



No Jurisdiction Left Behind

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In every state and province, there are jurisdictions pursuing best practices in assessment administration. In 2002, the IAAO Research Committee initiated a certificate program to recognize jurisdictions that exemplify best practices. A quest to discover these beacons of distinction, as well as to inspire all jurisdictions to embark upon this journey, is part of the ongoing work of the Research Committee.

The IAAO Certificate of Excellence in Assessment

Administration (CEAA) recognizes jurisdictions that utilize best appraisal and assessment practices in their offices.

Through this certificate program, IAAO encourages jurisdictions to develop teamwork and gain a sense of accomplishment in a very difficult profession. The IAAO Certificate of Excellence in Assessment Administration (CEAA) recognizes jurisdictions that utilize best appraisal and assessment practices in their offices. Since the program is directed at an entire jurisdiction rather than an individual, there is a strong emphasis on teamwork and group achievement. Jurisdictions that earn this designation demonstrate a high level of proficiency in the assessment and appraisal disciplines to both their constituents and their peers. In addition, candidate jurisdictions find that preparing the materials required for the certificate serves as a learning process, providing a greater awareness of the jurisdiction's strengths as well as revealing areas for continued development.

Many professional associations, such as the Government Finance Officers Association (GFOA), offer recognition of local governmental units for adopting and following

best practices in their offices. However, IAAO is the only organization that can independently and objectively determine whether an assessment jurisdiction is meeting standards and best practices in the appraisal profession. An assessment jurisdiction can use the process of obtaining a CEAA from IAAO to:

- Enhance the public trust
- Promote professionalism
- Be recognized as a leader in the industry
- Identify strengths as well as areas for continued development
- Provide a framework for setting strategic goals
- Boost staff morale and create a strong team environment.

Recognition from IAAO through a CEAA is the highest professional honor an assessment jurisdiction can receive. The vision of the Research Committee is that there will be at least one certificate recipient in every state and province, and eventually multiple recipients in every state and province.

Since the inception of the CEAA, seven jurisdictions have achieved recognition, as follows:

- Alachua County, Florida, Property Appraiser's Office (2004, 2010)
- Johnson County, Kansas, Appraiser's Office (2005)
- Seminole County, Florida, Property Appraiser's Office (2005)
- King County, Washington, Department of Assessments (2008)
- Lee County, Florida, Property Appraiser's Office (2008)



The Alachua County, Florida, Property Appraiser's office earned the first IAAO Certificate of Excellence in Assessment Administration for pursuing best practices in 2005 and a recertification in 2010. Pictured (l to r) are Mike Oliver, Walter Barry, Colleen Keene, Pam Oliver, Tracy Bayles, Teri Conti, Dan Marvel, Glenda Walrath and Bob Bates.

- Manatee County, Florida, Property Appraiser's Office (2008)
- Osceola County, Florida, Property Appraiser's Office (2010).

The First: Alachua County, Florida, Property Appraiser's Office

The first jurisdiction to receive the CEAA, the Alachua County, Florida, Property Appraiser's Office, believed that its business processes were exceptional and wanted to be the first certificate recipient in 2004. To achieve this goal, four point people from various departments were selected: the Chief Deputy Property Appraiser, the Executive Direc-



The Seminole County, Florida, Property Appraiser's office proudly displays its CEAA plaque. Pictured (l to r) are (standing) Stephen Spence, Brad Sefried, Sally Sheibenberger, Jeff Overbay, and (seated) Alice Weinberg, David Johnson, and Tyra Miller.

tor of Administration, the Executive Director of Valuation, and the Information Technology Director. These four representatives made the commitment to complete the self-evaluation with their respective staff members in the shortest time possible. The process ended up taking three weeks of focused, dedicated effort, plus many overtime hours. Glenda Walrath, IT Director, said,

In retrospect, we should have broken the project down in greater detail and assigned it to the responsible departments. In fact, when we worked on our five-year resubmission, we did that, and it was much more manageable.

The Alachua County Property Appraiser's Office encourages jurisdictions that are interested in pursuing the certificate to give themselves enough time to go through the exercise carefully, and advises that, if they discover a process that does not meet or exceed the requirements, to use the *Assessment Practices: Self-Evaluation Guide* to assist in improving those areas. Walrath also advises,

In addition, have one person handle the administrative tasks of formatting and tracking the exhibits included in the document. Also, use your most knowledgeable staff to manage the self-assessment exercise.

The Alachua County office considers the CEAA recognition to be confirmation that it is a leader in the industry, along with the benefit that the journey itself created a strong team environment among the staff members who participated.

