



ASSESSMENT UPDATE

2019 Revaluation Update

KEN JOYNER

Towns & City Council Meeting 2017



ASSESSMENT UPDATE

- **Framework for the Davidson update**
 - **Point 1 - 2019 Revaluation Update**
 - **Point 1** – Our Values
 - **Point 2** – Our Story
 - **Point 3** – Our Response to 2011 Revaluation
 - **Point 4** – BOCC Calendar of Events
 - **Point 5** – Market Data 5 & 10 Year Trends
 - **Point 6** – 2017 District Samples
 - **Point 7** – 2017 Commercial Averages
 - **Point 2 – Modria – On-line Dispute Resolution System**



Item #2: 2019 Revaluation Update

“We Value Mecklenburg County”

Our Values:

- Visit and Inspect Properties
- Appraisal Principles
- Law Based
- Uniformity
- Equitable
- Stability and Consistency



2019 Revaluation Update

"We Value Mecklenburg County"

Our Story:

- Transparent
- Market Based
- Customer Service
- Open Minded
- Stability/Consistency
- Appraisal Principles

2019 Revaluation Update

“We Value Mecklenburg County”

The 2011 Revaluation brought about many concerns from our citizens and elected officials

In response to those concerns:

- The Board of County Commissioners overhauled the Board of Equalization & Review
- The County Assessor’s Office (CAO) was established as a standalone department
- County Manager’s Office and the Board of County Commissioners appropriated new positions and additional money to support the department
- A permanent Revaluation Division was established to coordinate future revaluations
- CAO is instituting a Dispute Resolution Solution (Modria) to help manage the expected 45-55,000 inquiries following the mailing of 2019 valuation notices
- CAO is working with our software vendor (NCPTS) to improve the appeals process
- CAO written policies & procedures have been updated or created

2019 Revaluation Update

“We Value Mecklenburg County”

Customer Service changes:

- Increased staffing allows timely service of our customers
- Increased customer service specific training for staff
- Modria Customer Service Portal for customer contact allows for ease of communication between our customers and CAO staff; management verification that customers are served timely
- Increased professional training for CAO staff; increased IAAO Professional Designations
- Upgraded NCPTS Appeal System will allow BER appeals to be scheduled and heard quicker
- CAO community presentations to inform and answer questions for our community
- Updated and streamlined CAO website

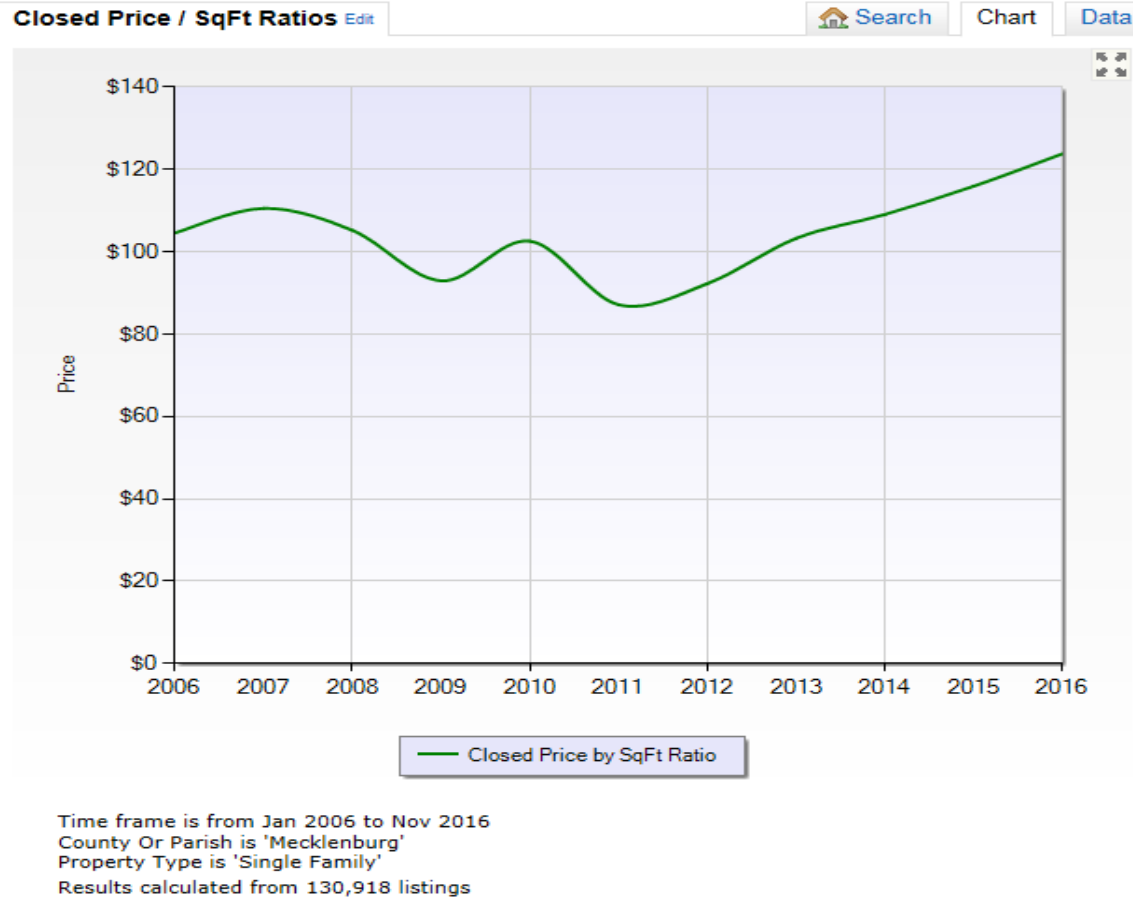
2019 Revaluation Update

“We Value Mecklenburg County”

Calendar of Events – BOCC

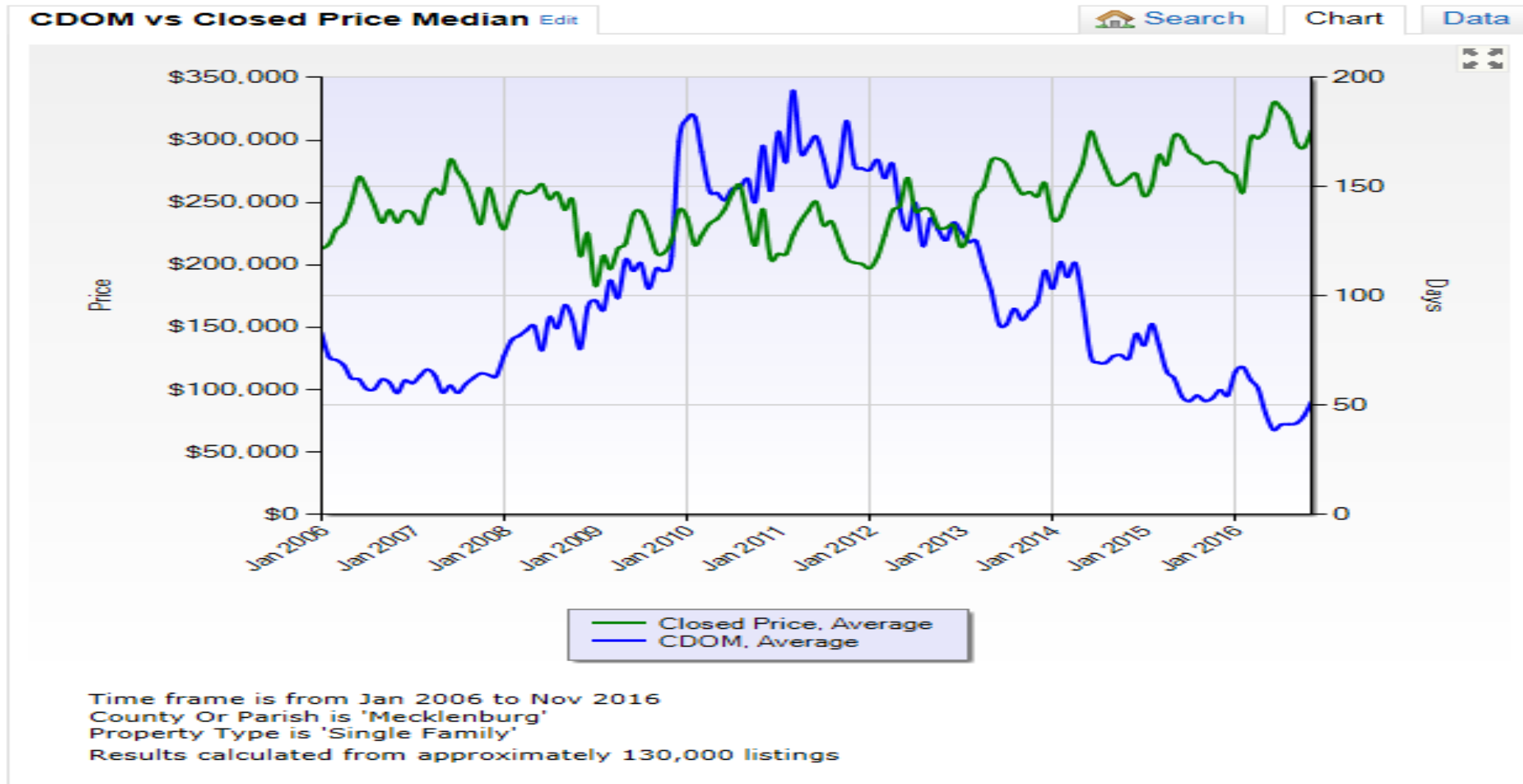
- **1/17-7/19** **Public Relations**
- **1/17** **Board of County Commissioners Retreat**
- **9/17-10/17** **Towns/City Council Meetings**
- **10/17-10/18** **Citizens Review Committee**
- **8/18** **BOCC Initial Presentation of Schedule of Values**
- **9/18** **Public Hearings for Schedule of Values**
- **9/18** **BOCC Adoption of Schedule of Values**
- **10/18** **CAO Value Finalization**
- **12/18** **Notices of Value Mailing**
- **7/19** **Tax Bill Mailing – FY20 Collections**

