

100-Day Plan Results

Cook County Assessor's Office
April 2019



CCAO Guiding Principles

FAIRNESS

Deliver accurate and uniform assessments, with timely and informative notices, in compliance with industry standards, and guided by best practices.

TRANSPARENCY

Build transparency into every part of the office – making services more effective and efficient – and earn the public’s trust.

ETHICS

Create an office culture of professionalism, inclusion, and public accountability, with engaged employees who take pride in the delivery of high-quality services, accessible for all.

CCAO 100-Day Objectives

1. Ensure seamless continuity of service to the public
2. Develop CCAO's strategic plan
3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent
4. Improve CCAO's assessment methodologies, workflow, and processes
5. Update CCAO's information technology infrastructure
6. Overhaul CCAO's approach to communications, outreach, and transparency

CCAO 100-Day Plan

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100-Day Objectives

1. Ensure seamless continuity of service to the public

- 1A. Chicago Triad Completion
- 1B. North Triad Assessment
- 1C. Tax Year Calendar

2. Develop CCAO’s strategic plan

- 2A. Mission, Vision and Values
- 2B. 1-Year Operating Plan
- 2C. Strategic Plan
- 2D. IAAO Audit
- 2E. Market Research
- 2F. Employee Feedback
- 2G. Fritz Tour

3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent

- 3A. Day-1 Leadership
- 3B. Leadership Training
- 3C. Commitment to Ethics
- 3D. New Ethical Professional Standards
- 3E. IAAO Classes
- 3F. New Organization

4. Improve CCAO’s assessment methodologies, workflow, and processes

- 4A. Commercial Sales Ratio Study
- 4B. Data Modernization Law
- 4C. Next-Gen Residential Framework
- 4D. Data Architecture
- 4E. QA Process
- 4F. Hand Review Best Practices

5. Update CCAO’s information technology infrastructure

- 5A. Website Redesign
- 5B. Legacy Systems
- 5C. Tablets Pilot
- 5D. Tyler Implementation
- 5E. Security Audit

6. Overhaul CCAO’s approach to communications, outreach, and transparency

- 6A. 100-Day Progress Reports
- 6B. Publish North Triad Framework
- 6C. Publish Sales Ratios
- 6D. Community Outreach
- 6E. Online Historical Data
- 6F. Content and Audience Strategy

100-Day Initiatives

CCAO 100-Day Plan Results



100-Day Objectives	1. Ensure seamless continuity of service to the public	2. Develop CCAO's strategic plan	3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent	4. Improve CCAO's assessment methodologies, workflow, and processes	5. Update CCAO's information technology infrastructure	6. Overhaul CCAO's approach to communications, outreach, and transparency
100-Day Initiatives	1A. Chicago Triad Completion	2A. Mission, Vision and Values	3A. Day-1 Leadership	4A. Commercial Sales Ratio Study	5A. Website Redesign	6A. 100-Day Progress Reports
	1B. North Triad Reassessment	2B. 1-Year Operating Plan	3B. Leadership Training	4B. Data Modernization Law	5B. Legacy Systems	6B. Publish North Triad Framework
	1C. Tax Year Calendar	2C. Strategic Plan	3C. Commitment to Ethics	4C. Next-Gen Residential Framework	5C. Tablets Pilot	6C. Publish Sales Ratios
		2D. IAAO Audit	3D. New Ethical Professional Standards	4D. Data Architecture	5D. Tyler Implementation	6D. Community Outreach
		2E. Market Research	3E. IAAO Classes	4E. QA Process	5E. Security Audit	6E. Online historical data
		2F. Employee Feedback	3F. New Organization	4F. Hand Review Best Practices		6F. Content and Audience Strategy
		2G. Listening Tour				

CCAO 100-Day Initiative:


1A. Chicago Triad Completion

 Fully Delivered

100-Day Objective 1. Ensure seamless continuity of service to the public		Department(s) Valuations
Initiative Name 1A. Chicago Triad Completion	Description Complete all work related to the Chicago Triad	Impact: High Difficulty: Low Priority: B
100-Day Achievements <ul style="list-style-type: none"> The Cook County Assessor’s Office (CCAO) has completed all outstanding work for the 2018 Assessment Year, with some Certificates of Error still outstanding. The CCAO has documented and reviewed the office’s procedures on AR (Assessor Recommendations), C of C’s (Certificates of Correction), C of E’s (Certificates of Error), and re-review. Changes to some of these processes are reflected in the new rules for lawyers, tax representatives and practitioners doing business with the CCAO. In response to an issue raised about the Class 9 Incentive, the CCAO undertook a project to determine the number of properties that qualified for the Class 9 Incentive in the 2018 Assessment Year, contacted each property owner, and informed them of any missing or outstanding documentation that must be submitted to our office. The CCAO determined that the 2018 population of Class 9 is 758 properties and has been working to follow up with each property owner to reinstate them back into Class 9 after the documentation was submitted and approved, and informed them that they might be eligible for past year Certificates of Error. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO has identified a long-term project to improve how new construction and demolition are captured by our office. The CCAO has identified a long-term project to improve the valuation policy for low income housing throughout the County.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

