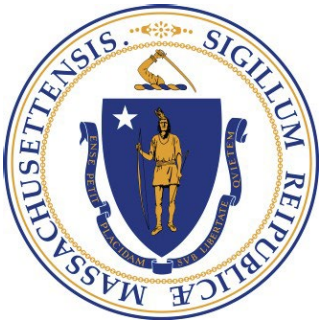


# Commonwealth of Massachusetts



Supporting a Commonwealth of Communities

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*March 22 2023*

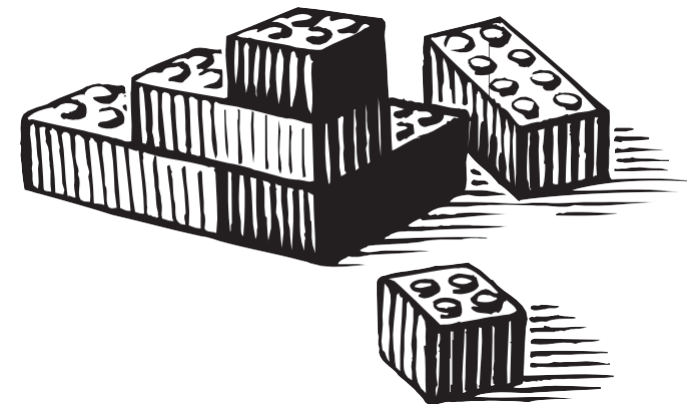
## Measure and List Let's Get Out There!!!

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“The collection and maintenance of current and accurate property inventory data is a critical element in the development of uniform and equitable market values.”

(MA Department of Revenue –Certification Standards)





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## **Certification Standards IGR 19-08**

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- ❖ Types of Inspections
- ❖ Ten Year Cycle
- ❖ Visit History Reports
- ❖ Data Collection Manual
- ❖ Digital Imaging Technology
- ❖ Field Work

[https://www.mass.gov/files/documents/2019/04/26/igr2019-8\\_0.pdf](https://www.mass.gov/files/documents/2019/04/26/igr2019-8_0.pdf)



## Types of Inspections

- Cyclical Inspections
- Sales
- Building Permits
- Abatements



A large, stylized red clock face with white tick marks and a white number '10' in the center, set against a dark red background with a subtle light flare.

- Certification Standards: page 4
- The presence of a systematic program to inspect all properties in addition to those that have sold or for which building permits have been issued.
- “The BLA requires that a periodic data inspection program provide for the inspection of each parcel at least once every **TEN YEARS**. An inspection of the property should be a full measure and listing of the exterior and a concerted effort demonstrated for interior inspections. All condo units must be included in the ten-year cyclical program. It is recommended that this being on ongoing program to ensure current accurate data to be used in the valuation process and to spread out the data collection cost.”

# Cyclical Inspections continued

The inspection program needs to include all parcels.

- Residential
- Commercial
- Chapter Land
- Exempt
- Vacant land



Best practices would be to send out cyclical mailers informing taxpayers of intent to visit the property prior to visit.



# Cyclical Inspections continued

- Certification Standards: page 4
  - “The collection of property data can be the most costly part of the revaluation process. Unless such data is regularly maintained, a community will inevitably face the requirement of an expensive community-wide data recollection effort in order to provide uniform assessments and meet certification requirements.”
  - Estimating yearly number of inspections:
    - # of parcels / Years (10) = Inspections per year
    - # Inspections per year / # working days = Inspections per day  
(4 days per week for 40 weeks per year =160 days)
- Ex: 8,000/10=800 per year  
800/160 =5 per day



## Sales Inspections and Review

- Inspection: All sales properties should have a full measure and list shortly after the sale to ensure proper analysis of market data utilized in the mass appraisal process.
- Sales Questionnaires: Should be sent to new property owners asking them for details about the sale and if any special circumstances were present.
- MLS: Great reference source to view interiors, extra features, condition of sale, info on anything being sold with property, etc.







# Building Permit Inspections

A cyclical inspection should be combined with the building permit inspection to maximize efficiency when ever possible.

Inspections of permits are essential for capturing “New Growth”.

