

FY2018 Accomplishments - Assessing**Outcome #1 - Timely, Full, Fair Cash Values****Target****Result****Strategy #1: Sales Verification**

Inspected sold properties/interviewed buyers/consulted sources to update property database.
100% of properties inspected within 2 months of deed receipt.

FY18
Annual

Completed

Strategy #2: CAMA Software

Utilized computer assisted mass appraisal software to analyze sales to develop formulas to value properties.

Jul 2017

Completed

Strategy #3: Cyclical Property Re-Inspection

Inspected residential, commercial and industrial properties to verify property characteristics and updated database.

Dec 2017

Completed

Strategy #4: Income/Expense Analysis of Commercial, Industrial and Apartments (4+ Units)

Sent income and expense forms to be returned by owners of these types of properties.
Analyzed income and expense forms.

Apr 2017
Jul 2017

Completed
Completed

Strategy #5: Personal Property

Mailed Forms of List to be returned by businesses to keep the personal property database current for valuation.

Dec 2016

Completed

Strategy #6: Receive Certification of Values from Massachusetts Dept. of Revenue

Met or exceeded DOR standards for FY2017 certification of values.

Nov 2017

Completed

Outcome #2: Accurate Calculation of New Growth due to New**Construction/Renovations****Target****Result****Strategy #1: Inspect all Properties with Building Permits**

Made data changes and determined value change due to new construction or renovation.

Nov 2017

Completed

Photographed all properties with large building permits within 2 weeks of January 1 assessment date.

Jan 2017

Completed

Strategy #2: Calculate New Growth Based on DOR-Required Formula

Utilized required State form LA-13 for calculations.

Oct 2017

Completed

Strategy #3:

Submitted by October, so that Tax Classification hearing was scheduled.

Oct 2017

Completed

Outcome #3: Timely Review of Abatement Applications and Successful Defense of Values**Target****Result****Strategy #1: Review All Legally-Filed Abatement Requests**

Conducted inspections.

May 2018

Ongoing, expect to meet target

Met w/ taxpayers.

May 2018

Ongoing, expect to meet target

Acted within statutorily required 3-month period.

May 2018

Ongoing, expect to meet target

Strategy #2: Prepare for Appellate Tax Board

Performed appraisal and created report.

Ongoing

Ongoing

Hired expert witnesses and outside consultants, when necessary.

Ongoing

Ongoing

Outcome #4: Tax Assistance Programs Pursuant to Mass. Law, City Ordinance**Target****Result****Strategy #1: Publicize Tax Assistance Programs**

Included information inserts in 3rd quarter tax bill.

Dec 2017

Completed

Provided F.A.Q.'s and application forms on website.

Jul 2017

Completed

Strategy #2: Process 70% of Prior Year Recipients' Applications in Time for Deduction, if Granted, on 3rd Quarter Tax Bill

Mailed all prior-year recipients applications at start of fiscal year.

Jul 2017

Completed

Granted exemptions to qualifying applicants.

Dec 2017

Completed

Strategy #3: Validate Remaining Timely-Filed/Documented Exemption Applications

Acted within statutory deadline.

May 2018

Ongoing, expect to meet target

Outcome #5: 2-Day Turnaround of Timely-Filed, Documented Excise Requests**Target****Result****Strategy #1: Publicize Requirements for Motor Vehicle Excise Abatements**

Provided F.A.Q.'s and abatement application form on website.

Feb 2018

Completed

Strategy #2: Process Qualifying Abatements once Supporting Documentation Supplied

Cross trained staff so that 2-day turnaround goal was be met during high-demand and low-staffing periods.

Ongoing

Ongoing

Once approved, supplied Treasurer/Collector with abatement information within 2 days.

Ongoing

Ongoing

FY2019 Desired Outcomes - Assessing**Outcome #1 - Timely, Full, Fair Cash Values****Target****Strategy #1: Sales Verification**

Inspect sold properties/interview buyers/consult sources to update property database. FY19
 100% of properties inspected within 2 months of deed receipt. Annual

Strategy #2: CAMA Software

Utilize computer assisted mass appraisal software to analyze sales to develop formulas to value properties. Jul 2018

Strategy #3: Cyclical Property Re-Inspection

Inspect residential, commercial and industrial properties to verify property characteristics and update database. Dec 2018

Strategy #4: Income/Expense Analysis of Commercial, Industrial and Apartments (4+

Send income and expense forms to be returned by owners of these types of properties. Mar 2018
 Analyze income and expense forms. Jul 2018

Strategy #5: Personal Property

Mail Forms of List to be returned by businesses to keep the personal property database current for valuation. Dec 2017

Strategy #6: Receive Certification of Values from Massachusetts Dept. of Revenue

Meet or exceed DOR standards for FY2017 certification of values. Nov 2018

Outcome #2: Accurate Calculation of New Growth due to New**Construction/Renovations****Target****Strategy #1: Inspect all Properties with Building Permits**

Make data changes and determine value change due to new construction or renovation. Nov 2018
 Photograph all properties with large building permits within 2 weeks of January 1 assessment date. Jan 2018

