

## Data Collector Standards

### A. Definitions

- Data Collector – Individual employed by a county or county vendor for the sole purpose of collecting real property characteristics.
- Property Record Card including “ecard” – A document, hard paper copy or electronic, detailing basic real property information and property improvement characteristics.
- Labeling – Detail on property record card to identify specific sections or elements of construction that are pertinent to the valuation process and/or necessary for data entry to any valuation (CAMA) program.
- CAMA – Computer Assisted Mass Appraisal – A system, manual or computerized, to value real property and property improvements based on property characteristics, based on valuation models.

### B. Role of the Data Collector

1. Data collectors play an essential role in a county’s everyday collection of property characteristics as well as in a county reassessment as they are involved in gathering the data on the characteristics of each parcel that is required to successfully complete a property valuation whether as a routine daily activity or as part of a countywide reassessment. Such data must be complete and accurate to properly estimate property values in designated neighborhoods and jurisdictions within the county.
2. Data collectors also represent the county, the county’s assessment office, and a county vendor (who represents the county). This individual may be the initial and possibly only contact with the property owner/public, therefore being knowledgeable of the process is critical. For these reasons, the following data collector standards are provided as recommended guidelines for counties and county assessment offices and their representatives (i.e., contractors and subcontractors).

### C. Standard for Representing the County and County Assessment Office

1. Professional responsibilities for data collectors require the data collector to:
  - Be familiar with the *role of the data collector* in the valuation and/or reassessment process, property inspection, data collection and reporting, and representing the county.
  - Be thoroughly familiar with county and county assessment office policies regarding appearance and dress, safety and access to parcels (e.g., reason

for entry onto the property exterior; hours within which such entry may occur, including at a nonroutine time agreed upon with the property owner; prohibitions against opening doors, entry through open doors or looking into windows of structures; requirements to leave a notice (e.g., door hanger; see attachment for example) on the principal building providing the owner with information on how to contact the data collector or other county designated contact).

- Be sure the correct property record card for the property is in hand for each field visit.
- Have his/her I.D. card ready and make no attempt to enter a property without it.
- Be ready to politely and properly identify oneself and identify and address the occupant.
- Tactfully explain the purpose for the visit to the property (standard script).
- Ask permission to inspect the property to ensure the property record is complete and accurate (standard script).
- Conduct all work in a polite, businesslike, efficient, and professional manner.
- Comply with policies related to prohibitions on entering the premise if the owner/occupant provided notice denying entry, and the requirement to immediately leave the property if the owner/occupant requests, and conduct oneself in a manner consistent with such policies.
- If an owner or occupant is not available at the time of the visit, follow preestablished protocol relative to property inspection and provide notice explaining the reason for the visit (e.g. door hanger with contact information).

If entry to the interior of a property is required, two county representatives must be present at all times for interior inspections and in compliance with county established trespass and privacy standards (see example of such policies attached).

2. Professional responsibilities for data collectors will also require a data collector to respond appropriately in special circumstances. For example, relative to a residential property, a data collector should:

- Not enter property grounds if the property is posted with “no trespassing” signs or the perimeter of the property is fenced in with the access gate locked or unlocked.
- If met by a minor after entering property grounds, ask if the parents are home. If the minor indicates the parents are at home, ask the child to tell

the parents someone is at the door. When minors are present on property grounds, do not measure the exterior of the property until an adult has given permission. If the minor indicates no parent/adult is present, do not measure the exterior of the property and plan a revisit.

- Plan a revisit if there has been illness or death in the family.

#### D. Standards for Visitation Procedures

1. **Owner/Occupant Present:** The data collector should contact the parcel owner/occupant and if permitted, physically inspect each improved parcel. The purpose of the exterior inspection of the improvement(s) is to list and/or verify, and if necessary correct and/or revise, the property improvement characteristics/information contained on the property record card (including ecards) to validate the current property characteristics/information for each parcel.

If permission to inspect is denied, notation as to the circumstances is to be made on the property record card and a supervisor immediately notified. Further, if an inspection for any other reason (i.e. safety, security, health-related issues, only minor present, trespass issues) is not possible, notation as to the circumstances are to be made on the property record card and a supervisor is to be immediately notified.

As part of the data collection/inspection process, the data collector should inspect all improvements and perform measuring pertaining to collecting and recording complete data regarding the physical characteristics of all the improvements for every parcel. (Improvement should be measured from the exterior and rounded to the nearest foot and recorded on the property record as directed. The dimensions should be written on a preliminary sketch and later transferred to the property record card. The sketch should contain exterior dimensions, story heights and labeling. The final sketch should be neat and to scale. Dimensions should be properly placed so that the square footage for specific areas and total square footage is able to be correctly calculated; labeling should be legible and complete.)