All permits should be added to the Property Record Card.



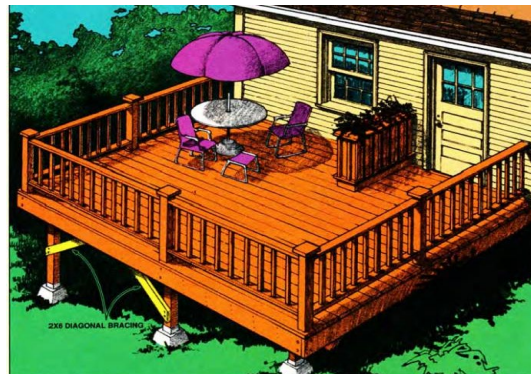


# Building Permit Inspections continued

Develop a good working relationship with your Building Department.

*M.G.L Chapter 143 Section 61: Notice to assessors of building permits*

*Section 61. The local inspector in every city and town shall give to the assessors thereof written notice of the granting by him of permits for the construction of any building in such city or town or for any substantial alteration or addition thereto. Such notice shall be given **within seven days** after the granting of each permit and shall state the name of the person to whom the permit was granted and the location of the building to be constructed or altered or to which an addition is to be made.*





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# Building Permit Inspections continued

Assessment Administration: Law, Procedures and Valuation  
Mass Appraisal Chapter 2

Rev 01/22

## **4.4 New Construction Data**

Assessors must collect data on properties that have had new construction, alterations or demolitions each year and update their property inventory records to reflect the physical status of each parcel as of January 1, or June 30 if the municipality has accepted a local option reflecting the physical status of real property as of June 30 assessed on January 1.

### **4.4.1 Building Permits**

Assessors should make arrangements to receive copies of all building and demolition permits issued in the municipality so they can identify and collect the following construction data:

- New structures
- Additions to existing structures
- Renovations and other remodeling

### **4.4.2 Partial Construction Valuation**

Assessors must determine the percentage of completion of any new construction on the status date. That percentage is applied to the estimated value of the structure as completed. That amount is then added to the land value to determine the property's valuation for the year.



# Abatement Inspections

All abatements should have a full interior and exterior inspection of the entire property to ensure the data is correct.

- Review application for abatement reason prior to inspection
- Make an appointment for inspection
- Inspect all areas of the house
- Make note of any corrections on the PRC



# Denied



## Visit History Reporting

Visit History reports should be run to determine the number of cyclical, sales or permit inspections needed.

Keeping an accurate and updated visit history saves time and money. Use this module **only** for qualifying inspections. (not to track I&E's etc.)

- Enter all visits in **Visit History** module as soon as possible, use the date inspected not the date entered in the CAMA
- Enter photos, the front of the house should be the prime.
- Close any permits in Permit module



# Visit History Reporting continued

Visit History or Last Inspected Report format

MBLU	Street #	Street	Use Code	Inspection Date	Initials	Inspection Type	Inspection Code Description
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Inspection types:

- Full measure and list
- Measure exterior
- Measure w/ info at the door
- Field review
- Refusal

A copy of a current Visit History Report must be submitted to the DOR for 3<sup>rd</sup> Year check-in and Certification communities.

This report needs to show every parcel, including parcels with no visit dates.

Example: If you have 2,606 the report should show a visit for all 2,606 parcels.



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# Data Collection Manual

- Certification Standards: page 3

A comprehensive data collection manual is essential to ensure that property data is collected and recorded in a *consistent* manner. The data collection manual should contain a set criteria used to identify building styles and story heights applied in the community. Any subjective data such as quality of construction (grade), condition, application of the depreciation and any applicable views should be clearly defined and illustrated in the data collection manual. This manual must be retained in the assessors' office and adhered to by all assessing and data collection personnel. A copy should be presented to the field advisor upon request or during the certification review process.

Do you have one in the office?