Strategy #2: Calculate New Growth Based on DOR-Required Formula

Utilize required State form LA-13 for calculations. Oct 2018

Strategy #3:

Submit by October, so that Tax Classification hearing can be scheduled. Oct 2018

Outcome #3: Timely Review of Abatement Applications and Successful Defense of Values**Target****Strategy #1: Review All Legally-Filed Abatement Requests**

Conduct inspections. May 2019
 Meet w/ taxpayers. May 2019
 Act within statutorily required 3-month period. May 2019

Strategy #2: Prepare for Appellate Tax Board

Perform appraisal and create report. Ongoing
 Hire expert witnesses and outside consultants, if necessary. Ongoing

Outcome #4: Tax Assistance Programs Pursuant to Mass. Law, City Ordinance**Target****Strategy #1: Publicize Tax Assistance Programs**

Include information inserts in 3rd quarter tax bill. Dec 2018
 Provide F.A.Q.'s and application forms on website. Jul 2018

Strategy #2: Process 70% of Prior Year Recipients' Applications in Time for Deduction, if Granted, on 3rd Quarter Tax Bill

Mail all prior-year recipients applications at start of fiscal year. Jul 2018
 Grant exemptions to qualifying applicants. Dec 2018

Strategy #3: Validate Remaining Timely-Filed/Documented Exemption Applications

Act within statutory deadline. May 2019

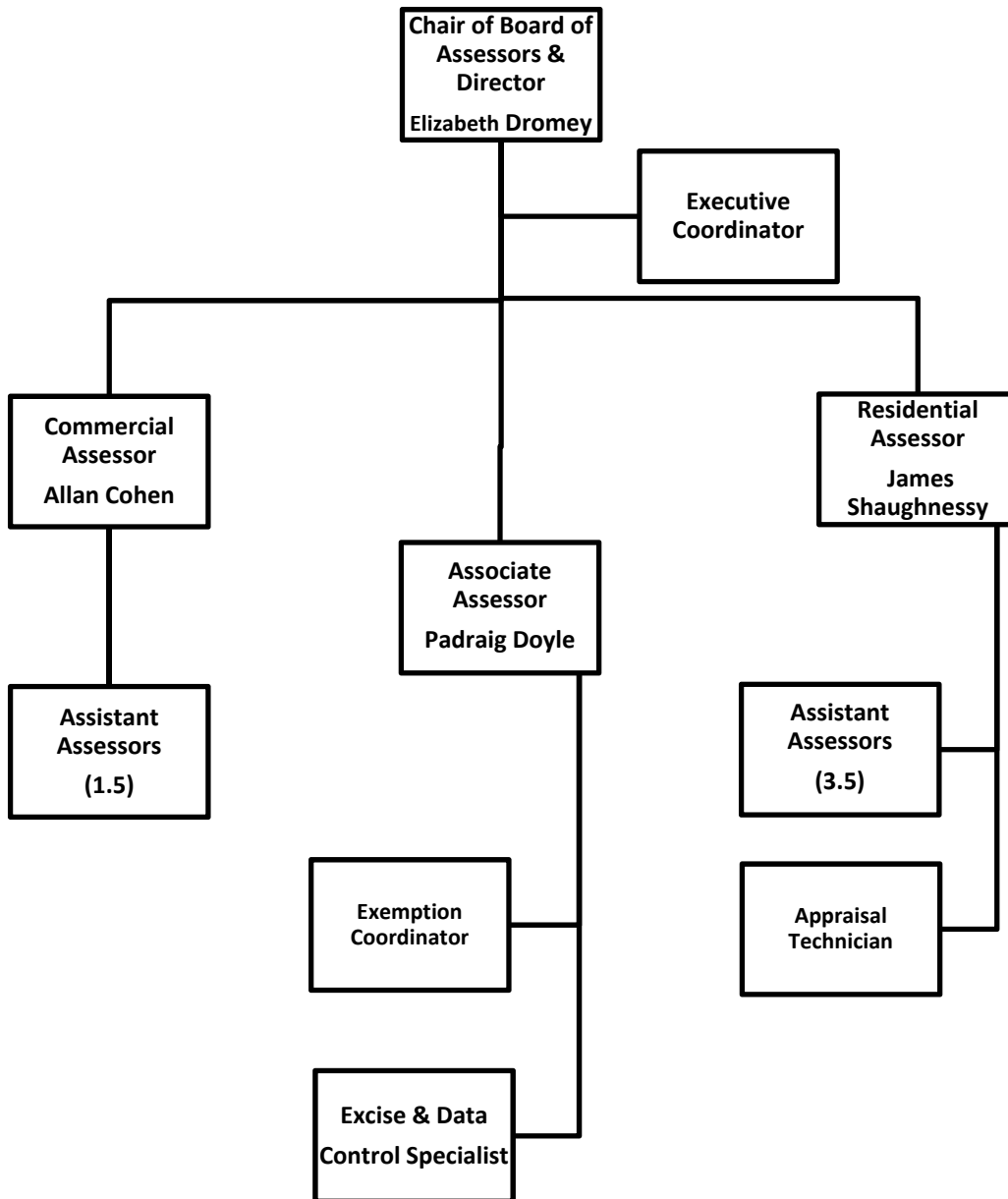
Outcome #5: 2-Day Turnaround of Timely-Filed, Documented Excise Requests**Target****Strategy #1: Publicize Requirements for Motor Vehicle Excise Abatements**

