

APPRAISERS MANUAL

DATA COLLECTION PROCEDURES IN THE FIELD

PREFACE

The application of standardized method in the appraisal of a structure requires work to be performed in three areas: fieldwork, calculation and valuation. The purpose of this chapter is to supply basic definitions and depict common situations that must be contended with in the field.

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DATA COLLECTION PROCEDURES IN THE FIELD

INTRODUCTION

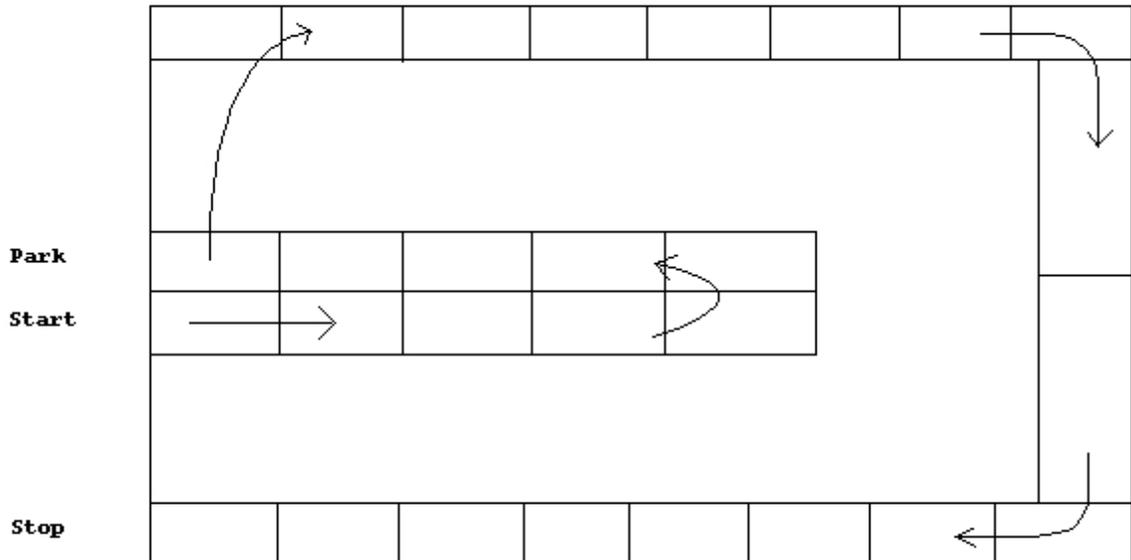
Fieldwork should be approached with three basic components in mind: Collection or verification of measurements of any improvements including correction of any such measurements and recording information correctly on the field data collection instrument. The first two topics are discussed in this chapter; the third in the next chapter.

COLLECTION OR VERIFICATION OF CONSTRUCTION DATA

This involves two basic techniques. The majority of the data is confirmed by a visual inspection and can be done while walking up to the front door. It is helpful to give the area you are covering a "windshield" preview while looking for a parking spot. This gives a good indication of the typical exterior components such as roofs and exterior walls and helps develop a "feel" for the neighborhood.

In order to work at maximum efficiency, plan your route ahead of time. Check your map and arrange cards in the order you will want to walk; ideally stopping and starting at the same point.

Example



As you approach each house, check your exterior walls, roof structure, roof cover; look for indications of heating type - fireplace, compressors, oil drums, etc.

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COLLECTION OR VERIFICATION OF CONSTRUCTION DATA, cont.

Identify yourself and your purpose, remembering at all times to be polite and respectful. One approach is as follows:

"Good morning. My name is John Doe and I am with the County Revaluation office; (show your identification card) verifying data for the County Tax Reassessment. I need to ask you a few questions and walk around the outside of the house."

Usually, most people are cooperative. Remember, your job is solely to collect or verify data; not to come up with the assessment value. While you are introducing yourself, glance inside to check for interior wall construction, flooring, and indications of heating and cooling systems.

Several questions can be asked as follows:

1. "What sort of floors do you have?" (Carpet, hardwoods, laminate, tile, etc
2. "What type of heating and cooling system do you have? How old is your system?" (If they don't know, and that happens, you can almost see physical indications from the outside such as chimney or an oil drum.
3. "How many bathrooms and bedrooms do you have?"
4. Then, "Thank you very much. Now all I need to do is take a quick look around the outside, okay?"

Sometimes, you will have to take measurements to appraise improvements. If you have to measure the whole house, just explain to the owner you are collecting and verifying building measurements.