1B. North Triad Reassessment



Fully Delivered

100-Day Objective 1. Ensure seamless continuity of service to the public		Department(s) Valuations
Initiative Name 1B. North Triad Reassessment	Description Deliver on-time 2019 reassessment of North Triad	Impact: High Difficulty: Medium/High Priority: B
100-Day Achievements <ul style="list-style-type: none"> The CCAO began the 2019 reassessment of the North Triad by separating out the modeling functions of the office into a new Data and Modeling Department. The Data and Modeling department has built, tested, and deployed a new residential modeling process that has been used by the Valuations Department to deliver high quality, on-time assessments for the first three townships in the North Triad. The Valuations and Legal Departments have written and released new rules for lawyers, tax representatives and practitioners doing business with the CCAO. The Valuations, Data, and Communications Departments have released residential and Industrial Commercial (I/C) reports for each township completed in the North Triad. The Commercial Valuations Department has improved the process for valuing income producing properties by employing property use type models, market based research on capitalization rates, and utilizing industry standard valuation practices for rents, vacancies, and expenses. The CCAO has begun to implement a staffing plan for the Valuations Department. The CCAO continues to work with the International Association of Assessing Officers (IAAO) on an audit of the office's operations (see initiative 2D). The second phase of the audit will include ongoing consultation with experts in valuations and assessment. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The Data and Modeling Department will soon begin work on the I/C modeling process. The Valuations, Legal, and IT Departments have begun to scope a long-term project to implement online filing of forms, starting with the Real Estate Income and Expense Worksheet (RPIE) form in 2019. The CCAO plans to release further reports at the end of the triennial cycle (late 2019) with the models, code, and accompanying documentation used in the North Triad assessment. The CCAO has made changes to the notices taxpayers receive, and will continue to make improvements. The Valuations Department has begun to restructure the Special Properties Division to reevaluate which properties fall into this division, and implement industry's best practices. The CCAO is working to expand the information given to those who appeal, beyond a simple approval or denial.



Fully Delivered



Partially Delivered



Work to Do

CCAO 100-Day Initiative:


1C. Tax Year Calendar

 Fully Delivered

100-Day Objective 1. Ensure seamless continuity of service to the public		Department(s) Valuations
Initiative Name 1C. Tax Year Calendar	Description Work with other property tax offices to set 2019 Assessment Calendar and 2018 Property Tax bill Timeline	Impact: Low Difficulty: Low Priority: A
100-Day Achievements <ul style="list-style-type: none"> The CCAO has collaborated with the Board of Review to set the 2019 Assessment Year calendar for the North Triad. The CCAO has made changes to the 2019 Assessment Year Calendar posted on its website, increasing the clarity and transparency around important filing and appeal deadlines. The CCAO has attended regular meetings with the offices of the Cook County Board President, the Cook County Clerk, the Cook County Treasurer, and the Board of Review to determine the calendar for the 2018 Tax Year, to ensure that deadlines are met and the offices work collaboratively to deliver timely tax bills. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO plans to continue these collaborations every year.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


2A. Mission, Vision and Values

 Partially Delivered

100-Day Objective 2. Develop CCAO's strategic plan		Department(s) All
Initiative Name 2A. Mission, Vision and Values	Description Define new CCAO mission, vision and values	
100-Day Achievements <ul style="list-style-type: none"> The CCAO operates from a set of three core values: <ul style="list-style-type: none"> <i>FAIRNESS: Deliver accurate and uniform assessments, with timely and informative notices, in compliance with industry standards and guided by best practices.</i> <i>TRANSPARENCY: Build transparency into every part of the office—making services more effective and efficient—and earn the public's trust.</i> <i>ETHICS: Create an office culture of professionalism, inclusion and public accountability, with engaged employees who take pride in the delivery of high-quality, accessible services for all.</i> The CCAO is in the process of developing full mission and vision statements to help guide the strategic planning of this office, and communicate to the public what it is the Assessor's office does, and what drives our work. The CCAO has consulted with Assessors at our peer offices across the country, including the Los Angeles County Office of the Assessor and the City of Milwaukee Assessor's Office, on their processes for developing a mission, vision, and values statement and broader strategic planning. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The mission and vision statements are in the drafting phase. The next step is to workshop these drafts with a small group of CCAO employees representing all parts of the office, then sharing the drafts for a final round of feedback and edits from the entire office. We expect to complete this project in spring 2019.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


