

# Accurate Appraisal – Whitewater Meeting

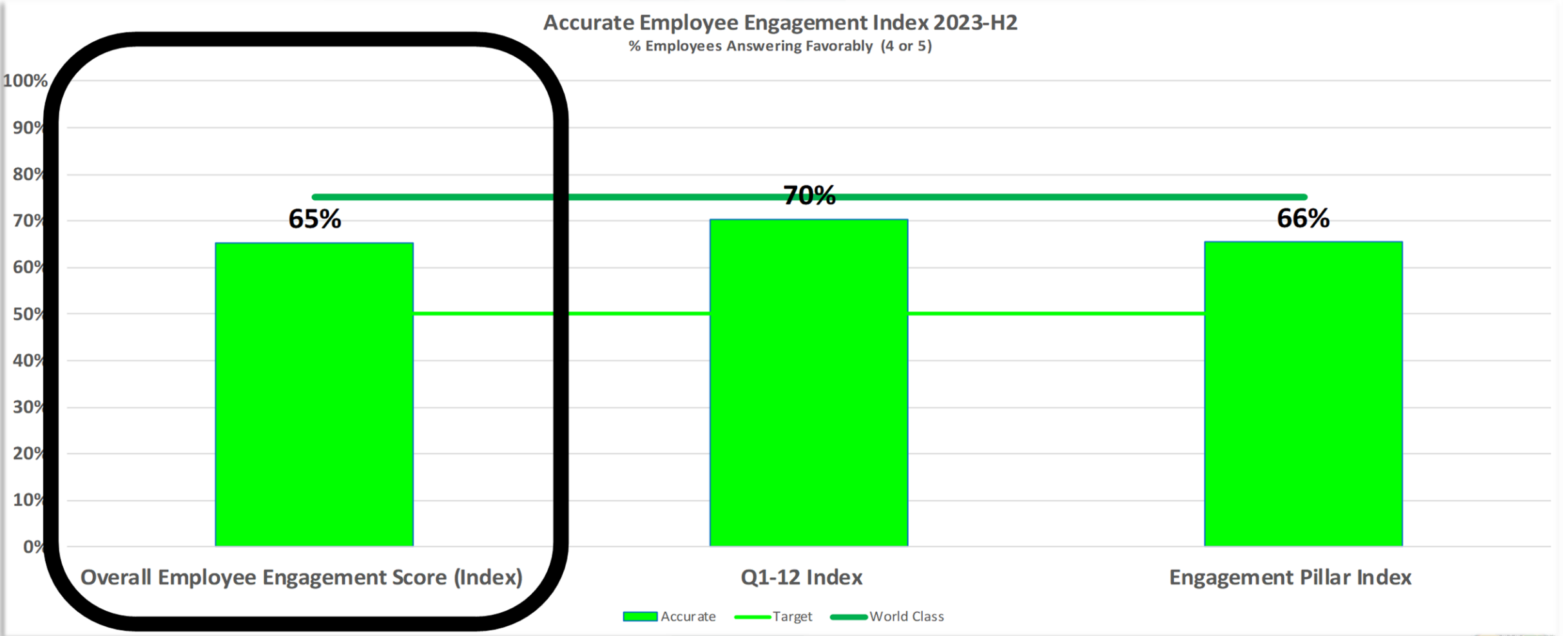
# The Accurate Family



- Employee Engagement & Development Focused
- Culture based and Core Values driven by (4) Engagement Committees
  - Ships & Giggles | Honey Do Crew | Communication | Benefits & Incentives
- Community Fundraisers/Outreach
- Teammates in (25+) different municipalities & (10+) counties
- 180+ years of assessment knowledge
- (25) Assessor-2 Certifications
- (4) Assessor-3 Certifications
- (2) Assessor-1 Certifications
- (1) Assessor-Technician Certification
- Serving (107) Municipalities and their citizens



# Engagement Index Results



# Engagement Index – How We Stack Up

**65% Overall Engagement Index (4.0 Average Score)  
and 100% Response Rate**

## Top Engagement Themes:

Acting according to Core Values **(81%)**  
Leader treats me with respect **(78%)**  
Someone at work encourages my development **(78%)**  
Company is safe & respectful **(89%)**  
Leadership is open & honest **(78%)**  
Would recommend my company **(78%)**  
Proud to work for my company **(81%)**  
Overall, I am satisfied with my company **(74%)**

## Benchmark Information (Gallup)

- The average response rate is **50% - 60%** for U.S. Companies
- The average U.S. Company Engagement Scores the past 3 years were:
  - 2020 = **36%**
  - 2021 = **34%**
  - 2022 = **32%**
- **> 50%** is considered a “Very Good” Engagement Score and top companies should set this as their goal.
- **> 75%** Engagement Score is considered “World Class”



# What our public citizens are saying...

- We have worked extremely hard to bring a positive light to Assessing and here is what our most recent reviews show



# Team Training & Development

- Quality & Training Manager Role
  - Standard Operating Procedures (SOP's)
  - Comprehensive Training Program & Performance Coaching
    - Monthly WPAM Chapter Reviews
    - Personal Development Plans for every employee
    - Job-specific Training Checklists
  - Metrics for each element of the Assessment Cycle
  - Continuing education through the WPAM, DOR, WAAO, IAAO, LOM's, etc.