Residential Price Per Square Foot 2006 thru 2016

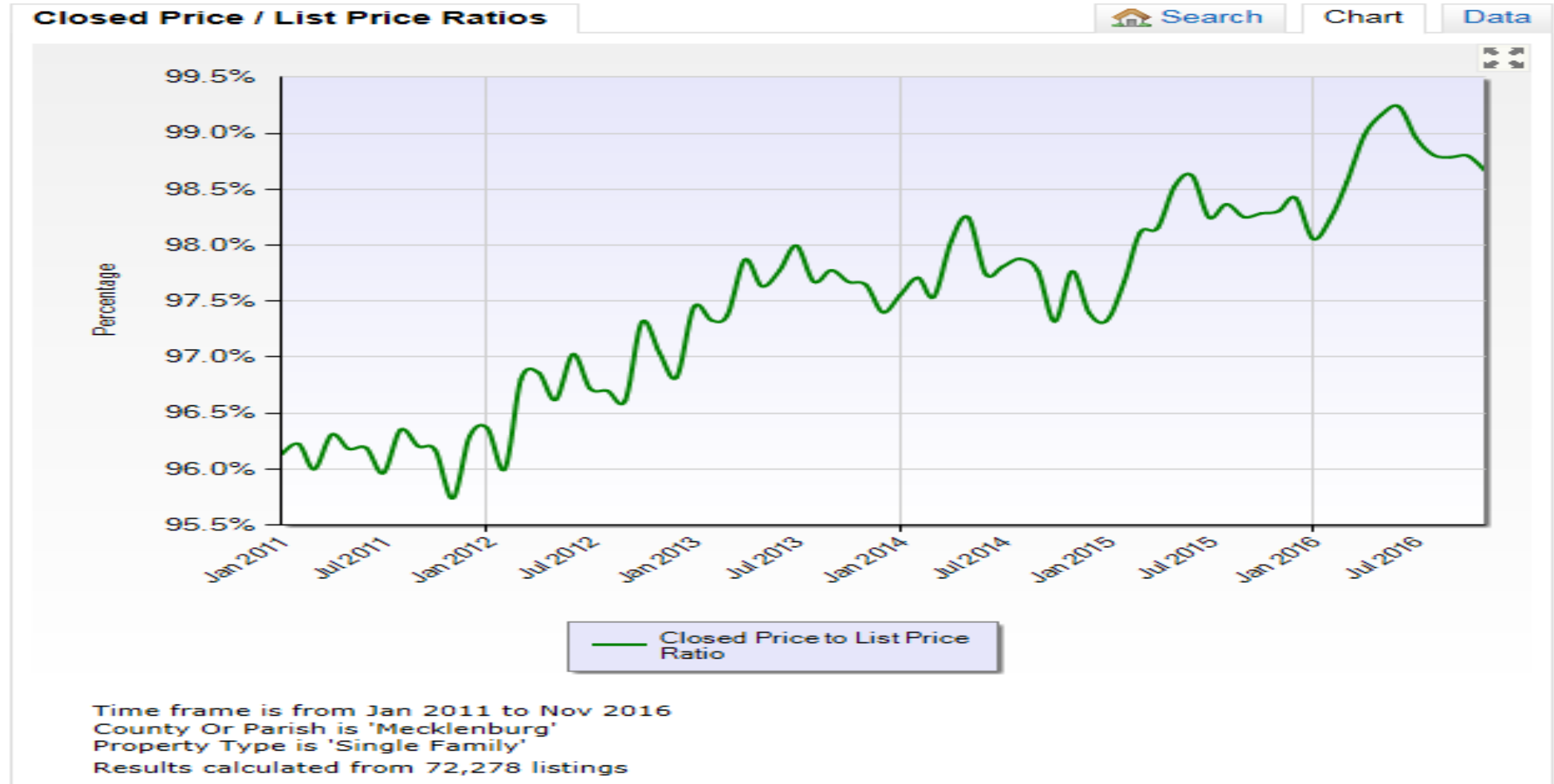


Primary Year	Closed Price by SqFt Ratio
2006	\$105
2007	\$111
2008	\$105
2009	\$93
2010	\$103
2011	\$87
2012	\$92
2013	\$103
2014	\$109
2015	\$116
2016	\$124

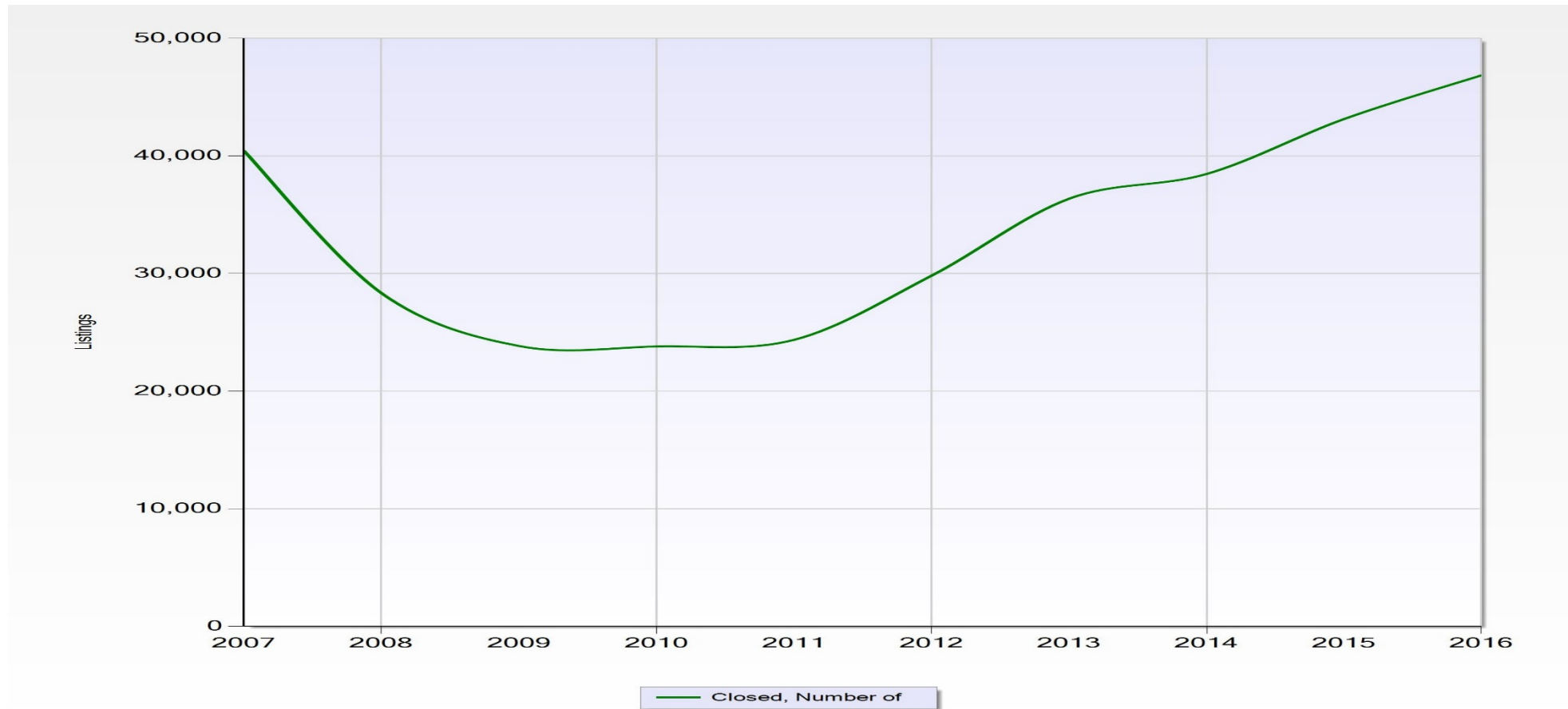
Residential Cumulative Days on Market Versus Closed Price Median – 2006 thru 2016



