

The 2020 Portland Revaluation

**3 parts Mass Appraisal
1 part Mass Chaos**



Chris Huff
Tax Assessor
City of Portland

The 2021 Portland Revaluation

“The best laid plans of mice and men often go awry.”



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Tax Assessor
City of Portland

City of Portland Parcels

- Parcel Count - 24,363 total parcels
 - Residential
 - 20,404 parcels or 84%
 - Commercial / Industrial
 - 2,702 parcels or 11%
 - Exempt
 - 1,257 or 5%

Moving Away from the Traditional Revaluation Method

- Traditional approach is labor intensive
- Take advantage of new technology
- IAAO Standard 3.3.5
- Saves time and expenses



IAAO Mass Appraisal Standard 3.3.5

Jurisdictions may employ a set of digital image technology tools to replace the routine cyclical field inspection with a computer assisted office review. This tool set should include:

- ▶ High-resolution street view images that enable quality, grade and physical condition to be verified
- ▶ Orthogonal images (minimum 6" per pixel)
- ▶ Oblique imagery (minimum 6" per pixel)
- ▶ Effective GIS tool sets that validate CAMA sketch data and compare building dimensions
- ▶ Data to verify changes to exterior / interior characteristics
 - ▶ Permits
 - ▶ Data / Sales Mailers
 - ▶ Sales Data (MLS, Brokers, Realtor.com, Redfin, etc.)
 - ▶ Field visits to verify data and observe changes in neighborhood condition and trends

A physical review shall be conducted when significant changes are detected.

Street Level Imagery

- IAAO Standard: a high-resolution street view image that enables quality, grade and physical condition to be verified
- Resolution: Professional DSLR – 12+ mp Digital Image
- Coverage: Structure is 75% of image; 2 sides minimum

