

ASSESSMENT TIMELINE

Before January of each year we will send you options for open book and board of review dates. We will work with you to schedule new construction checks, field work, data entry, and the date notices are mailed. Below is a standard outline of what happens throughout the assessment timeline.

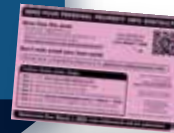
JAN-FEB

We start every year by visiting new construction to verify the % completion of new property. Trespass notices are mailed to property owners so they know we will be in the area.

If the property is not complete as of January 1st (each year) we update our records accordingly and flag the parcel/s for a final visit to measure and list the property as complete.



Personal Property post cards are mailed with digital submission options available.



This timeline may change depending on the agreed upon dates for Open Book and Board of Review. **We are flexible on the date for Open Book and Board of Review.**

MAR-APR

New construction field checks are reviewed and verified by our office. Sales, permits, exemptions and any other assessment related data is updated in our records.

Initial DOR equalized values are reviewed. Personal Property is collected. Every personal property blotter is saved digitally.

During the market update - education is implemented through social media, newsletters, and custom content.



MAY-JUNE

Properties are sorted and mapped for field inspections based on permits, sales, inspection requests, etc. Assessors update data on premise with their laptops.

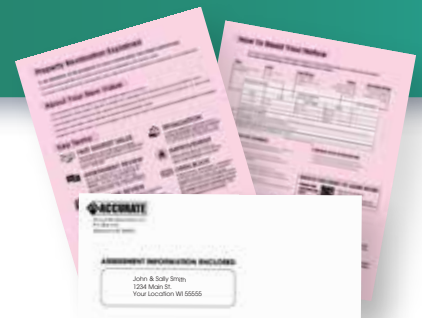
Initial market statistics from recent sales are calculated. Properties are segmented into neighborhoods to compare market values of like/similar property.



JULY-AUG

Initial values are forecasted. Value checks are performed and revisions are made. Our import/export team works with the county to verify assessment and mailing data. Initial statutory board meeting must be held if needed.

Notices are printed and mailed. Every notice includes an educational insert with links to videos and FAQ's. Rolls are posted online.



SEPT-OCT

The assessment review period starts. Property owners can contact Accurate by phone, email, or online appointment. The open book period begins the day they receive their notice up to 7 days before board of review begins.

Final rolls are verified with the county and prepared for Board of Review. The assessor signs the final roll.



WORKLOAD

Your account coordinator will meet with your team weekly to go over accountability and workload. **There will be a standard agenda to ensure open communication and that all metrics are being followed.** Below is an example of a progress report that will be created to ensure you know the progress of current processes.

City of Kenosha Interim Market Update (2024)

Project Start: Mon, 7/24/2023
 Display Week: 1

TASK	ASSIGNED TO	PROGRESS	START	END	TOTAL DAYS	DAYS LEFT	Jul 24, 2023							Jul 31, 2023							Aug 7, 2023							Aug 14, 2023						
							M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
Education / Publication																																		
Prep and share Education Plan	Chris	100%	8/1/23	8/30/23	30	-19																												
Update website - Add video	Chris	1%	8/1/23	4/1/24	245	196																												
Create content on current Res Market	Chris	1%	8/1/23	4/1/24	245	196																												
Initiate education through all forms of communication	Chris	1%	9/1/23	9/30/23	30	12																												
Mill Rate Education with Tax Bill (if allowed)		100%	11/1/23	12/31/23	61	61																												
Prepare notice letter and insert for 2024 market update (if allowed)		1%	11/1/23	4/1/24	153	153																												
Connect Accurate's Facebook to Kenosha website		1%	1/1/24	1/15/24	15	15																												
Send Mailer		1%	1/15/24	4/1/24	78	78																												
Use all avenues of Education		1%	2/1/24	4/1/24	61	61																												
Additional education on the BOA and BOR		1%	5/1/24	5/31/24	31	31																												
Data Transfer & Analysis																																		
Data Transfer		1%	1/1/24	1/15/24	15	15																												
Code Table Data Reviews & Return		1%	1/1/24	3/30/24	70	70																												
Fieldwork (Permits & New Construction)																																		
Permit Reviews (Verify permits (occ) and what our next step is, actionable or non-actionable)(Value partial Construction)		5%	8/14/23	12/31/23	140	104																												
Commercial Permit Value (Permits completed after 1/1/23 (value them))		5%	8/14/23	12/31/23	140	104																												
New Construction Checks		1%	8/14/23	12/31/23	140	104																												
New Construction Alterations/Progress		1%	8/14/23	12/31/23	140	104																												
Ag Checks (Kenosha mails letter, Lori onsite visit)		100%	9/8/23	9/29/23	22	11																												
Ag Checks (Kenosha 2nd letter, data update)		100%	10/1/23	11/15/23	46	46																												

Four main annual meetings will cover:

Kick-Off Meeting:

We will meet with your team members and set up a weekly cadance for all task managers.

Weekly Cadence of Accountability:

Every week we will update you on our progress, share any permit and new construction projects, and ensure we are staying on task to hit all assessment milestones throughout the process.

Pre Open Book and Board of Review Meetings:

We will spend time with your clerk and assessors reviewing the assessment rolls. Cover the expectations at the BOR, go over all objections to ensure we have all of them, reminder to set meeting after board ensuring the manufacturing values are in the roll for export to the county.

End of the Year Wrap Up:

What went well, what needs to be addressed, prep for late fall field work, prepare for the next assessment year.