- Contact with the parcel owner/occupant also provides opportunity to verify the available information on the parcel and may provide information about the age of buildings, recent sales information from the owner, and information on any changes to the improvements and also identify factors that might affect the value of the property (e.g., special easements, unusual soil conditions, property rights). It also provides opportunity to advise the owner, if asked, when and where the information on the property valuation will be available, or how such information may be obtained.

- If entry to the interior of the property is required, two data collectors or county representatives must be present at all times and act in conformance with county-established trespass and privacy standards.
2. **Occupant Not Present:** If contact is not made with the owner/occupant of a specific improved property, and policies with respect to special circumstances and county policies regarding privacy and trespass are not applicable (e.g., a vacant property), the data collector should go about the process of measuring and collecting visible property characteristics, inspect the subject property from the exterior, and leave a notice (door hanger) with a local telephone number informing the owner/occupant that the property has been inspected and how the property owner may reach the county-designated contact if desired.
  3. If the owner/occupant refuses entry, the data collector may estimate both size and property characteristics (see attachment with possible example of a notice concerning the estimated assessment).
  4. The data collector must document all reasons for inability to conduct a physical inspection of the exterior of the property and specifically report such parcels that were not physically inspected (for any reasons previously discussed in C 2) to their supervisors.
  5. The data collector must complete and submit **all required field reports** promptly following completion of the field review per the requirements of the county assessment office.

## E. Training and Quality Assurance Standards

1. The data collector<sup>1</sup> should bring to the **position basic skills** including, but not limited to, basic observational and mathematical skills required to collect data and perform arithmetic, and possess communication skills. In some communities, bilingual skill may be desirable.
2. The data collector **must be trained to:**
  - Generally understand property valuation as it relates to assessment and the purpose of a reassessment as it relates to general countywide reassessment or daily field property review and the data collector's role in the assignment or project.
  - Understand the data to be collected and the property record fields to be verified and completed.

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<sup>1</sup> Prior to employment, potential data collectors should possess a valid driver's license and reliable vehicle, and have complied with county policies related to current background checks.

- Accurately and fully complete relevant fields on the property record card<sup>2</sup> based on the training or operational manual with instructions for its completion.
  - Accurately and consistently verify or collect new property characteristics and record property characteristics, square footage, angles, sketches and dimensions for appropriate field documents.
  - Take clear digital images of properties.
  - Gather cost and sales information and records on appropriate field documents, if required. [Note Well: This step relative to cost and sales information may be considered as “valuation” and not in the purview of the data collector. In the sales comparison, the comparable selection process requires the selection of comparable properties which is subjective and should only be done by Certified Pennsylvania Evaluators (CPEs).]
  - Document/update data on the physical condition of buildings based on objective property characteristics (e.g., the presence or absence of a structure).
  - Complete logs and control forms and required documentation, as required.
  - Bring to the attention of the field supervisor issues that may be identified regarding mapping, or inaccuracies on the parcel identification and property record card (e.g., the presence or absence of a structure).
3. The data collector gathers and records objective property characteristics. Property elements that require estimation of value or consideration of subjective factors may not be reported by data collectors, unless the individual acting as a data collector is a CPE or certified appraiser. As a result, data collectors should not assign value attributed to property characteristics, such as:
- Grading factors.
  - Quality of a structure.
  - Condition of a structure.
  - Depreciation.
  - Effective age.
  - Legal property rights (e.g., riparian rights, oil and gas rights).

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<sup>2</sup> While a data collector may not complete all fields on a property record card, typically, the existing property record card will include property identification data such as the parcel number (aka property identification number or PIN), name and address of owner, legal description, a detailed listing of building characteristics, an area to sketch the building, a list of minor buildings, a space for a photograph and notations, all land listing data and computations, a sketch of the parcel, property identifiers such as parcel number and property location, sales data, building permit records, and factors affecting land values (i.e., use, depth, influence factors, topography, utilities, type of street or road, dwelling setback, fronting traffic, and zoning), quality of construction, and condition, desirability and usefulness for the building’s age and type.

Such characteristics and data are the responsibility of certified (CPE) project staff involved in support, supervision, and quality assurance for field data collection.

4. Training must be consistent for data collectors employed at the beginning and during all other phases of the assignment or countywide reassessment project.
5. All data collectors must be supervised.
6. Quality control is key to accurate and complete property inventory data. Data collector supervisors must check the data collector's work for accuracy and completeness, provide for retraining, and discipline collectors unable to meet standards for accuracy and completeness. (Refer to the model contract for suggested International Association of Assessing Officers (IAAO) standards for supervisors to sample the submitted work.)
7. The exact amount of time required for data collector in-class and field in-service training will be similar for certain modules (e.g., county policies regarding dress, safety, and property access) but may vary for others depending upon the skills and prior experiences of the collector (e.g., a contractor with skills in building measurement or a CPE performing data collection functions, inspection procedures, etc.). Typically, about one-week of in-service training may be required to assure the quality and consistency of the process of data collection.