CABARRUS COUNTY 2024 APPRAISAL MANUAL

DATA COLLECTION PROCEDURES IN THE FIELD

PREFACE

The application of a standardized method in the appraisal of a structure requires work to be performed in three areas: fieldwork, calculation and valuation. The purpose of this chapter is to supply basic definitions and depict common situations that must be contended with in the field. It is no longer required in North Carolina to physically inspect each property when conducting a county wide revaluation project. Property is physically inspected when structures are first built and will be re-inspected when changes are made to the property such as; additions, deletion, remodeling, up fit, or changes in use. During the revaluation process certain properties or neighborhoods may require physical inspections to achieve the desired results. Cabarrus County uses modern technology and information, such as; orthophotography, oblique imagery, street level photographs, building permits and taxpayer listing, to further insure that our data stays current and accurate. Once the Notice of Assessed Value is sent to the property owner, the owner may request an onsite inspection.

Cabarrus County has deployed the use of Mobile Tablets using the ITS Mobile Application. Instructions regarding the use of this application can be found in the Bitek Help Manual. The following chapters address procedures and methodology that can be applied in data collection with either mobile tablets or paper records.

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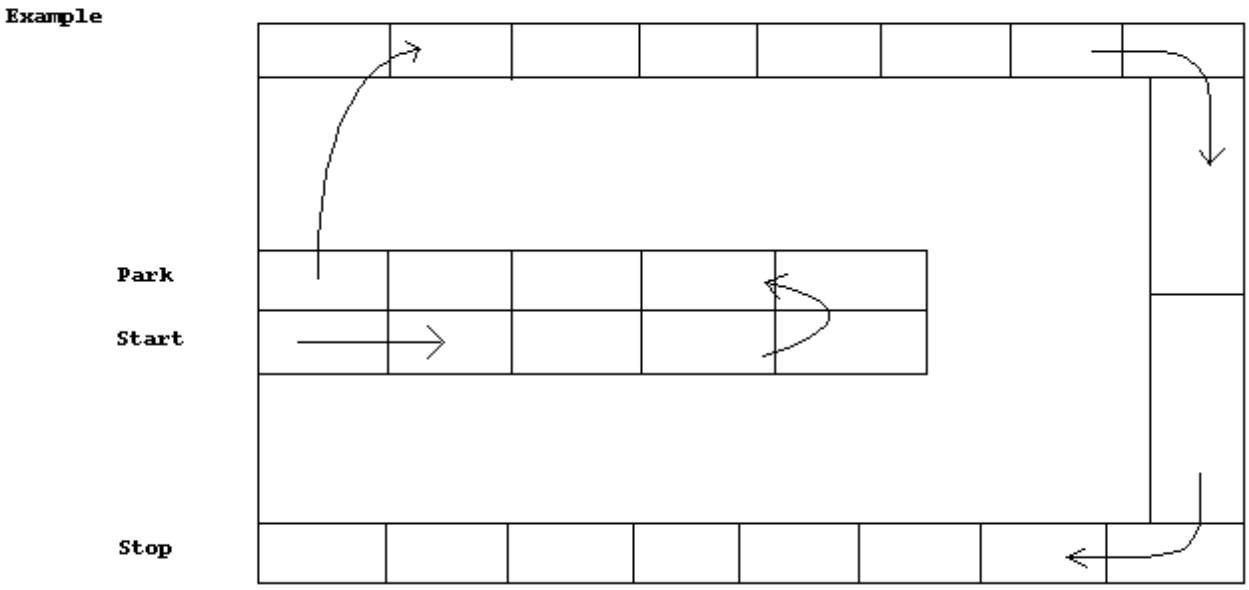
INTRODUCTION

Fieldwork should be approached with three basic components in mind: Collection or verification of measurements of any improvements including correction of any such measurements and recording information correctly on the field data collection instrument (Data Sheet) or in ITS Mobile. The first two topics are discussed in this chapter; the third in the next chapter.