2B. 1-Year Operating Plan

 Fully Delivered

100-Day Objective 2. Develop CCAO's Strategic Plan		Department(s) Administrative Operations
Initiative Name 2B. 1-Year Operating Plan	Description Finalize one-year operating plan and budget	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has completed its budget for 2019 through a process that began with a series of listening sessions conducted with Administrative Operations and each department. Out of these sessions (Initiative 2F), each department formulated a series of budget asks and completed a new budget template. The Administrative Operations Department is using these budget templates, standard across the office, to prepare for both the 2019 and 2020 budgets in the Spring of 2019, on schedule. The most significant changes to operations have occurred in the Valuations Department. Previously, valuations-related processes fell under the responsibility of three Deputy Assessors. Consolidating all such processes under one Deputy Assessor has provided for better continuity of service and consistency of assessment methodology. The CCAO continues to evaluate the training needs of the office and how to streamline work across different departments, units, and divisions. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> Looking ahead to the 2020 budget and operating plan, the CCAO is preparing for the implementation of iasWorld (Tyler Technologies' CAMA system). This will affect the entire office with regards to staffing needs, training, workflow, and budgets.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


2C. Strategic Plan

 Fully Delivered

100-Day Objective 2. Develop CCAO's Strategic Plan		Department(s) Administrative Operations
Initiative Name 2C. Strategic Plan	Description Initiate three-year Strategic Plan development	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has worked to assemble its fact base from: <ul style="list-style-type: none"> Strategic plans and transition plans from exemplary Assessor's Offices in our peer counties, such as Los Angeles Market research findings (initiative 2E) IAAO audit (initiative 2D) Employee feedback (initiative 2F) Many of these initiatives are complete or near complete. The CCAO visited the Los Angeles County Office of the Assessor in March of 2019. The CCAO has completed its initial round of employee feedback, and both the market research and IAAO audit are due to be complete in spring 2019. From this fact base, the CCAO has begun to identify its core strategic initiatives: <ul style="list-style-type: none"> Improving maintaining quality data; Enhancing valuation methods and techniques; Sustaining agile technology in office operations; Increasing professional and technical training of staff; and Obtaining additional highly technical staff to enhance operations. The CCAO will continue to develop its three-year strategic plan around these initiatives. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO is preparing for the implementation of iasWorld (Tyler Technologies' CAMA system). This will affect the entire office with regards to staffing needs, training, workflow, and budgets. Until implementation is complete, much remains unknown about the implications.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


2D. IAAO Audit

 Fully Delivered

100-Day Objective 2. Develop CCAO's Strategic Plan		Department(s) All
Initiative Name 2D. IAAO Audit	Description Implement International Association of Assessing Officers audit	
100-Day Achievements <ul style="list-style-type: none"> Through a generous grant from the MacArthur Foundation, the CCAO in partnership with the Civic Consulting Alliance has engaged the International Association of Assessing Officers (IAAO) to complete a practices and procedures audit. Phase I of the audit is nearly complete. The CCAO completed a detailed questionnaire and three-day onsite visit with the IAAO consulting team in order to provide a current snapshot of the office's practices, procedures, and performance against the IAAO's standards. The IAAO is preparing a report on their findings to be released in spring 2019. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO will continue to work with the IAAO on Phase II of the audit through the remainder of 2019.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

2E. Market Research

 Fully Delivered

100-Day Objective 2. Develop CCAO's Strategic Plan		Initiative Owner Valuation Directors
Initiative Name 2E. Market Research	Description Conduct external market research to better understand our constituencies' needs	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has partnered with the Civic Consulting Alliance (CCA) to conduct a qualitative market research study on the commercial real estate industry in Cook County. CCA consultants have developed a set of interview questions on commercial real estate participants' experience with the assessment system and have conducted in-depth interviews with real estate participants, representing diverse segments of the market (commercial, industrial, and multifamily, owners, operators, lenders, etc.). A final report from the CCA with anonymized and synthesized interviews is on schedule to be completed in spring 2019. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO has partnered with Northwestern University Kellogg School of Management to conduct a quantitative survey on the experience of taxpayers with the residential assessment system, to be completed in summer 2019.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


2F. Employee Feedback

 Fully Delivered

100-Day Objective 2. Develop CCAO's Strategic Plan		Department(s) Administrative Operations
Initiative Name 2F. Employee Feedback	Description Conduct internal CCAO focus groups and surveys to better understand our employees' needs and aspirations	
100-Day Achievements <ul style="list-style-type: none"> • The CCAO has created a number of avenues to receive, evaluate, and respond to employee feedback. • The CCAO held a town hall meeting with all employees Assessor Kaegi's second week in office, and plans to hold quarterly town hall meetings, to take questions and hear concerns directly from employees. • The CCAO held listening sessions with each department, as well as over 200 individual listening sessions, which were confidential to HR. • The CCAO has rolled out an internal, online suggestion box where employees can anonymously submit feedback to the Assessor. The CCAO has formed a small committee of seven employees, representing each department, who will begin to implement these suggestions submitted by fellow employees. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> • The CCAO is working to coordinate all of this feedback into an internal report and plans to have an office-wide engagement survey later in 2019.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