### Assessment Process Quality Summary

Auditor: Janice Busha

Municipality: Franklin, City of

#### Real Estate Quality Audit

Status	Assessment Category	Notes / Findings
<input checked="" type="checkbox"/> Fixed	Map	42 locations still on the map. These have been emailed to the team to clean up. - Purple dots were just photos, will be done this fall.
<input checked="" type="checkbox"/> Fixed	Exemption Check	We received several Res. and Com. parcels from the old assessor with no value and no note indicating why there is no value. These and a City owned parcel with value are being looked into by the team. - City sale was on 2/10/22, this will be looked at for 2023. Res/Com parcels these are all out in the field and shouldn't have a value due to size/situation or are assessed with another assessor.
<input checked="" type="checkbox"/> Complete	New Construction	New construction permits were reviewed. No issues found.
<input checked="" type="checkbox"/> Complete	Multi-Parcel Sales	Verified value in multi-parcel sales. No issues found.
<input checked="" type="checkbox"/> Complete	Parcel Review	All items that were completed. No issues found.
<input checked="" type="checkbox"/> Complete	Roll Work Folders	Roll work, part of parcels, splits, etc. were completed for 2022. No issues found.
<input checked="" type="checkbox"/> Complete	Sales Analysis	Was completed correctly, no issues found.
<input checked="" type="checkbox"/> Fixed	Manufacturing Roll	12 discrepancies were found that did not match the 2022 manufacturing roll. This is being updated by
<input checked="" type="checkbox"/> Fixed	Ag Conversion	
<input checked="" type="checkbox"/> Complete	Sales Upload	
<input checked="" type="checkbox"/> Fixed	Value Checks	

### Personal Property Quality Audit

Status	Assessment Category	Notes / Findings
<input checked="" type="checkbox"/> Complete	Map	Completed, no issues found.
<input checked="" type="checkbox"/> Complete	Ratio	Ratio is set at 100% for 2022, no issues found.
<input checked="" type="checkbox"/> Complete	Statements	Reviewed and double checked all new accounts and various address accounts. - Cleaned up roll to ensure no extra accounts were listed. Items for review were completed.
<input checked="" type="checkbox"/> Complete	Folders	Verified PP4 values match. Notices were listed on new items for review were completed.
<input checked="" type="checkbox"/> Complete	PP4B	Verified PP4 values match. Notices were listed on new items for review were completed.
<input checked="" type="checkbox"/> Fixed	Notices (RE & PP)	Verified
<input checked="" type="checkbox"/> Complete	New Accounts	Verified

### Training Outline for Field Assessor Support Specialist

Employee Name: \_\_\_\_\_ Issued by: \_\_\_\_\_  
(Please Print) (Please Print)

Date Given: \_\_\_\_\_

Directions: Checklists must be thoroughly completed. The trainee must fully understand all tasks that pertain to the specific job that they are training for. Please place a check in the "Trainee Understands" box as you complete each task. If there is a specific task that does not apply to your training, the Trainee must mark N/A & their initials in Trainee Understands box. All signatures and dates are required. Once completed, turn training checklist into Quality Manager.

Below explains the purpose of each column on the training checklist

SOP's Location	Assessment Category	Notes / Findings
Maintain Location	Assessment Category	Notes / Findings
New Family Member	Assessment Category	Notes / Findings
Member Understands	Assessment Category	Notes / Findings
Mentor Initials	Assessment Category	Notes / Findings

Competency / Task Section Index - To be completed when each section is verified.

Competency / Task Section Index	New Family Member Initials	SME Initials
Culture Immersion		
Maintenance Review in the Field - Residential (Rural & Urban)		
Maintenance Review in the Field - Commercial		
Ag Query		
Sales		
Permits		
Review		
Checks		
Open Book (OB)		
Board of Review (BOR)		
Roll Work / Roll Books		
State		
Jim's Method		
Condos		
Commercial		
Neighborhoods		
Land		

### New Employee Onboarding Checklist

Employee Name: \_\_\_\_\_ Issued by: \_\_\_\_\_  
(Please Print) (Please Print)

Date Given: \_\_\_\_\_

Directions: Work with your manager and/or team members to ensure all of the onboarding items are completed timely. Place a DATE in the "Received" and "Completed" columns when those are complete and add your initials in the "Initials" column.

