Partner with Communications and IT to redesign the assessor's webpage to better represent the diverse community and people of Minneapolis</li> <li>● Target: Webpage design updated by 12/2015</li> </ul> |
| <p style="text-align: center;"> <span style="color: green;">● Grow the City</span> <span style="color: orange;">● Close the Racial Equity Gap</span> <span style="color: purple;">● Good Government</span> </p> |   |  |  |

# Department Goals, Objectives and Tactics

| <b>Strategic Direction</b>  | <b>Department Goal</b>  | <b>Department Objective and Targets</b>  | <b>Department Tactics and Targets</b>   |
|---|---|--|---|
| Engaged and talented employees reflect our community, have the resources they need to succeed and are empowered to improve our efficiency and effectiveness | Department employees are high-performing engaged and empowered                                  | <ul style="list-style-type: none"> <li>● Objective: Insure staff is trained and competent to perform their job efficiently and professionally</li> <li>● Target: 100% of the appraisal staff will be AMA certified by 2019 per MN statute</li> </ul>   | <ul style="list-style-type: none"> <li>● Tactic: Each appraiser will develop a personal and professional growth plan by 6/2015</li> <li>● Target: 20% of the appraisers will be AMA certified by 12/2015<br/>40% AMA certified by 2016<br/>60% AMA certified by 2017</li> </ul>   |
|   | The department's institutional knowledge is maintained through training, mentoring and coaching | <ul style="list-style-type: none"> <li>● Objective: Develop a succession plan with staff to ensure they have the skill and ability to fill key positions within the department as staff retire</li> <li>● Target: Increase the number of coaching and mentoring opportunities for staff to participate within the department and the city</li> </ul> | <ul style="list-style-type: none"> <li>● Tactic: Identify staff with career goals and aspirations for career advancement within the department or city-wide enterprise</li> <li>● Target: Review 100% of staff's personal and professional growth plans by 7/2015</li> <li>● Tactic: Partner with HR to identify training and educational opportunities for candidates within the assessor's office interested in a career advancement</li> <li>● Target: Dept. succession plan developed by 12/2015</li> </ul> |
| <ul style="list-style-type: none"> <li>● Grow the City</li> <li>● Close the Racial Equity Gap</li> <li>● Good Government</li> </ul>                         |   |  |   |

# Department Goals, Objectives and Tactics

| <b>Strategic Direction</b>  | <b>Department Goal</b>   | <b>Department Objective and Targets</b>   | <b>Department Tactics and Targets</b>   |
|---|--|---|---|
| <p>Departments work seamlessly and strategically with each other and with the community</p>   | <p>Cross-departmental initiatives that provide new or better services to all residents and taxpayers</p> | <ul style="list-style-type: none"> <li>● Objective: Identify communities of color where property tax information and tax relief programs are underutilized or not represented</li> <li>● Target: Partner with NCR to develop a working relationship with leaders within communities of color to listen and understand the barriers they experience within to the property tax system</li> </ul> | <ul style="list-style-type: none"> <li>● Tactic: Identify which neighborhoods tax relief programs are underutilized or not represented within predominantly communities of color</li> <li>● Target: Develop an outreach pilot program to that minimizes or eliminates barriers that inhibit or obstruct access or utilization of property tax programs for communities of color by 12/2015</li> </ul> |
|   |  | <ul style="list-style-type: none"> <li>● Objective: Reduce or eliminate redundant expenditures by coordinating and sharing resources between departments</li> </ul>   | <p>Continued on the next page.</p>  |
| <p style="text-align: center;"> <span style="color: green;">● Grow the City</span> <span style="color: orange;">● Close the Racial Equity Gap</span> <span style="color: purple;">● Good Government</span> </p> |  |   |   |

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|---|---|--|--|
| Departments work seamlessly and strategically with each other and with the community  | Cross-departmental initiatives that provide new or better services to all residents and taxpayers | <ul style="list-style-type: none"> <li>● Target: Partner with CPED on subscriptions, memberships, appraisal reports and market research reports</li> </ul> | <ul style="list-style-type: none"> <li>● Tactic: Assign staff to research and identify duplicate expenditures between department for consolidation</li> <li>● Target: Consolidate services and subscriptions where appropriate by 12/2015</li> </ul> |
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|---|---|---|--|
| City operations are efficient, effective, results driven and customer focused   | The Assessor's office is transparent in interactions with stakeholders and responsible for assuring all values and property tax programs are fair, equitable and defensible | <ul style="list-style-type: none"> <li>● Objective: Increase property tax knowledge and awareness in Minneapolis's residents and the business community</li> <li>● Target: Educate real estate brokers, title companies and neighborhood groups the principles and fundamentals of the property tax system so they in turn can accurately educate their clients and members of the community</li> </ul> | <ul style="list-style-type: none"> <li>● Tactic: Provide seminars and training to Real estate and Title companies to educate them in the property tax system</li> <li>● Target: Identify and engage the two major real estate and title companies that service Minneapolis by 6/2015 and facilitate presentations to their staff by 12/2015</li> <li>● Tactic: Provide seminars and training to neighborhood and business groups within each council members ward</li> <li>● Target: Neighborhood meetings scheduled by 1/2015 for calendar year 2015</li> </ul> |
|   |   | <ul style="list-style-type: none"> <li>● Objective: Property tax programs are administered accurately and timely</li> </ul>   | <ul style="list-style-type: none"> <li>● Tactic: The department's assessment work meets statutory requirements and Minnesota Department of Revenue guidelines</li> <li>● Target: Sales ratio for each classification (Res/Apt/Com) is between 90-105% annually</li> </ul>  |
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| City operations are efficient, effective, results driven and customer focused   | The Assessor's office is transparent in interactions with stakeholders and responsible for assuring all values and property tax programs are fair, equitable and defensible | (continued from above)<br><ul style="list-style-type: none"> <li>● Objective: Staff are ambassadors and supporters of the city at all touch-points</li> <li>● Target: Staff are trained and have the tools and resources to represent the city and create a friendly welcoming environment for taxpayers, residents and visitors</li> </ul> | <ul style="list-style-type: none"> <li>● Tactic: Partner with internal and external agencies and to develop staff training on what it means to be an "ambassador" for the department and the city</li> <li>● Target: Partnerships and staff training initiated by 12/2015</li> <li>● Tactic: Identify tools and resources to assist staff in fulfilling the role of an ambassador to the city.</li> <li>● Target: Tools and resources acquired by 12/2015</li> </ul> |
| <ul style="list-style-type: none"> <li>● Grow the City</li> <li>● Close the Racial Equity Gap</li> <li>● Good Government</li> </ul> |   |   |  |