There are a few aids to measuring that make it a little quicker and easier. The use of the Disto laser measuring devices has proven to be an accurate and effective. It works best when there are walls or corners for the laser to bounce off of. If a measuring tape is needed, a screwdriver or long nail serves as a good anchor for the tape end. This works well when you cannot get to the wall because of fences or shrubs. Despite logic, sometimes measurements will not produce a square or even sided home. Be sure to check for this before turning in the appraisal

It is also essential that the measurements produce an even sided structure. A simple method of checking for closure is to add all the front measurements (bottom horizontal) and add all the back measurements (top horizontal) to see if the two are equal. The same should be done for the sides of the house (left and right verticals). This is known as checking for closure. Another way to insure the proper length is to measure the length without any offsets to get the overall length. The same can be done for the width.

There are three basic steps to this process:

1. Measure each side of the structure accurately.
2. Make a diagram placing dimensions (rounded to the nearest foot) beside each line they represent.
3. Label structural variations with appropriate abbreviations (FEP, FSP, FCP, etc.). Lettering and numbers are to be neatly made with measurements written so as to read from the bottom of the card looking up.

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TO CHECK FOR CLOSURE:

The basic rule is the sums of the lengths of the opposite sides must be equal to each other as follows:

The sum of the top horizontal lines, (the back of the house) should equal the sum of the bottom horizontal lines, (the front of the house). The sum of the left vertical lines, (the left side of the house) should equal the sum of the right vertical lines, (the right side of the house), in the same manner.

The following are examples depicting various types of improvements and how they should be drawn, labeled and checked for closure.

STANDARDIZED METHOD OF DRAWING STRUCTURES

A uniform method of drawing and labeling structures must be adopted. The following method is to be employed in preparing documents for use by the system.

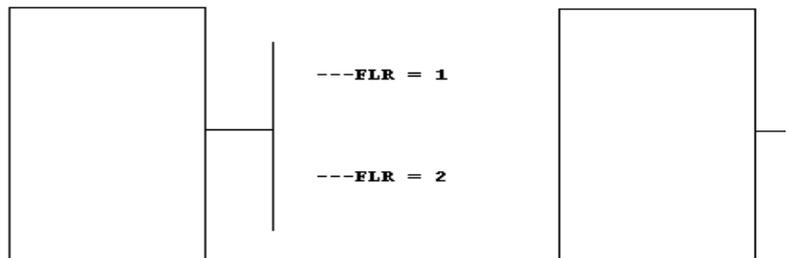
Orient the drawing so that the front of the structure is towards the bottom of the card. All labeling should be oriented in this same direction.

It is essential in drawing the structures to delineate the auxiliary areas properly in order that they can easily be distinguished from the base area.

Familiarity with auxiliary area abbreviations is essential along with an understanding of the visual indications of these areas. For example: an enclosed porch which may have windows different from the base, a lower foundation than the base, or different roof cover.

If you are confronted with an exceptionally large property with many sides, a piece of graph paper used in drawing the sketch can be invaluable in preventing errors.

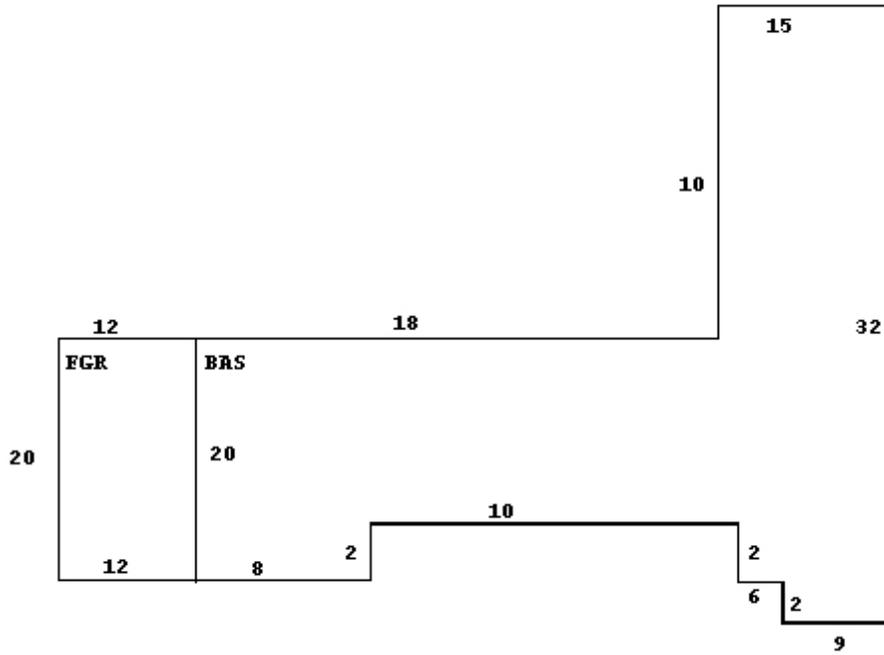
Special attention needs to be given multi-story buildings. A notation to denote upper stories and/or basements should



