

Annual Valuation Conversion Work Plan

The “County Conversion Work Plan” is a tool for identifying, tracking and managing the detailed steps for converting from cyclical valuations to annual valuations. It is free to Washington Counties from the DOR and based on Excel.

As a starting point for planning your conversion it contains over 100 common steps or tasks and the likely timeframe for each of those steps. These can be added to or modified for a county’s specific challenges. It provides for a listing of tasks, for tracking of task assignments, percentage complete and status, for multiple filter options and for two different formats of timelines.

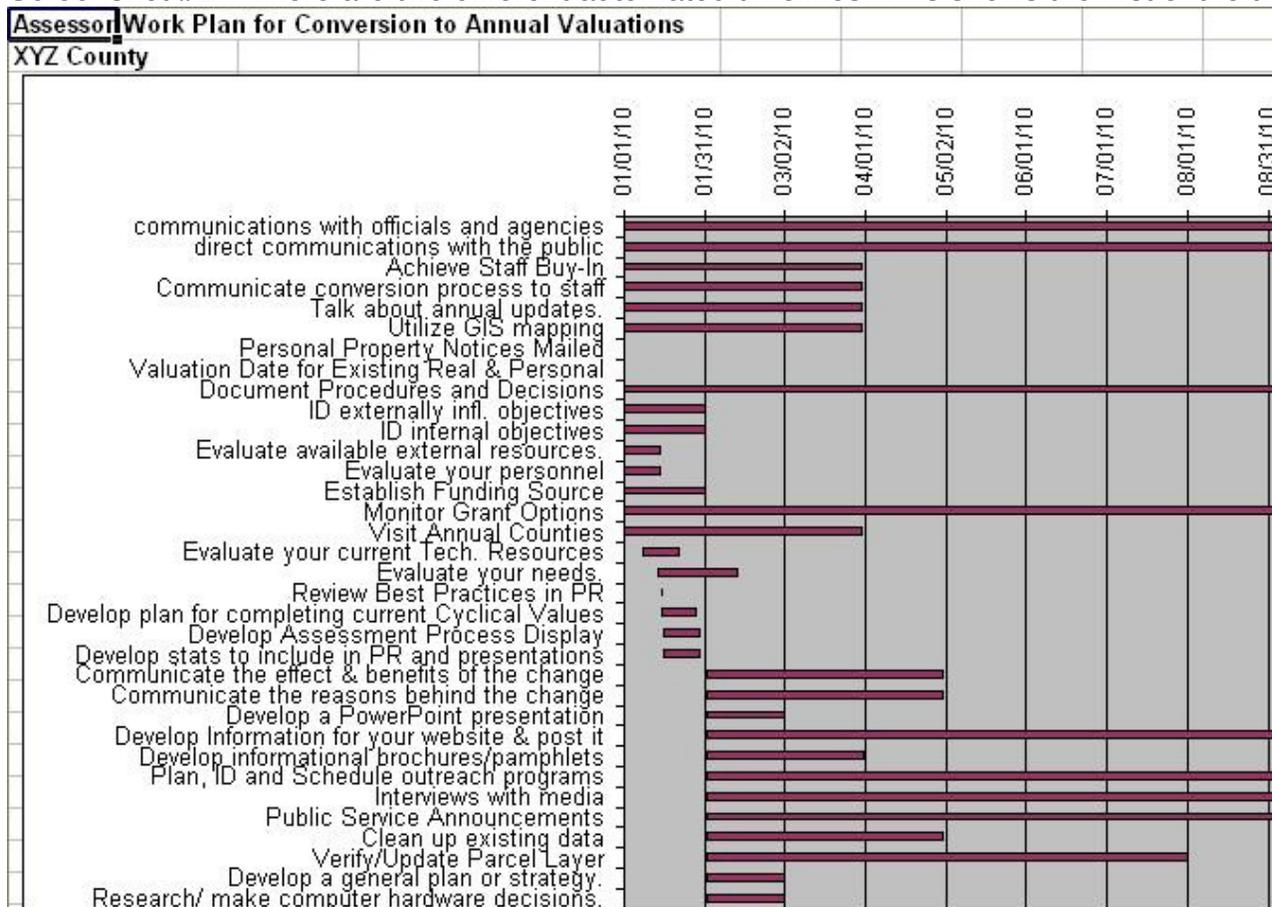
It also allows for the identification of key tasks the management needs to track more closely and for producing a list and timeline just for those key tasks.

Screenshot #1 – This shows the primary task view. There is automated filtering for viewing particular categories, focus areas, tasks of a particular status, tasks assigned to particular staff and other options. To the right of the Notations column but not shown in the screenshot is a column with additional detail and explanation for some of the tasks.

Assessor Work Plan for Conversion to Annual Valuations														Up
Update Colors		XYZ County			Project Dates:		01/01/10	12/31/11						
Column J ("A/S") - A = Admin (Assessor, Deputy, Chief Appraiser); S = Staff; B = Both														
Order	Ref	Category	FocusArea	Task	StartDate	EndDate	Duration	% Comp	Status	A/S	Assign	Notations		
1	347	Implementation	Administration	Document Procedures and Decisions	01/01/10	12/31/11	730			B	All	See Detail		
2	501	Planning	1- Objectives Identification	ID internal objectives	01/01/10	01/31/10	31			A				
3	502	Planning	1- Objectives Identification	ID externally infl. objectives	01/01/10	01/31/10	31					See Detail		
4	535	Planning	Funding	Establish Funding Source	01/01/10	01/31/10	31							
5	536	Planning	Funding	Monitor Grant Options	01/01/10	12/31/11	730					See Detail		
6	505	Planning	2- Status Analysis	Evaluate your personnel	01/01/10	01/14/10	14					See Detail		
7	503	Planning	2- Status Analysis	Evaluate available external resources.	01/01/10	01/14/10	14					See Detail		
8	531	Planning	Research	Visit Annual Counties	01/01/10	03/31/10	90					See Detail		
9	614	Communications	Staff Relations	Talk about annual updates.	01/01/10	03/31/10	90					See Detail		
10	613	Communications	Staff Relations	Communicate conversion process to staff	01/01/10	03/31/10	90					See Detail		
11	615	Communications	Staff Relations	Utilize GIS mapping	01/01/10	03/31/10	90					See Detail		
12	616	Communications	Staff Relations	Achieve Staff Buy-In	01/01/10	03/31/10	90					See Detail		
13	609	Communications	Govt Relations	communications with officials and agencies	01/01/10	12/31/11	730					See Detail		
14	610	Communications	Public Relations	direct communications with the public	01/01/10	12/31/11	730							
15	504	Planning	2- Status Analysis	Evaluate your current Tech. Resources	01/08/10	01/21/10	14					See Detail		
16	506	Planning	3- Needs Analysis	Evaluate your needs.	01/14/10	02/12/10	30					See Detail		

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Screenshot #2 – There are two different automated timelines. This shows the first of the two.



Screenshot #3 – This shows the second automated timeline.

