



Finance and Administrative Services Department – Purchasing Division

RFP Addendum No 1

January 16, 2026

ORANGE COUNTY RFP No 367-OC 5469

Request for Proposals to Conduct an Evaluation of the Reappraisal and Tax Assessment Process in Orange County, NC

To All Interested Consultants:

Please see the following questions and responses below.

1. Was the last reappraisal done in-house or did you contract those services out?

RESPONSE: The residential values were done in-house. The commercial values were contracted out.

2. Do you have a modeler or a statistician on staff?

RESPONSE: No, we don't. That is one of the areas that we need some help identifying how that is best accomplished.

3. What is your current tax provider?

RESPONSE: Currently Patriot Properties AP5. Conversion to Farragut's NCPTS CAMA is scheduled for March 31, 2026.

4. Is it the County's expectation that public relations will be managed by the county with possible input from the Vendor?

RESPONSE: Yes. The County would take the lead in public relations with input from the vendor.

5. What are the County's expectations regarding in-person visits, including frequency, duration, and key milestones that may require on-site participation?

RESPONSE: Please expect three to four in-person presentations.

6. Could the County provide:
 1. a current organization chart, job description(s), and job specification(s) for current and future positions.
 2. an overview of current staffing levels within the Tax Assessment Office including overturn rates.

RESPONSE: Attached find the requested documentation, including the Organizational Chart for Tax Administration, overview of current staffing levels, job descriptions for current positions, and tentative job descriptions for future positions.

- I. Job Descriptions for current positions within the Assessment Division:
 - a. Deputy Tax Assessor
 - b. Real Property Manager
 - c. Chief Appraiser
 - d. Appraiser I
 - e. Appraiser II
 - f. PUV Compliance Appraiser
- II. Tentative Job Description for Revaluation Manager.
- III. Sample Job Description for Data Analyst (Guilford County)
- IV. Overview of Tax Assessment Division Staffing Levels

7. Could the County provide the most recent reappraisal report with annual ratio study reports since the reappraisal to current?.

RESPONSE: See attached the two most recent reports provided: January-October 2025 Sales Ratio & 2025 Q2 Ratio.

8. What data sources will be made available to the selected consultant (CAMA database(s), GIS maps and shapefiles, last 5 years sales data, current and historical ratio studies, appeals data, etc.)?

RESPONSE: CAMA Database, GIS maps, Last 5 years' sales data, current and (some) historical ratio studies, appeals data 2021-current, recent neighborhood review results.

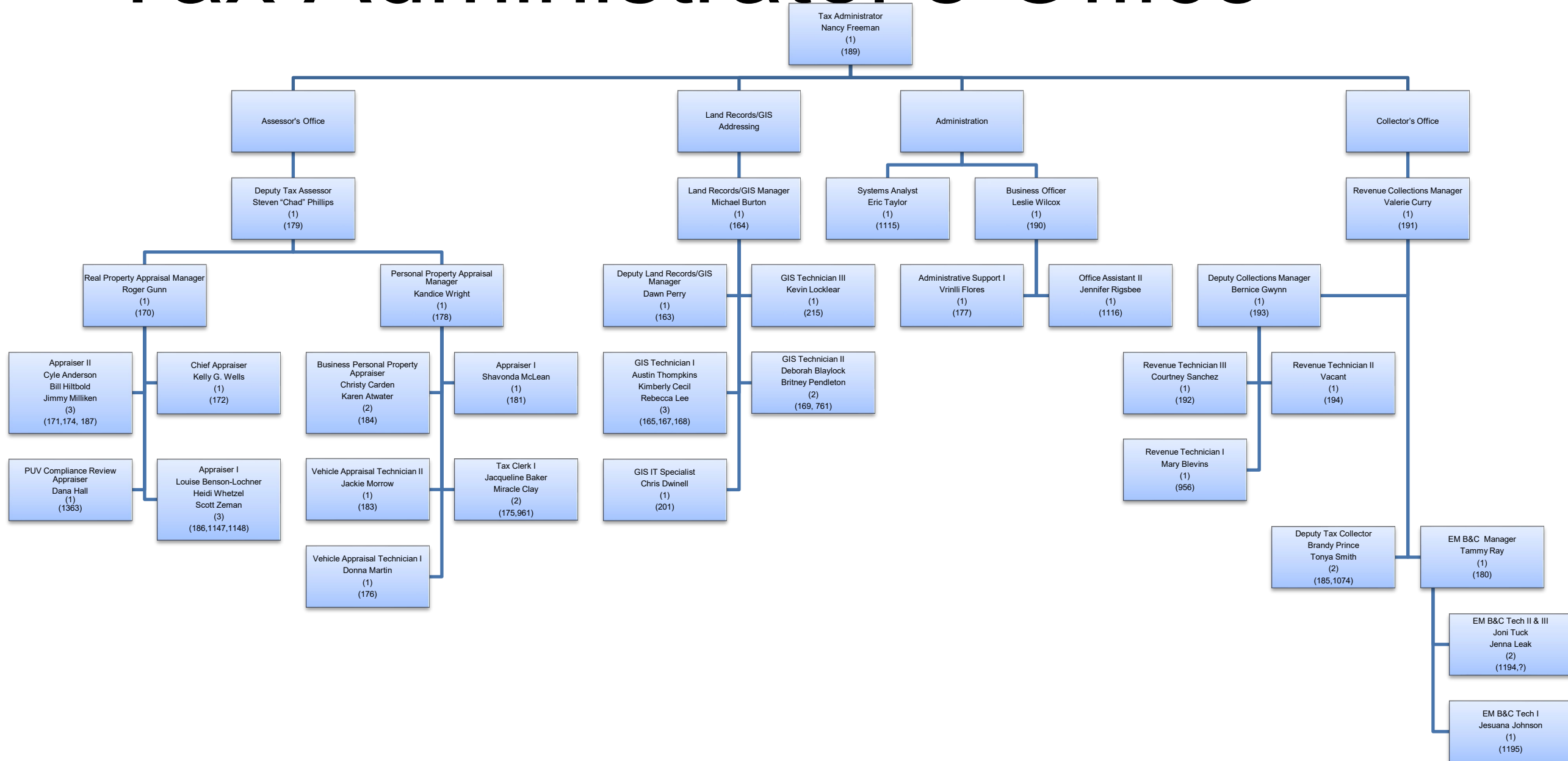
9. What are the County's expectations for the timeline and deliverables that meet the statutory needs in question?

