

# Real Estate Assessments

**Mission Statement:** The mission of Real Estate Assessments is legally and equitably to assess all taxable and non-taxable real property, provide quality customer service and maintain community understanding of the process.

Expenditure By Classification	FY 2009 Actuals	FY 2010 Approved	FY 2011 Approved	% Change 2010-2011
Personnel	\$1,417,922	\$1,308,458	\$1,455,760	11.3%
Non-Personnel	155,228	208,036	209,463	0.7%
Capital Goods Outlay	137	0	0	-
<b>Total Expenditures</b>	<b><u>\$1,573,287</u></b>	<b><u>\$1,516,494</u></b>	<b><u>\$1,665,223</u></b>	<b>9.8%</b>
<b>Funding Sources</b>				
Internal Services	\$0	\$0	\$0	0.0%
Special Revenue Funds	0	\$0	\$0	0.0%
<b>Total Designated Funding Sources</b>	<b><u>\$0</u></b>	<b><u>\$0</u></b>	<b><u>\$0</u></b>	<b>0.0%</b>
<b>Net General Fund Expenditures</b>	<b><u>\$1,573,287</u></b>	<b><u>\$1,516,494</u></b>	<b><u>\$1,665,223</u></b>	<b>9.8%</b>
<b>Total Department FTE's</b>	<b>16.0</b>	<b>14.0</b>	<b>15.0</b>	<b>7.1%</b>

## Highlights

- In FY 2011, the Approved General Fund budget increased by \$148,729 (9.8%)
- FY 2010 personnel costs increased by \$147,302 (11.3%); most of the increase is due to costs associated with a step increase for employees and the addition of a senior appraiser position for commercial property.
- Total non-personnel costs increased by \$1,427 (0.7%), due to the department's share of costs of the new Cityworks customer relationship management system.

## Selected Performance Measures

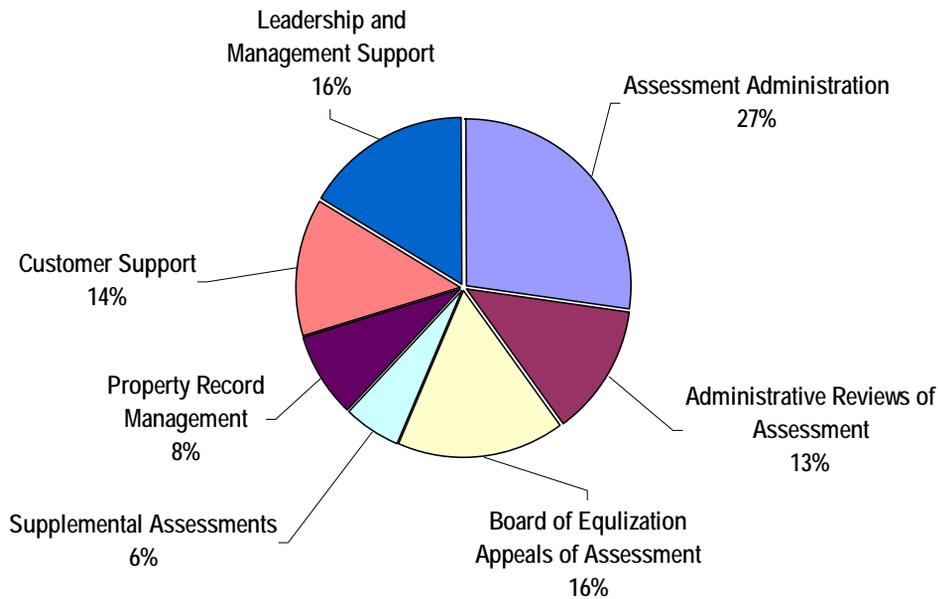
Selected Performance Measures	FY 2009	Actual*	FY 2010 Approved*	FY 2011 Approved*
% of deeds and transfers entered within 30 days		100%	100%	100%
% change in value due to BOE adjustments compared to tax base		0.2%	0.4%	0.4%
Assessment/Sales Ratio***		98.6%	98.5%	98.5%
Coefficient of Dispersion***		7.4%	8.0%	7.0%

\*Data for FY 2009, FY 2010, and FY 2011 are based on calendar year data for 2008, 2009, and 2010 respectively.