Item / Task	Received	Initials	Completed	Initials
ACH Pay Setup from ADP   I9 Form				
Company Org Chart				
Signature for Birthday/Anniversary cards				
Intellectual Property   Work Product Agreement				
Wisconsin WT-4 (Quickbooks)				
ADP Payroll setup   W4 Setup				
QuickTime (T-Sheets) setup				
Concur Setup				
Performance Review Process / Leader 1:1's				
UHC Health Forms   Plan outlines and premiums				
Dental Insurance Sheet				
Vision Insurance Sheet				
401K New Participant Packet   Election Form				
Vacation Policy / Expectations				
Fitness Incentive				
Job Specific Training Checklist / SOP's Location				
Enrolled in 1-Year of Culture Club with Jim D.				
Discuss/Schedule Assessor Certification Exam				
Receive quietest links and study information				
90-Day Performance Review Scheduled				
90-Day Review of Our Company Scheduled				
MFA Enabled (Multi-Factor Authentication)				
Laptop Issued & Setup - OnDrive setup and storage settings				
Monitor(s) / Keyboard, etc for home use issued				
LinkedIn Profile Setup & Associate with Company				
Proton Setup / Password				
Phone Reimbursement (if applicable)				
S/S Drive Access - On site				
S/S Drive Access - Remote				
Microsoft Outlook Setup & added to proper groups				
Microsoft Teams Login / Chats				
Mileage Reimbursement (if applicable)				

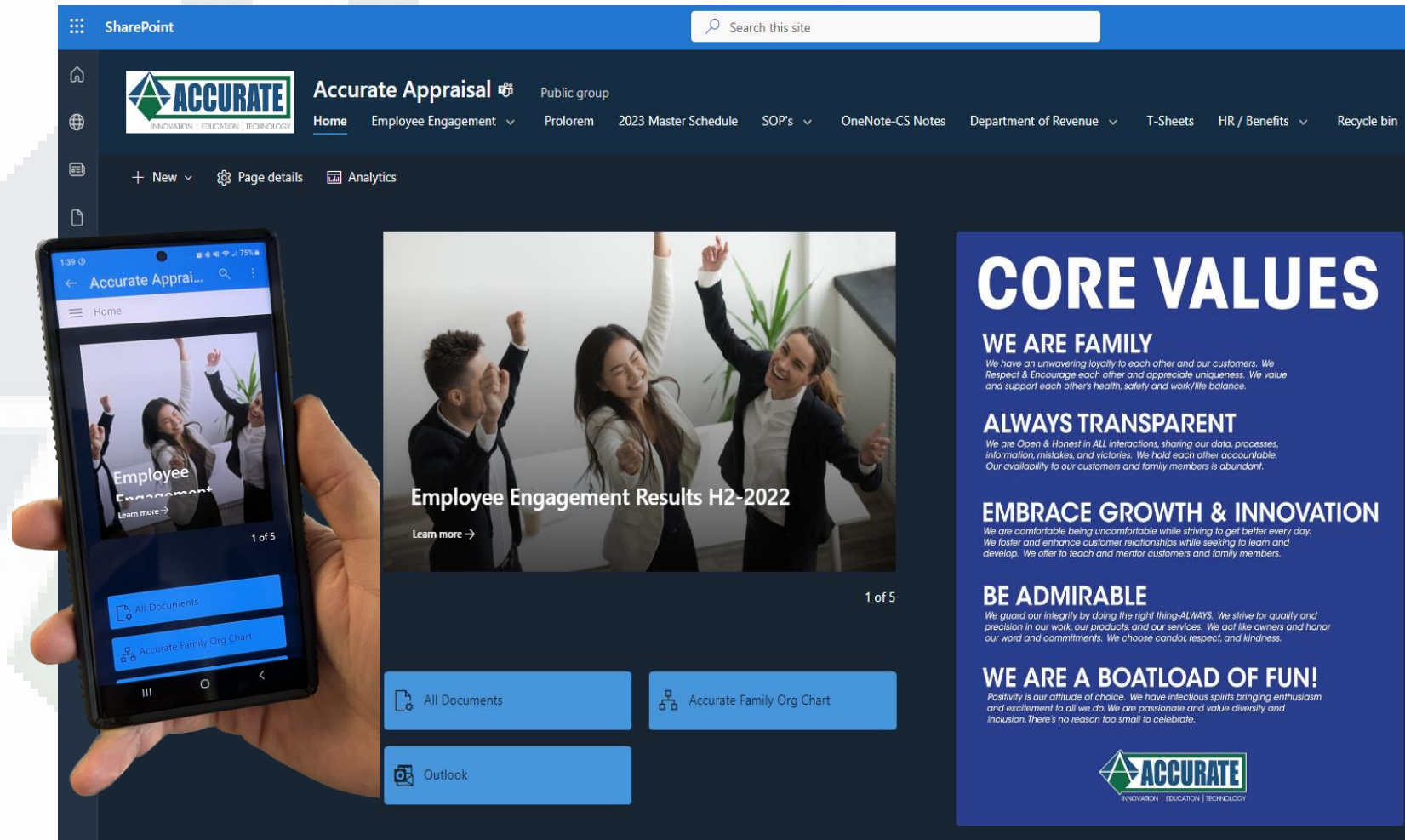


# Team Training & Development



- Sharepoint Intranet Website

- Interactive
- Mobile app
- One-Stop Shop
- Links to...
  - Employee Engagement
  - Prolorem CAMA
  - Master Schedule
  - SOP's
  - Training Checklists
  - DOR Materials
  - HR/Benefits