COLLECTION OR VERIFICATION OF CONSTRUCTION DATA

This involves two basic techniques. The majority of the data is confirmed by a visual inspection and can be done while walking up to the front door. It is helpful to give the area you are covering a "windshield" preview while looking for a parking spot. This gives a good indication of the typical exterior components such as roofs and exterior walls and helps develop a "feel" for the neighborhood.

In order to work at maximum efficiency, plan your route ahead of time. Use of routing applications can be helpful if your dialy work is spread-out over multiple areas. Check your map and arrange cards in the order you will want to walk; ideally stopping and starting at the same point.



As you approach each house, check your exterior walls, roof structure, roof cover; look for indications of heating type - fireplace, compressors, oil drums, etc.

COLLECTION OR VERIFICATION OF CONSTRUCTION DATA, cont.

Identify yourself and your purpose, remembering at all times to be polite and respectful, your identification badge should be displayed on your shirt above the waist and the identifying county seal magnets should be on each side of your car. One approach is as follows:

"Good morning. My name is John Doe and I am with the Cabarrus County Assessor's office; verifying data for the County Tax Revaluation. I need to ask you a few questions and walk around the outside of the house."

Usually, most people are cooperative. Remember, your job is solely to collect or verify data; not to come up with the assessment value at the time of inspection. While you are introducing yourself, glance inside to check for interior wall construction, flooring, and indications of heating and cooling systems.

Your three questions can be asked as follows:

"What sort of floors do you have?" (Don't confuse rugs with carpet. The latter is physically secured to the floor; rugs are not.) "How do you heat and cool your house?" (If they don't know, and that happens, you can almost always see physical indications from the outside such as a chimney, heat pump or an oil drum. "How many bathrooms and bedrooms do you have?" Then, "Thank you very much. Now all I need to do is take a quick look around the outside, okay?"

Sometimes, you will have to take measurements to appraise improvements. If you have to measure the whole house, just explain to the owner you are collecting and verifying building measurements.

In addition to the Laser Measuring Device that is issued, you should be familiar with techniques using standard measuring tapes and measuring wheels. There are a few aids to measuring that make it a little quicker and easier. A screwdriver or long nail serves as a good anchor for the tape end when you cannot get to the wall because of fences or shrubs. Despite logic, sometimes measurements will not produce a square or even sided house. Be sure to check for this before turning in the appraisal card.

It is also essential that the measurements produce an even sided structure. A simple method of checking for closure is to add all the front measurements (bottom horizontal) and add all the back measurements (top horizontal) to see if the two are equal. The same should be done for the sides of the house (left and right verticals). This is known as checking for closure. Another way to insure the proper length is to measure the length without any offsets to get the overall length. The same can be done for the width.

There are three basic steps to this process:

1. Measure each side of the structure accurately.

2. Make a diagram placing dimensions (rounded to the nearest foot) beside each line they represent.

3. Label structural variations with appropriate abbreviations (FEP, FSP, FCP, etc.). Lettering and numbers are to be neatly made with measurements written so as to read from the bottom of the card looking up.

TO CHECK FOR CLOSURE:

The basic rule is the sums of the lengths of the opposite sides must be equal to each other as follows:

The sum of the top horizontal lines, (the back of the house) should equal the sum of the bottom horizontal lines, (the front of the house). The sum of the left vertical lines, (the left side of the house) should equal the sum of the right vertical lines, (the right side of the house), in the same manner.

The following are examples depicting various types of improvements and how they should be drawn, labeled and checked for closure.

STANDARDIZED METHOD OF DRAWING STRUCTURES

A uniform method of drawing and labeling structures must be adopted. The following method is to be employed in preparing documents for use by the system when using a standard paper data sheet. The ITS Mobile application has Sketch-Tek loaded and should be used when using the tablet.

