SOUTHERN CALIFORNIA RAPID TRANSIT DISTRICT
PLANNING DEPARTMENT
INTERDEPARTMENTAL MEMORANDUM

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DATE: December 13, 1988

TO: Charles Schimpeler

FROM: Gary S. Spivack

SUBJECT: **Comments on Technical Memoranda 89.4.1 and 89.4.2**

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We appreciate the opportunity to review and comment on Technical Memorandum 89.4.2, Development of the MOS-2 Data Base For Benefit Assessment, and Technical Memorandum 89.4.1, Documentation of Field Survey Procedures for The Phase II Benefit Assessment Data Base. Included with this correspondence are copies of the referenced documents highlighting our specific concerns.

Technical Memorandum 89.4.2

In general, the document is well prepared and technically well written. We suggest that the language and structure of the document be revised to make it more suitable for use by non-technicians. For example, you may want to include flow charts or diagrams which will visually highlight data hierarchies or field relationships during file conversion and data file creation processing. Some of the confusion surrounding the written descriptions or instructions may be eliminated if the reader can visualize what portion of the processing application they are in, and which data elements are being manipulated.

Another general comment is that the use of acronyms is appropriate but they should be written out early in the discussion so that the reader understands their meaning. In particular, the use of the acronym MOS-2 should be replaced with the phrase Phase II throughout the document.

Our specific comments are as follows:

Page 1 (Section 1.0) There are eleven station areas. The document references ten in several discussions. It is our understanding that complete data for all eleven stations is being collected. Please verify that this is correct.

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(Section 1.2)	The assessment methodology expressed in the last two sentences has not yet been agreed upon by the Phase II Task Force .
Page 2 (Section 2.0)	Please outline the differences in the development methodologies used for MOS-1 and Phase II. Please also note if these differences would require any changes to our established updating procedures.
(Section 2.0)	Instructions for how to convert the new database into a tape compatible with the assessor's requirement should be included since the previous Manual prepared by the consultant provides instructions based upon the LUPAMS database.
Page 3 (Section 3.1)	Refinements in the boundary definitions cannot be made by the Task Force. The Task Force can recommend changes.
	Please explain how any suggested or adopted modifications to boundary rules can be incorporated into the database. What is the procedure?
(Section 3.1)	We will need to know how the distance (e.g. 1/3 mile, 1/2 mile) from the center is recorded in the database.
	Why is there no mention of 1/4 mile radius options?
	Please elaborate on how boundaries were formed, i.e., were barriers such as freeways or topography taken into account? What were the particular inclusion rules for blocks, i.e., where the boundary splits a block.
Page 4 (Section 3.2)	Information regarding contact persons, cost, and other acquisition data should be supplied.
Page 5 (Section 4.1)	Explain "Packed data".
(Section 4.1.1)	This paragraph is confusing. Perhaps the last sentence should be moved.
(Section 4.1.2)	Please explain how instructions are developed to delete Parcel Numbers.

	Also, please explain why parcels were extracted at the 1/3 mile and the 1/2 mile radius. This is confusing. If you extract parcels at the 1/2 mile radius, wouldn't you automatically get all the parcels at 1/3 mile? Were parcels extracted twice and put in two different places? Please clarify.
(Section 4.1.2)	A discussion of the data "unpacking" process would be appropriate, especially as it applies to the tax assessor's data.
Page 6 (Section 4.1.2)	Again, a complete discussion of the downloading procedure would be appropriate in the appendix.
(Section 4.2)	The discussion of the appending process is confusing.
	Please explain in more detail, what appending is and why it is done. Also, are the fields 1-39 and 58-63 created automatically when the Assessor's tape is downloaded?
	In neither section 4.2 nor 4.3.1, is there any discussion of how the diskette file is loaded into Drive C. If this step is included, it should be specifically spelled out, since this file is later assumed to be on Drive C.
	Please outline any differences between MOS-I and Phase II data files, if any.
Page 7 (Section 4.2)	It might be helpful to create fields for state and county since the rate of foreign ownership is increasing.
Page 8 (Section 4.3.1.1)	Please provide an example of a Data Specification Sheet.
(Section 4.3.1.1)	We should be supplied a copy of the County Assessor's Data Definitions.
	The discussions contained in this section need to be expanded to include instructions specific to which fields are to be created in the files.

Page 9 (Section 4.3.1.1)	Please provide a list and sample of the file structure used to append the data. Is this structure the same as the assessor's file?
(Section 4.3.1.2)	A discussion of why we use indexing would be more appropriate here since this is where the term first appears. Page 10 highlights a short definition, but for a non-technician a more elaborate but succinct definition would be appropriate.
(Section 4.3.1.2)	Specify fields and note how to SET RELATION. Note that (PARCEL NO.) type must be a character field.
Page 10 (Section 4.3.1.2)	Are the fields referenced in the ASCII files character fields? Please indicate whether all fields are being transferred. Are the phrases "Alias A" and "Alias B" part of the Command Structure? Please explain command structure.
Page 11 (Section 4.3.1.2)	What do we do with the Flood Control Data Base file after the parcel area data are inputted into the Assessor's Data Base?
(Section 4.3.1.2)	Please provide supporting formulae and identification of relevant fields for converting acreage to square feet.
(Section 4.3.3)	Please provide an actual example of the computer generated fields. The discussion is confusing and difficult to understand.
(Section 4.3.3)	Explain how data is protected. Were data entry screens created? If so, please describe them or include a hard copy.
Page 12 (Section 4.3.3)	Please explain how to batch update without having direct access to the main database.
(PRCLNO-PCL) (800 series)	"Equalization" is misspelled. Was there any special handling of possessory interests as was done for MOS-1?