2G. Fritz Tour

 Fully Delivered

100-Day Objective 2. Develop CCAO's strategic plan		Departments Communications
Initiative Name 2G. Listening Tour	Description Implement CCAO listening tour of Cook County by Assessor Kaegi	Impact: Medium Difficulty: Low Priority: A
100-Day Achievements <ul style="list-style-type: none"> The CCAO has begun a listening tour of Cook County, with stops planned in April, May, and June in all 17 Cook County Commissioner districts. We have held five tours so far. Each event on the tour includes a presentation from the Assessor on property tax 101, a moderated Q&A with a local community leader, and open Q&A with the audience. CCAO staff and staff from the Commissioners offices will be accepting appeals forms and are available to assist taxpayers with questions before and after each event. Simultaneous translation will be available at certain April events in Hindi, Polish, Spanish, Korean, with more languages, captioning, and ASL available at future events in May and June. 		100-Day Shortfalls and Ongoing Projects

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


3A. Day-1 Leadership

 Fully Delivered

100-Day Objective 3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent		Department(s) Administrative Operations
Initiative Name 3A. Day-1 Leadership	Description Implement Day One leadership structure	
100-Day Achievements <ul style="list-style-type: none"> • The CCAO has recruited and hired its leadership team with just two positions still open in the Communications and Data Departments. • The CCAO has completed an interim reorganization of its departments, removing operational silos and moving all valuations-related operations under the management of the Deputy Assessor—Chief Valuations Officer. 		100-Day Shortfalls and Ongoing Projects

 Fully Delivered

 Partially Delivered


 Work to Do

CCAO 100-Day Initiative:


3B. Leadership Training

 Partially Delivered

100-Day Objective 3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent.		Department(s) All
Initiative Name 3B. Leadership Training	Description Complete leadership training for staff	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has identified funding and a vendor for leadership training for the Assessor's team, to be completed in May 2019. The CCAO has also completed scoping and planning for management training across the office, for managers, assistant managers, deputies, and directors. 		100-Day Shortfalls and Ongoing Projects

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


3C. Commitment to Ethics

 Fully Delivered

100-Day Objective 3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent		Department(s) Legal
Initiative Name 3C. Commitment to Ethics	Description Create and adopt an ethics code for all CCAO employees	
100-Day Achievements <ul style="list-style-type: none"> On day one in office, Assessor Kaegi issued an executive order, amended in February of 2019 aimed at increasing professionalism, transparency, and public trust in the office, as well as eliminating conflicts of interest. The CCAO has continued to release a public visitor's log each month. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> In keeping with Section 12 of the ethics order, the CCAO has completed a revision of its discrimination, harassment, and sexual harassment policy. All CCAO employees will complete a training in this policy in spring 2019.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


3D. New Ethical Professional Standards

 Fully Delivered

100-Day Objective 3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent		Initiative Owner Legal
Initiative Name 3D. New Ethical Professional Standards	Description Develop new professional standards based on comprehensive review of CCAO practices	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has adopted a number of changes to internal processes, in order to ensure fairness, accuracy, and uniformity in assessments. Within the Legal and Valuations Departments, an additional layer of approval is now needed for both Certificates of Corrections and Assessor Recommendations, to ensure legal oversight and double sign-offs. In accordance with the CCAO's Employment Plan, all employees have completed the annual Shakman Training for 2019. The CCAO has published a set of official rules providing requirements, parameters and guidance to attorneys and practitioners doing business with the CCAO. Under Rule 10, all documents filed in support of an appeal must include only the attorney or practitioner's unique ID number. Thus, the identity of an attorney, practitioner, or law firm is kept anonymous from the valuations analyst handling the appeal. 		100-Day Shortfalls and Ongoing Projects


 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


3E. IAAO Classes

 Partially Delivered

100-Day Objective 3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent.		Department(s) Administrative Operations and Valuations
Initiative Name 3E. IAAO Classes	Description Define and schedule International Association of Assessing Officers certification classes	
100-Day Achievements <ul style="list-style-type: none"> • The CCAO has conducted an office-wide survey on current training levels and certifications for all employees. A second survey was sent to analysts within the Valuations Department to determine a baseline of training in specific areas of assessment. • The CCAO has consulted with the IAAO to establish memberships for CCAO employees, and to begin envisioning what onsite training at the CCAO will look like. • The CCAO has consulted with our peers in Los Angeles and Milwaukee, to learn from their best practices. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> • The CCAO is working to hire a Director of Training under the Deputy Assessor of Administrative Operations to further lead the CCAO's training programs.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

3F. New Organization

 Fully Delivered

100-Day Objective 3. Reorganize CCAO to improve efficiency, quality of service, and ability to retain and attract talent.		Department(s) Administrative Operations
Initiative Name 3F. New Organization	Description Develop a new organization structure and processes to support the new strategy	
100-Day Achievements <ul style="list-style-type: none"> Through the strategic planning and employee feedback initiatives, the CCAO has developed an interim organizational chart, which was rolled out to the office at the 2019 Q1 Employee Town Hall Meeting. This organizational chart reflects the streamlining of valuations-related operations under one department, and one Deputy Assessor of Valuations. Changes to the organizational structure of the CCAO remain ongoing. 		100-Day Shortfalls <ul style="list-style-type: none"> With the implementation of iasWorld, and the ongoing modernization of the office, the CCAO is engaged in a long-term visioning process. What does a modern Assessor's Office look like? Moving from legacy systems to next generation IT frameworks will have implications for the entire office, not just the Valuations and IT Departments. For this reason, developing a new organization structure for the CCAO has not been a one-off process and changes will continue to be made throughout the office.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