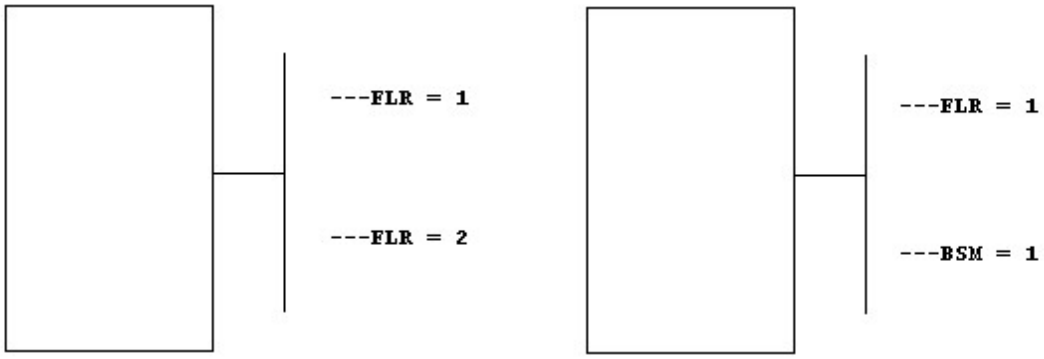
Orient your drawing so that the front of the structure is towards the bottom of the card. All labeling should be oriented in this same direction.

It is essential in drawing the structures to delineate the auxiliary areas properly in order that they can easily be distinguished from the base area.

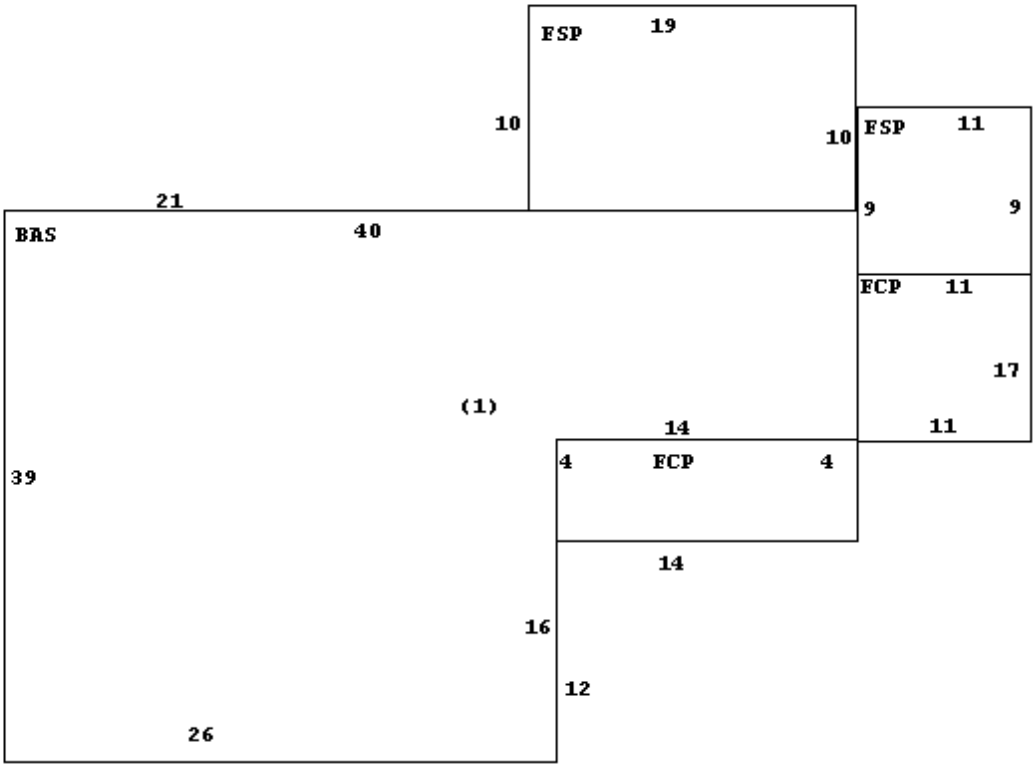
Familiarity with auxiliary area abbreviations is essential along with an understanding of the visual indications of these areas. For example: an enclosed porch which may have windows different from the base, a lower foundation than the base, or different roof cover.

If you are confronted with an exceptionally large property with many sides, a piece of graph paper used in drawing the sketch can be invaluable in preventing errors.

