

Results Minneapolis

City Assessor's Office

May 20, 2016

INTRODUCTION

Department Statistics

Number of employees (FT):

37

Average age of workforce:

46.2

Average years in current classification:

5 years 5 months

Gender:

Male: 62%

Female: 38%

Race and Ethnicity:

People of Color: 22%

White: 78%

2016 Annual Budget:

\$5,027,275

CARS Funding:

\$135,000

Level of Licensure:

Non-licensed: 6

Pre-licensed: 5

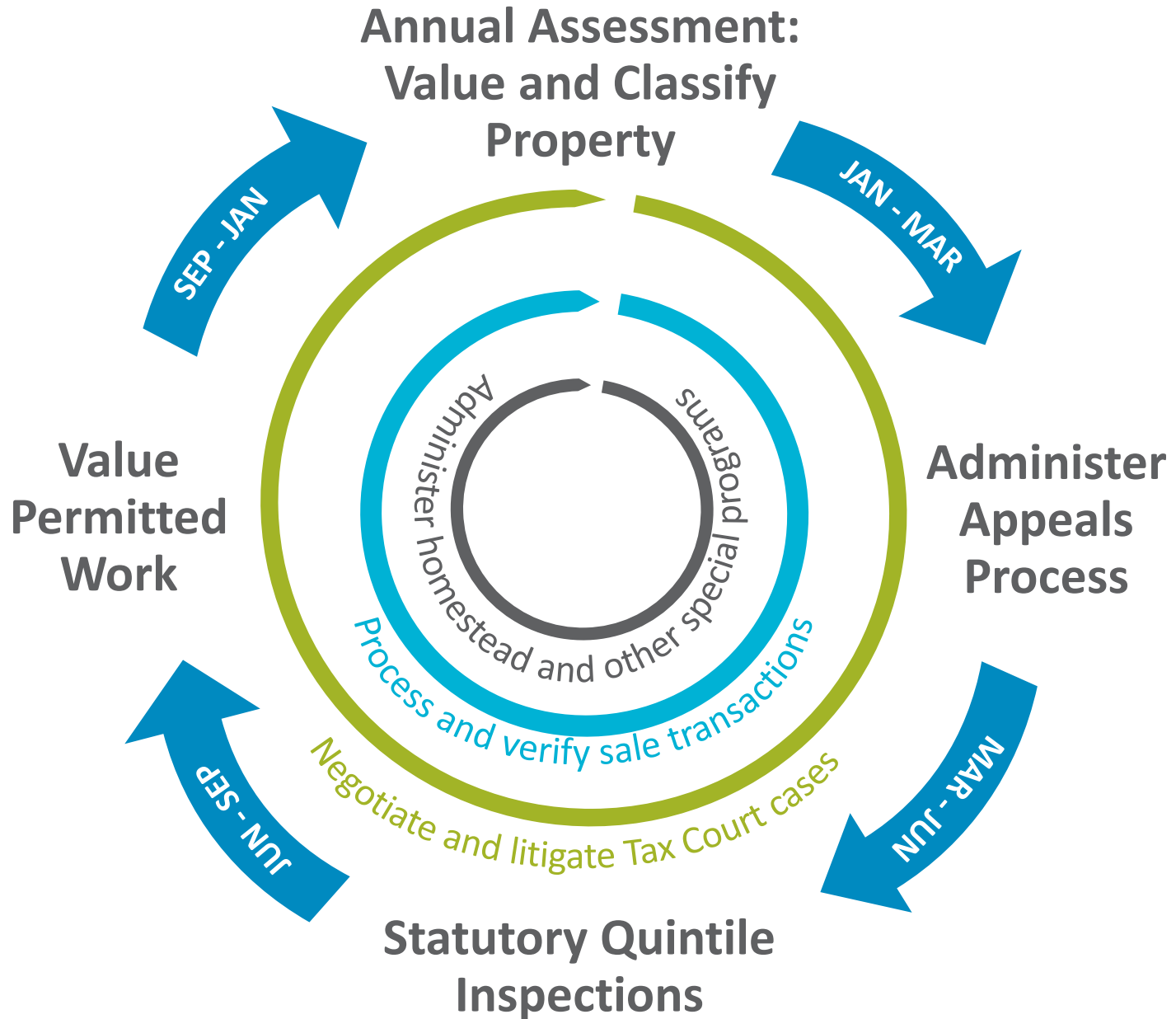
CMA: 16

CMAS: 2

AMA: 3

SAMA: 5

CORE BUSINESS FUNCTIONS



Successes

- ✓ Sales Ratio standards met for the last seven years
- ✓ \$6.2 Billion in tax base growth since 2014
- ✓ \$1.9 Billion in new construction since 2014
- ✓ Local Board of Appeal and Equalization (LBAE) online application process
- ✓ Department restructuring for improved operation effectiveness and efficiency
- ✓ Staff involvement in creation of new department standards
- ✓ Department commitment to integrity, public accountability and trust including new internal ethics training
- ✓ Staff involvement in state and international professional association activities to represent the city

Work To Do

- ✓ Revisit and revise department goals, objectives, targets and tactics
- ✓ RFP for a new assessment software system to improve department services and customer experience
- ✓ Review of the LBAE process to provide more customer options and process efficiencies
- ✓ Work on outreach project to seek opportunities for property owners to take advantage of available property tax programs

DEPARTMENT GOALS OVERVIEW

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 law.

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 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, Vision and Values

Department Goals

Enhanced
Web Services

Maintain
Institutional
Knowledge

Cross-
Department
Initiatives

Transparency
in
Interactions
and Fair and
Equitable
Values

Engaged,
High
Performing
Employees

DEPARTMENT GOAL RESULTS

Department Goal:

Expand web services, provide additional options for educating taxpayers electronically while providing a portal to facilitate other taxpayer transactions

Work Completed

- ✓ New educational videos in multiple languages
- ✓ Five online applications
- ✓ eHomestead application in development
- ✓ Assessment data available on Open Data Minneapolis



Work To Do

- RFP for new CAMA system
- Webpage redesign
- Continue translation of documents