4A. Commercial Sales Ratio Study

 Work to Do

100-Day Objective 4. Improve CCAO's assessment methodologies, workflow, and processes		Department(s) Data and Modeling
Initiative Name 4A. Commercial Sales Ratio Study	Description Perform commercial/industrial sales ratio study	
100-Day Achievements <ul style="list-style-type: none"> The goal of this initiative was to develop a baseline for the quality of commercial and industrial assessments. This report would show summary and in-depth statistics that speak to the central question of whether the CCAO's commercial and industrial assessments corresponded well to sales activity in the market. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO was unable to produce this report within the first 100 days, given the available resources of the Data and Modeling Department. After producing the reassessments for Norwood Park, the CCAO determined that reporting the results of the current 2019 North Triad reassessments was more important than a retrospective report. This CCAO intends to produce regular commercial sales ratio studies.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


4B. Data Modernization Law

 Fully Delivered

100-Day Objective 4. Improve CCAO's assessment methodologies and processes		Department(s) Policy
Initiative Name 4B. Data Modernization Law	Description Support the passage of a data modernization law in Springfield	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has dedicated many resources to supporting the passage of data modernization legislation in Springfield, specifically SB1379/HB2217, which passed the Senate with a bipartisan 36-16-1 vote, and currently has 23 sponsors in the House, including key leadership. The bill improves data collection and brings Cook County and Illinois in line with professional practices used by Assessors in at least 17 other States, including Florida and Virginia, and other major cities, including New York, Boston, Washington D.C., and Seattle. Assessor Kaegi has written in Crain's Chicago Business and appeared on Chicago Tonight, to enumerate the benefits of de-risking the assessment system through data modernization. 		100-Day Shortfalls and Ongoing Projects

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


4C. Next-Gen Residential Framework

 Fully Delivered

100-Day Objective 4. Improve CCAO's assessment methodologies and processes		Department(s) Valuations
Initiative Name 4C. Next-Gen Residential Framework	Description Define next-generation residential data framework	
100-Day Achievements <ul style="list-style-type: none"> The CCAO has built, tested, and deployed a new residential Computer Assisted Mass Appraisal (CAMA) system end-to-end using free, open-source software, which has been used by the Valuations Department to deliver on-time assessments for the first three townships in the North Triad. This is an iterative process. The CCAO's residential modeling system was designed to be dynamic, so that the same code base can be used to value each township, even as improvements to the process are made. As the CCAO moves through the 2019 North Triad reassessment, improvements have been made including automatic adjustments for local ratios, mechanisms for reporting post-desk-review values, and more robust protections against over-trimming. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO is engaged in a long term effort to improve both residential data quality and integrity. The vision for this includes: <ul style="list-style-type: none"> Gathering better and more broad characteristics of residential housing. Improving in-house data collection methods, as well as looking to outside, third-party data sources. Leveraging the county's GIS technology to move towards 3D building indexing, in which every building will have a unique geo-logic/referenced ID number, maintained by the CCAO.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

4D. Data Architecture



Fully Delivered

100-Day Objective 4. Improve CCAO's assessment methodologies, workflow, and processes		Department(s) Data and Modeling
Initiative Name 4D. Data Architecture	Description Define approach to improve data collection	
100-Day Achievements <ul style="list-style-type: none"> • Within the first 100 days, the CCAO has learned a great deal about the quality of the office's data and has worked to establish a protocol for ingesting, cleaning, and operationalizing new data streams. • One major achievement is the creation of a new table that contains location data for each PIN, including address, census tract, public use micro area, and latitude and longitude coordinates. This has proven particularly helpful in residential modeling. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> • Improving the quality and integrity of the CCAO's data is a long term effort. • The CCAO's ability to leverage its current data sets remains limited by the lack of systematization of the commercial valuations process, which is still done on spreadsheets. • Identifying and correcting issues with the CCAO's current data sets, and acquiring and operationalizing new data sets, remain top priorities for the remainder of 2019.



Fully Delivered



Partially Delivered



Work to Do

CCAO 100-Day Initiative:


4E. QA Process

 Fully Delivered

100-Day Objective 4. Improve CCAO's assessment methodologies, workflow, and processes		Department(s) Data and Modeling Valuations
Initiative Name 4E. QA Process	Description Define end-to-end quality assurance process	
100-Day Achievements <ul style="list-style-type: none"> The goal of quality assurance in the assessment process is to identify and track the impact of each step on valuations. The key to an effective QA process is to anticipate errors before they arise and design tools to test for those errors. For residential valuations, the CCAO has built robust QA systems into everything deployed to date, and continues to build new systems to monitor the performance of our processes. Performance statistics are calculated at each step of the residential valuations process, so that changes in Coefficient of Dispersion (COD), Price Related Differential, Price Related Bias (PRB), and median ratio can be identified at each step. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO will continue to build-out this QA framework, but the office has made significant progress towards a more transparent methodology. The CCAO's ability to integrate a similar QA framework into the commercial assessment process remains limited by the lack of systematization of the commercial valuations process, which is still done on spreadsheets.