Residential Closed Price to List Price 2011 thru 2016



10 Year Closed Sales 2007-Current



Davidson Appreciation

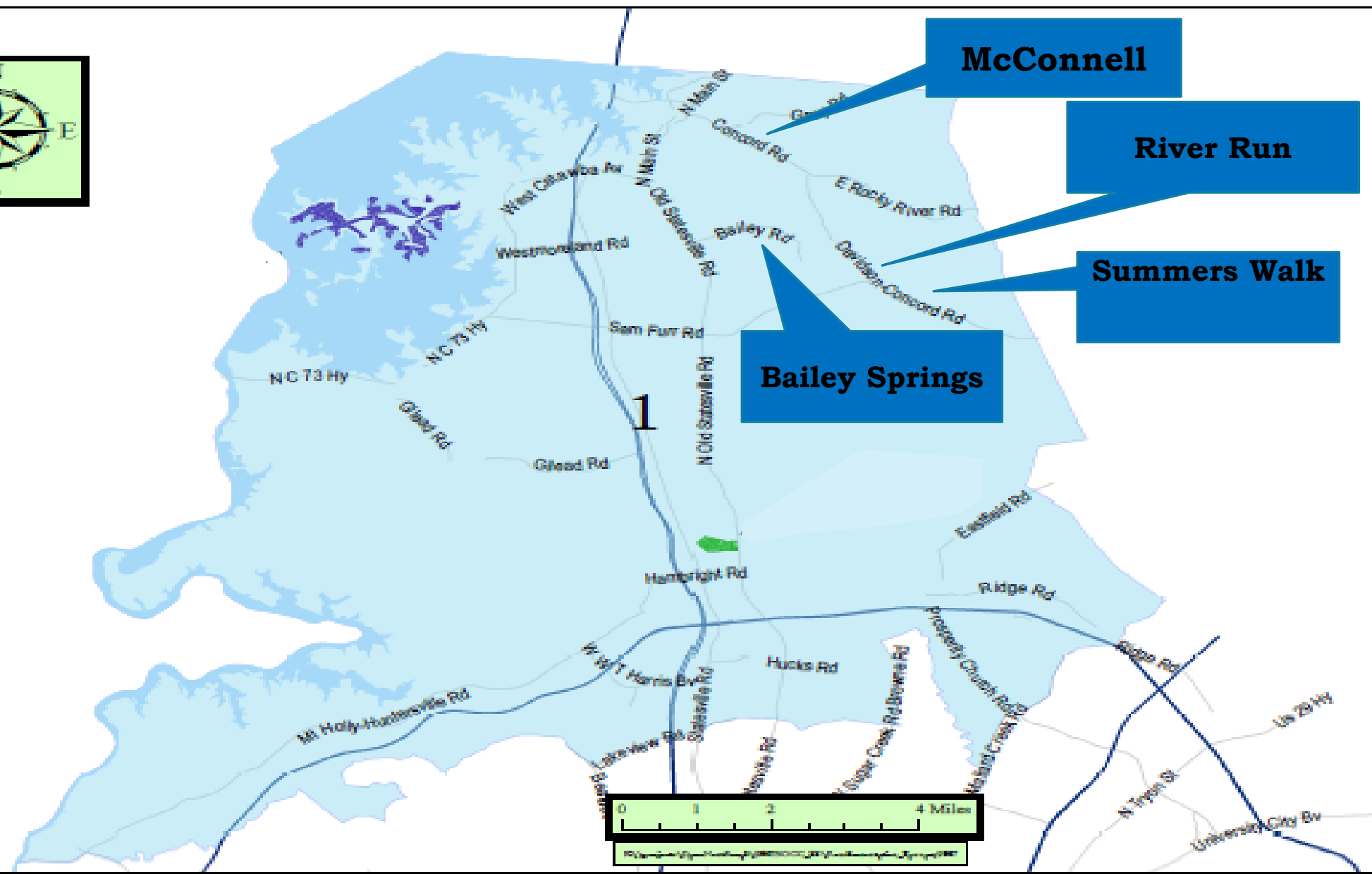
Sample Neighborhood Re-Sales

Davidson

Sample Subdivisions
Re-Sale Average

Appreciation

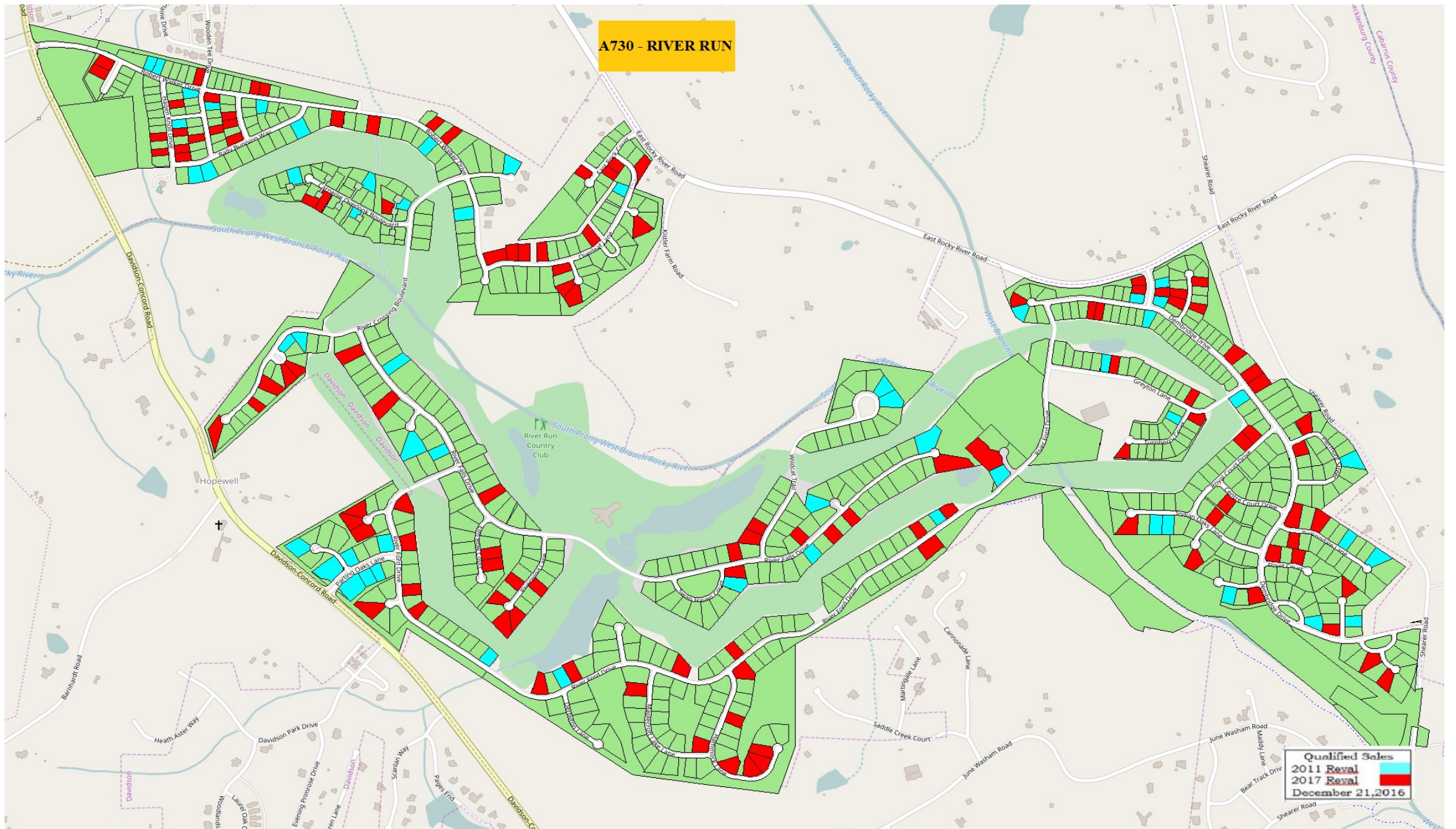
20.50%



RIVER RUN SUBDIVISION



A730 - RIVER RUN



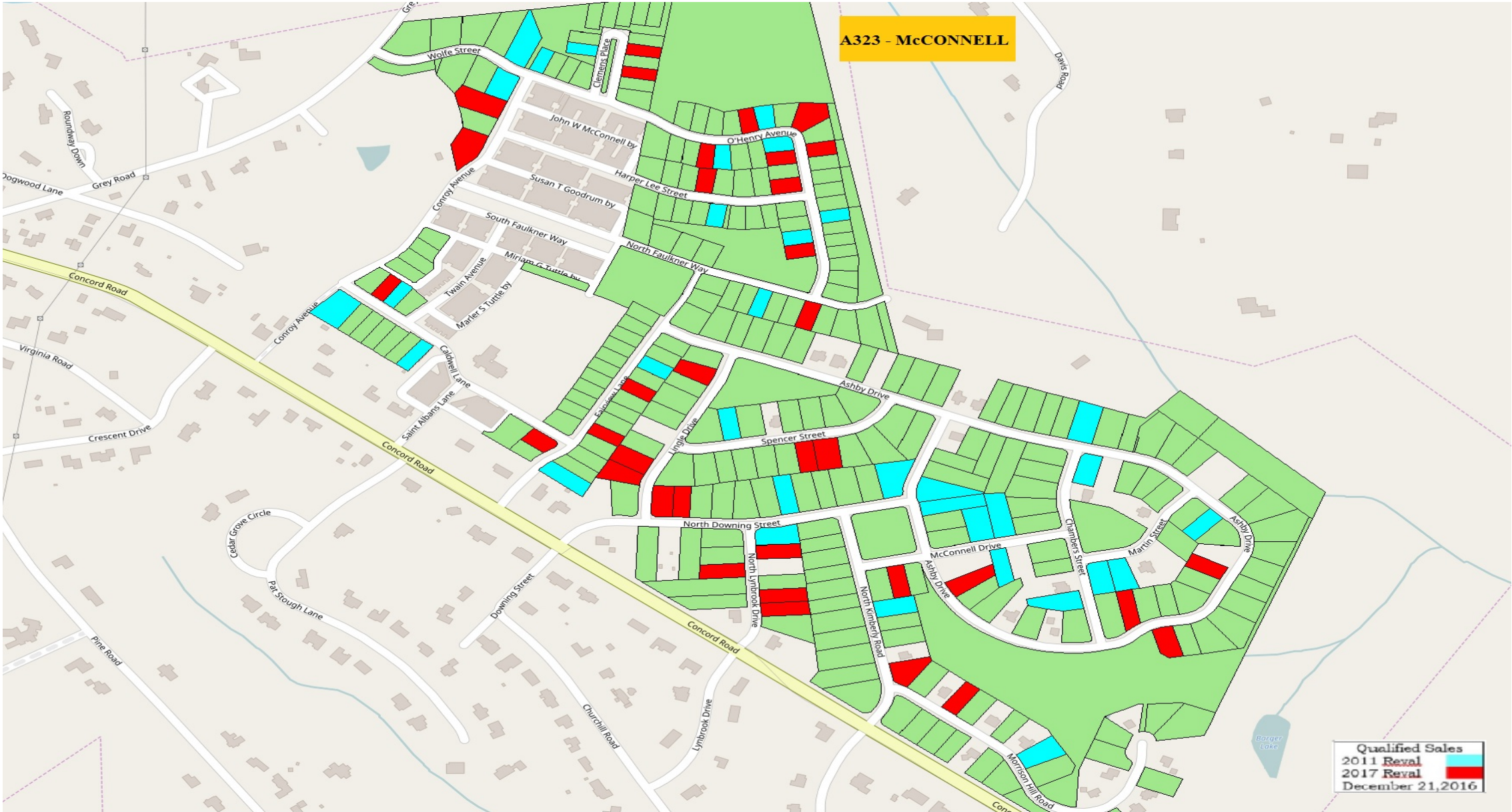
River Run Residential Sales

Parcel Number	Sales Date	Sale Price	Square Footage	Price per Foot	Appreciation
007-263-37	9/1/2010	\$865,000	5,764	\$150.07	13%
007-263-37	2/14/2017	\$980,000	5,764	\$170.02	
007-264-19	3/25/2011	\$750,000	5,958	\$125.88	12%
007-264-19	7/19/2016	\$843,000	5,958	\$141.49	
007-416-11	7/29/2011	\$815,000	3,974	\$205.08	9%
007-416-11	2/21/2017	\$890,000	3,974	\$223.96	
007-341-24	7/2/2010	\$605,000	3,642	\$166.12	36%
007-341-24	4/28/2017	\$825,000	3,642	\$226.52	
007-412-03	12/29/2010	\$482,500	3,760	\$128.32	35%
007-412-03	6/24/2016	\$650,000	3,760	\$172.87	
Average of resales evaluated in River Run. Sales shown may be a selected sample.			21%		

McCONNELL SUBDIVISION



A323 - McCONNELL



McConnell Residential Sales

Parcel Number	Sales Date	Sale Price	Square Footage	Price per Foot	Appreciation
003-318-13	10/29/2010	\$385,000	2,642	\$145.72	6%
003-318-13	6/3/2015	\$409,000	2,642	\$154.81	
003-312-06	10/30/2012	\$313,000	2,606	\$120.11	32%
003-312-06	8/4/2017	\$412,500	2,606	\$158.29	
003-314-04	7/30/2014	\$418,500	4,081	\$102.55	19%
003-314-04	6/19/2017	\$500,000	4,081	\$122.52	
003-311-72	7/15/2014	\$285,000	1,723	\$165.41	14%
003-311-72	5/1/2017	\$325,000	1,723	\$188.62	
003-318-03	5/14/2010	\$345,000	2,234	\$154.43	6%
003-318-03	5/16/2014	\$365,000	2,234	\$163.38	