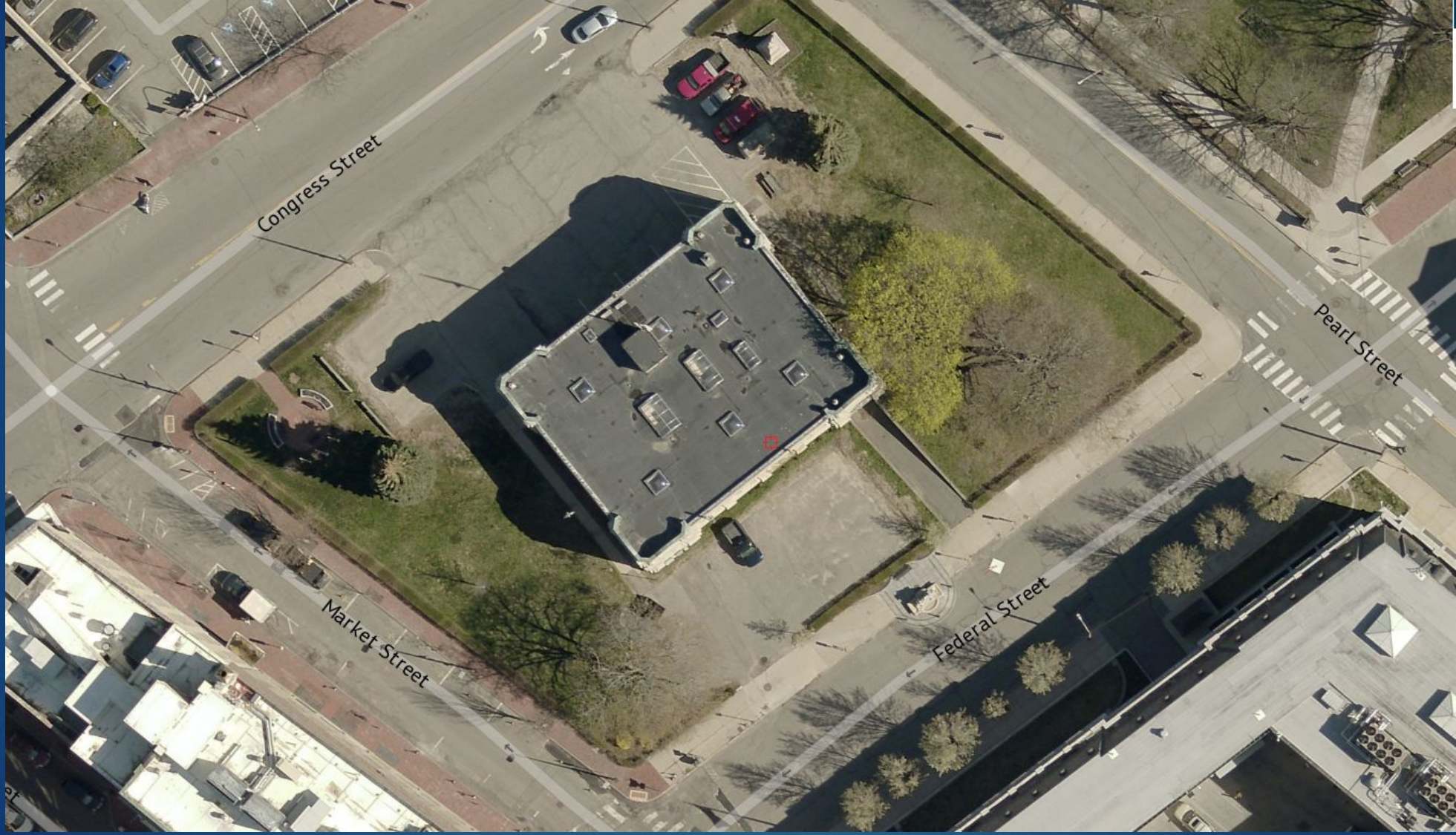


Street Level Imagery



- Street Address and Street Centerline Field Verified
- XY Coordinate Placed (Point Addressing)
- Note and correct street names, addresses, land-use, etc.
- 21,567 images taken in 5 weeks
- 98% of all parcels
- .06% error rate