# 2024 ASSESSMENT TIMELINE





# Open Book Process

- Open Book refers to a period of time (before BOR begins) when the completed assessment roll is open for examination.
- This period of time is an opportunity to discuss your property value with the assessor and provide reason for changing the value, if appropriate.
- Assessor must be present for at least two hours while the assessment roll is open
- In 2023, the Accurate team fielded over 85,000 inquiries between April and September Open Book periods (~700/day)
- 2024 – Revamped the process to accommodate the larger volumes more timely while providing education
  - Open Book Assistant launched

## WHAT IS OPEN BOOK?



Open book is a period of **time to discuss your property value** with an assessor.



A typical **open book meeting** lasts about 15 minutes.



Share a recent appraisal, evidence of value, and any recent sales. The assessor will share their **sales analysis** and explain how they came to your new value.



A roll book of all property values in your municipality is available for your review. **The roll book will be posted online** for your convenience.



In lieu of attending **open book** you may submit a **Request For Assessment Review** form online through our **Open Book Assistant**.



To learn more about the assessment process you may visit **accurateassessor.com** then **simply click ASSESSMENT EDUCATION**.

# Open Book Process


- The new process allows for municipality specific email inquiries to be batched at almost 10x the response rate
- Filling out the form expedites the Assessor's ability to decide if a change is warranted or not.
- Watching the video helps educate citizens on how the Assessment Process actually works.

## INTRODUCING OPEN BOOK ASSISTANT



# Quality & Process Improvement Focused

- Quality Process Defined
- Quality Audit & checks process documented
- Process Mapping & Improvement events
  - Appointment Scheduling
  - Property Info online
  - Fieldwork process flow
  - Etc.



## Assessment Process Quality Summary

Auditor: Jamie Busha

Municipality: Franklin, City of

### Real Estate Quality Audit

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<input checked="" type="checkbox"/> Complete	Parcel Review	
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<input checked="" type="checkbox"/> Complete	Sales Analysis	
<input checked="" type="checkbox"/> Fixed	Manufacturing Roll	
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<input checked="" type="checkbox"/> Fixed	Statements	
<input checked="" type="checkbox"/> Complete	Folders	
<input checked="" type="checkbox"/> Complete	PP4B	
<input checked="" type="checkbox"/> Fixed	Notices (RE & PP)	
<input checked="" type="checkbox"/> Complete	New Accounts	