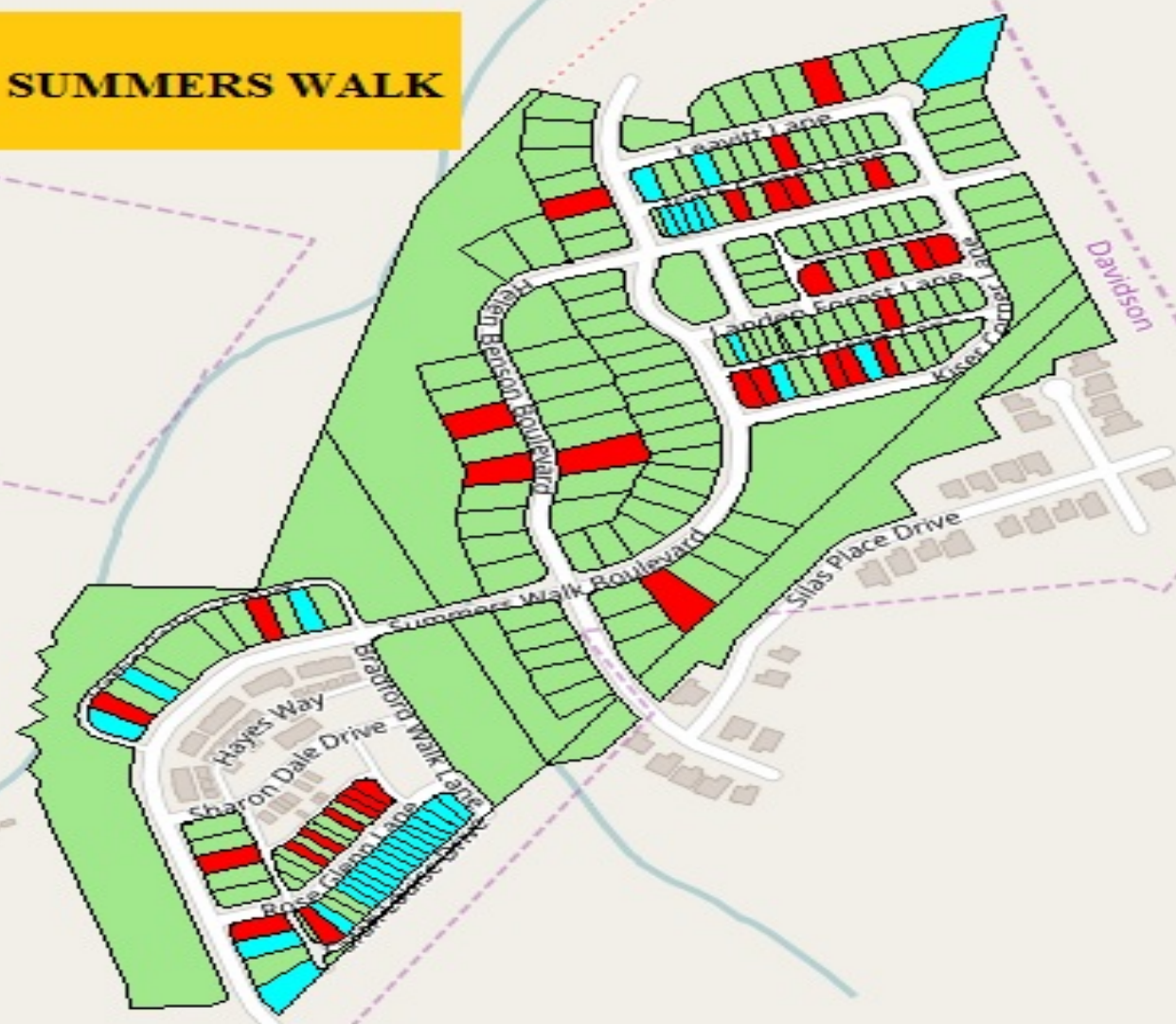
Average of resales evaluated in McConnell. Sales shown may be a selected sample.



15%

SUMMERS WALK SUBDIVISION



A726 - SUMMERS WALK



Qualified Sales
2011 Reval 
2017 Reval 
December 21, 2016

Summers Walk Residential Sales

Parcel Number	Sales Date	Sale Price	Square Footage	Price per Foot	Appreciation
007-473-23	11/13/2009	\$278,000	2,436	\$114.12	13%
007-473-23	3/27/2017	\$315,000	2,436	\$129.31	
007-477-31	7/1/2011	\$220,000	2,968	\$74.12	27%
007-477-31	4/6/2017	\$280,000	2,968	\$94.34	
007-476-53	9/16/2011	\$154,000	1,446	\$106.50	34%
007-476-53	4/27/2017	\$206,500	1,446	\$142.81	
007-475-15	5/28/2010	\$156,000	1,344	\$116.07	15%
007-475-15	10/7/2016	\$180,000	1,344	\$133.93	
007-476-57	6/27/2011	\$229,000	2,538	\$90.23	24%
007-476-57	11/1/2016	\$285,000	2,538	\$112.29	

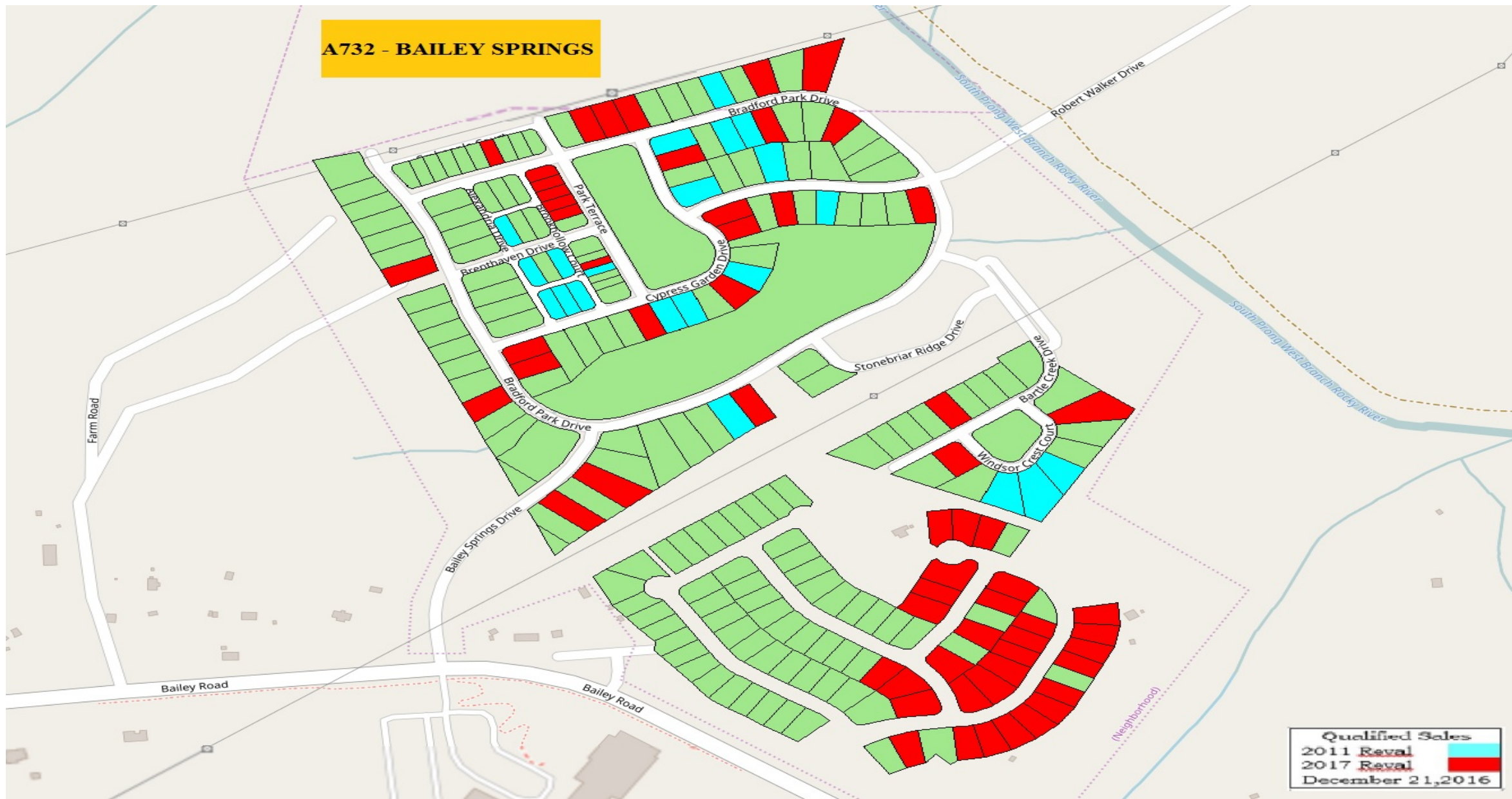
Average of resales evaluated in Summers Walk. Sales shown may be a selected sample.