RESPONSE: The vendor will be asked to prioritize a staffing analysis. The County Manager will present the recommended budget on May 5, 2026.

10. Does the County have a budget range or not-to-exceed amount in mind for this engagement?

RESPONSE: The vendor should present more than one scope option and associated costs for the County to evaluate.

Tax Administrator's Office





Orange County Government
DEPUTY TAX ASSESSOR

CLASS CODE	2504	SALARY	\$35.76 - \$62.18 Hourly \$74,382.00 - \$129,339.00 Annually
REVISION DATE	August 23, 2012		

General Description

Responsible for managing and supervising the day-to-day operations of the assessment division of Tax Administration.

Example of Duties

A position may not include all the work examples given, nor does the list include all that may be assigned.

Manage the personnel and processes of the appraisal division, including interviewing, selecting, training, evaluating, counseling, and coordinating staff.

Review data collected by appraisers for accuracy and to ensure that properties are appraised at fair market value; conducting field reviews as needed.

Hear and decide informal appeals, both residential and commercial.

Respond to and resolves property assessment disputes; defends appraised values, schedules, and methods before the Board of Equalization and Review for unresolved disputes.

Provide expert testimony before the Board of Equalization and Review and the North Carolina Property Tax Commission.

Prepare various reports.

Distinguishing Factors

This classification focuses on the tax assessment of personal property and business personal property. The classification is responsible for budget preparation and management.

Minimum Qualifications

Knowledge, Skills, Abilities

- Knowledge of modern real and personal property appraisal principles and practices.
- Knowledge of state laws pertaining to property appraisal and taxation.
- Knowledge of the geography and location of property in the County.
- Knowledge of typical income, expense, and capitalization rates.

- Knowledge of statistical analysis, accounting, budgeting, and financial management concepts and practices.
- Knowledge of computerized systems for property valuation.
- Knowledge of modern office practices and procedures, including modern office technology.
- Skill in conducting statistical research and preparing reports.
- Skill in oral and written communication.

Supervision

Assignments are provided by setting overall objectives and resources available. The employee and supervisor in consultation develop deadlines, projects, and work to be done. The classification does supervise a division with multiple positions, within a department.

Minimum Qualifications

- Requires any combination of education and experience equivalent to a Bachelor’s degree and five years of experience in tax assessment, appraisal, or collections.
- Possession of or ability to readily obtain a valid driver’s license issued by the State of North Carolina for the type of vehicle or equipment operated.
- Ability to complete necessary training and certification by the North Carolina Department of Revenue as prescribed in the Machinery Act of North Carolina.

Supplemental Information

Physical Activities

N = Never; R = Rarely (Less than 25%); O = Often (25% - 75%); A = Always (More than 75%)

Standing	O	Sitting	O
Walking	O	Bending	O
Stooping	O	Kneeling	R
Crawling	N	Climbing	O
Typing	O	Grasping	O
Talking	O	Hearing	O
Repetitive motions of hands/wrists	A	Handing	O
Repetitive motions of feet	O	Reaching	O

Average number of pounds through a normal day that are pushed, pulled, etc. and the distance over which the weight is moved:

Activity	Average Number of Pounds	Distance Weight is Moved
Pushing	5	200 ft
Pulling	5	200 ft
Lifting	20	200 ft
Carrying	20	200 ft

Examples of physical activities required in this position:

Sitting at a computer for many hours per day

Filing papers

Walking to work station

Possible Hazards (chemicals, dangerous machinery, etc.)

None known



Orange County Government
REAL PROPERTY APPRAISAL MGR

CLASS CODE	2441	SALARY	\$34.04 - \$59.19 Hourly \$70,798.00 - \$123,106.00 Annually
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General Description

General Description

Oversee all aspects of the countywide revaluation process.

Example of Duties

Examples of Essential Functions

A position may not include all the work examples given, nor does the list include all that may be assigned.

Create a revaluation schedule of values and applying these countywide fairly and equitably, maintaining sales data, assisting taxpayers with the resolution of complex revaluation issues; listening to and deciding informal appeals; providing expert testimony before the Board of Equalization and Review (BoER) and Property Tax Commission

Responsible for the complete and proper preparation of all documents for BoER including schedules, agendas, and posting minutes to the appropriate websites.

Lead department employees involved in revaluation including instructing, assigning and reviewing work.

Minimum Qualifications

Knowledge, Skills, Abilities

Knowledge of modern office practices and procedures, including modern office technology.