be as follows

Further refinements of this situation are necessary to contend with many older, odd shaped homes often with 2 or more stories. Careful attention must be paid to auxiliary areas and whether or not they extend to all floors.

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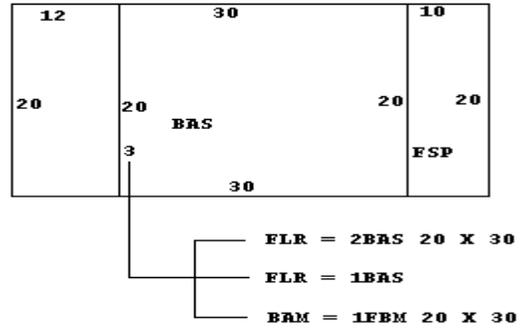
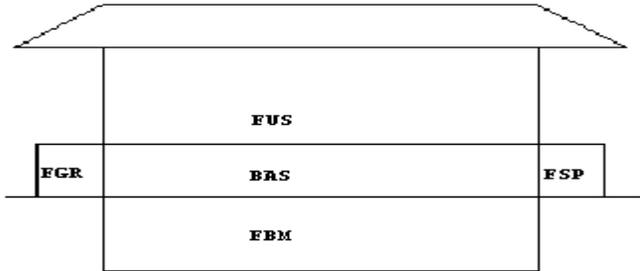


$$15 + 18 + 12 = 45$$

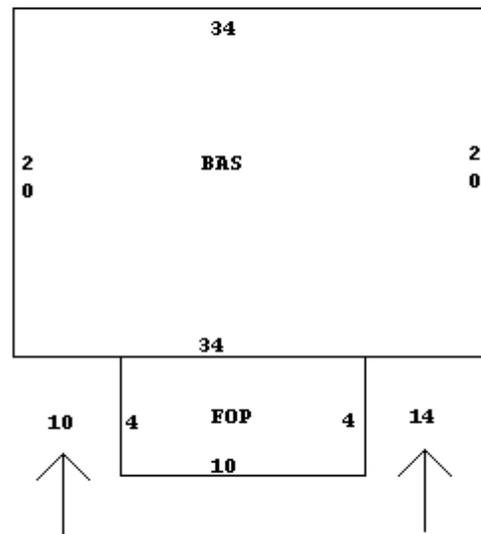
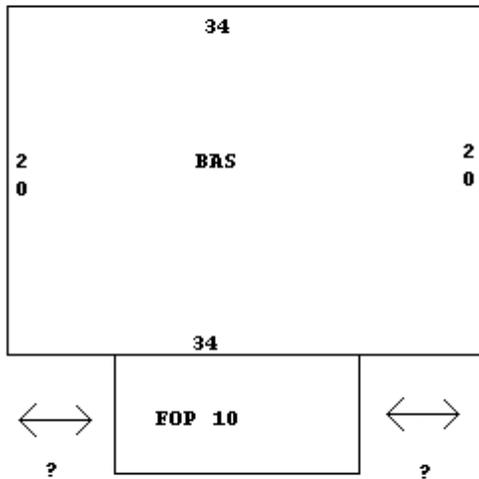
$$12 + 8 + 10 + 6 + 9 = 45$$