23%

BAILEY SPRINGS SUBDIVISION



A732 - BAILEY SPRINGS



Bailey Springs Residential Sales

Parcel Number	Sales Date	Sale Price	Square Footage	Price per Foot	Appreciation
007-112-54	3/29/2012	\$291,000	2,470	\$117.81	25%
007-112-54	5/26/2017	\$365,000	2,470	\$147.77	
007-112-76	3/30/2011	\$224,500	2,464	\$91.11	41%
007-112-76	4/13/2017	\$316,500	2,464	\$128.45	
007-112-73	7/26/2010	\$259,000	2,191	\$118.21	14%
007-112-73	3/27/2017	\$296,000	2,191	\$135.10	
007-112-63	4/29/2011	\$349,500	3,236	\$108.00	12%
007-112-63	3/14/2017	\$390,000	3,236	\$120.52	
007-112-31	7/27/2010	\$380,000	3,248	\$117.00	18%
007-112-31	8/31/2016	\$450,000	3,248	\$138.55	
007-113-47	2/3/2012	\$170,000	1,727	\$98.44	29%
007-113-47	6/12/2017	\$220,000	1,727	\$127.39	

Average of resales evaluated in Bailey Springs. Sales shown may be a selected sample.

23%

Davidson Appreciation

Sample Neighborhood Re-Sales

Davidson

Sample Subdivisions
Re-Sale Average

Appreciation

20.50%



Office	2011	2017	Overall Percent Increase
Average Price Per Square Foot	\$88.29	\$178.11	101%

Office Market Statistics

Data Source

Costar



Industrial	2011	2017	Overall Percent Increase
Average Price Per Square Foot	\$35.78	\$51.77	45%

Industrial Market Statistics Data Source From Costar



Warehouse	2011	2017	Overall Percent Increase
Average Price Per Square Foot	\$38.96	\$49.81	28%

Warehouse Market Statistics Data Source Costar



Retail	2011	2017	Overall Percent Increase
Average Price Per Square Foot	\$90.63	\$160.20	77%

Retail Market Statistics

Data Source From Costar

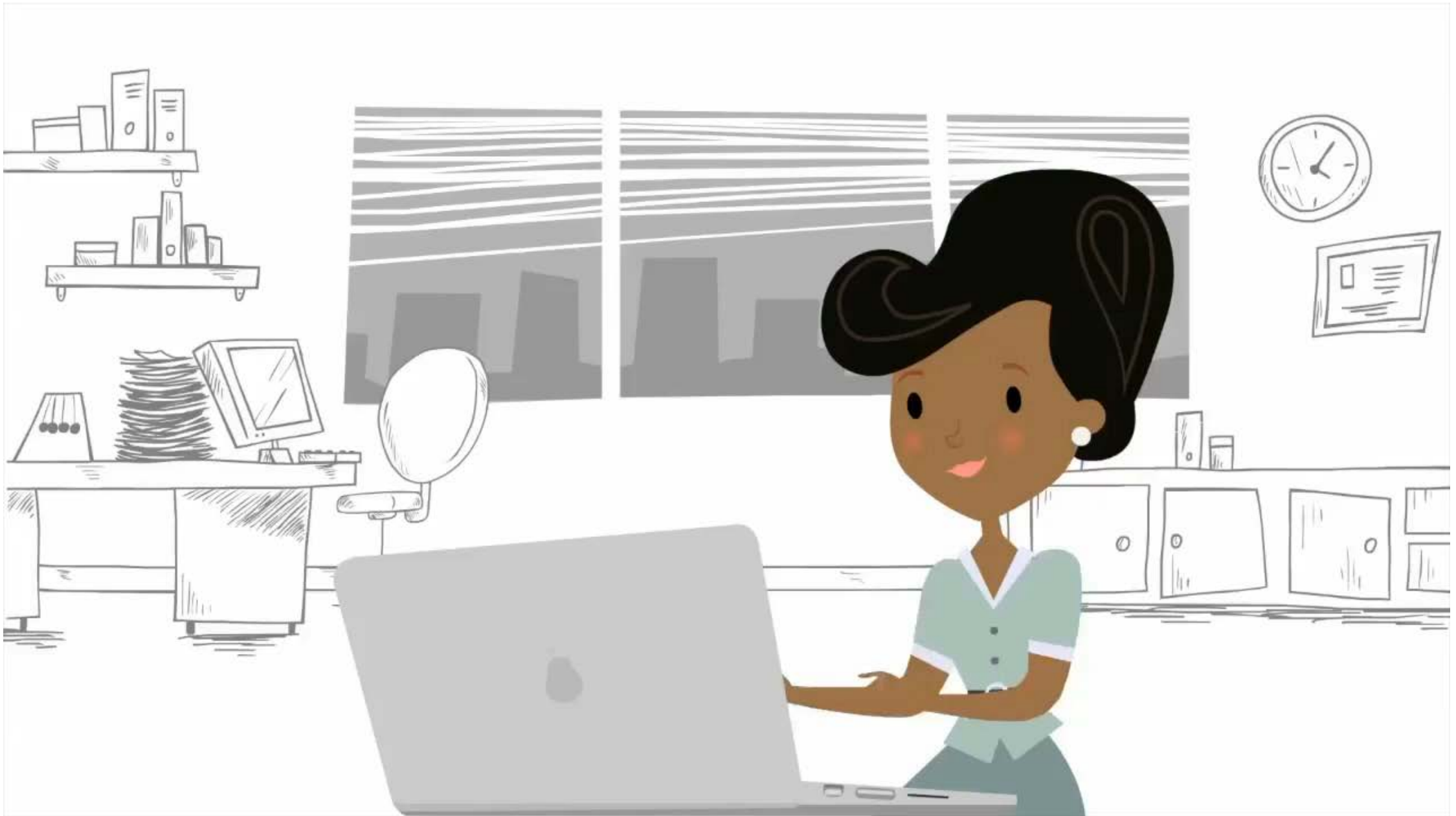
Commercial 2011-2017



Modria Tour

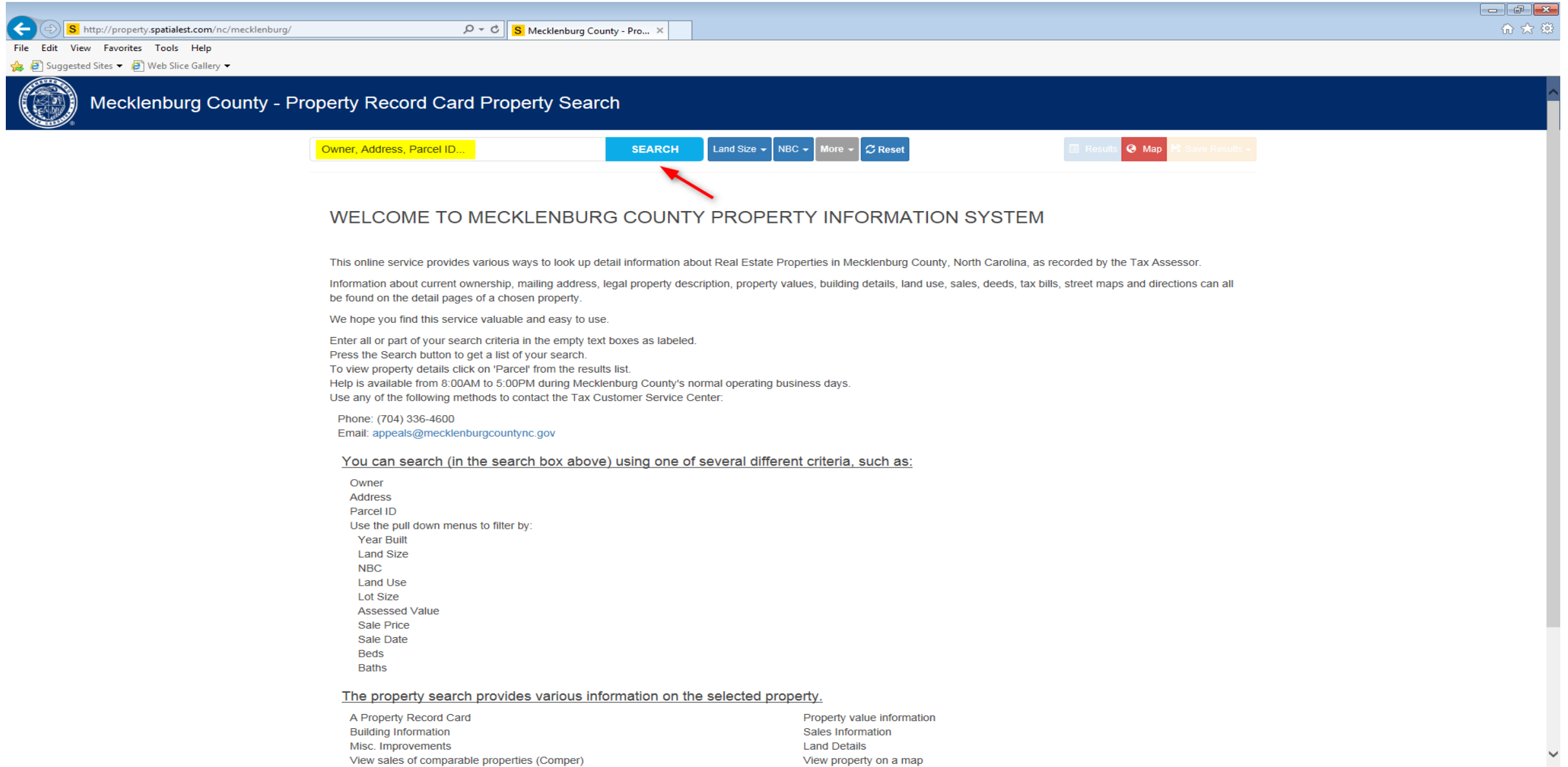
Modria is an online resolution portal for Mecklenburg properties

