



**Pierce County**

**Office of the Assessor-Treasurer**

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**DALE WASHAM**  
Assessor-Treasurer

**REPORT  
OF  
PIERCE COUNTY  
ASSESSOR-TREASURER'S OFFICE  
ACHIEVEMENTS  
FOR  
2009 -2010**

**2010 Assessor-Treasurer's Office Achievements Report for  
Department of Appraisals & Statistics  
By: Deputy Assessor-Treasurer Alberto Ugás**

- **52,472** residential and commercial Physical Appraisals conducted in 2009. It includes 15,316 Physical Appraisals from 2008 that were not completed.
- **64,779** residential and commercial Physical Appraisals conducted in 2010.
- **18,785** residential Physical Appraisals conducted so far in 2011.
- **3,099** 2008 residential and commercial real property valuation appeals made to the Board of Equalization and to the State Board of Tax Appeals responded to in 2009.
- **4,239** 2009 residential and commercial real property valuation appeals made to the Board of Equalization and to the State Board of Tax Appeals responded to in 2010.
- Received a letter dated April 26, 2010 from the State Department of Revenue, whereby it states: *"We commend your effort in completing the revaluation requirements as mandated by Washington State law."*
- Pierce County's assessment performance ranks as one of the top in the state based on metrics published in 2010 by the State Department of Revenue and the Office of Program Research at the State House of Representatives, designed to measure appraisal performance using statistical standards.
- Implemented a new innovative public on-line tutorial on the Assessor-Treasurer website that step by step explains and assists taxpayers through the intricacies of the property valuation appeal process.
- Beginning in 2011 we are implementing new public tutoring sessions that will assist taxpayers in navigating through the appeal process and inform the public about other available on-line resources.
- The Assessor-Treasurer office has embraced a number of new technologies and processes designed to increase the efficiency and productivity from field and office staff.
- In process of developing an electronic application for the reporting of assets from the county's largest Trended Investment accounts, where few accounts represent a large portion of the county's total assessment base and a significant portion of the Assessor-Treasurer office's appeal workload. The automation of this process will provide significant cost savings.

# **2010 Assessor-Treasurer's Office Achievements Report for Department of Administration and Tax Statistics By: Tax Administration Officer Billie O'Brien**

- From January 1, 2010 through September 30, 2010 the Customer Service staff in the ATR have served 25,586 customers at the front counter with 8,124 of those in the month of April. Our Customer Service phone operators have answered 35,889 calls regarding taxes and values and other issues.
- We implemented an electronic work flow for property tax protest letters that increased the efficiency of the process, and allows for notification to the taxpayer of receipt of their protest.
- Worked with the Auditor's office staff to implement a process that alleviated customer frustration by eliminating the need for mobile home owners to go back and forth between offices to verify taxes for mobile home transfers as required by new legislation.
- The Senior/Disabled Persons Exemption team have met with an additional 1,173 taxpayers and responded to 5,222 phone customers. They have processed 1,234 new applications, 2,747 application renewals and 641 status changes. Based on new legislation we are implementing the option of allowing program participants to renew on a 6 year cycle instead of the current 4 years to make it easier for our senior customers currently in the program, this will begin in 2011.
- Personal Property staff completed a series of tutorials on Personal Property filing including instructions for filling out the personal property affidavit, these are available to all business owners on our website. In addition, we held two instructional personal property workshops with the focus on personal property statutes and processes and completing the affidavit. These were open to the public with approximately 35 business owners, accountants and others attending. We processed and certified 10,838 personal property affidavits. 2010 was the first year of personal property E-filing after the 2009 beta test year and we had 1,318 E-filers. As this new system continues to grow we look forward to saving in mailing costs for both affidavits and value notices for personal property accounts. We have written and published on our website full instructions for using the E-file system. In addition an E-file survey was created and made available for users to detail what they liked and disliked about the system. After compiling the results of the survey, we worked with our vendor to request changes based on the customer survey. We have reviewed our system of responding to taxpayer requests and streamlined it by making better use of the website, this will also decrease mailing costs.
- Due to Budget cuts and retirements the Cartography and Segregations team have been combined and staff has been cross trained in the segregation

process. We continue to strive toward making this a fully electronic process by working with the Auditor's office to receive electronic seg documents in lieu of paper copies. The property segregation workflow process is fully functional with electronic document indexing kicking off the workflow and electronic notification of segregations completed going to appraisal staff and other offices in the county.