Special attention needs to be given multi-story buildings. A notation to denote upper stories and/or basements should be as follows



Further refinements of this situation are necessary to contend with many older, odd shaped homes often with 2 or more stories. Careful attention must be paid to auxiliary areas and whether or not they extend to all floors.



TOP HORIZONTAL LINES
(left to right)
WEST
11 + 19 + 21 = 51

BOTTOM HORIZONTAL LINES
EAST
26 + 14 + 11 = 51

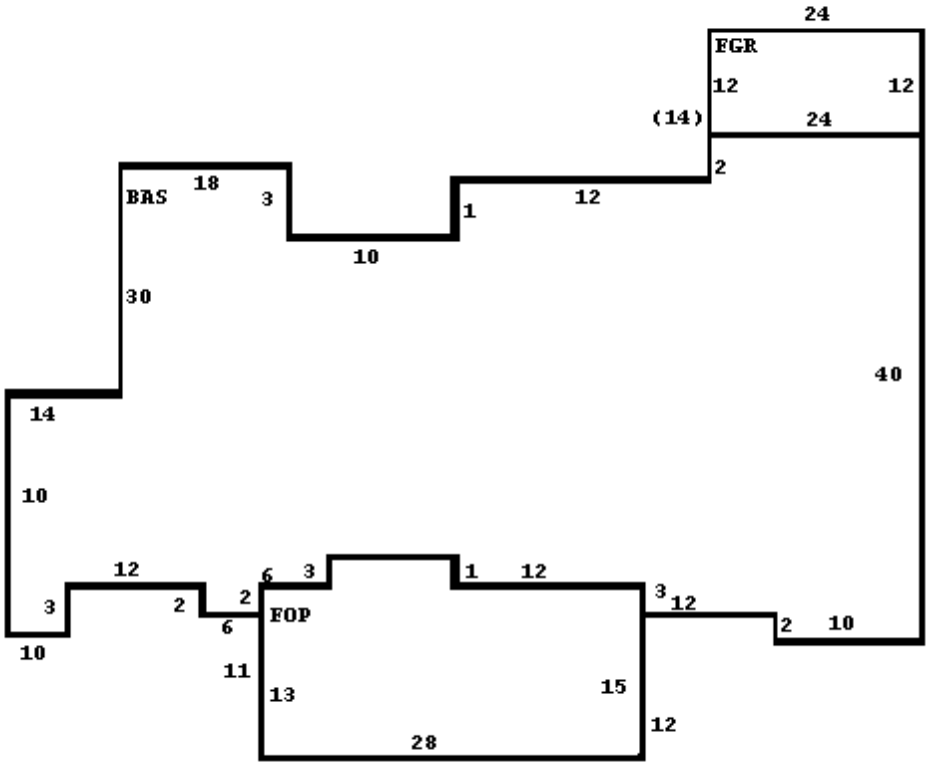
11 + 19 + 21 = 51
26 + 14 + 11 = 51

LEFT VERTICAL LINES
(top to bottom)
SOUTH
10 + 39 = 49

RIGHT VERTICAL LINES
NORTH
7 + 9 + 17 + 4 + 12 = 49

	7
10	9
39	17
49	4
	12
	49

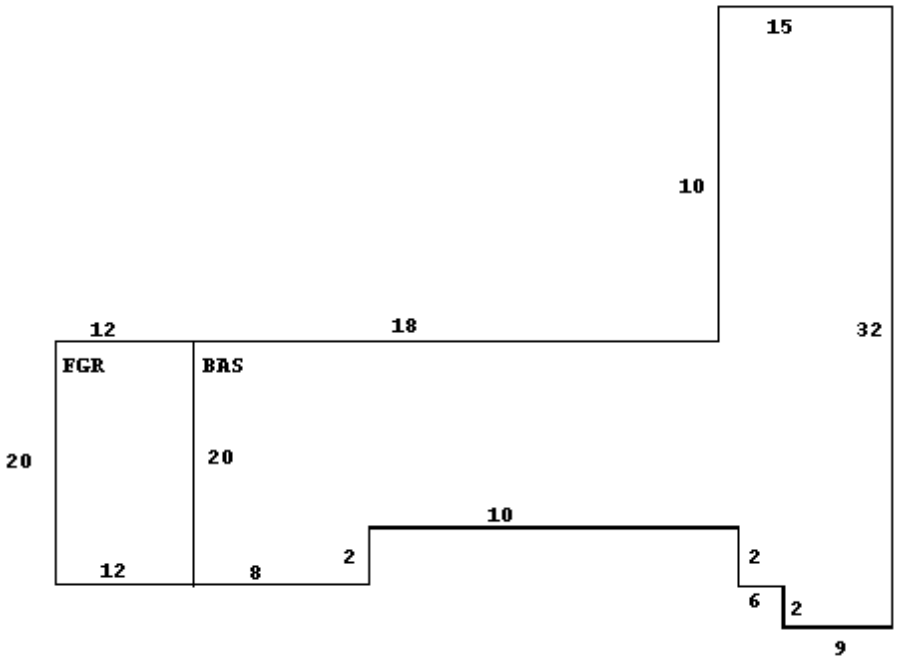
In the above example the auxiliary areas, such as the screened porch (FSP) will prevent actual measurement of some of the walls of the base. This is overcome by recording the actual measurements of the perimeter and deriving some of the base wall measurements from them. In this example, the length of the rear wall of the base is determined by adding the length of the rear wall of the screen porch (19) to that of the accessible rear wall of the base (21).