Knowledge of NC General Statutes and NC Machinery Act.

Knowledge of state and federal laws and county policies regarding taxes, titles, registrations, exemptions, estates, and bankruptcies.

Knowledge of accounting principles and practices.

Knowledge of title searching for use in *in rem* foreclosure proceedings.

Knowledge of laws, regulations and procedures pertaining to Medicare and Medicaid.

Skill in conducting research.

Skill in performing mathematical calculations.

Skill in organizing and prioritizing work.

Skill in dealing effectively with the public.

Skill in oral and written communication.

Supervision

Assignments are provided by indicating generally what is to be done. Quality and quantity expectations are provided. Additional details are provided for new, difficult, or unusual problems. This classification may serve as a lead.

Distinguishing Factors

This classification is distinguished from the Appraiser II classification by the focus and responsibility of the revaluation process.

Minimum Qualifications

Requires any combination of education and experience equivalent to a Bachelor's degree and five years of experience in tax assessment/appraisal, and revaluation. Possession of or ability to readily obtain a valid driver's license issued by the State of North Carolina for the type of vehicle or equipment operated. Has completed all necessary training and certification by the North Carolina Department of Revenue as prescribed in the Machinery Act of North Carolina to be certified as a North Carolina County Appraiser.

Supplemental Information

Examples of physical activities required in this position:

Sitting at a computer

Driving

Walking to work station

Possible Hazards (chemicals, dangerous machinery, etc.)

None Known



Orange County Government
CHIEF APPRAISER

CLASS CODE	2035	SALARY	\$27.94 - \$48.58 Hourly \$58,107.00 - \$101,040.00 Annually
REVISION DATE	December 12, 2018		

General Description

DISTINGUISHING FEATURES OF THE CLASS: Under the general supervision of the Real Property Appraisal Manager, an employee of this class is primarily responsible for overseeing the process of revaluing all real property within the county to its current market value as of an established date. An incumbent in this class will be responsible for obtaining, developing, analyzing, and maintaining records necessary for the appraisal associated with real property within the jurisdiction of the County according to the State of North Carolina General Statutes. Work involves overseeing and managing the County revaluation process. This position also serves as a commercial real property appraiser. Leadership and oversight is provided to staff. Does related work as required.

Example of Duties

Examples of Essential Functions: Following are examples of typical work activities and responsibilities. The incumbent may be responsible for performing other related duties and responsibilities as required or assigned. *A position may not include all the work examples given, nor does the list include all that may be assigned.*

Plans, organizes and manages the revaluation process in the County for property tax assessments to ensure equitable distribution of the tax burden among all classes of property and the assessment of current market values as of the effective date of the revaluation;

Develops and maintains the real property schedule of values, adjusting as changes in economic conditions warrant or as otherwise dictated by County, State or Department policies, and making sure that the appraisal of all properties adhere to the Uniform Standards of Professional Appraisal Practice, the Standards and Ethics of the International Association of Assessing Officers, and the General Statutes of the North Carolina Machinery Act (including North Carolina General Statutes 105-286 and 105-317);

Lists and appraises commercial and industrial properties in the County and performs onsite inspections as needed to verify the physical characteristics and make changes when needed;

Compiles records, analyzes and maintains a variety of data pertaining to real property sales, building costs, zoning regulations, income and expenses information, etc.;

Leads and participates in the maintenance of a variety of records, reports, forms, and other data to substantiate and document the appraisal process;

Collects income and expense information by mailing questionnaires to commercial property owners, and verifies and enters data received;

Assists the public via telephone, internet, and in person with inquiries concerning appraisal values, procedures, and other functions of the department. Performs research and/or investigates as necessary and responds to taxpayers to resolve issues;

Assists property owners in properly listing properties;

Creates a revaluation schedule of values and applies them fairly and equitably countywide;

Maintains sales data;

Listens to and decides informal appeals; assists taxpayers with the resolution of complex revaluation issues;

Provides expert testimony before the Board of Equalization and Review and the North Carolina Property Tax Commission;

Leads real property appraisal staff involved in the revaluation process including instructing, assigning, and reviewing work their work to ensure adherence to proper techniques, methods, and procedures;

Provides information and research as well as maintains records for the North Carolina Department of Revenue;

Provides statistical information for General Assembly analysts;

Adheres to the department's safety rules and regulations;

Uses computer applications or other automated systems such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments;

May perform other incidental tasks, as needed.

Minimum Qualifications

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES:

Thorough knowledge of North Carolina General Statutes, rules, and regulations applicable to the appraisal of real property for property tax assessments, in order to fairly and equitably value all real property in the County;

Thorough knowledge of NC Machinery Act;

Good knowledge of the principles and techniques of supervision;

Good knowledge of office procedures, practices and equipment, including computer operation;

Ability to plan, organize and lead the work of others;

Ability to analyze data pertaining to real property sales, costs, etc. to properly apply findings to value property within the County;

Ability to establish and maintain cooperative relationships with other departments, customers and residents, and skill in dealing effectively with the public;

Ability to communicate effectively, both orally and in writing;

Ability to prepare and maintain accurate and legible records;

Ability to enter and retrieve data using relevant programs and systems and skill in conducting research;

Ability to perform mathematical calculations associated with the work;

Skill in organizing and prioritizing work.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE:

Bachelor's Degree and three (3) years of experience in tax assessment/appraisal, and having completed a revaluation for a County; and

Certification by the North Carolina Department of Revenue as prescribed in the Machinery Act of North Carolina as a North Carolina County Real Property Appraiser; and

Valid North Carolina Driver License.