Provide F.A.Q.'s and abatement application form on website. Feb 2019

Strategy #2: Process Qualifying Abatements once Supporting Documentation Supplied

Cross train staff so that 2-day turnaround goal can continue to be met during high-demand and low-staffing periods. Ongoing
 Once approved, supply Treasurer/Collector with abatement information within 2 days. Ongoing

ASSESSING



FUND: 01 - GENERAL FUND
DEPARTMENT: 106 - BOARD OF ASSESSORS

CITY OF NEWTON BUDGET
DEPARTMENT LEGAL LEVEL OF CONTROL

	ACTUAL 2016	ACTUAL 2017	AMENDED 2018	YTD 4/12/2018	RECOMMENDED 2019	CHANGE 2018 to 2019
BOARD OF ASSESSORS SUMMARY						
51 - PERSONAL SERVICES	1,045,926	1,030,248	1,061,516	755,088	1,054,695	-6,821
52 - EXPENSES	40,843	48,254	62,175	35,193	63,375	1,200
57 - FRINGE BENEFITS	125,999	142,753	153,042	91,581	134,621	-18,421
TOTAL DEPARTMENT	1,212,768	1,221,255	1,276,733	881,862	1,252,691	-24,041
ASSESSING						
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CITY OF NEWTON BUDGET
DEPARTMENTAL DETAIL

	ACTUAL FY2016	ACTUAL FY2017	AMENDED 2018	YTD 4/12/2018	RECOMMENDED 2019	CHANGE 2018 to 2019
106 - BOARD OF ASSESSORS						
0110601 - ASSESSING						
PERSONAL SERVICES						
511001 FULL TIME SALARIES	984,857	978,678	1,017,501	718,452	1,040,945	23,444
511003 WORK FOR OTHER DEPTS	0	0	0	-195	0	0
511102 PART TIME > 20 HRS/WK	0	3,562	0	9,619	0	0
514001 LONGEVITY	13,350	8,258	11,900	11,250	11,750	-150
514309 OTHER STIPENDS	30,231	30,116	30,115	7,500	0	-30,115
515005 BONUSES	0	0	0	1,400	0	0
515006 VACATION BUY BACK	14,988	7,634	0	5,562	0	0
515102 CLEANING ALLOWANCE	2,500	2,000	2,000	1,500	2,000	0
TOTAL PERSONAL SERVICES	1,045,926	1,030,248	1,061,516	755,088	1,054,695	-6,821
EXPENSES						
52401 OFFICE EQUIPMENT R-M	1,405	1,059	2,000	1,374	2,000	0
52403 MOTOR VEHICLE R-M	500	500	654	654	1,200	546
52405 COMPUTER EQUIPMT R-M	0	0	346	0	500	154
52410 SOFTWARE MAINTENANC	13,299	18,581	24,300	16,708	27,000	2,700
5319 TRAINING EXPENSES	3,468	4,205	7,000	4,978	7,500	500
53401 TELEPHONE	1,734	1,378	1,500	869	1,500	0
53404 INTERNET ACCESS CHAR	652	615	1,075	415	1,075	0
5341 POSTAGE	10,419	9,606	9,000	2,874	6,000	-3,000
5342 PRINTING	2,503	2,273	4,000	2,723	4,000	0
5343 ADVERTISING/PUBLICATIO	0	0	500	0	600	100
5420 OFFICE SUPPLIES	3,103	4,551	5,000	1,984	5,000	0
5480 GASOLINE	906	589	1,200	538	1,200	0
5523 PAPER GOODS & SUPPLIE	477	0	500	0	500	0
5592 BOOKS/MANUALS/PERIODI	173	330	300	200	300	0
5710 VEHICLE USE REIMBURSE	31	462	500	136	500	0
5711 IN-STATE CONFERENCES	664	2,581	2,500	275	2,600	100
5730 DUES & SUBSCRIPTIONS	1,510	1,525	1,800	1,465	1,900	100
TOTAL EXPENSES	40,843	48,254	62,175	35,193	63,375	1,200
FRINGE BENEFITS						
57DENTAL DENTAL INSURANCE	3,151	3,872	2,369	2,450	2,810	441
57HLTH HEALTH INSURANCE	105,086	118,399	129,396	72,403	108,359	-21,037
57LIFE BASIC LIFE INSURANCE	434	340	342	212	285	-57
57MEDA MEDICARE PAYROLL TAX	14,869	14,125	12,332	11,651	15,308	2,975
57OPEB OPEB CONTRIBUTION	2,459	6,017	8,602	4,865	7,860	-743
TOTAL FRINGE BENEFITS	125,999	142,753	153,042	91,581	134,621	-18,421
TOTAL ASSESSING	1,212,768	1,221,255	1,276,733	881,862	1,252,691	-24,041
TOTAL BOARD OF ASSESSORS	1,212,768	1,221,255	1,276,733	881,862	1,252,691	-24,041