

NCAAO Data Sharing Committee

September 21, 2017

NCDOR Advanced Seminar

Data Sharing Committee

- Purpose:
 - To provide the structure to increase tax appraisal accuracy and fairness through a statewide initiative where counties actively participate in data sharing regarding real estate sales, appraisal values and other county data

The Past

2004 – The beginning of the ICMAC Committee

– Industrial Commercial Mass Appraisal Committee

– Idea began with Karen Carter, Rockingham County

- Early Participants:
- Karen Carter, Mark McClintock, Joe Hunt, Chris Ferris, Chuck Erwin, Brent Weisner, Ken Joyner, Rick Wall, Ron McCarthy, Bill McGinn, Neal Morris, Roger Bedsaul, Neal Morris, Garrett Alexander, Michael Sutton, Larry Bolick, Mark Wilkes, Robert May, Marlon Long

Past vs. Present Difference Makers

- The Wake-Up Call
 - Lowest Hardware state-wide appeals
 - Other state-wide appeals
- Technology advancements

We agree...

- There is a need to know about significant property sales across North Carolina
- There is a need to know property and sale details for analysis
- It is helpful to know how other counties are valuing hot topic properties
- We will produce more fair and accurate values if we commit to working together and helping others
- To commit to success for the whole state, every county

Data Sharing Committee

- Plan
 - Provide structure for sharing commercial/industrial sales, hot-topic assessment values (big box, drugstores, cell tower sites, etc.), and basic county data such as standard residential square foot building rates.
 - Be willing to walk before we run... start with basic form and spreadsheets
 - Designate 1 data editor per county. Follow up with multiple county viewers
 - Learn from you (regarding the spreadsheets), then build web “system” for the long run

Data Sharing Committee

Current Activity

- Form to collect basic county data was sent out on September 1st to all on the Assessor's List Serve, reminder email sent
- Created spreadsheet "Data Sharing Committee – Commercial/ Industrial Sales Data"
- Created spreadsheet "County Appraisal Data – Data Sharing Committee" to collect county appraisal data for topics of big box, drugstores, Dollar General/Family Dollar, cell tower sites, solar farms, grocery stores, bill board sites and golf courses

Data Sharing Committee

Current Topics of discussion

- Will the data entered on the spreadsheets be included in the new system? (Yes)
- Can I enter data in mass? (Yes. Individual entry is good too.)
- What if I don't have all the data you ask for - or in the way you ask for it? (Conformity is always right. Do the very best you can. No data is the worst option.)
- Why use Google spreadsheets to begin with? (Google allows multiple simultaneous editors)
- Only enter data at the bottom of each spreadsheet. Make your own copy to sort, filter, etc.

Data Sharing Committee

The Future

- Gaston County has offered to build a web-based solution, that will be more stable, private and long term
- Data Sharing activities will continue to progress, over time. We are walking – not leaping...
- Please contact members of the Data Sharing Committee with your feedback, thoughts and questions... Alex Hamilton (Wilkes), Jimmy Tanner (Gaston), Chris Nelson (Lincoln), Gary Briggs (Moore), Hosea Wilson (Dare), Jeff Niebauer (Brunswick), Chip Main (Pitt), Deborah Wilson (Yancey) and John Burgiss (Forsyth)

So, let's move forward... Challenge

- Let's commit to success
- Challenge #1 – Have all 100 counties fill out the Assessor Form (50 of 100 completed)

Got Dollar General?



So, let's move forward... Challenge

- Challenge # 2 – Enter sales, within the past two years, for stand alone Dollar General / Family Dollar properties (vacant land and improved sales) on the “Data Sharing Committee Commercial / Industrial Sales Data” spreadsheet by November 1st, 2017

