

Setting the Standard: Partnerships for Development, Growth, and Excellence at the Maricopa County Assessor's Office

BY ALLEN ZINGG



When Paul Petersen was appointed as the Maricopa County Assessor in 2013, he signaled his intent for the Assessor's Office by crafting Assessor Vision 2020.

The Vision encompassed a modernized, highly professional assessment operation staffed by qualified leadership and staff.

While many initiatives toward this end were conceivable, crucial to the success of the office was and is its professional staff at all levels and in all functions.

While the Maricopa County Assessor's Office (MCAO, Phoenix, Arizona) was staffed with diligent, skilled employees committed to the residents of the county, Petersen knew that to keep pace with changing times, markets, and technology, there needed to be a commitment to the development and growth of the people who make up the Assessor's Office.

A more knowledgeable and capable staff leads to greater capacity for the production of fair and equitable values and service. Here we'll focus on four partnerships that led to a clearly demonstrated commitment and resulted in the development of staff at all levels:

- ✦ The Arizona Department of Revenue (AZDOR) and MCAO
- ✦ The MCAO Appraisal Division Training Team and MCAO leadership
- ✦ IAAO and MCAO
- ✦ MCAO leadership and staff.

AZDOR and MCAO

AZDOR, which licenses and regulates ad valorem appraisal in the state, developed the course curricula and examinations required for Appraisal Level I and Level II Certifications. In addition, AZDOR establishes continuing education requirements and guidelines for maintaining certification. The department has a long-established relationship with MCAO, as it does with all Arizona county assessor's offices.

In the last few years, AZDOR has shown interest in working with counties to review the effectiveness of these educational programs, not only with current curricula but also with a view to changing requirements of the county

assessor's offices and most effective use of resources. Representatives of MCAO and other county assessor's offices meet regularly with the AZDOR Education Committee as part of this effort.

One recent outcome of this joint effort is that AZDOR worked with the counties to create a new Data Collection course to meet the changing needs of county assessor's offices. Thus, MCAO, like some of the other county assessor's offices, redesigned its appraiser positions.

MCAO now has Field Appraisal Services and Valuation Services. The Data Collection course and examination is a perfect training tool for appraisers in the Field Appraisal Services teams. As a result, the field appraisers are given just what they need to excel in obtaining accurate property information in a timely manner. It is also more cost-efficient training.

MCAO has an internal training team in the Appraisal Division that has been trained and approved by AZDOR to deliver this new Data Collection course. This has proven to be very effective, putting the training resource closer to the appraisers learning and enhancing their field appraisal skills.

Appraisal Division Training Team and Assessor Leadership

In the past, training, especially appraiser training, consisted primarily of ensuring that appraisers took and passed the AZDOR Level I and Level II Certification courses, and that they maintained continuing education course work.

There was internal training as well, but it was often limited due to time. This began to change about five years ago. In 2014 an Appraisal Division Training Team was created, and within the past two years, this team has significantly increased the variety and volume of training delivered. And, most importantly, the training has become more relevant.

Some of the accomplishments over the past two years:

- ✦ Development and implementation of online training modules, making the training more immediate and available as needed and helping to prepare for a future workforce that may operate more remotely. These modules are either standalone or supplement current classroom coursework.
- ✦ Development of basic training for all new appraisers to teach processes, impart knowledge, or provide skills, such as computer drawing tools, blueprint reading, property measurement, proprietary systems software utilization, and so forth.
- ✦ Establishment of one-on-one training to support appraisers in their learning and to reinforce formal training and courses.

- ✦ Expansion, promotion, and coordination of external training, such as Appraisal Institute, USPAP, and Urban Land Institute events; IAAO courses and designation programs; and webinars from external providers.

In 2017, MCAO staff attended more than 80 courses or educationally focused events.

What accounts for today's more continuous learning environment?

First, Appraisal Division managers and supervisors partnered with the Training Team to discuss the most relevant priorities supporting development of appraisers and consistency in appraisal practices.

This produced mutual ownership of training efforts, greater support for training and development *throughout* the year, and a better understanding of the role of training in specific business processes that occur at different times during the year.