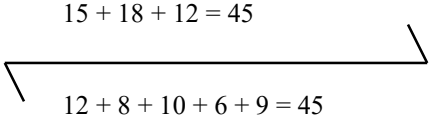


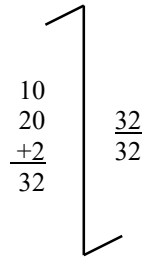
BE SURE TO GET ALL SMALL MEASUREMENTS

$$\frac{24 + 12 + 10 + 18 + 14 = 78}{10 + 12 + 6 + 6 + 10 + 12 + 12 + 10 = 78}$$

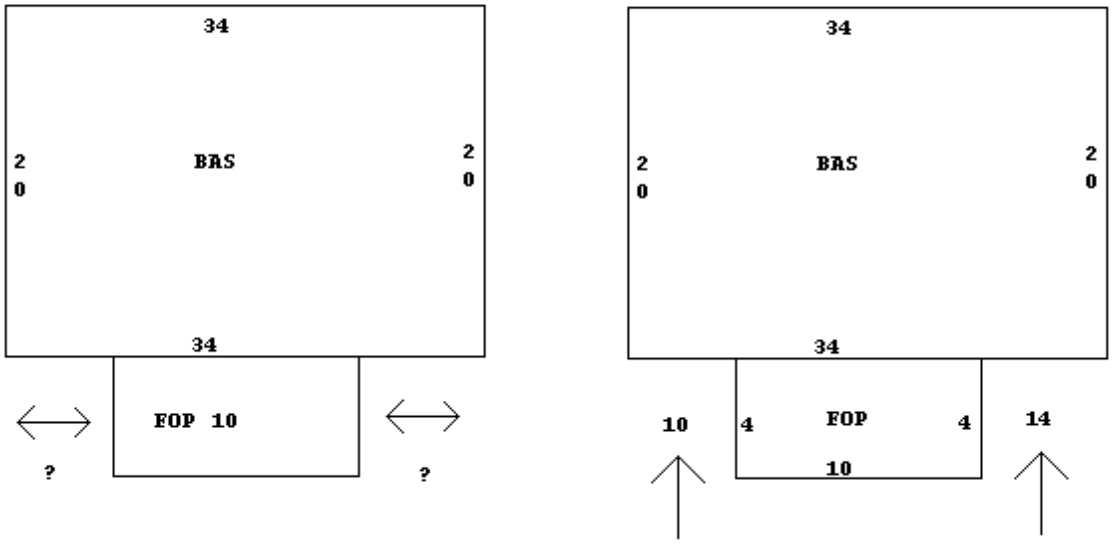
12	12
2	40
1	52
-3	
30	
10	
52	

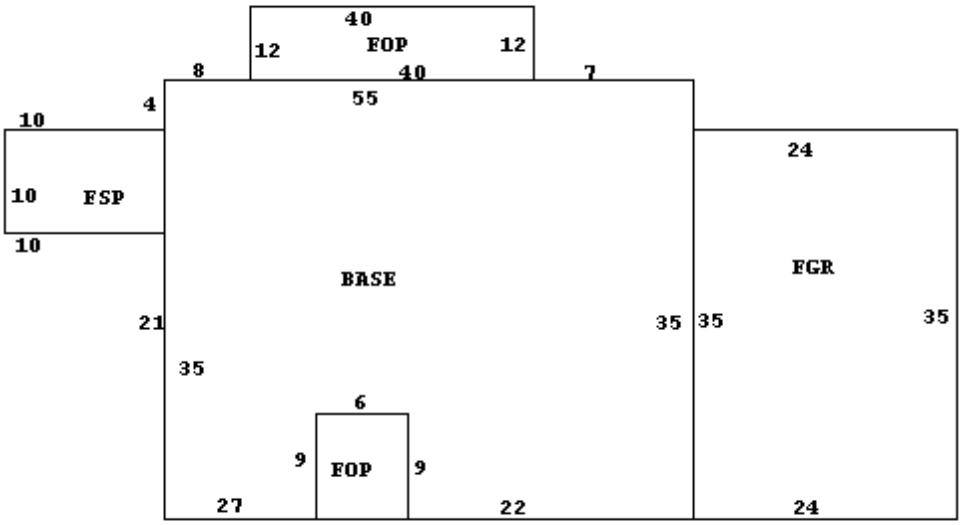

15
10
12
18
32
FGR
BAS
20
20
10
12
8
2
2
6
2
9


15 + 18 + 12 = 45
12 + 8 + 10 + 6 + 9 = 45


10
20
+2
32
32
32

Be sure to label each side of the property, placing these dimensions to the inside which show ACTUAL length. Whereas those measurements used to determine the position of auxiliary areas along the perimeter of