Supplemental Information

PHYSICAL REQUIREMENTS AND POSSIBLE HAZARDS

Must be able to physically perform the basic life operational support functions of standing, walking, typing, typing, talking, sitting, grasping, hearing, handling, reaching and repetitive motions of the hands/wrist/feet.

Ability to perform sedentary work, exerting up to 10 pounds of force occasionally, and/or negligible amount of force constantly to lift, carry, push, pull or otherwise move objects.

Must possess the visual acuity to prepare and analyze documents, data and figures, perform research and extensive reading and operate a computer terminal.

Worker is not substantially exposed to adverse environmental conditions.



Orange County Government Appraiser I

CLASS CODE	1752	SALARY	\$50,106.00 - \$87,126.00 Annually
ESTABLISHED DATE	April 14, 2021	REVISION DATE	April 14, 2021

General Description

DISTINGUISHING FEATURES OF THE CLASS

This position is responsible for appraising residential property for assessment and tax purposes. Work is performed under the general supervision of the Real Property Appraisal Manager with considerable leeway to exercise independent judgment within the framework of applicable rules, regulations, policies and procedures in the performance of duties. This position does not supervise. Does related work as required.

Example of Duties

EXAMPLES OF ESSENTIAL FUNCTIONS

Following are examples of typical work activities and responsibilities. The incumbent may be responsible for performing other related duties and responsibilities as required or assigned. ***A position may not include all the work examples given, nor does the list include all that may be assigned.***

Conducts field evaluations of residential, commercial, agricultural and industrial properties for the purpose of appraising structures, noting any changes to the property and sales history, to establish taxable value.

Assesses tax value of land by determining if property meets Present Use Value criteria for agriculture, horticulture, or forestland categories, and determines continued property eligibility in program.

Inspects property by measuring structures, determining square footage and percentage of improvements, observing the quality of construction, and sketching improvements, and records information in a database.

Assists the Board of Equalization and Review; provides expert testimony before the Board of Equalization and Review and the North Carolina Property Tax Commission.

Assists property owners by explaining property valuations, describing potential exemptions, and explaining appraisal and tax assessment rules and regulations, including how to appeal the value of their home or other property.

Adheres to the department's safety rules and regulations.

Uses computer applications or other automated systems such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments.

Performs other related duties as required and/or assigned.

Minimum Qualifications

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

Comprehensive knowledge of procedures and techniques used to determine valuations of residential, commercial, industrial, and agricultural property.

Thorough knowledge of state and county rules and regulations regarding property valuation, appraisal and land use, and collecting and recording data.

Thorough knowledge of NC Machinery Act.

Good knowledge of general building and construction principles and practices.

Good knowledge of techniques used in determining fair market value.

Good knowledge of the geography and location of properties in the County.

Skill in being customer-focused, adept at problem solving and working collaboratively with others.

Skill in collecting and recording data, and the ability to maintain accurate records.

Skill in reading and interpreting maps, deed information, and costing manuals.

Skill in using measurement tools and equipment.

Skill in planning, organizing and prioritizing work.

Ability to demonstrate sound judgment, integrity, resourcefulness, accuracy, thoroughness and the physical condition commensurate with the demands of the position, while maintaining an ethical standard of care.

Ability to interpret and apply county, state and federal regulations, policies and procedures.

Ability to collect, analyze and compare data pertaining to real property sales, costs, etc. to properly apply findings to value property within the county.

Ability to enter and retrieve data using relevant programs and systems and skill in conducting research.

Ability to read and interpret maps, blueprints, plans, drawings, deed information and costing manuals.

Ability to organize, consolidate and evaluate information, maintain records, prepare reports, and complete assignments accurately and timely.

Ability to communicate complex information effectively both orally and in writing, with a wide variety of people.

Ability to establish and maintain cooperative relationships with other departments, customers and residents, and skill in dealing effectively with the public.

Ability to perform advanced mathematical calculations associated with the work.

Ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software to maintain records, prepare reports, and conduct correspondence related to the work.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE

Graduation from an accredited college or university with an Associate's Degree **AND** one (1) year related experience in tax appraisal; **OR**

Graduation from High School or General Educational Development (GED) test equivalency **AND** three (3) years' related experience in tax appraisal; **OR**

An equivalent combination of training and experience as defined above. A higher degree is not a substitute for work experience.

SPECIAL REQUIREMENTS

Possession of or ability to readily obtain a valid driver's license issued by the State of North Carolina for the type of vehicle or equipment operated is required.

Ability to complete necessary training and certification by the North Carolina Department of Revenue as prescribed in the Machinery Act of North Carolina.

Bilingual applicants are encouraged to apply.

Supplemental Information

PHYSICAL REQUIREMENTS AND POSSIBLE HAZARDS

Ability to physically perform the basic life operational functions of climbing, balancing, stooping, kneeling, crouching, crawling, reaching, standing, walking, pushing, pulling, lifting, typing, grasping, feeling, talking, hearing and repetitive motions of the hands/wrists.

Ability to perform light work exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently, and/or negligible amount of force constantly to lift, carry, push, pull or otherwise move objects.

Possess the visual acuity to prepare and analyze data and figures, perform extensive reading, and perform work on a computer.

Must be able to work in outside environmental conditions, with minimal protection from weather.