Second, Appraisal Division leadership redesigned appraiser jobs and decided to appraise properties by geographic regions, which meant that appraisers would need to become proficient in appraising multiple property types (rather than being assigned to specific property types). Training and development were recognized as key to implementing this change.

IAAO and MCAO

In its desire to elevate the knowledge, skills, and abilities of the staff and increase the appraisal capabilities

of the department, the Assessor's Office recognized the value of IAAO and early on established strong ties.

Specific IAAO courses were identified for the overall development of appraisers and appraisal leadership, for example, IAAO Course 400 Assessment Administration. Initially, all managers and supervisors were required to pass this course. Assessor leadership recognized the value of this course as a vehicle to achieve greater understanding of the bigger picture of assessment, and began enrolling staff in this course. Through 2017, 79 staff members have passed this course.

Examples of IAAO courses that support functional areas or provide a greater understanding of functional areas are Course 300 Fundamentals of Mass Appraisal and Course 601 Cadastral Mapping Methods & Applications.

Many IAAO courses are offered not only to appraisers but also to staff in other areas to support the work done in those areas and/or to achieve a greater understanding of the purpose of and methods involved in producing fair and equitable property values.

In addition to targeted course offerings, in 2015 the Candidates Club was established to encourage staff to pursue IAAO professional designations. In 2016, there were 18 staff members who achieved their designations, winning the IAAO Virginia Cup.

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In 2017, 11 staff members earned IAAO designations and four others achieved their second designation. Currently 15 staff members are working on their designations.

The Assessor's Office demonstrates its support of IAAO designations by advocating legislative financial recognition.

Although these efforts haven't yet been successful, the office shows its appreciation for the efforts of staff who have achieved their designation by paying their expenses to attend the IAAO Annual Conference in the year in which they attain their designation.

The IAAO 2017 Annual Conference exposed staff to cutting-edge thinking, such as the research and findings of the IAAO Special Committee on Big-Box Valuation and valuation of underperforming malls, as well as presentations and discussions on a wide variety of assessment topics.

In 2017 Quantá Crews, an MCAO appraiser, attended the IAAO President's Leadership Symposium and Leadership Days.

The Assessor's Office is closely involved in IAAO, as a number of staff members serve in key leadership positions in the local chapter. Their efforts have made the Arizona IAAO Chapter vibrant and active, providing networking and educational opportunities and sponsoring and promoting IAAO courses in Arizona.

One new team member said:

As a new member of the Maricopa County Assessor's Office, it was obvious from the start that our administration finds value in the IAAO organization. Less obvious, however, was the reason the support was there. After a little research, it became apparent to me that IAAO has a lot to offer those of us who wish to better ourselves and to the assessment community as a whole.

Nate Maher, Appraisal Supervisor, is a participant in the IAAO U40 initiative within the Assessor's Office, coordinating and leading discussions, networking, and other related activities.

Assessor's Office leadership and staff

This is perhaps the most meaningful partnership of all. The commitment by the leadership to the development and growth of staff at all levels is clear.

Providing financial support and the time for training and development is just the foundation. The recent redesign of appraiser jobs and the regionalization of operations will result in better defined career options. Staff from nonappraiser functions have already trained for and moved into appraisal positions.

As new and existing appraisers acquire more knowledge, skills, and abilities that will enable them to appraise multiple property types, both the office and the individual appraiser will reap the benefits.

Supervisors, in both appraisal and nonappraisal functions, have long been key to the local training and development of their staff, and MCAO continues to seek ways to support their efforts with initiatives like those already described as well as with other resources. For instance, the Assessor's Office has a robust training curricula available to all county staff. Divisions within the office have specialized training (e.g., the Ownership & GIS Mapping Division).

MCAO has made the development of its staff and its capability as an office a priority toward achieving Vision 2020. It is the staff, however, that has embraced their own development and opportunity for growth that is making the difference.

All these partnerships, especially with IAAO, are working to elevate staff and the profession and to enhance the Assessor's Office's ability to produce fair and equitable values in service to the residents of Maricopa County.



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