- The Modria Tour starts in Spatialest, Mecklenburg County's property information system, for accurate parcel specifics.
- The link may be accessed by visiting:
<https://MeckNC.gov/AssessorsOffice>





Enter the parcel number



The screenshot shows a web browser window with the URL <http://property.spatalest.com/nc/mecklenburg/>. The page title is "Mecklenburg County - Property Record Card Property Search". The search bar contains the placeholder text "Owner, Address, Parcel ID..." and a blue "SEARCH" button. To the right of the search bar are dropdown menus for "Land Size", "NBC", and "More", along with a "Reset" button. Further right are buttons for "Results", "Map", and "Save Results".

WELCOME TO MECKLENBURG COUNTY PROPERTY INFORMATION SYSTEM

This online service provides various ways to look up detail information about Real Estate Properties in Mecklenburg County, North Carolina, as recorded by the Tax Assessor. Information about current ownership, mailing address, legal property description, property values, building details, land use, sales, deeds, tax bills, street maps and directions can all be found on the detail pages of a chosen property.

We hope you find this service valuable and easy to use.

Enter all or part of your search criteria in the empty text boxes as labeled.
Press the Search button to get a list of your search.
To view property details click on 'Parcel' from the results list.
Help is available from 8:00AM to 5:00PM during Mecklenburg County's normal operating business days.
Use any of the following methods to contact the Tax Customer Service Center:

Phone: (704) 336-4600
Email: appeals@mecklenburgcountync.gov

You can search (in the search box above) using one of several different criteria, such as:

- Owner
- Address
- Parcel ID

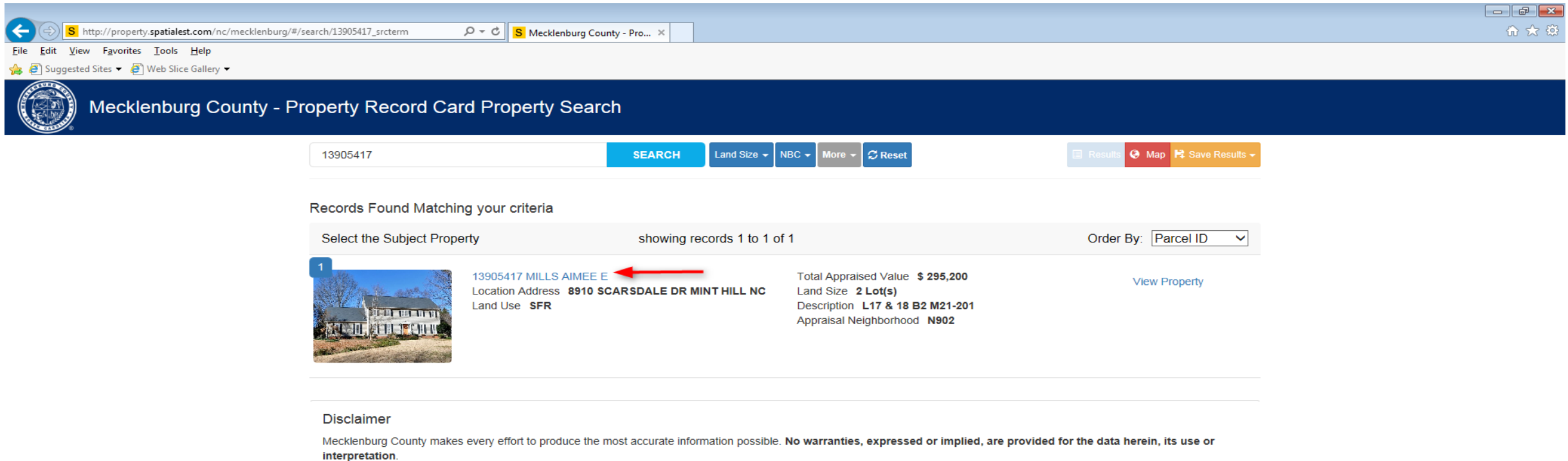
Use the pull down menus to filter by:

- Year Built
- Land Size
- NBC
- Land Use
- Lot Size
- Assessed Value
- Sale Price
- Sale Date
- Beds
- Baths

The property search provides various information on the selected property.

A Property Record Card	Property value information
Building Information	Sales Information
Misc. Improvements	Land Details
View sales of comparable properties (Comper)	View property on a map

Click the situs link for parcel details



Comper view and options

The screenshot displays the Mecklenburg County COMPER (Comparative Market Price Estimator) interface. The browser address bar shows the URL: <https://nc-mecklenburg-citizen.comper.info/template.aspx?propertyID=13905417&venc>. The page title is "COMPER - Mecklenburg, NC".

Refine By: Distance 1 miles | Sale Date 2014-05-04 - 2017-05-04 | My Neighborhood | Finished Area | Story Height | Actual Year Built

Subject Property (Market Value **\$295,200**)

8910 Scarsdale Dr Mint Hill
Distance: N/A | Sale Date: 26 Jul 2012 | Parcel ID: 13905417 | Neighborhood: N902 | Sale Price: \$242,000 | Finished Area: 3,102 Sqft

34 Nearby Sales (Sort)

8936 Dartmoor Pl Mint (Comparable) **\$298,000**
Distance: 236 ft | Sale Date: 30 May 2014 | Parcel ID: 13905416 | Neighborhood: N902 | Sale Price: \$298,000 | Finished Area: 2,772 Sqft

8923 Lauriston Pl Mint (Comparable) **\$244,000**
Distance: 286 ft | Sale Date: 28 Oct 2015 | Parcel ID: 13905420 | Neighborhood: N902 | Sale Price: \$244,000 | Finished Area: 2,201 Sqft

8911 Scarsdale Dr Mint (Comparable) **\$274,000**
Distance: 291 ft | Sale Date: 14 Aug 2015 | Parcel ID: 13905524 | Neighborhood: N902 | Sale Price: \$274,000 | Finished Area: 2,423 Sqft

8810 Scarsdale Dr Mint (Add Comp) **\$280,000**
Distance: 332 ft | Sale Date: 25 Apr 2016 | Parcel ID: 13905434 | Neighborhood: N902 | Sale Price: \$280,000 | Finished Area: 2,948 Sqft

8929 Lauriston Pl Mint (Add Comp) **\$275,000**
Distance: 392 ft | Sale Date: 30 Apr 2015 | Parcel ID: 13905421 | Neighborhood: N902 | Sale Price: \$275,000 | Finished Area: 3,080 Sqft

8811 Scarsdale Dr Mint (Add Comp) **\$250,000**
Distance: 431 ft | Sale Date: 30 Nov 2015 | Parcel ID: 13905521 | Neighborhood: N902 | Sale Price: \$250,000 | Finished Area: 2,284 Sqft

8901 Euston Ct Mint (Add Comp) **\$270,000**
Distance: 488 ft | Sale Date: 26 Aug 2016 | Parcel ID: 13905435 | Neighborhood: N902 | Sale Price: \$270,000 | Finished Area: 4,424 Sqft

8903 Euston Ct Mint (Add Comp) **\$252,500**
Distance: 484 ft | Sale Date: 27 Dec 2016

Map | Satellite

Help | **Print** | **X Close**

Creates pdf- automatically attaches to Modria log

Comparables

Map data ©2017 Google | 50 m | Terms of Use | Report a map error

Click the **X Close** to return to the Comper screen.