Ortho Imagery



Oblique Imagery



Oblique Imagery

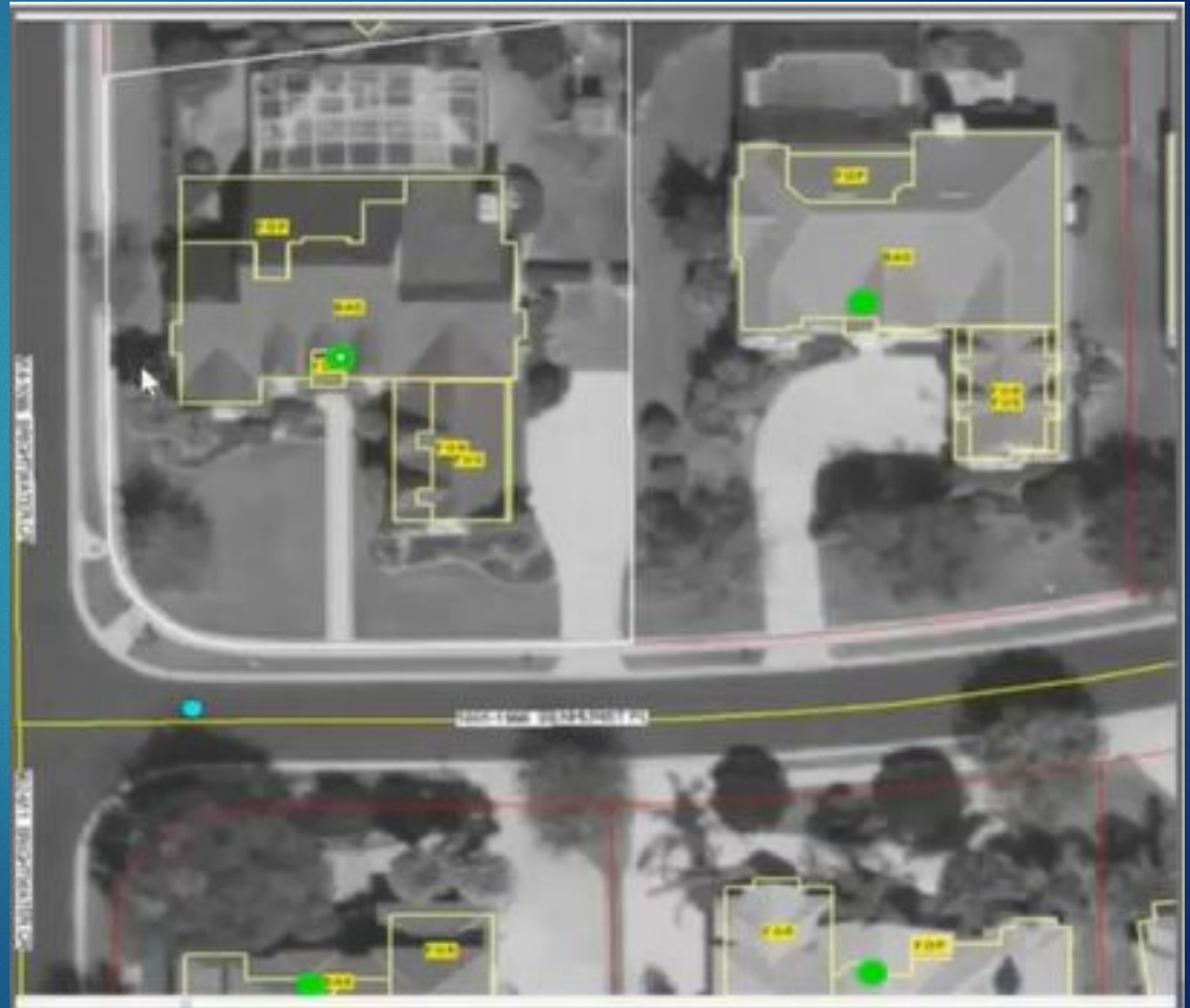


Oblique Imagery



Sketch Data Validation / Verification

- Extract CAMA Sketch Vectors
- Rotate, Scale and Locate to Aerial Image
- Flag Exceptions
 - < 50 Sq. Ft. - **GREEN**
 - 50 – 250 Sq. Ft. - **BLUE**
 - > 250 Sq. Ft. - **ORANGE**



Sketch Data Validation / Verification



Sketch Data Validation / Verification

- **Residential**
 - 14,049 sketches reviewed
 - 2,049 or 14.6% flagged and field visited
- **Commercial / Exempt**
 - 3,483 sketches reviewed
 - 202 or 5.8% flagged and field visited

Data to verify changes to exterior / interior characteristics

- Permits
- Data or Sales Mailers
- Sales and Property Data (RETTD's, MLS, Brokers, RE Agents, Realtor.com, Redfin, Estately, etc.)
- Field visits to verify data and observe changes in neighborhood condition and trends


A physical review shall be conducted when significant changes are detected

Revaluation Data Mailers


- Residential
 - 18,744 mailed
 - 12,316 returned or 66%

- Commercial I&E Statements
 - 2,440 mailed
 - 686 returned or 28%

- Total Rate of Return - 61%



Tyler Technologies
City of Portland
389 Congress St. – Room 115
Portland, ME 04101
(207) 874-8763



John and Jane Doe
123 Main St.
Portland, ME 04101

October 7, 2019
Parcel ID/CBL: 123 Z456789
Location: 123 MAIN ST
Card # 1

Dear Property Owner,

The City of Portland Tax Assessor's Office seeks your assistance in verifying data regarding your property. Staff will use this data as we prepare to update tax assessments for the April 1, 2020 property revaluation.

Please review this information carefully. If you feel that any data is incorrect, enter the correct information directly on the form. Kindly sign and return this form, with or without changes, using the postage paid envelope provided. Your property info and dwelling sketch can also be found at www.portlandassessor.com. A glossary of terms is included on the reverse side.

Prompt attention to this request will help ensure that your assessment is based on the most accurate information available. Refusal or neglect to provide this data will result in staff visiting your property to verify and/or estimate the correct property characteristics.

Thank you for your prompt attention in this important matter. Please return this completed form by October 28th, 2019

Christopher A. Huff, Portland Tax Assessor

Dwelling Data

Land Use: Single Family	Fireplaces: 1	Total Rooms: 7
Style: Colonial	Heating System Type: Steam	Total Half Baths: 1
Approx. Year Built: 1920	Heating Fuel Type: Gas	Total Full Baths: 1
Exterior Walls: Frame	# of Living Units: 1	Total Bedrooms: 3
Story Height: 2.0	Rec Room Size: None	In-Law Suite: Y or N
Attic: Full Finished Wall Height		Finished Basement Area: None
Basement: Full		# of Basement Garages: 0

Sales Information

Date	Price	Grantee	Grantor	Book	Page
5/1/1999	\$200,000	DOE JOHN & JANE	SMITH TOM	25444	001