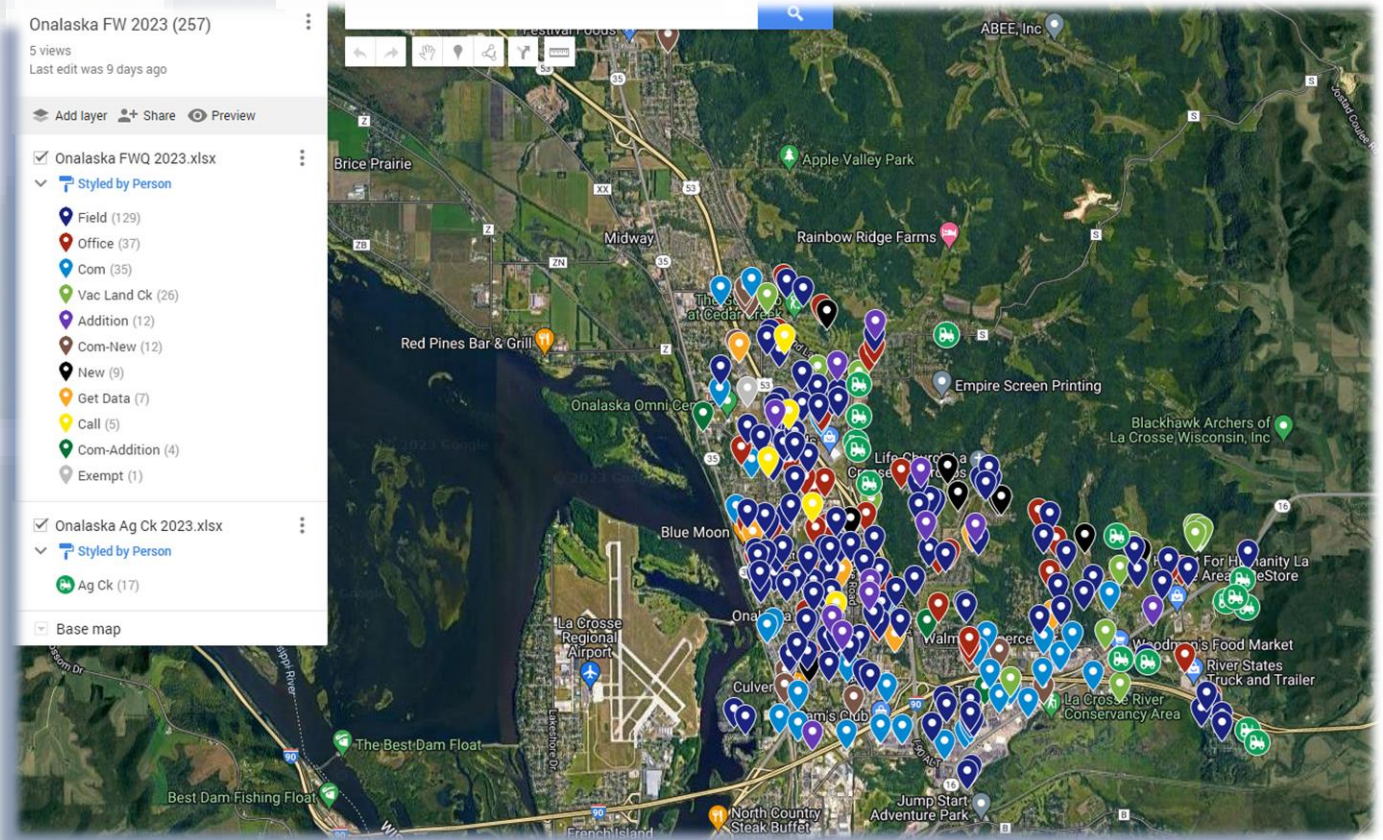
We Are Family | Always Transparent | Embrace Growth & Innovation | Be Admirable | We Are a Boatload of Fun

Act. Coord.		Stat. Ass.	Municipality	2023 Job Type	2023 Est. Ratio %	QC Auditor	Real Estate Quality Checks													PP Quality Checks										Quality Check Compl. Date	Days Left	Quality Check Due Date
							Map	Multi-Parcel Sites	Exempt. Check	Comm. Letters	New Const.	Large Value Change	Review Folder	Sales Analysis	Manuf. Roll	Ag Conv.	Sales Upload	RE Notice	Roll Work Folder	Total Comp.	New Ratio	Manu. Roll	20 Statements	Large Value Change	PP Folder	PP4B	Map	PP Notices	PP Roll	Total Comp.		
DR	SF		Albion, Town of	Mntce																0									0		156	7/21/23
KK	PR		Altoona, City of	Mntce																0									0		122	6/17/23
KK	JD		Baraboo, City of	Mntce																0									0		144	7/9/23
DR	LS		Bayside, Village of	FVM																0									0		92	5/18/23
KK	AC		Beaver Dam, City of	FVM		JB														0									0		71	4/27/23
DR	LB		Beloit, Town of	Mkt Reval																0									0		164	7/29/23



# Field Innovation & Technology

- First and only all digital organization in the field
  - Tablets with optical integration
  - Cellular link devices integrated into vehicles
- Fieldwork queries tied to maps and integrated into Prolorem. — (Sample next slide)





# Fieldwork Data Analysis Integration



**Franklin FW 2023 (773)**  
80 views  
Last edit was 5 days ago

**Franklin FWQ 2023 (688)**  
Stylized by Person

- Field (468)
- New (74)
- Office (66)
- Comm (51)
- Comm - get data (25)
- Vac Land Ck (25)
- Addition (21)
- Comm - New (8)
- Get Data (6)
- Call (5)
- Mfg (3)
- Other / No value (1)

**Franklin ag land 2023 (165)**  
Stylized by Person

- Ag Ck (85)
- office review (3)
- SPLIT (2)

**Base map**

**739-0117-000**

Parcel Type: RES  
St Name: 6900 TUMBLECREEK DR S  
City: Franklin, WI 53132  
Permit Date: No value  
Permit S: No value  
Permit Type: No value  
Permit Note: No value  
Sale Date: No value  
S: No value  
Review Yr: 2023  
Review Reason: Onsite Visit  
Rev Rsn: NO LISTING FOUND - NEED FURTHER VERIFICATION  
Review Notes: 8/31/2022 MW, SALE 6/22/2022 VALID, SQ SENT-NO RESPONSE, NO LISTING FOUND, FLAGGED FOR FIELD VISIT FOR FURTHER VERIFICATION, ALL PARCELS 739-0034-000, 739-0117-000 - PLAT OF OUTLOTS 1 THRU 5 OF TUMBLECREEK DR S

**739-0117-000 - Saved**  
Real Estate - Active Real Estate Form

Timeline

Create a note

Title

2/21/2022 LS, onsite visit for sale verification, spoke w/Mr at door who was able to confirm property data currently on file is accurate. Photo and sketch are accurate as well.