 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


4F. Hand Review Best Practices

 Partially Delivered

100-Day Objective 4. Improve CCAO's assessment methodologies, workflow, and processes		Initiative Owner Valuation Directors
Initiative Name 4F. Hand Review Best Practices	Description Define initial set of best-practice standards to improve hand review (data verification) process	
100-Day Achievements <ul style="list-style-type: none"> • The residential valuation process has historically entailed a number of manual processes. One of these is the 'hand-review' step. In this step, sales ratios were examined and manual corrections were made according to a number of criteria. • In the 2019 North Triad reassessment, the CCAO established a more formal system for correcting abnormal values while at the same time recognizing the value of the informed judgement of analysts. • This step in the valuations process is now called 'desktop review,' guided by industry best-practices, and a number of functions that were previously done by hand are now automated. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> • The CCAO continues to develop a system to replace the main component of the legacy hand-review system; identifying ratio outliers and correcting attribute information. This project is ongoing.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

5A. Website Redesign




Fully Delivered

100-Day Objective 5. Update CCAO's information technology infrastructure		Department(s) Information Technology, Communications
Initiative Name 5A. Website Redesign	Description Update and redesign the CCAO website	Impact: High Difficulty: High Priority: B
100-Day Achievements <ul style="list-style-type: none"> The CCAO has made several immediate changes to its current website including: <ul style="list-style-type: none"> Updated forms for Tax Year 2019 and new information about appeals Prominent links to the CCAO's social media pages Removal of advertisements, which created a confusing user experience for the taxpayer The CCAO has completed a review of its current web applications and all projects currently in progress in order to prioritize internal development priorities The CCAO has developed a timeline, requirements, and initial scope of work for a contract amendment with Clarity Partners, to complete a new CCAO website. As part of this scope, the CCAO has: <ul style="list-style-type: none"> completed internal and external focus groups with CCAO employees, township assessors, and taxpayers; completed analytics analysis on the current website; and conducted an analysis of assessment website best practices, drawing from our peers across the country. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO needs to dedicate additional time, and perhaps an internal project manager, to overhaul the communications side of the website. The current website is difficult for many taxpayers to navigate. Key information, such as the Frequently Asked Questions page, is hidden under different tabs that are not searchable by keyword. The CCAO will continue to develop scope of work and project plan with clarity and begin development later in 2019. The CCAO is working to move the entire office towards electronic filing of exemptions, appeals, and other forms that our website currently show as PDFs. Though we will always accept forms at our offices, through the mail, and through other channels (such as at outreach events), moving to a secure, online filing system is a top priority for the CCAO.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

5B. Legacy Systems

 Partially Delivered

100-Day Objective 5. Update CCAO's information technology infrastructure		Department(s) Information Technology
Initiative Name 5B. Legacy Systems	Description Define plan to modernize legacy technology systems	Impact: Medium Difficulty: Medium Priority: A
100-Day Achievements <ul style="list-style-type: none"> The CCAO has completed an audit of legacy hardware and worked to identify strengths and weaknesses throughout the office. The CCAO has completed a risk assessment. The CCAO has scoped an office-wide migration to Office365 to be completed later in 2019. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The scoping and planning process for the CCAO's internal application development is behind schedule. The IT department has been fulfilling requests for application development on an ad hoc basis. The goal moving forward is to engage in a more formal planning process where requests are scoped in accordance with the capacity of the IT team and the timing of the assessment cycle.

 Fully Delivered

 Partially Delivered

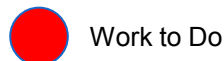
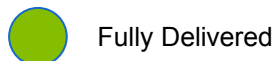
 Work to Do

CCAO 100-Day Initiative:

5C. Tablets Pilot



100-Day Objective 5. Update CCAO's information technology infrastructure		Department(s) Information Technology, Valuations
Initiative Name 5C. Tablets Pilot	Description Pilot tablet-based, productivity and accuracy-enhancing data collection process	Impact: Medium Difficulty: Medium Priority: C
100-Day Achievements <ul style="list-style-type: none"> The field units within the CCAO are responsible for inspecting residential and commercial/industrial property all across the county. Currently, these units use paper-based data collection systems. The CCAO has scheduled demonstration with Tyler Technologies for Spring 2019 to begin a beta test/pilot of their mobile field app, which will enable field units to record assessment attributes and other data points digitally, from the field. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> This project has been held on delay, due to timing of iasWorld implementation with Tyler Technologies.