- Improved outreach to communities of color

Equity Lens

Providing both equal access to information and documents among all Minneapolis citizens by providing language specific information in addition to electronic and hard copy options.

DEPARTMENT GOAL RESULTS

Department Goal:

The department's institutional knowledge is maintained through training, mentoring and coaching

Work Completed

- ✓ 11% of staff participate in City's phased retirement to coach and mentor their successors
- ✓ 28% of leadership team participated in Leadership U
- ✓ 28% of leadership team participated in Supervisor U



Work To Do

- >70% of leadership team will have participated in Leadership U
- Staff provided opportunity to coach and mentor interns

Equity Lens

Provides all employees of the Assessor's office equal opportunity to acquire skills allowing them the opportunity for advancement and assurance of job satisfaction.

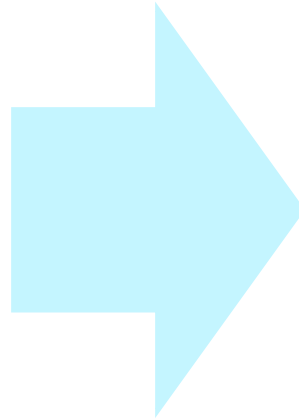
DEPARTMENT GOAL RESULTS

Department Goal:

Department employees are high-performing engaged and empowered

Work Completed

- ✓ >25% of appraisal staff have received their AMA or SAMA license
- ✓ 43% of Leadership Team is female
- ✓ Leadership participation in Urban Scholar mentoring
- ✓ Creation of department employee group to coordinate recognition and celebrations



Work To Do

- ❑ 60% of appraisal staff will be AMA certified by December 2016
- ❑ 75% of CBD will have obtained their MAI designation
- ❑ Leadership participation in Urban Scholar mentoring

Equity Lens

Provides all employees of the Assessor's office equal opportunity to acquire skills allowing them the opportunity for advancement and assurance of job satisfaction.

DEPARTMENT GOAL RESULTS

Department Goal:

Cross-departmental initiatives that provide new or better services to all residents and taxpayers

Work Completed

- ✓ Partnered on projects with:
 - Civil Rights – Urban Scholar
 - Inter Governmental Relations – Crafting legislation
 - Public Works/City Attorney – Nicollet Mall
 - CPED – Accessory Dwelling Unit



Work To Do

- ❑ Partner with NCR and Communications to engage under served communities
 - Engage under served communities
 - Identify barriers
 - Identify opportunities for access to property tax programs

Equity Lens

Cross-departmental activities provide a broader perspective on the needs of the community so that we can respond to those needs in a collaborative and coordinated manner.