Modified on: 11/8/2022 11:35 PM  
Note modified by R James Leahy  
8/31/2022 MW, SALE 6/22/2022 VALID, SQ SENT-NO RESPONSE, NO LISTING FOUND, FLAGGED FOR FIELD VISIT FOR FURTHER VERIFICATION, ALL PARCELS 739-0034-000, 739-0117-000  
View more

Modified on: 11/8/2022 11:15 PM  
Note modified by R James Leahy  
Tyler Data  
11/2019 MA CHANGE VIA E-MAIL & CALL (KA)  
View more

Parcel ID	Parcel Type	St Name	City	Permit Date	Permit S	Permit Type	Permit Note	Sale Date	S	Review Yr	Review Reason	Rev Rsn	Review Notes
755-0038-001	Comm	7101 76TH ST S	Franklin, WI 53132	6/17/2022									
756-9993-010	Comm	7501 RAWSON AVE W	Franklin, WI 53132	12/9/2022									
794-9001-000	Comm	7700 LOVERS LANE RD S	Franklin, WI 53132	5/11/2022									
896-9987-001	Comm	7761 RYAN RD W	Franklin, WI 53132	12/6/2022									
840-9992-004	Comm	9725 ST MARTINS RD W	Franklin, WI 53132	10/20/2022									
739-0117-000	Field	6900 TUMBLECREEK DR S	Franklin, WI 53132										

2023 Onsite Visit NO LISTING FOUND - NEED FURTHER VERIFICATION

10/12/22 BR-Entered building permit PB22-0584, Occupancy Permit for name change from Stonefield Village to Haven Franklin Park - 11/19/22 11/19/22 BR-Entered building permit 22-1198, Connect sign to existing electric - 11/19/22 BR-Entered building permit 22-327, Rheem 11/19/22 BR-Entered building permit 22-1800, Exterior Sign - 11/19/22 BR-Entered building permit 22-434, New owner for Whitnall Dental 11/19/22 BR-Entered building permit 22-1537, Occupancy for Baseballism Inc., 7044 S Balloark Dr. #103 - OFFICE/RETAIL, SEE LONG NOTES, 3RD 11/19/22 BR-Entered building permit 22-725, Occupancy for Esther Eyebrow Threading II LLC, 7127 S 76 Street (no tenant alteration) - 01/22/2023 CL - Entered BP #PB22-0980 for Other - Onsite visit; Cert. of occupancy - Ownership change for Mcdonalds - Ricely Restaurant group LLC connect signs 182 to existing power - 11/19/22 BR-Entered building permit 22-101, New Tenant Occupancy for Jason Woodbury Financial Services, LLC - 01/22/2023 CL - Entered BP #REF1 - #REF1 - 11/19/22 BR-Entered building permit 22-1910, Occupancy for South Shore Counseling, LLC - 11/19/22 BR-Entered

# Metrics Driven

- Visual, Shared Metrics for Each Team
  - Ownership
  - Transparency
  - “Live” status
- Weekly cadence report-outs
- Flow to work

2023 Assessment Cycle Status Summary						
Amanda	Type of Contract	Count	(% Of Total)			
	Total Market Revals	19	18%			
	Total Full Value Maintenance	23	22%			
	Total Maintenance	64	60%			
	Total Contracts	106	100%			
Colin	Category	Complete	Remaining	On Time	Late	Overall Progress (%)
	Sales :	0	106	0	0	0%
	Permits :	0	106	17	20	46%
	Review:	0	106	105	0	100%
	Real Estate Notices:	0	106	105	0	100%
	Roll Work :	8	98	1	24	35%
	BOR Roll Books:	0	106	105	0	100%
Lori	New Construction Checks:	0	106	0	0	0%
	Field-Work Queries :	25	81	21	16	57%
	Field-Work :	0	106	105	0	100%
Danger	Initial Exports:	0	106	105	0	100%
	Intermediate (Pre-BOR) Exports:	0	106	105	0	100%
	Final Exports:	0	106	105	0	100%
	MAR's:	0	106	105	0	100%
Amy	PP Review/Notices:	0	106	105	0	100%
Jamie	Real Estate Quality Checks:	0	106	0	1	0%
	PP Quality Checks:	0	106			0%
Act. Coord.	Expectations Packet Sent	80	106			43%
	Board of Review Dates Set:	105	1			99%
	Permits Received	1123	1,272			47%
	Open Book/Roll Viewing Dates Set:	105	1			99%
	Notices Approved by Clerk:	0	106			0%
	Initial Rolls sent to Clerk:	0	106	105	0	100%
	Info Sheets sent to Clerk:	0	106	105	0	100%
	Total Special Reports = 0	0	0			
	Final MAR sent to Clerk:	0	106	105	0	100%