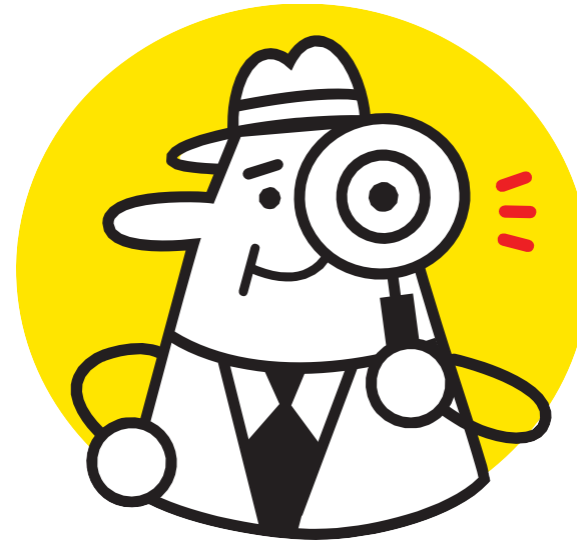
Is it up-to-date?

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# Data Collection Manual Cont.

## Table of Contents

- Introduction
- Collection Procedures
- Types of Inspections
- Data Collection
- Land Valuation
- Construction Detail
- Measuring & Sketching
- Condominiums
- Commercial Data Collection
- *Digital Imaging*

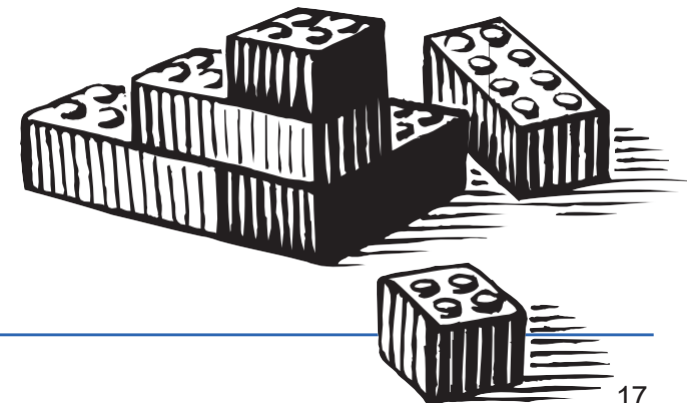






# Data Collection Manual Cont.

- The initial phase of any mass appraisal program is the data collection of the real property inventory data. **Your data is the foundation.**
- The Data Collector is the most visible member of the appraisal process to the general public. It is extremely important that the data collector possesses a complete understanding of what data needs to be collected and how best to collect it.
- The assessor should accurately measure to the nearest foot all improvements and prepare a complete outline sketch of the property noting all dimensions, story heights, additions, porches, and other attributes which contribute to value on the property record card (PRC) in accordance with the data collection manual. *Certification Standards: page 4*





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# Supplemental Digital Imaging Technology

- Certification Standards: page 3

Assessors may wish to consider employing digital imaging technology programs to **supplement not replace** the data collection activities in the field.

These programs allow assessors to perform computer assisted office review using orthophotography, oblique, and street level imagery.

Best practices to review large parcels, chapterland, and vacant lots.

Jennifer Williams, BLA Certification Advisor, gave a presentation on Digital Imagery. *“What Could the Future of Inspections Look Like”*



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# Field Work: Preparation

1. Send mailers to all cyclical inspections at least a week in advance.  
No surprise, owners know we are coming.

2. Make sure you have all equipment needed for inspections

- Photo ID
- Reflective vest/jacket
- Business cards
- Clip Board
- Pencils
- Camera
- Field cards, maps
- Door hangers
- Laser, Tape measure, Measure wheel



3. Organize your fields cards in visit order, try to consolidate to a specific area to maximize your time and efficiency.

4. Notify local police where you will be and the vehicle description especially if you have a vendor in the field.



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## Field Work: “Let’s get out There!”

- Drive to the property, park on the street in front (when safe to do so)
- Review field card before getting out. check style, story height, roof covering, siding, foundation type, chimney stacks, etc. Note any differences.
- Take front photo of house, preferably side angle of house, as soon as you get out of vehicle.

**NOTE: Interior Inspections require an adult over the age of 18 to be present!!**





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## Field Work cont.