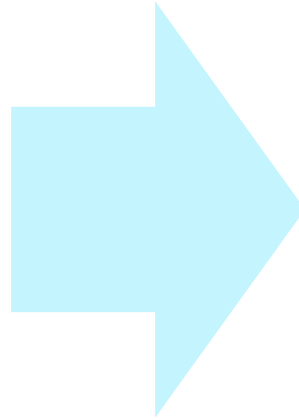
DEPARTMENT GOAL RESULTS

Department Goal:

Transparent in interactions with stakeholders and responsible for assuring all values and property tax programs are fair, equitable and defensible

Work Completed

- ✓ Ratio, statistical, and special programs met or exceeded MN Statute and Department of Revenue standards
- ✓ Participated in 12 community based events
- ✓ Less than one percent of parcels appealed market value
- ✓ High percentage of market value retained in Tax Court litigation



Work To Do

- Continue assessing needs of the community and respond in an appropriate and timely manner
- Provide education both online and in person regarding property assessment, programs and taxes

Equity Lens

Assessment information is available to all via the Data Portal. Participation in community based events allows for engaging and education diverse communities.

DEPARTMENT GOAL RESULTS

Tactic: The department's assessment work meets statutory requirements and Minnesota Department of Revenue guidelines

Target: Sales ratio for each classification is between 90-105%

Why is this goal important?

The Sales Ratio study is a tool used by the Department of Revenue to measure the quality, accuracy and uniformity of a city or municipality's real property assessment. Ratios in the 90 to 105 percent range indicate a high degree of accuracy and uniformity in the department's valuation practices and result in a fair distribution of the property tax burden for taxpayers. Ratios outside the indicated range results in lost revenue to the city's general fund, a significant increase in tax court petition filings and an increase in litigation work for staff.

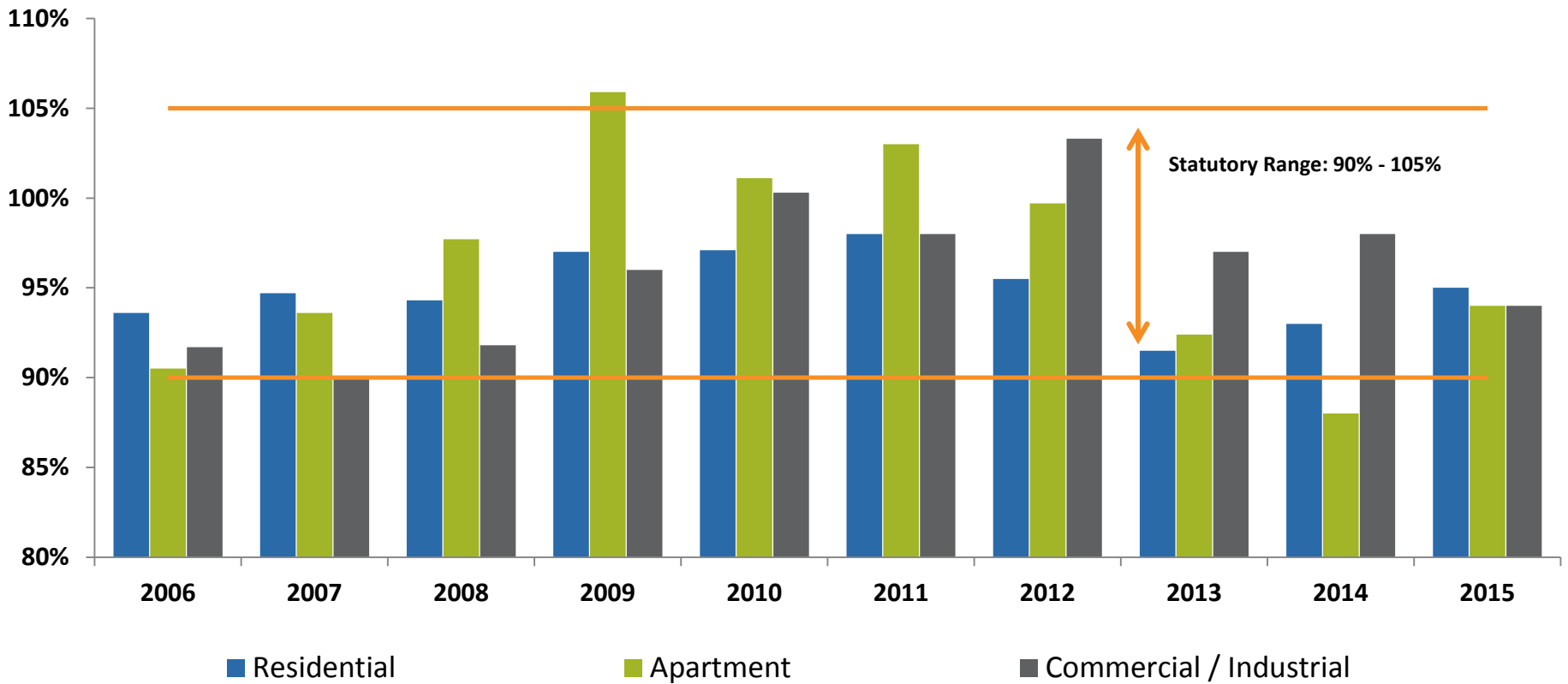
What will it take to make progress?

