

**Quality and Productivity Commission
27th Annual Productivity and Quality Awards Program
"Saluting County Excellence"**

2013 APPLICATION

Title of Project (Limited to 50 characters, including spaces, using Arial 12 point font):
NAME OF PROJECT: ASSESSMENT APPEALS BOARD (AAB) DAILY AGENDA REPORT

DATE OF IMPLEMENTATION/ADOPTION: MARCH 5, 2012
(Must have been implemented at least one year - on or before June 30, 2012)

PROJECT STATUS: Ongoing One-time only

HAS YOUR DEPARTMENT PREVIOUSLY SUBMITTED THIS PROJECT? Yes No

EXECUTIVE SUMMARY: Describe the project in 15 lines or less using Arial 12 point font. Summarize the problem, solution, and benefits of the project in a clear and direct manner

Problem: Utilization of an Excel spreadsheet based system to record the daily activities of Assessor personnel in front of the Assessment Appeals Board (AAB) was inefficient, prone to data entry errors, and the product could not provide reports desired by management in a timely manner.

Solution: Applying Microsoft Access, staff created a data entry system to capture all events occurring in the hearing room. Goals: 1) reduce the time needed to produce the report; 2) reduce the data entry error rate; 3) build a database system which could generate useful oversight reports for management. The project succeeded as follows:

1) Support staff now enters information from a single AAB agenda into the database in one hour or less, compared to an average of 3 hours using the Excel-based system.

2) The error rate has fallen from approximately 20% to 2% per agenda. The review and correction process is typically 2 hours per semi-monthly report (containing up to 40 agendas), reduced from 15 hours.

3) In addition to the Daily Agenda Report, six sub-reports have been created for use by management to monitor this critical area of Assessor operations.

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(1) ESTIMATED/ACTUAL ANNUAL COST AVOIDANCE	(2) ESTIMATED/ACTUAL ANNUAL COST SAVINGS	(3) ESTIMATED/ACTUAL ANNUAL REVENUE	(1) + (2) + (3) TOTAL ESTIMATED/ACTUAL BENEFIT	SERVICE ENHANCEMENT PROJECT
\$	\$ 46,275	\$	\$ 46,275	

SUBMITTING DEPARTMENT NAME AND COMPLETE ADDRESS Office of the Assessor 500 W. Temple St., Room 290 (Assessment Services Division) Los Angeles, CA 90012	TELEPHONE NUMBER 213-974-9201
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PROGRAM MANAGER'S NAME Dale Hough, Division Chief	TELEPHONE NUMBER 213-974-9201
	EMAIL dough@assessor.lacounty.gov

PRODUCTIVITY MANAGER'S NAME AND SIGNATURE <small>(PLEASE CALL (213) 893-0322 IF YOU DO NOT KNOW YOUR PRODUCTIVITY MANAGER'S NAME)</small> Steven Hernandez, Administrative Deputy	DATE 7/9/13	TELEPHONE NUMBER 213-974-3123
		EMAIL shernandez@assessor.lacounty.gov

DEPARTMENT HEAD'S NAME AND SIGNATURE Santos Kreimann, Chief Deputy Assessor	DATE 7/9/2013	TELEPHONE NUMBER 213-974-3101
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FACT SHEET – LIMITED TO 3 PAGES ONLY: Describe the **Challenge, Solution, and Benefits** of the project, written in plain language. Include a discussion of the technology and linkage to the County Strategic Plan. The description should identify Performance Measures.

CHALLENGE

SOLUTION

BENEFITS

LINKAGE TO THE COUNTY STRATEGIC PLAN (DETAIL IS REQUIRED FOR COUNTY DEPARTMENTS):

CHALLENGE

The Assessment Appeals Board is a broad point of contact between the Assessor and Taxpayers. In this area, it is essential that the Department exercise its mandate to fairly and transparently value real and personal property for property tax purposes. Historically, Assessor management has not monitored or systematically tracked assessment appeals case activity. This oversight was initially remedied by tasking support staff with entering the pertinent information into an Excel spreadsheet. After a thorough review a single report could be generated, the Daily Agenda Report (DAR). Due to the large amount of information emanating from approximately 1,200 cases scheduled for hearing each month, 11.5 months of the year, existing staff could not timely or accurately record the daily case activity using an Excel based system. No additional employee resources were available to apply to this new data collection and reporting requirement. Further, the system was not flexible enough to provide the level of analysis desired by Assessor management.