Then Two More: Seminole County, Florida, and Johnson County, Kansas

Two jurisdictions followed closely behind Alachua County and received the certificate in 2005: the Seminole County, Florida, Property Appraiser's Office and the Johnson County, Kansas, Appraiser's Office. The Property Appraiser in Seminole County had recently been elected to the position and chose the certificate process as an opportunity to formally inventory the office and determine strengths as well as identify areas for improvement. No one in the office had been through the process, so there was no one to mentor the staff, and there were no previous submissions to review for direction. The office therefore targeted organizing the data into a seamless submission and selecting a point person for the project. This person engaged as many other staff members as possible, but mainly served as the compiler who ensured that the final outcome was cohesive and seamless. Alice Weinberg, Customer Service Director for the Seminole County Property Appraiser's Office said, "Though it is a lot of work, the rewards are worth the time you put into it."

The Seminole County office benefitted from the recognition from fellow IAAO members because of the special

promotion of the certificate program at the IAAO annual conference and on the IAAO Web site. Weinberg added,

In our own jurisdiction, we promote the designation to our constituents, on our Web site, and in our collateral materials to highlight our professionalism. Our staff appreciates that we are concerned with providing the best services available, and they too have gained educational benefits through this process.

Dennis Gering, Operations Manager in the Johnson County, Kansas, Appraiser's Office, is an experienced professional who has undertaken procedural reviews in the past. Gering and the office staff there expected it to be a typical review that would confirm what they had addressed previously. However, completing the project turned out quite differently. Said Gering,

Take our strengths, for instance. Many of our strengths can be attributed to the staff and the experience, skills, and knowledge they have in their areas of expertise—people much like me who may not come from a background in the appraisal field but have many strong characteristics that, when combined with the skills of others, form a complete, balanced operation.

Gering further stated that the Johnson County office benefitted from examining not only the operational functions of the office but also those characteristics of the people within the office.

Other benefits that the Johnson County office enjoyed through the process included establishing benchmarks for operations, which served as points of comparison for future reviews. The office can look back and see the road traveled and how far it's come in the past five years. For instance, out of approximately 100 questions in the self-evaluation guide (at the time), 17 were answered "no" and 83 were answered "yes." Therefore, the assumption could be made that 83 percent of the operation complied with the recommendations in the *Assessment Practices: Self-Evaluation Guide*. In a few short years, many of the "no" responses have become "yes" responses and even surpassed the IAAO guidelines because of the established cultural values that support growth. According to Gering,

The momentum we carried forward from that point helps us to constantly change—to do bigger and better things. We strive to be the best!

King County, Washington, Department of Assessments

Lloyd Hara, the new Assessor for King County, Washington, is proud and excited about the many innovative ways his staff does business, and can understand why his jurisdiction was recognized for its best practices.

Winning this recognition seemed to 'recharge' staff to seek out continuous improvement in their individual activities



Representatives of the Lee County, Florida, Property Appraiser's office accept their CEA plaque from then-President Guy Griscom, CAE, at the 2008 annual conference. Pictured (l to r) are James Sherron, Jacqueline Mabry, and Guy Griscom, CAE.

and for the organization as a whole. Sometimes it takes seeing something written on paper to make it have an impact. Knowing recertification is required every five years you begin to think about which processes might be improved. We have already recognized areas where we could improve processes and have implemented some changes.

The King County department learned a valuable lesson about communication between and among divisions of the organization. Because the jurisdiction is so large, primary responsibility for various operations is divided among the accounting, commercial, residential, information tech-



Charlie Hackney, Property Appraiser in Manatee County, Florida, shows off the CEA plaque the office received in 2008. Pictured in the back row (l to r): Patti Kreider-McClintock, Scott Tussing, Debbie Lentz, Dale Friedley, Greg Pennington, and Bill Kersey. Front row (l to r): Bobbie Windham, Charlie Hackney, and Dianna Earnest.

nology, and administrative divisions. Ensuring the final submittal flowed in a consistent manner and bringing the different writing styles together proved to be the most difficult part of the process. According to Hara,

So often an organization commits to better communication, but for one reason or another that commitment gets overshadowed by the day-to-day operations. We again recognized the importance of and continued need for ongoing communication between and among divisions of the organization. Also paramount was communication with the public and our other external stakeholders. Pivotal to improving assessment administration was ensuring that we solicited input and considered the needs of all internal and external stakeholders.

More in Florida

Apparently there are overachievers in the state of Florida, because three additional jurisdictions have since received the CEAA. The Lee County Property Appraiser's Office perceived the certificate program as an opportunity to perform an in-depth review of current business practices and evaluate those findings according to the standards of IAAO.

Jacquelyn Mabry, who works in Training & Special Projects at the Lee County Property Appraiser's Office, said,

One of our most valuable lessons was that in assessment administration there are many options and choices in creating sound business practices and there is no harm in critiquing our own practices. Through critiquing, we can only move forward in a more appropriate direction.

In retrospect, the Lee County office would have spent more time in the planning stages. For a short time, many departments and employees were involved, thus creating many different templates, voices, and tones. This necessitated a revamp of the plan to assign one person to create one voice and one cohesive submission.