# Educational & Relational Partnerships



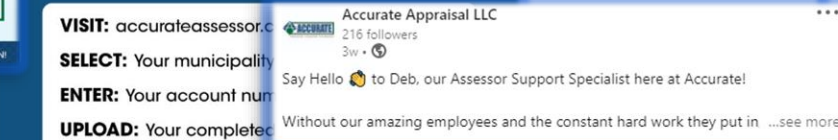
- Account Coordinators - Direct relationship fostering with municipal clerks and administration – (4) Pre-Scheduled Meetings with agenda per municipality
  - (4) Pre-Scheduled Meetings with agenda per municipality
    - Assessment Cycle Kickoff Meeting
    - Pre-Open Book Meeting
    - Pre-Board of Review Meeting
    - After-Board of Review Meeting
  - Daily/Weekly touchpoints per municipal request
- WPAM Chapter Review/Discussion teams
- (3) Live Customer Service Assessors
  - All interactions logged and categorized for statistical analysis



# Educational & Social Media Partnerships



- Integrated a Social Media Coordinator to the team in 2022
  - Partnered with Sales/Mkt Director
  - Website revamp, education section | videos | links | etc.
  - LinkedIn Follower count +350%
  - New Facebook Followers > 10 per month
  - >15 Social Media Posts per month
    - Educational | Informational | Personal





# "The Assessment" Monthly e-Newsletter

- Educational content for Municipal Clerks and anyone interested in Assessment Information
- Content Shared: Market data, Company events, News from the DOR, Monthly Calendar, etc.
- Email over 500 subscribers with an open rate of over 30%

## THE ASSESSMENT

Powered By: Accurate Appraisal

FEBRUARY 2023

### EXPECTATION VS REALITY

After record breaking home sales in 2021, along with the FED rates going up, there was little **expectation** of increased homes values for 2022.

However, looking over the actual numbers, the **reality** is home sales in 2022 continued their upward trend.

Based on statistics from **The Wisconsin Realtors Association** home values increased another 10% in 2022. The breaking year of 17% increase.

The reason values continue to increase is the low supply of homes.



### ASSESSORS INSTITUTE 2022

At Accurate we work hard to maintain strong connections with associations that help educate municipalities on the assessment process.

During the annual **League of Wisconsin Municipalities** event in Lacrosse WI, our very own Lori Sacco (assessor II and III certified) spent time moderating and working with other assessors and educators on "the importance of property record keeping, education to the public on the assessment process especially during revaluations or times of change."

Lori is part of a group of assessors that meets throughout the year to prepare content for events across Wisconsin. This year, along with educating property owners on how assessing works, Madison's assessor Michelle Drea spoke about how we as **assessors have to follow a lot of different guidelines, laws, standard practices put forth by the State of Wisconsin**. They stressed that if anyone wants change, it needs to be addressed at the state level.

Accurate team members are going to continue to work closely with municipal organizations to help communities like yours learn about how assessing works. Check out the League of Wisconsin Municipalities by visiting their website: [www.lwm-info.org](http://www.lwm-info.org)





# Prolorem Solution Development



- In house Solutions Development Staff

- (3) Full time Developers / Analysts
- Cloud-based software
- Dynamics 365 Platform
- “Live” data updates / Free online property info

- Developing ProloremConnect modules for Municipalities

- Permit management
- Tax Billing
- Licensing (dogs, bikes, etc)

Open Book BOR

Quick find

Account Coordinator	Assessor	Municipality	Open Book Date	Open Book Time	Board of Review Date	Board of Review Time
Dana Remien	Colin Loughrin	Albion	7/27/2023	3:00 pm - 5:00 pm	8/15/2023	5:00 pm - 7:00 pm
Kyle Kabe	Paul Reynebeau	Altoona	6/5/2023	-7/5/2023 TELEPH...	7/12/2023	5:00PM - 7:00PM
---	---	Angelica	---	---	---	---
Kyle Kabe	Jeff De Groot	Baraboo	6/16/2022	11:00 am - 3:00 pm	8/4/2022	9:00 am - 11:00 am
Dana Remien	Lori Sacco	Bayside	5/23/2023	1:00 pm - 3:00 pm...	6/27/2023	6:00 pm to 8:00 pm
Kyle Kabe	Alanna Carter	Beaver Dam	3/21/2022	3:00pm - 5:00pm	5/3/2022	10:00am - 12:00pm
Dana Remien	Lonnie Belcher	Beloit	6/22/2022	10:00am to 12:00...	7/14/2022	9:00am to 11:00am