10	
20	<u>32</u>
<u>+2</u>	32
32	

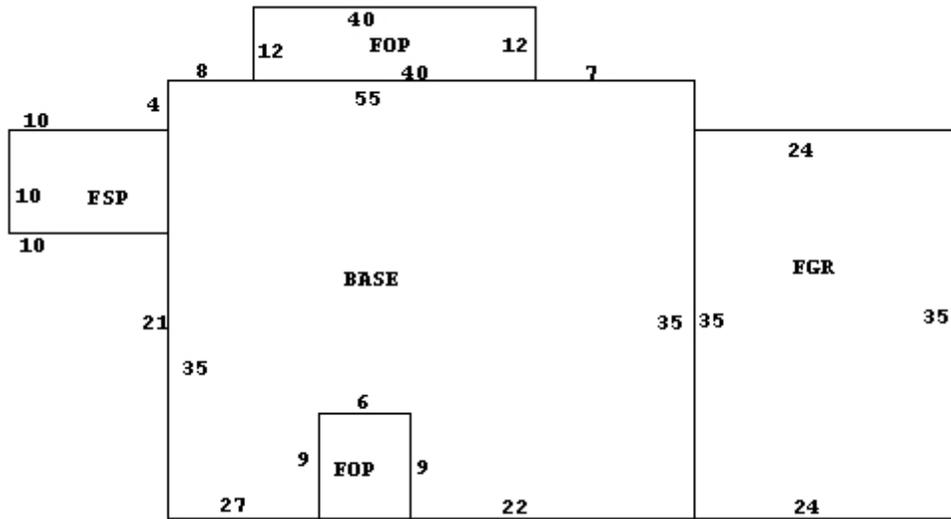
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Be sure to label each side of the property, placing these dimensions to the inside which show ACTUAL length. Whereas those measurements used to determine the position of auxiliary areas along the perimeter of the base should be placed on the outside of the sketch if they are not included within an auxiliary area. This is illustrated as follows:



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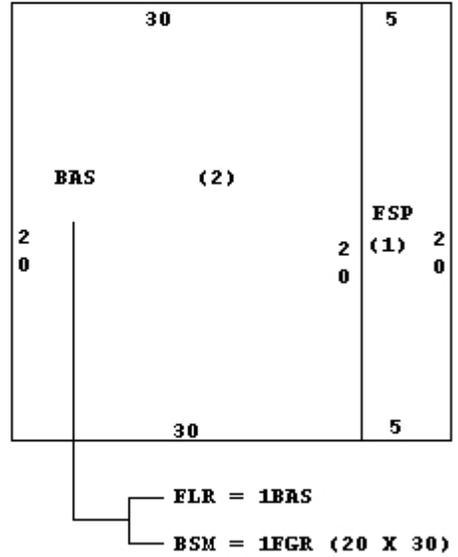
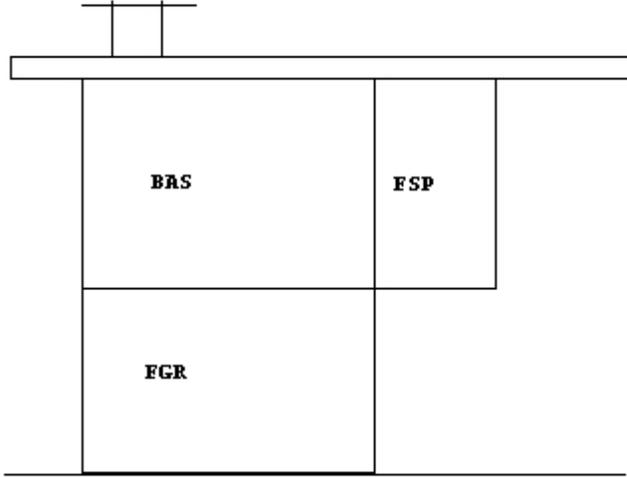
It is critical to the proper coding of structures to supply adequate measurements of the perimeter and auxiliary areas in order to determine the correct location of the auxiliary areas with respect to the base.

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BUILDINGS OVER ONE STORY

GARAGE APARTMENT

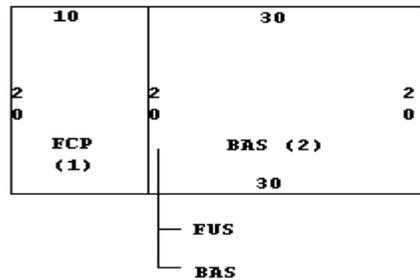
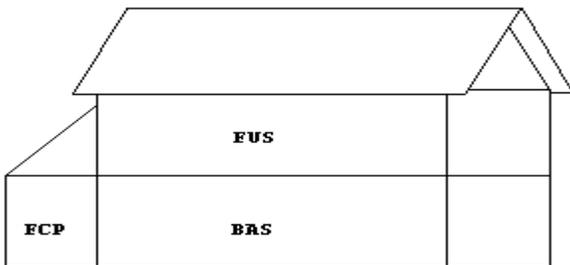
DIAGRAM AS FOLLOWS



TWO STORY RESIDENCE

TWO STORY RESIDENCE

DIAGRAM AS FOLLOWS



(since base measurements are shown on the diagram, they are not repeated)

Draw 1st level plan and denote upper story dimensions as shown.

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2 story continued