Comper pdf

Discussion

July 19, 2017

19-Jul-2017 02:52:51 PM **toni public** has completed **Filing a Citizen Inquiry - Event: Inquiry** filed successfully regarding parcel number 13905417. Mecklenburg CAO will review the details provided and contact the filer shortly.

02:52 PM

Toni Staff (Mecklenburg Cao)

TS

19-Jul-2017 02:56:18 PM Mecklenburg CAO has completed **Respond - Event: Please note** that Mecklenburg CAO appointed an appraiser to review this inquiry. The appraiser will review all the relevant facts at hand and may request additional information before either closing this inquiry, or submitting an Email Notification.

02:56 PM

Hello, can you please correct my bathroom count from 3 to 2?

03:11 PM

Modria Manager (Admin)

MM

Added file [comper_19716322_874482.pdf](#)

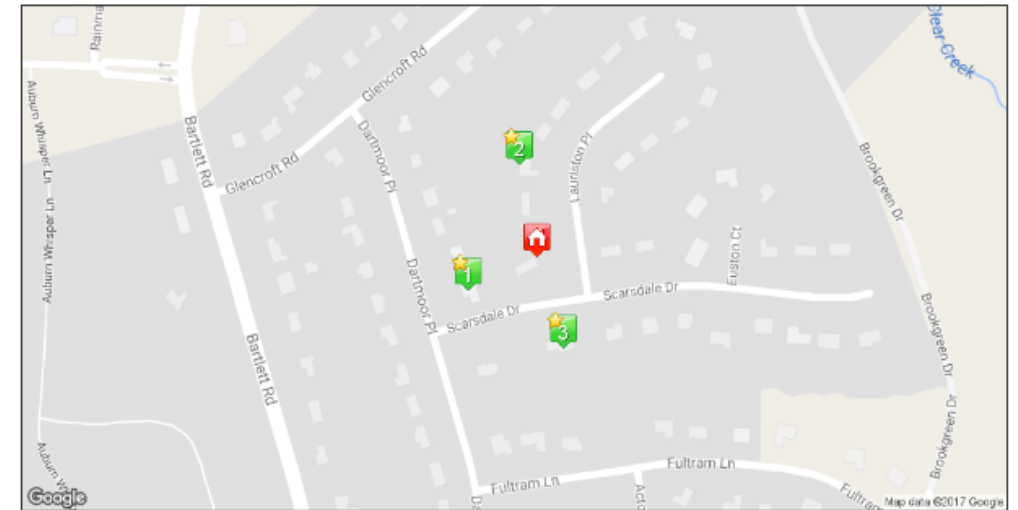
Notification of
Comper attachment



Post a message

☒ Press 'Enter' to send messages

Printout

Parcel ID: 13905417



	Subject	Comp 1	Comp 2	Comp 3
Parcel ID	13905417	13905416	13905420	13905524
				
Address	8910 SCARSDALE DR MINT HILL	8936 DARTMOOR PL MINT HILL	8923 LAURISTON PL MINT HILL	8911 SCARSDALE DR MINT HILL
Distance	0 ft	236 ft	286 ft	291 ft
Parcel ID	13905417	13905416	13905420	13905524
Sale Price	\$242,000	\$298,000	\$244,000	\$274,000
Sale Date	26 / Jul / 2012	30 / May / 2014	28 / Oct / 2015	14 / Aug / 2015
ghborhood	N902	N902	N902	N902
ished Area	3,102 Sqft	2,772 Sqft	2,201 Sqft	2,423 Sqft
lding Type	SINGLE FAMILY RESIDENTIAL	SINGLE FAMILY RESIDENTIAL	SINGLE FAMILY RESIDENTIAL	SINGLE FAMILY RESIDENTIAL
Bedrooms	5	4	3	3
Full Baths	3	2	2	2
Year Built	1986	1987	2004	1986

Posting a message to CAO staff



Cases Reporting Account Management Policy Center ▾ Templates ▾ Downloads

POWERED BY
MODRIA®



Inquiry: toni public - Parcel: 13905417 Year: 2017

Inquiry #504516 | Order #1500488782381 | Amount: 295200.00 USD

Discussion

Files

Information

Timeline (2)

WAITING APPRAISER REVIEW

Mecklenburg CAO appointed an appraiser to review the filer's inquiry



Next Step
03-Aug-2017

(Test) Set AutoClose...

(Test) Set AutoRemin...

Admin: Auto Close

Admin: Auto Reminder

Assign Staff

Automatic Assignmen...

Discussion

Internal

July 19, 2017

TP

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02:56 PM

TP

Toni Public (Filer)

Hello, can you please correct my bathroom count from 3 to 2?

03:11 PM

Post a message

Email and link into Modria

[EMAIL](#)[PRICING](#)[FAQ](#)

Inbox:

toni_public



toni_public@mailinator.com
m8r-29iyn9@mailinator.com

To: toni_public
From: no-reply@trial-mecklenburg.modria.com
Message Id: 1497989037-200036947054-toni_public
Subject: Your Inquiry No: 504501 - Inquiry submitted successfully
Received: Tue Jun 20 2017 16:03:57 GMT-0400 (Eastern Daylight Time)

text/html

Secure Link

Dear toni public,

We are contacting you regarding [Mecklenburg Resolution Center Inquiry: 504501](#) (Parcel #: 13905417)

Thank you for filing an inquiry regarding parcel number 13905417. Our services will review the details you provided and contact you shortly.

Sincerely,

Mecklenburg Resolution Center

Mecklenburg County Government - Assessor's Office

Website: [Click Here](#)

Powered by Modria

Modria inquiry CLOSED

←

https://trial-mecklenburg.modria.com/#casedetails/504516

🔍 🔒 ↻

S Mecklenburg County (TEST) - ...

Resolution Center


✕

Google

🏠 ☆ ⚙

File Edit View Favorites Tools Help

🌟 Suggested Sites Web Slice Gallery

 Cases Downloads

POWERED BY MODRIA DG

←

Inquiry: toni public - Parcel: 13905417 Year: 2017

Inquiry #504516 | Order #1500488782381 | Amount: 295200.00 USD

Discussion

Files

Information

Timeline (3)

CLOSED - COMPLETED

The Appraiser concluded that the inquiry was completed, and closed it.

Discussion

July 19, 2017

TP

Toni Public (Filer)

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02:52 PM

TS

Toni Staff (Mecklenburg Cao)

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02:56 PM

TP

Toni Public (Filer)


Hello, can you please correct my bathroom count from 3 to 2?

03:11 PM

19-Jul-2017 04:31:48 PM Arbitrator has completed Respond - Event: The Appraiser indicated that this inquiry was completed. Specifically, the Appraiser indicated the following: "I have updated your bathroom count from 3 to 2 and it has been corrected in CAO database. Thank you for your time." Consequently, this inquiry is now closed.

04:31 PM

Posting messages to this discussion is disabled (the case may be closed or you do not have permission to post at this time)

 ☒ Press 'Enter' to send messages

MODRIA

A CONVENIENT TOOL TO SHARE INFORMATION,
COMMUNICATE AND BUILD RELATIONSHIPS IN
OUR COMMUNITY.

Update Conclusions

- **2019 Revaluation – In Progress**

- 2011 Revaluation – Lessons Learned
- Customer Service Focus
- Revaluation Plan in Place
- Real Estate Market increasing

- **Modria is Live**

- Will assist both our citizens and staff in managing appeals
- Will provide another option for our citizens
- Using technology to provide transparent appeals solution