the base should be placed on the outside of the sketch if they are not included within an auxiliary area. This is illustrated as follows:





It is critical to the proper coding of structures to supply adequate measurements of the perimeter and auxiliary areas in order to determine the correct location of the auxiliary areas with respect to the base.

TWO STORY RESIDENCE

TWO STORY RESIDENCE

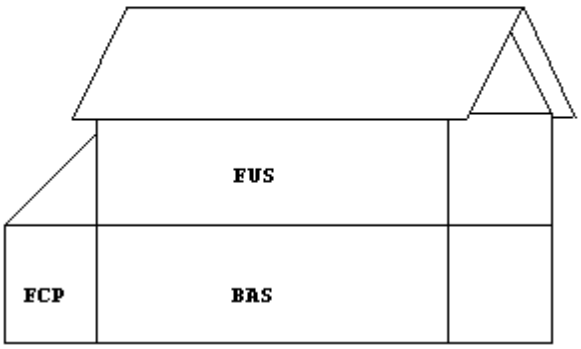
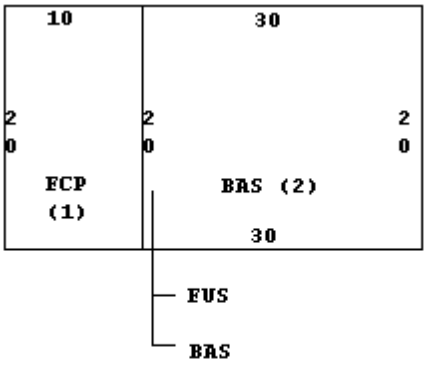


DIAGRAM AS FOLLOWS



(since base measurements are shown on the diagram, they are not repeated)

Draw 1st level plan and denote upper story dimensions as shown.