Staff at the Manatee County Property Appraiser's Office thought that the CEAA would provide a method for evaluating office procedures, measuring efficiencies, and making necessary improvements. The most difficult part of the process was dedicating the time staff members needed to complete the chapters assigned to them. The 9-member team consisted of the property appraiser, four directors, two supervisors, and two support staff. It was almost a year from the time they received the *Assessment Practices: Self-Evaluation Guide* until they finished the submission, although the actual time spent on the submission was considerably less, as they worked on each chapter around their office schedule and other deadlines.

Charles Hackney, Property Appraiser at the Manatee County Property Appraiser's Office, commented,

The greatest benefit is confirmation to our staff and constituents that our office is utilizing best practices in assessment administration. We learned the strengths and weaknesses of our organization and that overall we are in compliance with the standards set forth by IAAO.

If there is one thing that the Manatee County office would have changed about the process, it would be starting on the journey sooner. The office encourages other assessment jurisdictions to lay out a schedule for completion based on each chapter in the self-evaluation guide and on the office's work timeline. Many of the chapters can be done independently of each other and do not have to be completed in sequential order.

Last but not least, the Osceola County, Florida, Property Appraiser's Office took a hint from the Seminole County office when newly elected Property Appraiser Katrina S. Scarborough decided to use the CEAA vehicle to review office procedures and processes to determine whether the office was following best practices. She also wanted the office to work together to achieve a worthy goal that would represent a testament to the employees for their dedication and hard work in servicing the public. As the office's motto states, "The best PA office, because we care."

According to Scarborough,

While we have always been confident in our knowledge and processes, it was nice to see just how closely we follow the best practices in assessment, in accordance with the certificate program. It made everyone think about the steps in the management and appraisal process to see if there were any areas for improvement.

The office counted it as an advantage to know that it was doing things right. By analyzing everything and identifying areas for improvement, the entire office gained a boost in confidence. As a newly elected property appraiser, Scarborough found that public confidence in what the office is doing is a very valuable commodity. She recommends having a good mentor to assist with the certificate program, regardless of whether you're newly elected or not.

Several CEAA recipients suggest that interested jurisdictions try to obtain previous submissions from other recipients so they can see how each county interpreted the questions and the various styles of answers. Other recipients also recommend arranging for a mentor, perhaps a previous recipient or someone from the Research Committee.

Certificate Requirements

To apply for the CEAA, an assessment jurisdiction must meet the following requirements:

1. The applicant jurisdiction must have at least one employee who is a current IAAO member in good standing.

2. The submitter, assessment jurisdiction (candidate), and the submission must comply with the IAAO Code of Ethics and Standards of Professional Conduct.
3. The candidate jurisdiction must be an appraisal and assessment agency and not solely an oversight agency.
4. The application must be submitted with the accompanying fees as detailed in the latest IAAO CEAA Program, General Procedures.
5. Jurisdictions must identify the year of compliance, which can be no older than one year from the date of submission of application. This one-year window of opportunity (end of year of compliance) is based on the final valuation notice mailing date.
6. Each candidate jurisdiction shall receive an electronic copy of the latest versions of the following publications:
 - *Assessment Practices: Self-Evaluation Guide*
 - IAAO CEAA instruction manual
 - IAAO CEAA electronic submission template.

The candidate jurisdiction must complete a detailed report of its assessment practices according to the format of the IAAO *Assessment Practices: Self-Evaluation Guide*.

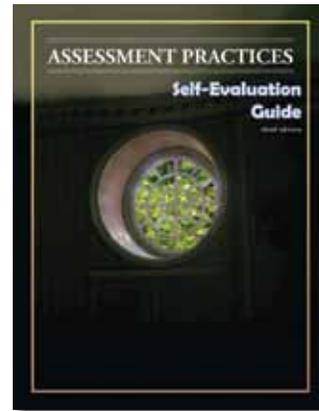
Previous recipients report that the number of people required to complete the submission varies widely. One jurisdiction had only three people working on the project, and it took them two years to complete because the Chief Deputy retired shortly after the project had begun. At the other end of the spectrum, a jurisdiction that had 15 people on the project spent a little less than one year working on it, using spare time wherever possible. However, most jurisdictions completed the submission within several months to a year.

Building and protecting a quality reputation is one of the great challenges of the assessment profession. Henry Ford, the American industrialist and pioneer of the assembly-line production method said, "You can't build a reputation on what you are going to do." Assessment professionals must turn intentions into actions and persevere until the goal is achieved. Three states currently have CEAA recipients, and there are candidate jurisdictions in five other states.

Is your organization ready to be one of the best? Find out how to get started at www.iaao.org/sitePages.cfm?Page=69, or send an e-mail with your questions to excellence@iaao.org. ■

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Assessment Practices Self-Evaluation Guide, 3rd ed.