To ensure and improve the accuracy of our assessments we need to:

- The RFP for the new CAMA system must diligently identify project goals, scope of work and deliverables that increases staff efficiency, improves assessment ratios and provide greater transparency for elected officials and taxpayers and the public.
- Achieve and maintain a high percentage of dismissals on tax petitions
- Reduce staff time dedicated to tax court petitions
- Add additional appraisal staff to inspect properties, collect and analyze market data

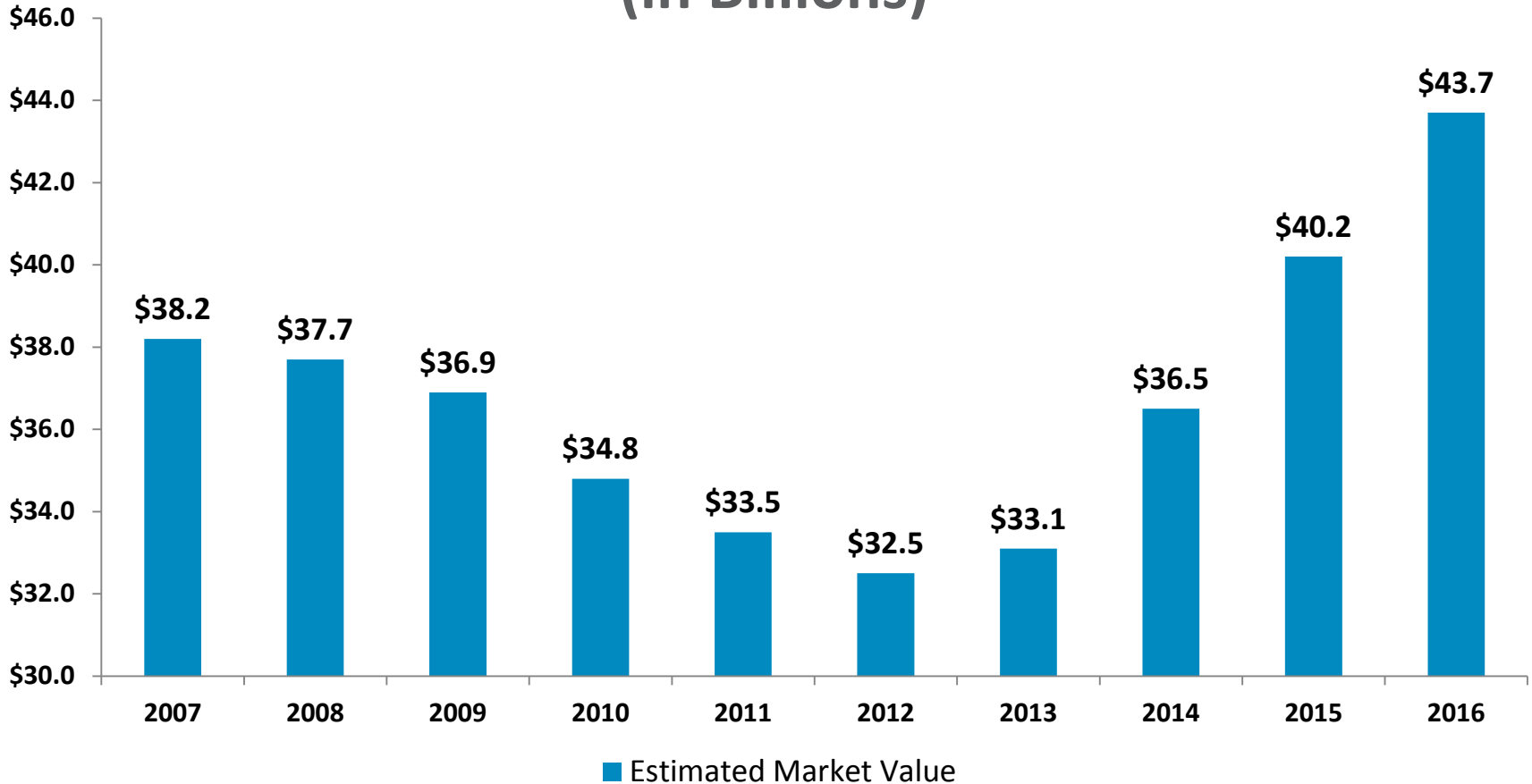
DEPARTMENT GOAL RESULTS

Sales Ratio (by Property Class)

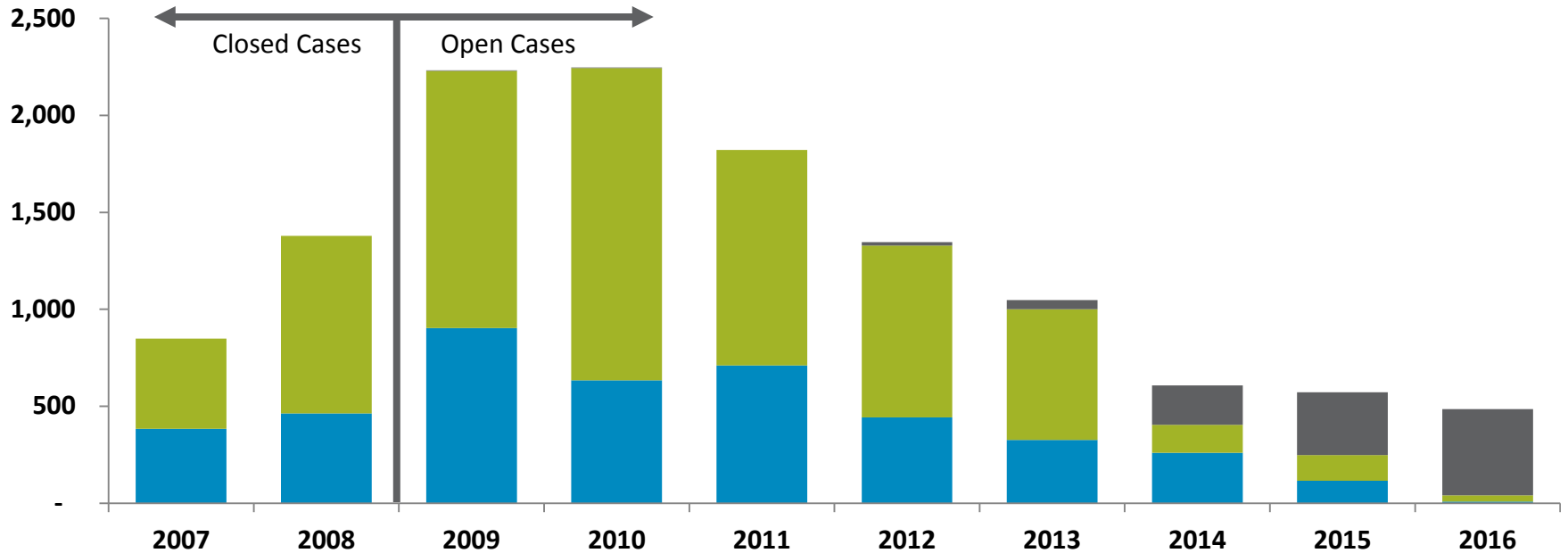


Source: Assessor's Office

Total City Estimated Market Value (in Billions)