Page 13 (IMPRV-YR1) (IMPRV-VAL1)	Please provide better descriptions of the fields and more detailed explanatory comments.
(BAD-DIST)	Your staff will have to provide this information after the Board determines boundaries and districts. It might be helpful to have a separate field developed to indicate which station the property is closest to.
Page 14 BAD-ASSESS	Is this amount determined from a formula based on information in other fields? If so, describe exactly how this is done and provide any and all formulas used. If a formula was used for MOS-1, please provide that as well as "what if" formulas that may have been developed for various walking distances and assessment tiers.
Page 16 ASSOR-CODE	Please provide the Assessor's Code so that we may interpret this field.
Page 16 U-PRCL TOTL	Please elaborate on the last sentence of the field description. What do the words "park" and "lane" mean in the second sentence. It appeared earlier in the document that parcel size was taken from the Flood Control Tape. What tape was acquired on November 29, 1984?
Page 17 U-INDUWARE Page 18 U-INSTGOV Page 18 U-RESIDEN Page 18 U-INSTLAND	The SCRTD Board has ruled that properties that are exempted or granted reduced assessments through the appeals process because they contain wholesale uses, residential hotels, or non-profit uses are only exempted for one year. It appears, however, that in setting up the original database, some square footages containing these uses are automatically placed in fields 45,49,50, and 51 and <u>not</u> assessed automatically every year. For the sake of equity , staff will probably want to review <u>all</u> properties with these classifications each year to recertify them rather than automatically not assessing them. Currently in the database, these properties are mixed in with other exempted and non-assessable uses. Please explain how staff could

	pull from the database, for example, all properties containing residential hotels? Perhaps it is necessary to create separate fields for non-profit, residential hotels, and wholesale square footages.
Page 18 U-NONPROF	Are some non-profit uses automatically included in the database in field 49 and others not? Please explain how this determination is made.
Page 19 U-RESHOTEL	Are some residential hotels automatically included in the database in field 50 and others not? Please explain how this determination is made.
Page 19 U-SOURCE U-NOTES	Do you have a data entry sheet to track the large number of concerns these fields incorporate? Can we have examples of hard copy backup? Did you consider doing logical fields for the various codes?
Page 19 EXP CLAIM	"Veteran" is spelled wrong. What is exemption 2?

<u>Technical Memorandum 89.4.1</u>

In general, the document is well prepared and well written. As with Memorandum 89.4.2., the use of acronyms is appropriate but care should be exercised in insuring that they are explained somewhere in the text in which they are referenced.

Our specific comments are as follows:

Page 2 Map	Please replace with attached map.
Page 3 (Section 2.1)	Please explain if any determinants, such as barriers, walking distances or block inclusion rules were utilized at this point, or if the radius was the only determinant.
	A discussion of how the Thomas Brother's Guide is referenced with the hierarchial data in the assessor's records would better define how the identification process works.
	Please show how the two parcel listings referenced in the discussion are delineated in the database.
	Why is there no mention of the 1/4 mile radius option referenced in this discussion?

Page 5 (Section 3.0)	Please explain exactly what data collection methods were used at the "one-third mile" versus the "one-half mile" radius. Was the field survey conducted for only those parcels in the 1/3 mile area? If the field survey was limited, it would be appropriate to include maps indicating which parcels were subject to the field surveys and the boundaries of the survey districts. This paragraph is confusing because it only mentions the 1/3 mile radius.
(Section 3.1.1)	Please include discussion on methodology as outlined in Attachment 2 of our comments.
Page 9 (Figure 4)	Please include a notation that all hard copies of these forms become the property of the District at the conclusion of the consultant agreement and will be located in the Benefit Assessment Office.
(Figure 4)	A better example would be provided if a copy of an actual sheet with real data is included as shown in Attachment 1.
Page 10 (Section 3.2)	Are the computer cassettes referenced compatible with District hardware specifications?
(Section 3.2)	See Attachment 3 for suggested discussion on Building Permit and Certificate of Occupancy Information.
Page 12 (Section 3.4)	Please explain where and how each source of gross square footage was entered into the survey record. Also provide an example of the calculations as an example. Why are parking ramps included in gross square footage?
Page 13 (Section 3.4)	Please provide samples of Database Summation characteristics.
(Section 4.1)	Please provide an example of completed Parcel Packet information in an appendix to the document.

In conclusion, we hope that these comments are helpful and informative. The technical documentation for the Data Base is a key element of the Phase II program, therefore, it should be easy to understand our concerns about the ease of use and clarity of the program documentation.

Prior to our final acceptance of the Data Base product, we want to test the data base application, its instructions and documentation to insure satisfactory completion of the system requirements. Upon completion of the system documentation, we should meet to discuss the testing requirement and proposed schedules.

If you have any questions regarding our comments, please contact David Hewitt at 972-4845.

Attachments

cc: Dave McCullough