\*\* Assessment data is sent to the State Department of Taxation in July to ensure accuracy and uniformity and available for reporting at the end of the calendar years 2008 and 2009 respectively.

\*\*\*A coefficient of dispersion is a ratio used to measure how sales prices vary from assessed values during a period of time.

## FY 2011 Approved Expenditures by Activity



# Real Estate Assessments

## Program Level Summary Information

### Expenditure Summary

Expenditure By Program	FY 2009 Actuals	FY 2010 Approved	FY 2011 Approved	% Change 2010-2011
Real Estate Assessment	\$969,812	\$924,688	\$ 1,030,582	11.5%
Property Data Services	\$603,475	\$591,806	\$ 634,641	7.2%
<b>Total</b>	<b>\$1,573,287</b>	<b>\$1,516,494</b>	<b>\$1,665,223</b>	<b>9.8%</b>

### Staffing Summary

Authorized Positions (FTE's) by Program	FY 2009 Actuals	FY 2010 Approved	FY 2011 Approved	% Change 2010-2011
Real Estate Assessment	9.8	8.0	9.0	12.5%
Property Data Services	6.2	6.0	6.0	0.0%
<b>Total</b>	<b>16.0</b>	<b>14.0</b>	<b>15.0</b>	<b>7.1%</b>

### Real Estate Assessments Programs and Activities

**Real Estate Assessment**  
 Assessment Administration  
 Administrative Reviews of Assessments  
 Board of Equalization  
 Appeals of Assessment  
 Supplemental Assessments  
  
**Property Data Services**  
 Property Record Management  
 Customer Support  
 Leadership and Management Support

### Dept Info

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# Real Estate Assessments

## Real Estate Assessments Program

The goal of Real Estate Assessments is to assess all real property within the boundaries of the City of Alexandria at 100% of fair market value pursuant to the Code of Virginia in a uniform and equitable manner to ensure the tax burden is shared fairly by each taxpayer.

Program Totals	FY 2009 Actual	FY 2010 Approved	FY 2011 Approved
% of All Funds Budget	61.6%	61.0%	61.9%
Total Expenditures	\$969,812	\$924,688	\$1,030,582
Less Revenues	0	0	0
Net General Fund Expenditures	\$969,812	\$924,688	\$1,030,582
Program Outcomes			
Assessment/Sales ratio*	98.6%	98.5%	98.5%
Coefficient of Dispersion*	7.4%	8.0%	7.0%

\*Assessment data is sent to the State Department of Taxation in July to ensure accuracy and uniformity and available for reporting at the end of calendar years 2009 and 2010 respectively. A coefficient of dispersion is a ratio used to measure how sales prices vary from assessed values during a period of time.

## Activity Data

ASSESSMENT ADMINISTRATION – The goal of Assessment Administration is to assess all real property within the boundaries of the City of Alexandria at 100% of fair market value as of January 1 in a uniform and equitable manner to ensure accurate taxation of real property.	FY 2009 Actual	FY 2010 Approved	FY 2011 Approved
Expenditures	\$464,605	\$458,728	\$453,312
FTE's	4.0	3.8	3.8
# of parcels assessed	44,511	45,000	45,500
Cost per parcel assessed	\$10.44	\$10.19	\$9.96
Parcels assessed per appraiser (FTE)	5,625	6,429	6,500
Review rate per 1000 parcels	16.4	22.2	25.0
Appeal rate per 1000 parcels	10.6	17.8	20.0

ADMINISTRATIVE REVIEWS OF ASSESSMENTS – The goal of Administrative Reviews of Assessments is to handle requests by property owners for the purposes of ensuring that the department has accurately and uniformly assessed an individual property.			
Expenditures	\$187,875	\$164,008	\$214,088
FTE's	2.0	1.6	2.1
# of requests for reviews filed with Department	635	1,000	1,000
Cost per review	\$296	\$164	\$214
% change in value due to administrative adjustments compared to tax base	0.15%	0.4%	0.4%

\*Assessment figures for FY 2009, FY 2010, and FY 2011 are based on calendar year data for 2008, 2009, and 2010 respectively.