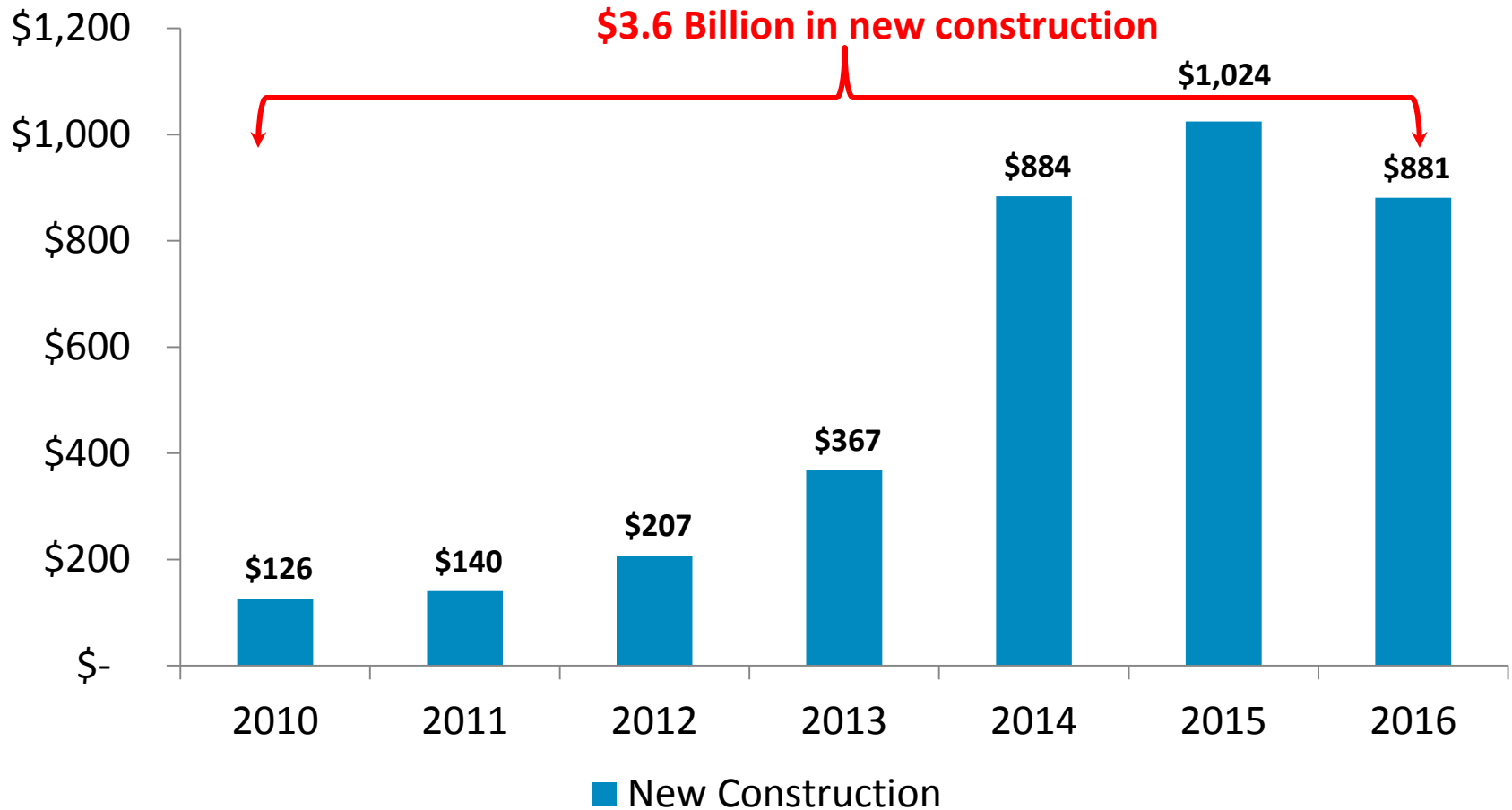
Tax Court Petitions (by parcel count)



■ Number of Parcels Dismissed ■ Number of Parcels Settled ■ Number of Open Parcels under Petition

Note: Parcels still under petition 2009 - 2016
Source: Assessor's Office

New Construction in Minneapolis (in millions)



THANK YOU

Any questions?

Patrick Todd, Assessor

Rebecca Malmquist, Director of Assessments