Orange County Government Appraiser II

CLASS CODE	1903	SALARY	\$26.59 - \$46.24 Hourly \$55,308.00 - \$96,173.00 Annually
REVISION DATE	November 08, 2020		

General Description

DISTINGUISHING FEATURES OF THE CLASS

This position is responsible for appraising residential property for assessment and tax purposes. Work is performed under the general supervision of the Real Property Appraisal Manager with considerable leeway to exercise independent judgment within the framework of applicable rules, regulations, policies and procedures, in the performance of duties. The employee in this classification does not supervise, but may serve as a lead worker to other staff. Does related work as required.

Example of Duties

EXAMPLES OF ESSENTIAL FUNCTIONS

Following are examples of typical work activities and responsibilities. The incumbent may be responsible for performing other related duties and responsibilities as required or assigned. ***A position may not include all the work examples given, nor does the list include all that may be assigned.***

Conducts field evaluations of residential, commercial, agricultural and industrial properties for the purpose of appraising structures, noting any changes to the property and sales history, to establish taxable value.

Assesses tax value of commercial, townhome and condominium properties by conducting field evaluations and researching and analyzing sales and cost data.

Assesses tax value of land by determining if property meets Present Use Value criteria for agriculture, horticulture, or forestland categories, and determines continued property eligibility in program.

Inspects property by measuring structures, determining square footage and percentage of improvements, observing the quality of construction, and sketching improvements, and records information in a database.

Provides expert testimony before the Board of Equalization and Review and the North Carolina Property Tax Commission.

Assists property owners' attorneys and surveyors regarding property tax issues and procedures, and the potential tax implications before property owner makes changes to land size or ownership; determines and applies appraisal adjustments based on evidence presented and site inspections.

Assists or leads other appraisal staff as needed.

Adheres to the department's safety rules and regulations.

Uses computer applications or other automated systems such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments.

Performs other related duties as required and/or assigned.

Minimum Qualifications

REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES

Comprehensive knowledge of procedures and techniques used to determine valuations of residential, commercial, industrial, and agricultural property.

Thorough knowledge of state and county rules and regulations regarding property valuation, appraisal and land use, and collecting and recording data.

Thorough knowledge of NC Department of Revenue regulations and the NC Machinery Act.

Thorough knowledge of techniques used in determining fair market value.

Good knowledge of general building and construction principles and practices.

Good knowledge of the geography and location of properties in the County.

Skill in being customer-focused, adept at problem solving and working collaboratively with others.

Skill in collecting, analyzing and comparing data, and the ability to maintain accurate records.

Skill in reading and interpreting maps, deed information, and costing manuals.

Skill in using measurement tools and equipment.

Skill in planning, organizing and prioritizing work.

Ability to demonstrate sound judgment, integrity, resourcefulness, accuracy, thoroughness and the physical condition commensurate with the demands of the position, while maintaining an ethical standard of care.

Ability to interpret and apply county, state and federal regulations, policies and procedures.

Ability to collect, analyze and compare data pertaining to real property sales, costs, etc. to properly apply findings to value property within the county.

Ability to enter and retrieve data using relevant programs and systems and skill in conducting research.

Ability to read and interpret maps, blueprints, plans, drawings, deed information and costing manuals.

Ability to organize, consolidate and evaluate information, maintain records, prepare reports, and complete assignments accurately and timely.

Ability to communicate complex information effectively both orally and in writing, with a wide variety of people.

Ability to establish and maintain cooperative relationships with other departments, customers and residents, and skill in dealing effectively with the public.

Ability to perform advanced mathematical calculations associated with the work.

Ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software to maintain records, prepare reports, and conduct correspondence related to the work.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE

Graduation from an accredited college or university with a Bachelor's Degree **AND** two (2) years' related experience in tax appraisal; **OR**

Graduation from an accredited college or university with an Associate's Degree **AND** four (4) years' related experience in tax appraisal; **OR**

Graduation from High School or General Educational Development (GED) test equivalency **AND** six (6) years' related experience in tax appraisal; **OR**

An equivalent combination of training and experience as defined above. A higher degree is not a substitute for work experience.

SPECIAL REQUIREMENTS

Possession of or ability to readily obtain a valid driver's license issued by the State of North Carolina for the type of vehicle or equipment operated is required.

All offers of employment are conditional upon successful clearance of a background check and pre-employment drug testing. Employment cannot commence until the employee has been cleared.

Ability to complete necessary training and certification by the North Carolina Department of Revenue as prescribed in the Machinery Act of North Carolina.

Bilingual applicants are encouraged to apply.

Supplemental Information

PHYSICAL REQUIREMENTS AND POSSIBLE HAZARDS

Ability to physically perform the basic life operational functions of climbing, balancing, stooping, kneeling, crouching, crawling, reaching, standing, walking, pushing, pulling, lifting, typing, grasping, feeling, talking, hearing and repetitive motions of the hands/wrists.

Ability to perform light work exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently, and/or negligible amount of force constantly to lift, carry, push, pull or otherwise move objects.

Possess the visual acuity to prepare and analyze data and figures, perform extensive reading, and perform work on a computer.

Must be able to work in outside environmental conditions, with minimal protection from weather.



Orange County Government
Present Use Value (PUV) Compliance Review Appraiser

CLASS CODE	1995	SALARY	\$26.59 - \$46.24 Hourly \$55,308.00 - \$96,173.00 Annually
ESTABLISHED DATE	November 15, 2022	REVISION DATE	November 23, 2022

General Description

DISTINGUISHING FEATURES OF THE CLASS The work involves the responsibility for administering the Present Use Value Program which entails working with property owners to ensure they are compliant with general statute guidelines of the program. The incumbent must be a certified appraiser and will be required to complete the appropriate North Carolina Department of Revenue (NCDOR) Present Use Training and Present Use Value (PUV) Training within one year of hire date.