Detached Structures

#	Description	Year Built	Area
1	SHED	2010	80
2	GARAGE	2015	200



No Changes Necessary
 Name: _____

Further Review Requested; Please Contact Me
 Daytime Phone: _____

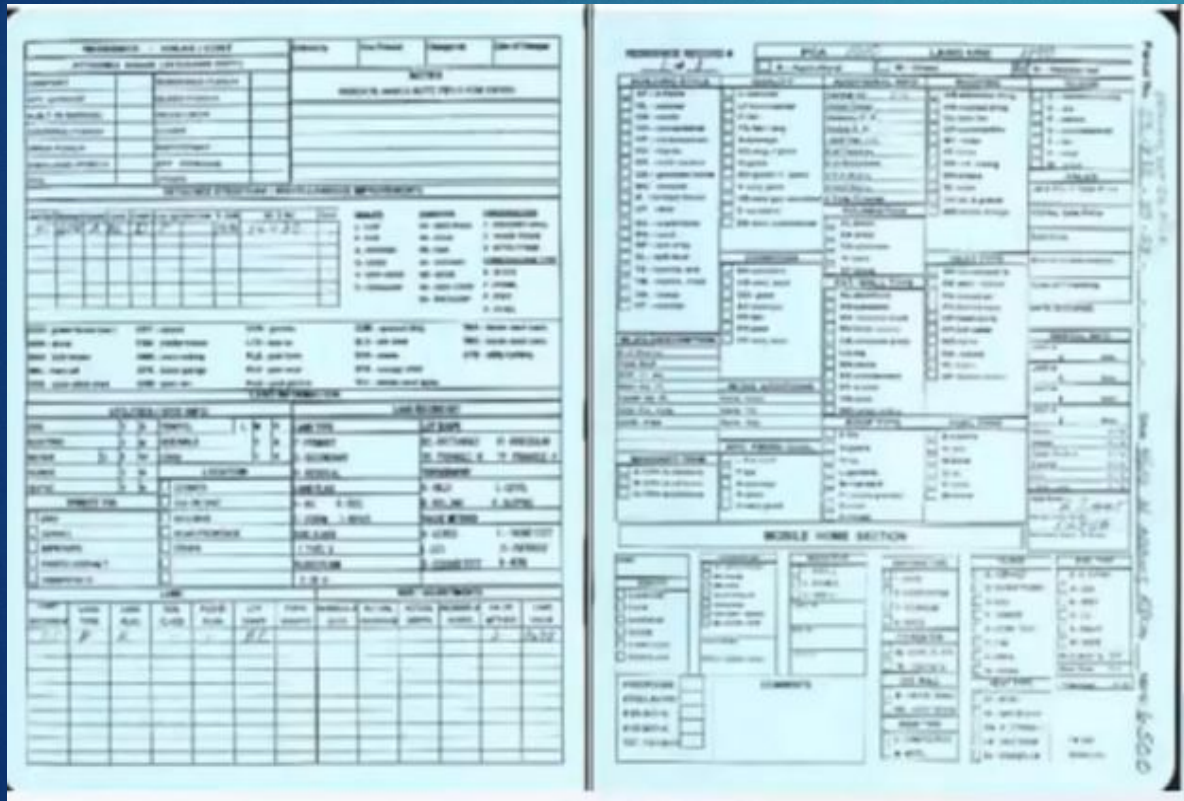
Changes As Listed; No Contact Required

Sales Data

- **Total Sales**
 - 6,410 sales reviewed from 4/1/2017
- **Verified/Valid Sales for Sales Ratio Study**
 - 2,563 valid sales
 - 40% of total sales and 10.5% of total parcel count