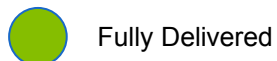


CCAO 100-Day Initiative:

5D. Tyler Implementation



100-Day Objective 5. Update CCAO's information technology infrastructure		Department(s) Information Technology, Valuations
Initiative Name 5D. Tyler Implementation	Description Continue Tyler Technologies project development and implementation	Impact: High Difficulty: High Priority: B
100-Day Achievements <ul style="list-style-type: none"> The CCAO has reviewed existing project requirements and documentation with a fresh set of eyes, and has recorded deficiencies with Tyler's future state documentation to identify potential risks and ensure that the future state meets the actual needs of the CCAO and Cook County's assessment cycle. The CCAO is working to re-engage internal subject matter experts (SME's), to increase the staff's familiarity, comfort, and buy-in with the future state. The CCAO has held meetings with the Board of Review, Cook County Clerk, Cook County Treasurer, and Illinois Department of Revenue, as well as the Office of the Cook County Board President, to update each office impacted by the IPTS project as to the status of the Assessor's Office implementation. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> At the time of the transition, the Tyler implementation had been delayed from a previously scheduled go-live of December 2018 to December 2019. Presently, the project still has significant delays in critical areas, placing in jeopardy the updated go-live and the ability of CCAO to upgrade its existing core technology.




CCAO 100-Day Initiative:


5E. Security Audit

 Fully Delivered

100-Day Objective 5. Update CCAO's information technology infrastructure		Department(s): Information Technology
Initiative Name 5E. Security Audit	Description Conduct system and data security audit	Impact: Medium Difficulty: Medium Priority: B
100-Day Achievements <ul style="list-style-type: none"> The CCAO has worked with the Cook County's Bureau of Technology ISO team to complete a vulnerability scan, in point protection, and firewall. A risk score is in progress. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO is developing an acceptable use policy to be rolled out internally later in 2019. The CCAO plans to continue regular meetings with ISO.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

6A. 100-Day Progress Reports



Fully Delivered

100-Day Objective 6. Overhaul CCAO's approach to communications, outreach, and transparency		Department(s) Communications
Initiative Name 6A. 100-Day Progress Reports	Description Publish 100 Day progress report/scorecard	Impact: High Difficulty: Medium Priority: A
100-Day Achievements <ul style="list-style-type: none"> The CCAO released a 50 Day progress report to inform the public on the changes the CCAO had implemented including a new ethics order, a public visitors log, and reorganization of the Valuations Department, in keeping with the CCAO's 100 Day Plan. <p>Recent press:</p> <ul style="list-style-type: none"> <i>Daily Herald</i>: "One constituent cut right to the chase with a question for Cook County Assessor Fritz Kaegi on Saturday. It was at The Grand at Twin Lakes Senior Living Facility in Palatine, the first location of 17 planned "listening sessions" by Kaegi to reach out to Cook County residents." WTTW's <i>Chicago Tonight</i>: "Fritz Kaegi has hit the ground running." WLS 890 AM: "Fritz Kaegi isn't wasting anytime." 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> The CCAO plans to release quarterly updates and an annual report, providing further updates on the ongoing modernization initiatives that the office has undertaken.



Fully Delivered



Partially Delivered



Work to Do

CCAO 100-Day Initiative:


6B. Publish North Triad Framework

 Fully Delivered

100-Day Objective 6. Overhaul CCAO's approach to communications, outreach, and transparency		Department(s) Communications
Initiative Name 6B. Publish North Triad Framework	Description Publish framework for reassessment of North Triad and rules for appeal process	Impact: Medium Difficulty: High Priority: A
100-Day Achievements <ul style="list-style-type: none"> The CCAO has published (and continues to publish) its framework for the 2019 North Triad assessment in township level reports. For residential, these reports include township and neighborhood-specific analysis of sales trends, an explanation of the home characteristic data that also affects the models we create, and a set of uniformity and compliance statistics we use to measure our work against IAAO standards and Illinois state law. For commercial, these reports include a breakdown of the CCAO's assessment methodology and township-specific data on net operating income, occupancy rates, and capitalization rates broken down by class and use type. The CCAO has published a set of official rules providing requirements, parameters and guidance to attorneys and practitioners doing business with the CCAO. The CCAO has held informational sessions on these new rules with internal staff, township assessors, and attorneys and practitioners. The code and models used in our assessments were published online during a Chi Hack Night event, a gathering of data journalists and open government enthusiasts. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> At the conclusion of the CCAO's assessment of the North Triad in late 2019, the office has committed to publishing a broad overview of the data and trends found in its assessments.


 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:


6C. Publish Sales Ratios

 Partially Delivered

100-Day Objective 6. Overhaul CCAO's approach to communications, outreach, and transparency		Department(s) Communications, Data
Initiative Name 6C. Publish Sales Ratios	Description Publish the sales ratios, at least annually	Impact: Low Difficulty: Low Priority: A
100-Day Achievements <ul style="list-style-type: none"> The Civic Consulting Alliance (CCA) has published a residential sales ratio study for the 2018 Chicago Triad, completed by the previous CCAO administration. This study was independently conducted and published by the CCA. As the CCAO continues to reassess the North Triad in 2019, we are committed to publishing the uniformity statistics (COD, PRD, PRB) and level of compliance (the legal requirement to assess residential property at a 10% assessment ratio) for each township, and measuring our performance against IAAO standards. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> At the conclusion of the CCAO's reassessment of the North Triad in late 2019, the office has committed to publishing a broad overview of the data and trends found in its assessments.

