

IAAO Annual Conference

Tampa, Florida

August 28-31, 2016



82nd Annual International Conference on Assessment Administration

“Site Inspection Process for Industrial Properties”



82nd Annual International Conference on Assessment Administration

Presented by:

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IAAO 2016

2:00 pm to 3:30 pm, Monday August 29, 2016

82nd Annual International Conference on Assessment Administration

Site Inspection Process for Industrial Properties Presentation at the 2016 IAAO Annual Conference

























Please welcome Dennis!!



Industrial Plant Inspections

What to Do and What Not to Do

Do

1. Arrange the inspection in advance.
2. Dress appropriately.
 - a. Check requirements in advance.
 - b. Be prepared to wear a hard hat, safety glasses, steel-toed boots, and Flame retardant clothing if required.

3. Bring note-taking material or device.
 4. Bring a camera if allowed.
 5. Request permission to take pictures.
 6. Expect an orientation session.
 7. Pay attention to safety concerns such as rallying points.
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3. Stay with your host at all times.
 - a. He or she is responsible for your safety.



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9. Ask appropriate questions.

- a. Realize that some information will need to be sent later.

10. Try to develop an understanding of what the plant does and how it operates.

11. Take notes!

- a. Plant name and location
- b. Owner
- c. People in attendance
- d. Date of the inspection



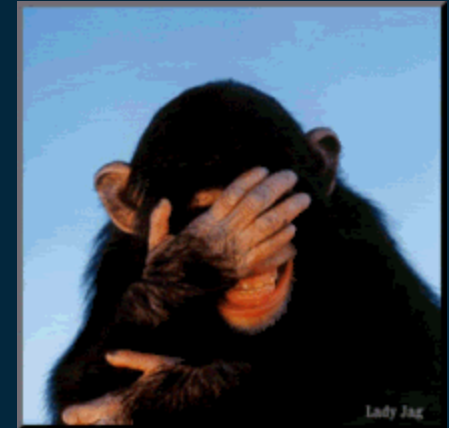
- e. The answers to your questions
 - f. Anything else that seems significant
12. Thank your hosts for their cooperation, time and information.
13. Above All, Be Professional!



Don't

1. Don't be adversarial - this is a learning and fact-finding mission not a contest or hearing.
2. Don't be late.
3. But don't arrive too early either. The plant personnel have plenty of other things to do besides entertain you.

4. Don't take pictures without permission.
5. Don't be a know-it-all; you are there to learn.
6. Above All, Don't Do Anything That Would Embarrass Your Employer!



“CUE BOB’S POINTS”

Site Inspection Philosophy



1. SAFETY

is the ONE and the ONLY THING
important – nothing else matters!!

(Bob to elucidate)



Topics: Safety video testing, PP&E,
where to walk, etc.

2. **Courtesy** - see #1 above!

Listen to all Protocols, Rules.
Watch any videos - often good
information , besides 7 ½ mph!



3. **Confidentiality** - Respect for all proprietary, trade secrecy, strategies, unique features or methods of operation.

(Bob to provide anecdotes, examples from above.)



4. Changes - If a repeat visit, recall what was, watch for changes during inspection -Ask good questions!!



5. Notes -

- a) Time, place, date, location (GPS, Sect., Township, Range, Directions)
- b) Contemporaneous notes are powerful -Keep in context, though! (Bob to explain)
- c) Use as memory cues- topics, correct dimensions or general size estimates.



6. **Follow up tips** - Check renditions, input from agent or representative, vs. notes and memory.

CWIP



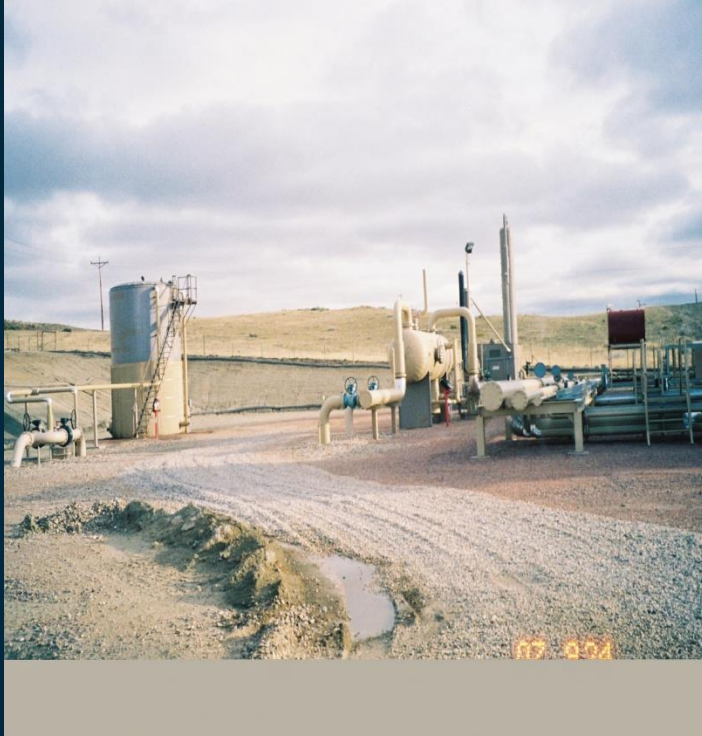
Deletions

Additions



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Personal Property or Real Property?



Take it away Nick!



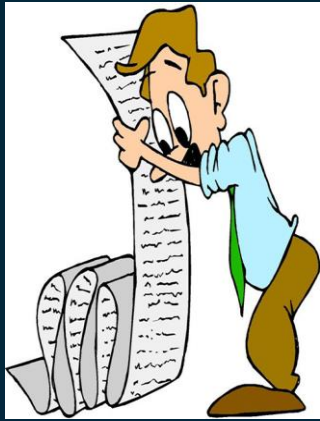


JACKSON COUNTY ASSESSOR'S OFFICE



1. Be prepared. Make plans ahead of time. Make sure to have all documents, equipment, PRCs, a list of questions, etc., that you may need.





2. Study published material on facility before visit.
3. Refresh on previous appraisals, prior year notes and value trends for the property.
4. Make no commitments or promises you may not be able to produce.



5. Be respectful!

These folks are usually your largest individual taxpayers. Remember you get more bees with honey than vinegar.

But... You should be confident in your position and what you are there to do.





6. Don't be afraid to ask questions, but keep in mind it may be better to follow-up with a call or email when you can consider exactly what you want to ask.
7. Listen more than you talk. It's amazing what you may hear or pick up on.

8. If you aren't qualified to accurately perform the appraisal, bring in someone who is. You would rather have a little cost up front than go down a road and get beat up on appeal because you lacked the knowledge to perform the appraisal.

Would you like to contact us??

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