The *Assessment Practices Self-Evaluation Guide*, 3rd edition, has been written to assist candidates for the Assessment Administration Specialist (AAS) designation, and jurisdictions seeking the Certificate of Excellence in Assessment Administration. It also can be used to document best practices in the office.

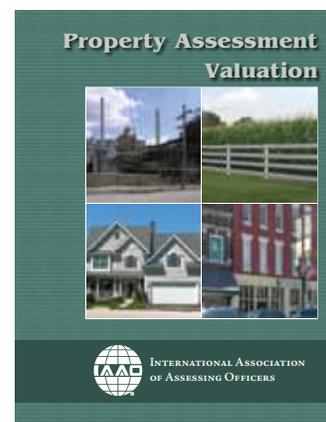
The guide incorporates accepted standards of assessment practice in the publications and standards of IAAO and reflects the requirements of the *Uniform Standards of Professional Appraisal Practice* (USPAP).

To order, go to www.iaao.org and click on Marketplace, the IAAO online ordering system!

Electronic version: Members \$25, Nonmembers \$50

Printed version: Members \$45, Nonmembers \$90

Property Assessment Valuation, 3rd ed.



Property Assessment Valuation, 3rd edition, is an introductory text on assessment administration and property appraisal principles for assessment purposes. The 3rd edition contains substantial updates on mapping, highest and best use, and personal property assessment. The book supports the following IAAO courses: 101—Fundamentals of

Real Property Appraisal, 102—Income Approach to Valuation, 112—Income Approach to Valuation II, 201—Appraisal of Land, and 500—Assessment of Personal Property.

To order, go to www.iaao.org and click on Marketplace, the IAAO online ordering system!

Members \$55, Nonmembers \$65

IAAO CEAA Frequently Asked Questions

1. What will this cost?
 - a. Application fee (\$100) submitted with the application.
 - b. Initial Certification fee to be submitted with submission materials when you are ready for grading:
 - \$250 for jurisdictions up to 25,000 total parcels and accounts of real and personal property
 - \$500 for jurisdictions 25,001 to 99,999 total parcels and accounts of real and personal property
 - \$1,000 for jurisdictions over 100,000 total parcels and accounts of real and personal property.
 - c. Resubmission fee (\$50) for regrading if needed.
 - d. Annual renewal fee (\$100).
 - e. Five-Year Renewal Recertification fee (\$250 for up to 99,999 parcels and \$500 for over 100,000 parcels).
2. Can a small jurisdiction apply for the Certificate?
 - a. Yes, the Certificate is designed so that small, as well as large, jurisdictions can meet the requirements.
 - b. IAAO provides an electronic template that can be used by large or small jurisdictions that will save time in getting started, set up, and through the material.
3. Will the submission be made public?
 - a. Yes, but only if it is successful.
 - b. As part of your Letter of Transmittal provided at the time your submission is sent for grading, you will authorize IAAO to make your submission public (answers that do not pass may be deleted or redacted).
4. How long do I have to get my submission to IAAO?
 - a. One year from the date your application is submitted.
 - b. Extensions may be granted on a case-by-case basis.
5. What kind of help is permitted?
 - a. An IAAO Research Committee mentor may be requested.
 - b. You may request a copy of a successful submission.
 - As a practical matter, request only one.
 - You may request the one you wish.
 - Your submission should be original like any published material (do not copy any of the provided material) and specific to your jurisdiction.
6. Who will grade my submission?
 - a. IAAO will select graders from the pool of those who have already qualified or from the AAS submission graders.
 - b. Graders will not be from your state to avoid any appearance of a conflict of interest.
 - c. You will not be told who your grader is and there will be no direct contact between you and your grader during the grading process.
 - d. During the grading process the Research Committee will contact you with any questions your grader has regarding your submission.
7. What are some of the things I should look out for in my submission?
 - a. If you use multiple writers, have a single writer edit the entire document so that it does not appear rough or disjointed.
 - b. Use the Certificate Submission Guide to ensure a professional appearance.
 - c. Be sure you answer every question and respond to each text box request for information supporting your response.
 - Certain chapters or questions may be inappropriate for your jurisdiction and can be answered as N/A, such as the Personal Property Chapter when your jurisdiction is not required to assess personal property.
 - Not all questions need to be answered “yes.”
 - If you do not answer “yes,” tell us what you do to deal with the issue described in the question.
 - Tell us why you deal with the issue differently.
8. When will I hear back from IAAO following my submission for grading?
 - a. That will depend on the graders and their schedule.
 - b. As a practical matter, it will take several months after submission. However, graders target complete grading in time to be approved by the IAAO Research Committee and the IAAO Executive Board by the last Board Meeting before the annual conference, which means you should try to submit by February or March of the year you wish to be recognized.