- Approach the house using the front walkway, go to the front door. Knock or ring doorbell, step away from the door.
  - a. If home: Introduce your self and explain the purpose of your visit to owner, ask if you can do an interior inspection to verify data.
  - b. not home: Place a door tag with date/time/reason for visit and your name. Measure and take photos of the exterior.
- If they refuse, ask if they are willing to verify the interior data and ask detailed questions, sometimes they will just show you.
- Ask permission to measure the outside and take pictures, generally at least one front and rear.



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# Field Work: Interior Inspections

- Respect their home, ask if they would like you to remove your shoes.
- Ask the homeowner to lead the tour. As you walk thru make note of:
  - # rooms, bedrooms, bathrooms (including # fixtures/bath)
  - Floor covering
  - Wall type (drywall, plaster, tile)
  - Heating type and fuel
  - Kitchen and baths last updated
  - Central air or mini splits
  - Basement area finished (square feet)
  - Is attic finished? Is it accessible by a fixed stairway or PDAS?
  - Ceiling heights, vaulted, cathedral
  - Moldings, custom paneling, built-ins, etc.
  - Condition overall





# Field Work: Exterior Inspections

Note to self.. Measure Twice Cut Once!!!

- Measure the **entire** building. Always start your measurements from the same place (eg. right front corner) so that your measurements are consistent from one house to another.
- Measure and take photos of all outbuildings: sheds, pools, patios, tennis courts, canopies, decks, etc.
- Take photos of rear and roof lines. You can never take too many photos.
- Walk around the entire building to make sure you see everything. Check each section of the building for basement area, story heights, etc.
- Measure everything accurately. Verify your sketch closes.





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## Field Work: Verify all Data

- Once inspection complete and back in the car. Review all data on field card before leaving to next inspection making sure you have all the information you need.
- Verify building closes with the measurements taken.
- Write in visit history date/time and type of inspection.
- Make note of the photo numbers taken.
- Add any comments or pertinent information about the property.







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# Condition

“The maintenance and care given to the house.”

**New Construction is always AVERAGE condition!**

Very Poor - No maintenance in years – almost beyond repair or uninhabitable

Poor - In need of repair

Fair – Has deferred maintenance, in need of up-dating or repairs

Average – Having received normal maintenance

Good – Having received better than normal maintenance or renovations

Very Good – Interior and/or exterior renovations

Excellent – Extensive interior and exterior renovations restoring property to original condition or better



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# Grade

“Quality of construction for the year built.”  
It is what it is!!

- Below Average - Low quality are of low-cost construction and meet minimum building code requirements. Ex: camps or Bungalows
- Average +/- - Usually mass produced and will meet or exceed the minimum construction requirements. Ex. Neighborhood of ranches or small colonials
- Good +/- - May be mass produced in above-average residential developments, exceeds the minimum construction requirements, some attention is given to architectural design and finishes.
- Excellent - High quality of workmanship, finishes and considerable attention to detail. Usually individual designed.
- Superb - Superb quality of workmanship, finishes and custom .



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# Sample New Construction % Complete

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	ITEM % OF TOTAL	CUMULATIVE %
Foundation	5%	5%
Decked	5%	10%
Framed & Boarded-in	15%	25%
Roof shingled	5%	30%
Exterior siding	5%	35%
Chimney & Brick work	5%	40%
Weather tight doors & windows	5%	45%
Rough plumbing & heating	5%	50%
Wiring & Insulation	5%	55%
Sheet Rocked	5%	60%
Finished Plaster	5%	65%
Finished floors & Trim	10%	75%
Finished plumbing	5%	80%
Finished Heat	5%	85%
Kitchen Cabinets & Appliances	5%	90%
Finished paint Int. & Ext.	5%	95%
Ext. Walks & Stairways	5%	100%



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## Summary

- Your data is the critical element in the development of uniform and equitable market values.
- All properties must be inspected at least once every **TEN YEARS**.
- Nothing can take the place of an in-person inspections.
- All sales should have a full measure and list.
- The Cyclical Inspection program should be ongoing to have accurate data and avoid costly community-wide data recollection to meet certification requirements.
- Keep visit history records up to date.