Work is performed under the general supervision of the Real Property Appraisal Manager with leeway to exercise independent judgment within the framework of applicable rules, regulations, policies and procedures in the performance of duties, both in terms of planning and accomplishing work, and in making decisions regarding client needs and requests and conducting project assignments. This position is not supervisory in nature. Position does related work as required.

Example of Duties

Examples of Essential Functions Following are examples of typical work activities and responsibilities. The incumbent may be responsible for performing other related duties and responsibilities as required or assigned. ***A position may not include all the work examples given, nor does the list include all that may be assigned.***

Administers the tax deferment programs related to farming, horticulture and forestry.

Responds to taxpayer inquiries concerning the PUV program.

Assists taxpayers with the applications process.

Annually reviews at least 1/8th of the parcels in the county classified for taxation at present use value to verify that these parcels qualify for the classification. NCGS 105-296(j).

Provides notification to property owners, removal of ineligible properties, and creation of deferred bills in compliance with statute.

Performs the duties of an Appraiser II in appraising the property and land in accordance with the adopted SOV and PUV rates.

Conducts field evaluations of the properties to help establish taxable value.

Determines PUV Program eligibility of new or continued use applications of the program by evaluating property use through audits and reports.

Represents the tax office in hearings to the Orange County Board of Equalization and Review (BOER) as well as the North Carolina Property Tax Commission (PTC) as required by serving as an expert in the field.

Uses specialized Geographic Information System (GIS) mapping programs to determine areas of open and wooded land; determines soil types and value per acre relative to how land is being used.

Adheres to the department's safety rules and regulations.

Minimum Qualifications

FULL PERORMANCE KNOWLEDGE, SKILLS AND ABILITIES

Thorough knowledge of rules and regulations regarding property valuation and appraisal methods.

Thorough knowledge of NC Machinery Act.

Good knowledge of general building and construction principles and practices.

Considerable ability to gather, compile and analyze numerical data along with knowledge of various software programs.

Considerable knowledge of General Statutes as they pertain to property tax laws.

Comprehensive knowledge of procedures and techniques used to determine valuations of residential, commercial, industrial, and agricultural property.

Good knowledge of techniques used in determining fair market value along with knowledge of the geography and location of properties in the County.

Ability to review and maintain confidential information and analyze and interpret policies and procedures.

Ability to understand, interpret and use GIS software.

Ability to read, compare and interpret property maps, surveys and aerial photographs accurately.

Ability to interpret property record cards along with the ability to operate office equipment required by the position such as personal computer and calculator.

Ability to tactfully and courteously deal with citizens, employees, and governmental agencies and departments.

Ability to demonstrate sound judgment, integrity, resourcefulness, accuracy, thoroughness and the physical condition commensurate with the demands of the position.

Skill in collecting and recording data and the ability to maintain accurate records.

Skill in planning, organizing and prioritizing work.

Ability to demonstrate sound judgment, integrity, resourcefulness, accuracy, thoroughness.

MINIMUM QUALIFICATIONS

Graduation from an accredited college or university with a Bachelor's Degree **AND** two (2) years' related experience in tax appraisal; **OR**

Graduation from an accredited college or university with an Associate's Degree **AND** four (4) years' related experience in tax appraisal; **OR**

Graduation from High School or General Educational Development (GED) test equivalency **AND** six (6) years' related experience in tax appraisal; **OR**

An equivalent combination of training and experience as defined above. A higher degree is not a substitute for work experience.

Prefer a background in farming/agriculture.

SPECIAL REQUIREMENTS

Possession of or ability to readily obtain a valid driver's license issued by the State of North Carolina for the type of vehicle or equipment operated.

All offers of employment are conditioned upon successful clearance of a background check. Employment cannot commence until the employee has been cleared.

Supplemental Information

PHYSICAL REQUIREMENTS AND POSSIBLE HAZARDS

Must be able to physically perform the basic life operational support functions of standing, walking, stooping, crawling, talking, repetitive motions of the hands/wrist, sitting, bending, kneeling, climbing, grasping, hearing, handling, pushing, pulling, lifting, carrying and reaching.

Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

Must possess the visual acuity to prepare and analyze data and figures, operate a computer terminal and perform extensive reading.



Guilford County Sr Tax Data Analyst

CLASS CODE	0935	SALARY	\$2,603.23 - \$3,123.88 Biweekly \$67,684.00 - \$81,221.00 Annually
ESTABLISHED DATE	February 09, 2025	REVISION DATE	February 21, 2025

Class Spec

GENERAL STATEMENT OF DUTIES

Position is responsible for professional and technical expert data analysis of residential, commercial, industrial, and land property appraisal data. The Sr Tax Data Analyst provides validation of data, reporting, trend analysis, sales analysis, review of and publishing of data as needed to be used in the appraisal and appeal systems.