# Real Estate Assessments

## Real Estate Assessments Program, continued

### Activity Data

<b>BOARD OF EQUALIZATION APPEALS OF ASSESSMENT</b> – The goal of Board of Equalization (BOE) Appeals of Assessment is to hear and give consideration to appeals and make adjustments to equalize such assessments so the burden of taxation rests equally upon all citizens.	<b>FY 2009 Actual</b>	<b>FY 2010 Approved</b>	<b>FY 2011 Approved</b>
Expenditures	\$216,961	\$215,436	\$270,427
FTE's	2.0	1.6	2.1
# of appeals to BOE heard	445	800	800
Cost per appeal	\$488	\$269	\$269
% change in value due to BOE adjustments compared to tax base	0.1%	0.3%	0.3%
<b>SUPPLEMENTAL ASSESSMENTS</b> – The goal of Supplemental Assessments is to review the progress of building activity and update assessments so that all buildings substantially completed and/or fit for use and occupancy will be assessed appropriately and timely.			
Expenditures	\$100,371	\$86,516	\$92,755
FTE's	1.0	1.0	1.0
# of parcels receiving supplemental assessments	55	100	200
# of parcels per appraiser receiving supplemental assessments	6.875	12.5	25
\$ value of supplemental assessments (in millions)	\$20.0	\$25.0	\$30.0

\*Assessment figures for FY 2009, FY 2010, and FY 2011 are based on calendar year data for 2008, 2009, and 2010. With the slowing of new development and home renovations/additions, projecting 2011 activity is speculative.

# Real Estate Assessments

## Property Data Services Program

The goal of Property Data Services is to collect and maintain reliable real property information in order to maintain the foundation for a property assessment system that is highly accurate, visible and understandable to the community.

Program Totals	FY 2009 Actual	FY 2010 Approved	FY 2011 Approved
% of All Funds Budget	38.4%	39.0%	38.1%
Total Expenditures	\$603,475	\$591,806	\$634,641
Less Revenues	0	0	0
Net General Fund Expenditures	\$603,475	\$591,806	\$634,641
<b>Program Outcomes</b>			
% increase in web site hits annually	20.0%	0.0%	5.0%

## Activity Data

LEADERSHIP & MANAGEMENT SUPPORT – The goal of Leadership and Management Support is to lead and manage all activities of the department.	FY 2009 Actual	FY 2010 Approved	FY 2011 Approved
Expenditures	\$239,016	\$262,925	\$270,901
FTE's	2.0	2.1	2.1
# of departmental FTE's managed (or supported)	14.0	14.0	14.0
\$ amount of departmental budget managed (in millions)	\$1.6	\$1.5	\$1.7
Leadership & Management Support Services cost as a % of total departmental expenditures	15.2%	17.3%	16.3%
% of departmental effectiveness targets met in all programs	93%	93%	93%

\*Data for FY 2009, FY 2010, and FY 2011 are based on calendar year data for 2008, 2008, and 2010 respectively.

PROPERTY RECORD MANAGEMENT – The goal of Property Record Management is to maintain current and up to date information on property descriptions, ownership and sales to ensure accurate assessment of real property.			
Expenditures	\$141,352	\$133,669	\$137,388
FTE's	1.0	1.6	1.6
# of parcel transfers	3,870	3,684	3,648
\$ of change in annual assessments	\$859,786,000	-\$723,654,000	-\$2,559,897,183
% of deeds and transfers entered within 30 days	100%	100%	100%

CUSTOMER SUPPORT – The goal of Customer Support is to provide timely and accurate information on property descriptions, ownership, sales and assessments in response to requests from the public and meet the real property information needs of City departments.			
Expenditures	\$223,107	\$195,212	\$226,352
FTE's	2.0	2.3	2.3
# web site hits	12,865,387	12,865,387	13,508,656
Customer support cost per 100 parcels	\$511	\$447	\$519
% of tax adjustments submitted to Treasury within 14 days	98%	98%	98%
% of public requests filled within 14 days	95%	95%	95%

