

LGFCU Excellence in Innovation Award Project Evaluation

Project ID	PIP-1
Title of Program	Review-Compare-Appeal Property Tax Portal
Program Category	Public Information and Participation
Submission Date	4/25/2016 2:00:59 PM
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Implementation Date	12/8/2015
FLSA Designation	Exempt
Project Team Members	Kimberly Simpson, Tax Administrator; Stephen Pelfrey, Deputy Assessor; Kimberly Horton, Appraisal Division Manager; Ryan Vincent, Deputy Assessor - Reval; Don Bogumil, Senior Applications Systems Analyst

Description of Productivity Improvement

Durham County's latest property tax reappraisal was scheduled to take effect in 2016. Our county made the decision to provide its citizens with notices of their new tax values on December 8, 2015, to maximum the amount of time available to our office to ensure that properties in the county were properly listed for tax purposes, and to assist property owners with the appeal process.

Our Review-Compare-Appeal tax portal, launched in conjunction with the mailing of value notices, was designed to improve the quality of tax record data; to educate citizens on local real estate values; and to provide a simple, secure process by which property owners could appeal their values, if desired. The portal, located at www.dconc.gov/taxhelp, provides a one-page solution that enables property owners to:

- 1) Verify that the data on record for their property is accurate;
- 2) Learn more about actual market prices through reviewing recent sales from their neighborhood; and
- 3) File a property tax appeal through a simple and secure process that permits them to upload documents or other file attachments, including a list of comparable neighborhood property sales.

Both the process and the portal were referenced in the value change notices mailed out in December. Traffic to the portal peaked at more than 1,200 visits per day, and has since dwindled to fewer than 100 visits per day.

Description of why this project was initiated

Reappraisal often causes anxiety in citizens because of the uncertainty associated with new property tax values. This is especially true when the prior reappraisal was conducted several years prior, and property values have changed dramatically during the intervening years. By implementing this process, we planned to address a significant number of valuation issues by leading citizens through a straightforward process that would reduce appeals resulting from data errors and from citizens' lack of relevant market information.

Quantifiable results (sustainability, cost savings, cost avoidance and/or a higher level of service).

Indication of what resources were used and what was done with any accrued time savings

Appeals resulting from the 2016 reappraisal are at the lowest level in decades. Historically, North Carolina counties expected about 10% of their property values to be appealed. In 2008, the year of our last reappraisal, we experienced an appeal volume of nearly 8%. As of today, with exactly one week remaining in the time available for filing an appeal, we have had almost exactly 5% of our values appealed.

While we believe that the 2016 reappraisal was a professional and high-quality project, we are certain that our appeal volume has been significantly reduced through the process and accompanying portal that we have created for our citizens. Not only have we been able to devote additional time and attention to each individual appeal, but we have also saved nearly \$12,000 in budgeted overtime costs, and have completely avoided the cost of contracting for additional field staff, which we had anticipated could cost tens of thousands of additional dollars.

Other descriptive information

We will be happy to submit a copy of the value change notice that we sent out, and we can also provide screen shots of the tax portal, if visiting the actual site is impractical for the committee.