DISTINGUISHING FEATURES OF THE CLASS

An employee in this class is responsible for the collection, analysis, validation of data, data analytics and reporting of appraisal work in support of the determination of the monetary value of residential, commercial, industrial, and land properties in the county. Work involves gathering data from various sources like CAMA, Power BI, City/County planning, permits, government websites, and market information from other locations where the data may be available. Creates reports to communicate tax data, develops analytical models and provides timely accurate analysis to influence and inform decision makers. Role requires strong technical abilities in managing and analyzing large amounts of data, understanding relationships between various databases and ability to identify discrepancies or variations. Considerable independent judgment and initiative must be exercised in correctly evaluating a wide variety of data. Organizes data and maintains appraisal neighborhoods in preparation for countywide reappraisals. Reviews market data and sets new values for countywide reappraisals. This position does not exercise supervision of staff. This position reports to the Assistant Tax Director. Work is performed under limited supervision and is reviewed for compliance with current departmental appraisal methods and procedures.

Examples of Duties

DUTIES AND RESPONSIBILITIES

Essential duties and responsibilities include, but are not limited to:

- Uses Power BI to design, build and test interactive dashboards, integrating with new data sources to visualize property tax data and trends.
- Build and optimize queries to extract and analyze data from appraisal and tax management systems.
- Gather and validate property data from various sources to include property records, sales data and SQL database tables.

- Review data from reports on the Appraisal System to develop values to be used in reappraisals and to identify patterns that may impact property values and tax revenues to inform policy decisions and tax strategies
- Implements quality control measures to ensure that data used for tax assessments complies with relevant regulations and standards, minimizing errors and discrepancies in property valuations.
- Identify weaknesses in appraisal data that may affect reappraisal outcomes, proactivity addressing issues to enhance data integrity.
- Assists in developing appeal presentations for the Board of Equalization & Review.
- Prepare comprehensive reports on property valuations and tax assessments, effectively communicating findings to senior tax management, Budget, DOR, and individual jurisdictions.
- Reviews commercial property data bases to be used in developing income property capitalization and expense rates.
- Assists in the listing of new construction appraisal.
- Reviews and adjusts appraisal market area boundaries; Assists with the delineation of new appraisal neighborhoods.
- Assists in training staff on software changes.
- Assist in developing schedule of values for reappraisals.
- Keeps abreast of the reappraisal and ongoing work cycles to plan and facilitate upcoming data analysis needs.
- Identifies holes or weaknesses in the appraisal data that may be affecting reappraisal outcomes.
- Identifies potential new data sources for elements like water/sewer, traffic counts, contamination sites, and zoning plans that may assist with the valuation of property.
- Produces data files for the statistician employed by the County to improve valuation modeling.
- Provides quality control over the sale records through analysis of the data and review of the business processes.
- Assists with development, testing, and quality control of the CAMA software. Assists with documentation and staff training as needed.
- Assists in working appeals of real estate tax value.
- Assists the Assessor in producing appraisal reports and maps for the public and the County Commissioners.
- Assists with the appraisal of real estate as needed. (Including the measure and listing of Real Property).
- Develops capitalization rate standards from analyzing the database.
- Discusses appeals with taxpayers, providing supporting documents to reach resolution.
- Adjusts boundaries of problem appraisal neighborhoods for consistency.
- Assists in responding to Chat inquiries on the Tax public website.
- Respond to help requests on technical issues from appraisal staff.
- May oversee interns, seasonal workers and/or volunteers.
- Performs other duties as assigned.

RECRUITMENT STANDARDS

Knowledge, Skills, and Abilities

- Advanced skills on Excel are required for use in analyzing data.
- Real estate oriented training with certification or licensure as an appraiser or real estate broker.
- Advanced knowledge of GIS relationship to real estate appraisal.
- Knowledge of real estate, tax and statutes.
- Knowledge and ability to use on-line meeting platforms such as MS Teams.
- Ability to communicate effectively orally and in writing; Ability to read and interpret deed descriptions and maps.
- Ability to compose presentations using Powerpoint for Board of E&R meetings.

- Ability to relate GIS software applications to enhance understanding of sales information.
- Ability to establish and maintain effective working relationships with other employees.
- Ability to work with databases, build queries and reports.
- Ability to gather and work with large amounts of data.

Typical Qualifications

Minimum Qualifications

Bachelor's degree in Business Administration, Accounting, Finance, GIS or related degree and five years of experience in real estate appraisal including commercial real estate OR Associates' degree in Business Administration, Accounting, Finance, GIS or related degree and seven years of experience in real estate appraisal including commercial real estate OR High School Diploma or G.E.D. and nine years of experience in real estate appraisal including commercial real estate.

Preferred Qualifications: Experience in the appraisal of commercial, industrial, residential properties and experience with mass appraisal.

Experience working with Power BI, Ama, NCPTS, Excel and/or creating data dashboards.

Special Qualifications: Must be able to obtain certification as a real property appraiser from the NC Department of Revenue within one year of employment.

Supplemental Information

Physical Demands and Work Conditions

- Must possess the visual acuity to prepare and analyze data and statistics, operate a computer terminal, and use measuring devices; may perform repetitive motions.
- Must be able to exert up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects.
- Must be able to express or exchange ideas by means of the spoken word. Those activities in which they must convey detailed or important spoken instructions to other workers accurately, loudly, or quickly.

Driving is Essential

Driving is an essential requirement of this position whether driving a County owned or personal vehicle to conduct county business. Motor Vehicle Reports may be verified for valid driver's license and that the driving record is compatible with the county's driving criteria. If a personal vehicle is operated for county business proper insurance is maintained as per Guilford County's vehicle use policy.