	A	B	C	D	E	F	G	H	I	J		
1	Ownership Information											
2	Buyer	Seller	Property Sub-Group (IND, WH, RTL, HTMT, MF, OF)	Use	Intended Use	Name	Sales Price	Sale Date	Address (Physical)	Parcel ID	PIN #	County
3	City Center West Associates LLC	Advent Properties I LLC	OF				\$1,210,000	5/20/2016	640 W. Fourth St		6835-06-3665.000	Fors
4	Serpentes Holdings LLC and 4600 Progress Lane LLC	IPTV B MC L1 LLC	WH				\$2,950,000	1/25/2016	4600 Progress Ln		6827-56-9322.000	Fo
5	Chick-Fil-A INC	Link Landing Denver LLC	RTL	V		Chick-Fil-A	\$790,000	4/19/2016	7267 NC 73 HWY	90539	4602-00-44-3235	Lir
6	Greco Property Management LLC	Oloughlinyear 2002 Irrevocable Trust The	RTL	I		Verizon	\$2,100,000	10/13/2016	7180 NC 73 HWY	85533	4602-00-34-6208	Lir
7	Big Box Property Owner E LLC	Exeter 519 Lincoln LLC	WH	I		Big Dog	\$12,550,000	12/31/2015	519 Lincoln County Parkway Ext	84603	3645-01-09-7651	Lir
8	BVP First Street Place LLC	Waypoint First Street Owner, LLC	MF	I		First Street	\$17,250,000	7/15/2016	400 W First ST	13500	4688-23-7116	P
9	BV 161 LLC	Lisa Marlene Mahaley	RTL	I		Biscuitville	\$830,000	4/14/2015	1815 Sandhills BLVD	46242	857119621252	Mo
10	L & MV Properties LLC	Carter-Halfast LLC	RTL	I		Golds Gym	\$730,000	4/2/2015	120 W Morganton Rd	32415	857112968654	Mt
11	Value Line Properties	Michael Dayhoff	RTL	I			\$900,000	11/1/2016	1480 US 1 HWY S	10001600	857115744427	Mt
12	Quail Run Business Center, LLC	Emerald Circle Drive Holdings LLC	RTL	I			\$1,992,670	6/23/2016	3712 N. Croatan Hwy.	18405036	987512871024	De
13	NCB Properties LLC	GSM Properties LLC	IND	I			\$1,075,000	11/21/2016	810 Park Ave	024176	1853-17-6678	Fra
14	DY Property Investment LLC	Dean Real Estate Inc	OF	I			\$350,000	10/19/2016	531 Bickett Blvd	029269	2805-39-8965	Fra
15	Tailwind Advisors	Carolina Emerald	RTL	I		Lowe's	\$10,500,000	3/7/2016	940 Concord PKWY		5611-93-7899-0000	Cat
16	PATWAR Investments	Best Hotel LLC	HTMT	I		Econo Lodge	\$1,500,000	5/9/2016	4646 EAST COAST LN	1970002016	107707687427	Brun
17	Leland FDS 709297 LLC	Gore Michale	RTL	I		family dollar	\$1,305,500	4/25/2016	1411 LANVALE RD NE CO	0290006107	218818409935	Brun
18	Hv Winston-Salem II LLC	Noble Winston-Salem Associates-East, LLC	HTMT	I		Marriott (Downtown)	\$27,350,000	7/28/2016	425 Cherry St		6835-17-7326.000	Fo
19	Charlene Horton	TBS Realty, Inc.	RTL	I		TBS Realty, Inc.	\$120,000	2/12/2016	7275 Semora Rd.	27460		Per
20	Starlites Tech Corp	Head Equipment Co., Inc.	RTL	I		The Inspiration Lounge	\$145,000	4/12/16	11969 Boston Rd.	1738		Pe

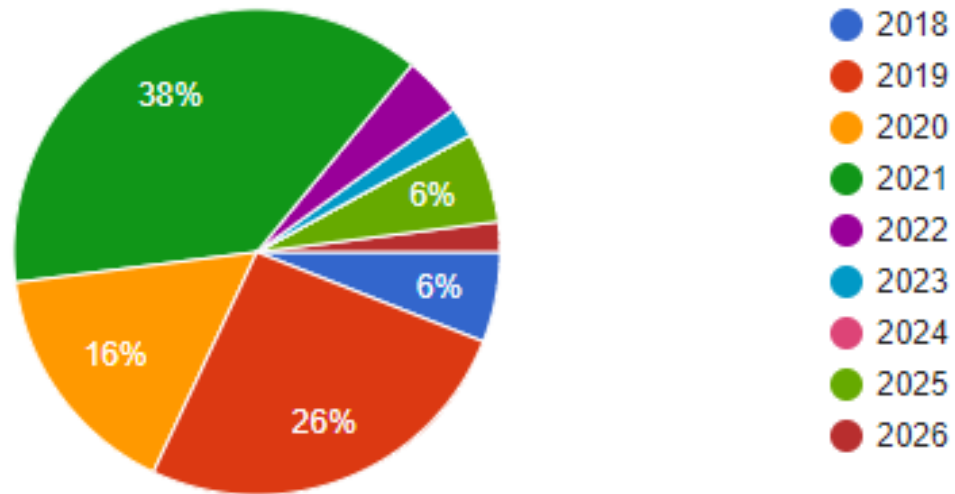
So, let's move forward... Challenge

- Challenge # 3 – Enter how you have appraised Dollar General / Family Dollar stand alone properties on the “County Appraisal Data - Data Sharing Committee” spreadsheet by November 1st, 2017

What's in it for my county?

Next Planned County Reappraisal Date

50 responses





Success depends on....

- **You**
- This is GIVE and TAKE
- If you don't give, no one can take
- If no one gave, there is nothing for you to take
- Participation by each and every county is the key to success
- So.... Let's Get Started

The End

- Questions??
- Comments??
- Thanks!

System Design

- **Committee responsibility for the program**
 - Design and details
 - Users and access
- **Each county would have a home page**
 - Reappraisal year
 - Parcel County
 - Staffing Levels
 - Base Rates by Type
 - Land Rates by Range and Type
- **Standardized, required fields for data entry**
 - Required fields for consistency
- **Index Format with Standardized Type and Use Codes for consistency**

About this Data Sharing session...

- Designed to be a group discussion
- Identify points of purpose, agreement and unity
- Leave in agreement with purpose and direction

Recent Data Requests...

- October 25th: “Cap Rates” request regarding Section 42
- October 24th: “*Dollar General Stores*”
- October 19th: “Appeals of Sonic Drive In Restaurants”
- October 5th: “Big box retail sales”
- September 19th: “Solar land research for Reval”
- September 16th: “Parcels per County Statewide”
- August 25th: “Cell Tower Sites and Locations”
- August 8th: “Shopping Center Value Appeal”

Information Contained...

- Commercial/Industrial sales data
- Hot Topic Tax Appraisal data
- County Comparison Data
- Ability to attach PRC's and Photos to entries

General Discussion

- From the Panel...
- From the Audience...

Current Offer and Option... Gaston

- Each county would have one user responsible for entering sales and market data
- All county tax office staff would have access to view all data
- Committee would be responsible for determining what other entities may be granted access