Digital Document Scanning

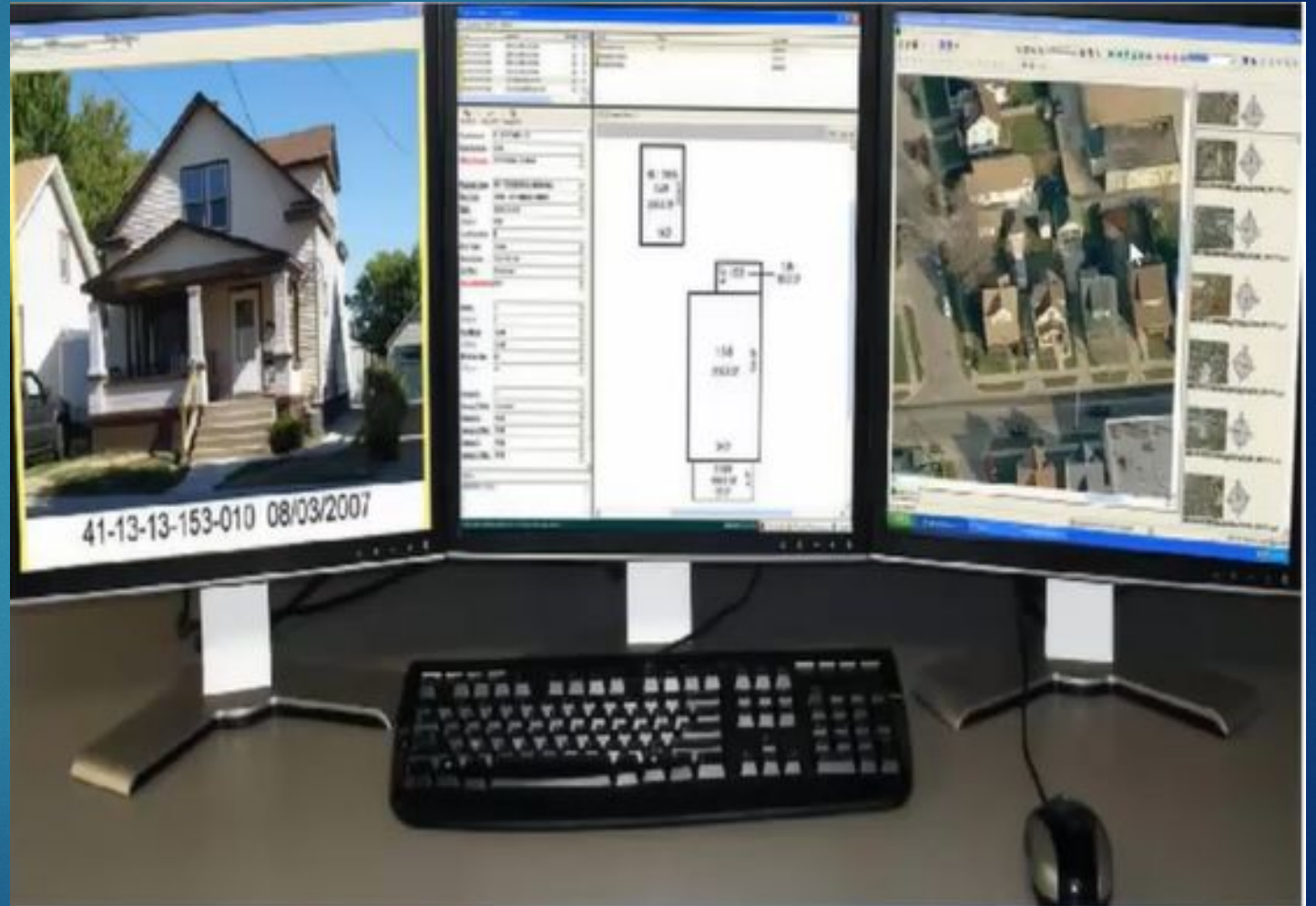
Property Records Cards from previous revaluations were scanned and will be indexed in CAMA allowing easier search and review of historical data.



- **78,708 documents scanned**
- Preserved PRC's from 1950's, 1980's and 1990's

Data Verification

- Complete Desktop Review
- Review Multiple Datasets
- Verify Property Characteristics
- Verify Sketch
- Confirm Features and Outbuildings



Communications / PR Planning

- City Manager and staff, Mayor, City Council, Citizens
- Revaluation Website - www.revalueportland.me
- Revaluation Helpline set-up - dedicated phone number/phone line
- Mailed a [general info brochure](#) to all parcels at project start
 - Second brochure mailing in January - [Let's Talk Revaluation](#)
- Meetings, meetings, meetings.....handouts, brochures, etc.
 - MRS: [Revaluations - Understanding the Process and the Myths](#)
 - IAAO: [Understanding Your Assessment](#)
 - [Citizen's Guide](#)
 - [Reval FAQ's](#)
- News Flashes / Press Releases at certain project benchmarks
- 4-part video series on the process of revaluation
- Op-Ed in local newspaper
- Interviews with local TV news stations, radio, newspaper, podcasts
- 30-second radio ad
- 30-second TV commercial
- 2 minute Portland project specific animated video

(Original) Project Timeline

2018 - City Council voted to fund project; aerial photography was flown; contract negotiated and signed

January / February 2019 - Project Kick-Off tasks

February 2019 - Sketch validation process started

March 2019 - Digital scanning project started

April 2019 - Street-level imagery started; Data Collectors / Field Reviewers started

May 2019 - Valuation/sales analysis started

August 2019 - Modeling process begins

December 2019 - Final Review & Q/A begins

April 1, 2020 - Assessment Date; new values to take effect

May 2020 - Final value notices to be sent

June 2020 - Informal appeals begin

August 2020 - Tax roll and commitment

Delayed Implementation Due to COVID-19

- Potential market changes from COVID make it difficult to implement new values as originally planned for 4/1/20 (FY21).
- New values will be implemented for 4/1/21 (FY22)
 - This allows the time to analyze these changes and make adjustments
- None of the work from the preceding 16 months will be lost, in fact, it will become the base for moving forward with a statistical adjustment of whatever the market bears out over the next year
- Reval contractor will remain on the project in a reduced capacity
 - Will assist with statistical analysis, valuation model and system implementation
 - Will facilitate final value notices and conduct informal appeals, as contracted
 - We are working on a contract amendment to update scope of work, cost, etc.

Thank You!