Flagged for Check\*

Edit columns Edit filters Quick find

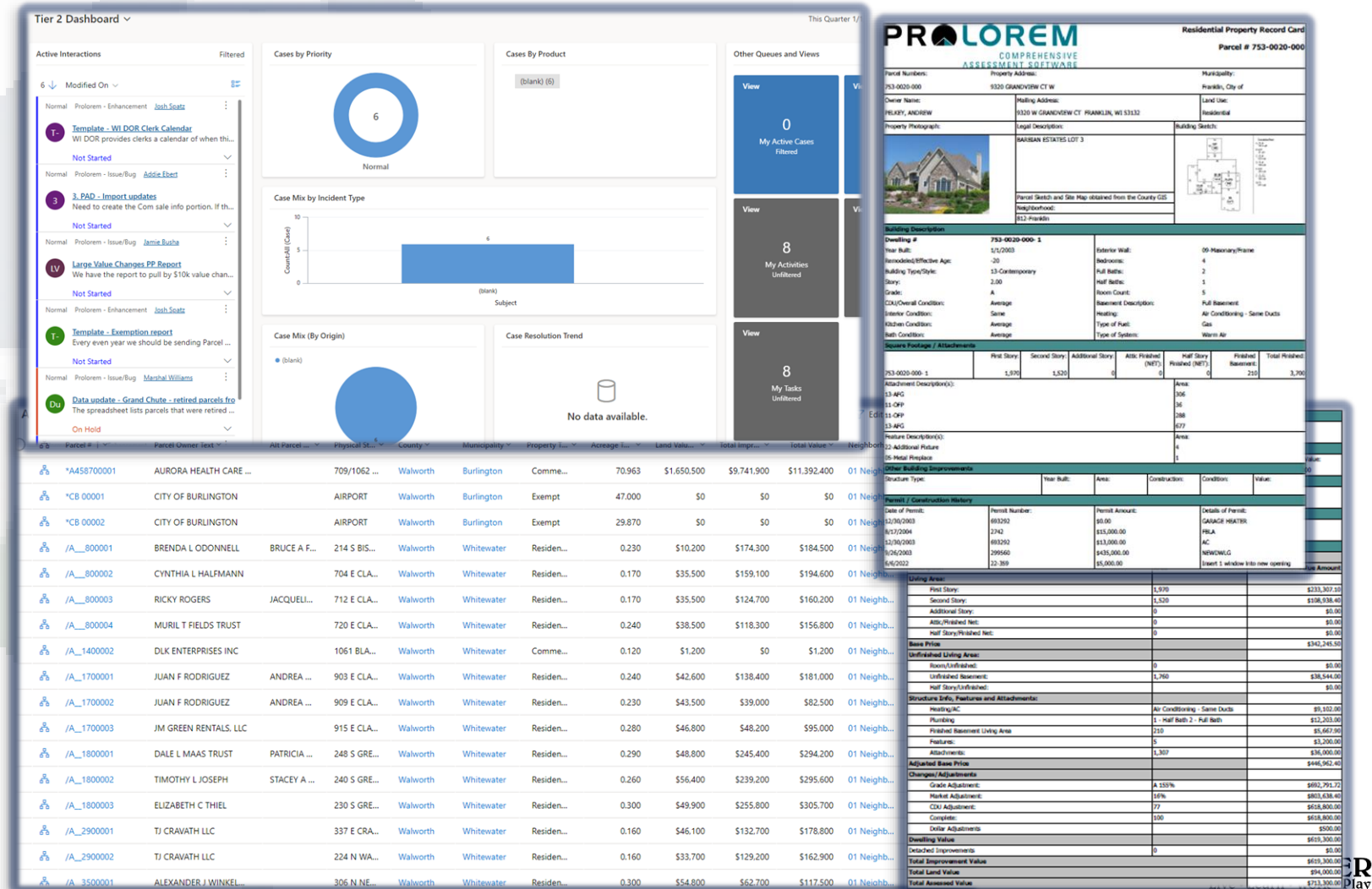
Parcel #	Flagged For	Flagged For Date	Flagged For Year	Review Notes
136.0001.0000	Onsite Visit		2023	NO LISTING FOUND
136-00059-0000	Onsite Visit		2023	NEED M&L DATA
136-00072-0000	Onsite Visit		2023	VERIFY IF AN IMPRO...
136-00128-0000	Onsite Visit		2023	FLAGGED TO VERIFY ...
136-00134-0000	Onsite Visit		2023	
136-00197-0000	Office Review		2023	missing upper floor s...



# Prolorem Solution Development



- User based customization for personalized dashboards
- Active quick links
- Property Record Card generation
- Interactive PR-130
- Personal Property Statements
  - Reducing paper/mail
- Sales Questionnaire Process
- Mass updates
  - Sales from PAD and into PAD
- Customizable Reports



# Questions ?