 Fully Delivered

 Partially Delivered

 Work to Do

CCAO 100-Day Initiative:

6D. Community Outreach



Fully Delivered

100-Day Objective 6. Overhaul CCAO's approach to communications, outreach, and transparency		Department(s) Communications, Data
Initiative Name 6D. Community Outreach	Description Identify community outreach initiatives and partners	Impact: Medium Difficulty: Low Priority: A
100-Day Achievements <ul style="list-style-type: none"> • The CCAO held more than 23 events between December 2018 and April 2019. • The CCAO held meetings with all 17 Cook County Commissioners and all township assessors. • The CCAO distributed a survey to several community organizations and nonprofits to better understand how the CCAO can meet the needs of the taxpayers. • The CCAO continues to develop a list of stakeholders to better understand the different groups (governmental agencies and offices, community organizations and nonprofits, business groups and chambers of commerce, etc.) our office interacts with). • The CCAO has worked to streamline paperwork intake processes with elected offices such as the Cook County Commissioners that perform their own outreach on property tax issues. • The CCAO has developed a public scheduling process that allows organizations, nonprofits, and other groups to request an outreach event and/or an event with the Assessor on our website. • The CCAO continues to learn from the best practices of other assessment jurisdictions, including neighboring counties in Illinois. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> • While the CCAO does have outreach staff experienced in conducting outreach events in Spanish (and staff in Taxpayer Services experienced in both Spanish and Polish), the office is engaged in a long-term effort to increase language access across the board. This effort will include the translation of forms, the hiring of new staff, translation services available at public events, and much more. • Following the Assessor's Listening Tour in April and May of 2019, the CCAO plans to continue experimenting and iterating on the format of outreach events. • The CCAO is committed to conducting outreach and engagement through the lens of racial equity.



Fully Delivered



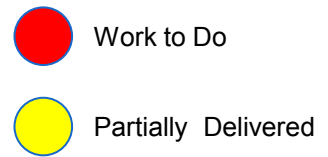
Partially Delivered



Work to Do

CCAO 100-Day Initiative:

6E. Online Historical Data




100-Day Objective 6. Overhaul CCAO's approach to communications, outreach, and transparency		Department(s) Communications, Data
Initiative Name 6E. Online Historical Data	Description Make historical assessment data available online	Impact: Low Difficulty: Medium Priority: C
100-Day Achievements <ul style="list-style-type: none"> The goal of this initiative is to publish the data necessary for the replication of the CCAO's residential valuation process. This includes modeling data, valuation data, and the necessary ancillary data for various calculations. The CCAO has released timely reports on the current assessments being done township by township in the North Triad, but has not yet released historical data on a bulk basis. We published historical data on the County Open Data Portal on April 16, 2019 to coincide with the release of the code we are currently using to assess the North Triad. This contained sales from 2013-2018. We are currently performing the necessary housekeeping tasks (dictionaries, recodes, integrity checks, etc.) required for publication. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> Accurate, high-quality data is critical for the execution of this office's mandate. We need to rigorously investigate our data, identify weaknesses, and craft remedies, both in the short term, and long term. As we work to bring transparency to the assessment system, we are still thinking through a number of questions: <ul style="list-style-type: none"> <i>How far back should the release of historical data go?</i> <i>How long will it take to assemble this data?</i> <i>A great deal of the office's records are stored and filed on paper. The CCAO is in need of massive digitization. What are the resources needed for this effort?</i> <i>Who checks our work? How do we let people (reporters, academics, assessment experts) check our work? How can the CCAO establish a collaborator policy to facilitate research and innovation with our data?</i>



CCAO 100-Day Initiative:


6F. Content and Audience Strategy

 Partially Delivered

100-Day Objective 6. Overhaul CCAO's approach to communications, outreach, and transparency		Department(s) Communications, Data
Initiative Name 6F. Content and Audience Strategy	Description Develop content and engagement strategies based on key audience segments	Impact: High Difficulty: Medium Priority: A
100-Day Achievements <ul style="list-style-type: none"> Restarted use of Facebook and Twitter, which had not been in use since 2016 and 2010, respectively. Published 100 Day Objectives and 50 Day Update Worked with several press outlets to meet the goal of increasing transparency around our work. Began project to re-brand CCAO within the office and externally; created new materials for Listening Tour. Responding to taxpayers, journalists and others via social media who have questions/concerns about our office. 		100-Day Shortfalls and Ongoing Projects <ul style="list-style-type: none"> Completion of hiring additional Director of Communications to handle additional digital content needs. Completing the re-branding project. Creating a Strategic Communications Plan for the next year.

 Fully Delivered

 Partially Delivered

 Work to Do