- Current use program staff has counseled 347 taxpayers in office regarding current use programs.
- The Foreclosure Department has had contact via phone or in person with over 4,000 customers and processed mailings of over 4,159 pieces notifying taxpayers, owners and lienholders of the foreclosure process. In addition, staff personally posted on-site 144 properties. We began the year in January with over 2,000 properties on the delinquency list and by the end of September we are down to 244 parcels.
- In our effort to continue to serve and educate taxpayers, the Administrative Manager spoke on the Senior/Disabled Exemption program at the Spring meeting of the South Sound Escrow Association and responded to general questions regarding assessment and taxation.
- We continue to increase the usage of electronic document management in all areas of Administration and Tax processes and to look at processes in an effort to continue to streamline and cross-train.
- For 2010, the Assessor-Treasurer's office mailed 317,115 regular notices of value, 5,609 new construction notices and 9,992 Personal Property notices.
- We also sent 183,810 annual property tax statements via our regular mailing and an additional 27,400 in-house statements to Pierce County taxpayers. Additionally, we mailed 8,289 Senior Status Change Notices and 3,224 Senior Renewals as required by law.
- All returned mail is researched to find corrected addresses and resent with notations made on each account that the mailing was returned and/or resent. Of the 6,000+ pieces returned this year, well over half have been remailed.

# **2010 Assessor-Treasurer's Office Achievements Report for Department of Information Management By: Information Management Officer Michael Johnson**

- The office has made most of its tax and appraisal data available for public download from the internet. This provides greater transparency at no additional charge to the taxpayers.
- A tool was developed to allow field appraisers to upload property photographs in a more efficient manner. Previously, photographs were uploaded one at a time. This new tool allows for the bulk upload of all photographs on an appraiser's camera in a matter of seconds.
- Personal property assets can now be uploaded from taxpayer provided spreadsheets. This procedure has allowed us the ability to track individual line items, instead of aggregating items to the category level. This affords businesses the opportunity to identify which items are being appraised. By automating this process, we have saved the staff hundreds of hours of data entry time and increased the level of accuracy.
- A procedure was developed that allows the office to send out an omitted value earlier than before. The law states that businesses have until Apr 30<sup>th</sup> the following year to pay omitted taxes, but many times businesses prefer to pay sooner. This procedure allows us to inform the businesses of their omitted taxes and provides them more flexibility for payment.
- An application was developed to display sale ratio data for Vacant, Single-Family, Multi-Family, and Condo property types. Sales ratios are presented in a histogram to assist analysis. The user is able to choose one of six methods to specify upper and lower sales ratio limits. The application then identifies and counts the sales with ratios outside the specified limits. High and low "outlier" sales are listed on separate worksheets that contain receipt-specific links to sale information on the Auditors website. The software is used by the Statistical Team to identify sales that need sales validation research.
- A new process was created for the Senior Exemption department that assists them in identifying parcels with new construction before the rolls are closed. This allows them to process these exemptions early, thus eliminating the need for additional notices being sent to the taxpayer.
- The office has expanded its use of wireless technology for field appraisers. Many staff members can access the county network from remote road shop locations, thus saving a trip into the office. Other staff members are utilizing wireless access to connect to the county network and work "live" while in the field.

- Enhancements were made to the Foreclosure system. This streamlined the previous system and allows the Foreclosure dept to send out Foreclosure letters, Certificate of Delinquency letters, letters to lienholders, download for Newspaper and quality control reports.
- Over 4,500 aerial photographs ranging from the year 1970 to 1995 were scanned. These scanned images are now being geo-referenced by the GIS Department, and will provide easy access to valuable information to not only the Assessor-Treasurer's Office, but to all Pierce County Departments.
- A new electronic workflow process was developed for taxpayer protest letters. This allows protest letters to be electronically routed to departments that need to take necessary actions, and increases the efficiency of the process.
- The office has adopted the Washington State Retention schedules which apply to Assessor and Treasurer's Offices to ensure appropriate retention and public availability of our records.
- Working with our forms printing vendor, the office has implemented the new postal delivery barcode IMB (Intelligent Mail Barcode) in order to achieve over \$1,500 in postage savings.
- The Records Management team provided guidance and records to citizens who submitted over 250 requests for public records and general information.
- The Records Management team has processed and scanned over 400,000 pages of business documents since January 1<sup>st</sup>, 2009. This provides enhanced access to our records and ensures better record management.
- The Application Support and PC/Network Support teams have responded to over 2,800 calls for support since January 1<sup>st</sup>, 2010.

# Appendix

- Washington State Department of Revenue Letter April 26, 2010

Pierce County Assessor-Treasurer's Tutorials on Website:

- Appealing Your Assessed Value
- Personal Property

Office of Program and Research - Washington State House of Representatives, July 26, 2010:

- Measuring Real Property Appraisal Performance in Washington's Property Tax System 2009 Report