Special Note: This generic class description gives an overview of the job class, its essential job functions and recommended job requirements. However, for each individual position assigned to this class, there is available a completed job description with physical abilities checklist which can be reviewed before initiating a selection process. They can provide additional detailed information on which to base various personnel actions and can assist management in making legal defensible personnel decisions.

Orange County Classification Specification

Revaluation Manager

Job Class Code: (To be assigned)

FLSA Status: Exempt

General Description

The Revaluation Manager leads the Countywide Revaluation program. This job makes sure property values are fair and accurate for all property types across the county. The Revaluation Manager helps set property values using sales data, market research, and mass appraisal methods.

This position also helps create and update the County's Schedule of Values and Appraisal Manual and makes sure property values follow North Carolina laws and professional appraisal standards. The Revaluation Manager supports appeals, helps answer public questions, and provides expert information when needed.

Examples of Essential Functions

(A position may not include all duties listed. Other related duties may be assigned.)

Revaluation Planning and Leadership

- Plans and runs the Countywide Revaluation process so property values are updated to current market value.
- Organizes revaluation work schedules and deadlines and makes sure the work is completed on time.
- Tracks progress and provides updates to leadership and governing boards when needed.
- Maintains records and documentation to support revaluation work and decisions.

Schedule of Values and Valuation Methods

- Helps develop, update, and maintain the County's Schedule of Values and Appraisal Manual.
- Develops and updates base rates, land schedules, and depreciation tables used to calculate property values.
- Makes changes to valuation schedules when the real estate market changes.
- Makes sure appraisal methods follow North Carolina law, USPAP standards, and IAAO guidelines.

Market Research and Data Analysis

- Reviews property sales and runs sales ratio studies to check fairness and accuracy of property values.
- Maintains and analyzes sales files, building cost data, zoning information, and market conditions.
- Performs land sales studies and cost research to support valuation updates.
- Collects and analyzes income and expense data for commercial properties to support income-based valuations.

Systems, Reports, and Quality Checks

- Uses the County's appraisal system (CAMA) to run reports, check values, and verify that data is accurate.
- Creates custom reports and tools when needed to support revaluation, transparency, and decision-making.
- Reviews and improves workflow and data processes to support accurate revaluation results.
- Works with IT, GIS, and vendors to improve data tools and public-facing resources.

Public Support and Appeals

- Helps answer questions from property owners about revaluation, property values, and appraisal methods.
- Speaks at public meetings and community events to explain revaluation and how values are calculated.
- Helps resolve informal appeals and supports formal appeals at the Board of Equalization and Review and the NC Property Tax Commission.
- Provides expert testimony when needed.

Staff Support and Training

- Leads and supports staff working on revaluation tasks by giving guidance and reviewing work for quality and consistency.
- Helps staff improve appraisal skills and supports training during the revaluation process.

Knowledge, Skills, and Abilities

- Strong understanding of property appraisal and revaluation methods.
- Strong ability to work with data, market trends, reports, and valuation studies.
- Ability to use appraisal software (CAMA) and tools such as spreadsheets and databases.
- Ability to clearly explain appraisal and revaluation work to staff and the public.
- Ability to stay organized, manage deadlines, and keep strong records.

Minimum Qualifications

- Associate's degree and three (3) years of experience in tax assessment/appraisal, including participation in a Countywide revaluation; OR equivalent combination of education and experience; AND
- Certification by the NC Department of Revenue as a North Carolina County Real Property Appraiser; AND
- Valid North Carolina driver's license.

Preferred Qualifications

IAAO RES designation or NC DOR Real Property Appraiser II certification.

6.2 – Overview of Current Staffing Levels Within the Tax Assessment Division

- The Tax Assessment Office is a division of the Tax Administration Department. There are 3 other divisions: GIS/Addressing/Land Records, Administration, and Tax Collector's Office.
- The Deputy Assessor is the division manager, with two managers as direct reports: Personal Property Manager and Real Property Manager.
- Real Property staffing:
 - (3) Appraiser I
 - (3) Appraiser II
 - (1) Chief Appraiser
 - (1) PUV Compliance Review Appraiser
 - (1) Real Property Manager
- We also have a Temporary Appraisal Assistant who has been with us since August 2024 and whose main duty has become to manage appeals, schedule BOER hearings, and assist with agendas and minutes.
- Turnover is low. The Real Property Manager has been with Orange County since April 2004, and previously worked in Guilford County. The most recent hire is an Appraiser I who started as a temporary staff member and joined as a permanent employee February 2023, and before that another Appraiser I who joined in 2021. The Deputy Assessor started in Orange County in June 2017 and worked as the Tax Assessor in McDowell County previously.
- Additionally in our upcoming budget we are requesting a Commercial Appraiser and a Data Analyst and plan to upgrade our Chief Appraiser position to Revaluation Manager.
 - No job description for the Commercial Appraiser, will be gathering information shortly to create it.
 - No job description yet for the Data Analyst, likely will include some basic information found in the attached Guilford County Data Analyst position.
 - Included a tentative job description for the Revaluation Manager

2025 Q2 Ratio

The following statistics are based off of the sales you have entered. These stats are based off of sales that were not disqualified. While we do believe all formulas are accurate, please do not consider this your final stats, as our office must still review the overall study. We may end up disqualifying or qualifying sales that your office had previously included or excluded.

Number of Sales

246

Median

0.938

COD

10.939

Mean

0.933

Range

2.035

PRD

1.042

January-October 2025 Sales Ratio

Number of Sales	319
Median	0.957
COD	10.434
Mean	0.949
Range	1.479
PRD	1.043