SOLUTION

In 2012, in consultation with data entry clerical, appraisal staff designed a Microsoft Access-based program. The new program embodies **County Strategic Plan goal #1** to "maximize the effectiveness of processes, structure, and operation to support timely delivery of customer-oriented and efficient public services"

The program was designed to prefill the information known prior to the hearing, thus reducing the number of keystrokes and potential for errors. Staff would then enter the hearing results into data entry screens. Mistakes were further eliminated at the data entry stage by using "drop down boxes" and lists, which limited the number and type of entries accepted for recordation. Interactive "pop-up" screens were also inserted to test the veracity of an entry which fell outside the parameters of the database design.

All the data entered is captured in the Access database environment, making it possible to query the system for information about particular cases, applicants, or assessor

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appraisers. Analysis by property type, valuation level or geographic area can also be performed, which addresses the reporting needs of several management levels.

BENEFITS

Fewer keystrokes to record the activities in the AAB hearing room translates into reports prepared more quickly, which then can be distributed timely. The dramatic reduction in data entry errors led to a large reduction in the time necessary to review and correct the semi-monthly DAR prepared for management, adding to the labor cost savings to the department. The previous system required an average of 111 hours, at a labor cost of \$2,683 to produce a single DAR. Utilizing the Access-based program, staff was able to produce an equivalent report in 34 hours and \$832 in cost to the Department.

As noted above, the flexibility of the DAR database system promotes improved information flow from the appraisal level to the executive management level through its ability to generate specific, relevant reports which are responsive to the needs of management.

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COST AVOIDANCE, COST SAVINGS, AND REVENUE GENERATED (ESTIMATED BENEFIT): If you are claiming cost benefits, include a calculation on this page. You must include an explanation of the County cost savings, cost avoidance or new revenue that matches the numbers in the box. Remember to keep your supporting documentation.

Cost Avoidance: Costs that are eliminated or not incurred as a result of program outcomes.

Cost Savings: A reduction or lessening of expenditures as a result of program outcomes.

Revenue: Increases in existing revenue streams or new revenue sources to the County as a result of program outcomes.

(1) ACTUAL/ESTIMATED ANNUAL COST AVOIDANCE	(2) ACTUAL/ESTIMATED ANNUAL COST SAVINGS	(3) ACTUAL/ESTIMATED ANNUAL REVENUE	(1) + (2) + (3) TOTAL ANNUAL ACTUAL/ESTIMATED BENEFIT	SERVICE ENHANCEMENT PROJECT
\$	\$46,275	\$	\$ 46,275	<input type="checkbox"/>

ANNUAL= 25 Reporting periods/year

	Hrs/report	Job Classification	labor rate/hour	Cost/ report	Annual reporting cost (25/year)
Data Entry					
Excel system	96	Senior Clerk	23.27	\$ 2,234	\$ 55,850
Access database	32	Senior Clerk	23.27	\$ 745	\$ 18,625
Review					
Excel system	5	Secretary/Chief	43.20	\$ 216	\$ 5,400
Access database	1.5	Appraiser Specialist/Principal Appraiser	42.90	\$ 64	\$ 1,600
Correction					
Excel system	10	Senior Clerk	23.27	\$ 233	\$ 5,825
Access database	0.5	Appraiser Specialist	45.51	\$ 23	\$ 575
Total cost/year					
Excel system	111			\$ 2,683	\$ 67,075
Access database	34			\$ 832	\$ 20,800
Cost Savings					\$ 46,275