



**FY2017 Accomplishments - Assessing**

<b>Outcome #1 - Timely, Full, Fair Cash Values</b>	<b>Target</b>	<b>Result</b>
<b>Strategy #1: Sales Verification</b>		
Inspect sold properties/interview buyers/consult sources to update property database. 100% of properties inspected within 2 months of deed receipt.	FY17 Annual	Completed Completed
<b>Strategy #2: CAMA Software</b>		
Utilize computer assisted Mass appraisal software to analyze sales to develop formulas to value properties.	Jul 2016	Completed
<b>Strategy #3: Cyclical Property Re-Inspection</b>		
Inspect residential, commercial and industrial properties to verify property characteristics and update database.	Dec 2016	Completed
<b>Strategy #4: Income/Expense Analysis of Commercial, Industrial and Apartments</b>		
Send income and expense forms to be returned by owners of these types of properties.	Apr 2016	Completed
Analyze income and expense forms.	Jul 2016	Completed
<b>Strategy #5: Personal Property</b>		
Mail Forms of List to be returned by businesses to keep the personal property database current for valuation.	Dec 2015	Completed
<b>Strategy #6: Receive Certification of Values from Massachusetts Department of Revenue</b>		
Meet or exceed DOR standards for FY2016 certification of values.	Nov 2016	Completed

**Outcome #2: Accurate Calculation of New Growth due to New**

<b>Construction/Renovations</b>	<b>Target</b>	<b>Result</b>
<b>Strategy #1: Inspect all Properties with Building Permits</b>		
Make data changes and determine value change due to new construction or renovation. Photograph all properties with large building permits within 2 weeks of January 1 assessment date.	Nov 2016 Jan 2016	Completed Completed
<b>Strategy #2: Calculate New Growth Based on DOR-Required Formula</b>		
Utilize required State form LA-13 for calculations.	Oct 2016	Completed
<b>Strategy #3: Submit Calculations on Form LA-13 to DOR for Approval</b>		
Submit by October, so that Tax Classification hearing can be scheduled.	Oct 2016	Completed

**Outcome #3: Timely Review of Abatement Applications and Successful Defense of Values**

	<b>Target</b>	<b>Result</b>
<b>Strategy #1: Review All Legally-Filed Abatement Requests</b>		
Conduct inspections.	May 2017	Ongoing, expect to meet target
Meet w/ taxpayers.	May 2017	Ongoing, expect to meet target
Act within statutorily required 3-month period.	May 2017	Ongoing, expect to meet target
<b>Strategy #2: Prepare for Appellate Tax Board</b>		
Perform appraisal and create report.	Ongoing	Ongoing
Hire expert witnesses and outside consultants, if necessary.	Ongoing	Ongoing

**Outcome #4: Tax Assistance Programs Pursuant to Massachusetts Law and City Ordinance**

	<b>Target</b>	<b>Result</b>
<b>Strategy #1: Publicize Tax Assistance Programs</b>		
Include information inserts in 3rd quarter tax bill.	Dec. 2016	Completed
Provide F.A.Q.'s and application forms on website.	July 2016	Completed
<b>Strategy #2: Process 70% of Prior Year Recipients' Applications in Time for Deduction, if Granted, on 3rd Quarter Tax Bill</b>		
Mail all prior-year recipients applications at start of fiscal year.	July 2016	Completed
Grant exemptions to qualifying applicants.	Dec. 2016	Completed
<b>Strategy #3: Validate all Remaining Timely-Filed and Documented Exemption Applications</b>		
Act within statutory deadline.	May 2017	Ongoing, expect to meet target

**Outcome #5. 2-Day Turnaround of Timely-Filed, Fully-Documented Excise**

<b>Requests</b>	<b>Target</b>	<b>Result</b>
<b>Strategy #1: Publicize Requirements for Motor Vehicle Excise Abatements</b>		
Provide F.A.Q.'s and abatement application form on website.	Jan. 2017	Completed
<b>Strategy #2: Process Qualifying Abatements once Supporting Documentation Supplied</b>		
Cross train staff so that 2-day turnaround goal can continue to be met during high-demand and low-staffing periods.	Ongoing	Ongoing
Once approved, supply Treasurer/Collector with abatement information within 2 days.	Ongoing	Ongoing

## **FY2018 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.  
100% of properties inspected within 2 months of deed receipt.

FY18  
Annual

#### **Strategy #2: CAMA Software**

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

July 2017

#### **Strategy #3: Cyclical Property Re-Inspection**

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

December 2017

#### **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.  
Analyze income and expense forms.

April 2017

July 2017

#### **Strategy #5: Personal Property**

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

December 2017

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

Meet or exceed DOR standards for FY2017 certification of values.

November 2017

### **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.  
Photograph all properties with large building permits within 2 weeks of January 1 assessment date.

November 2017

January 2017

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

Utilize required State form LA-13 for calculations.

October 2017

#### **Strategy #3:**

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

October 2017

### **Outcome #3: Timely Review of Abatement Applications and Successful Defense of Values**

#### **Target**

#### **Strategy #1: Review All Legally-Filed Abatement Requests**

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

May 2018

May 2018

May 2018

#### **Strategy #2: Prepare for Appellate Tax Board**

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

Year round

Year round

### **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.  
Provide F.A.Q.'s and application forms on website.

December 2017

July 2017

#### **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.  
Grant exemptions to qualifying applicants.

July 2017

December 2017

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

Act within statutory deadline.

May 2018

### **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.

February 2018

#### **Strategy #2: Process Qualifying Abatements once Supporting Documentation Supplied**

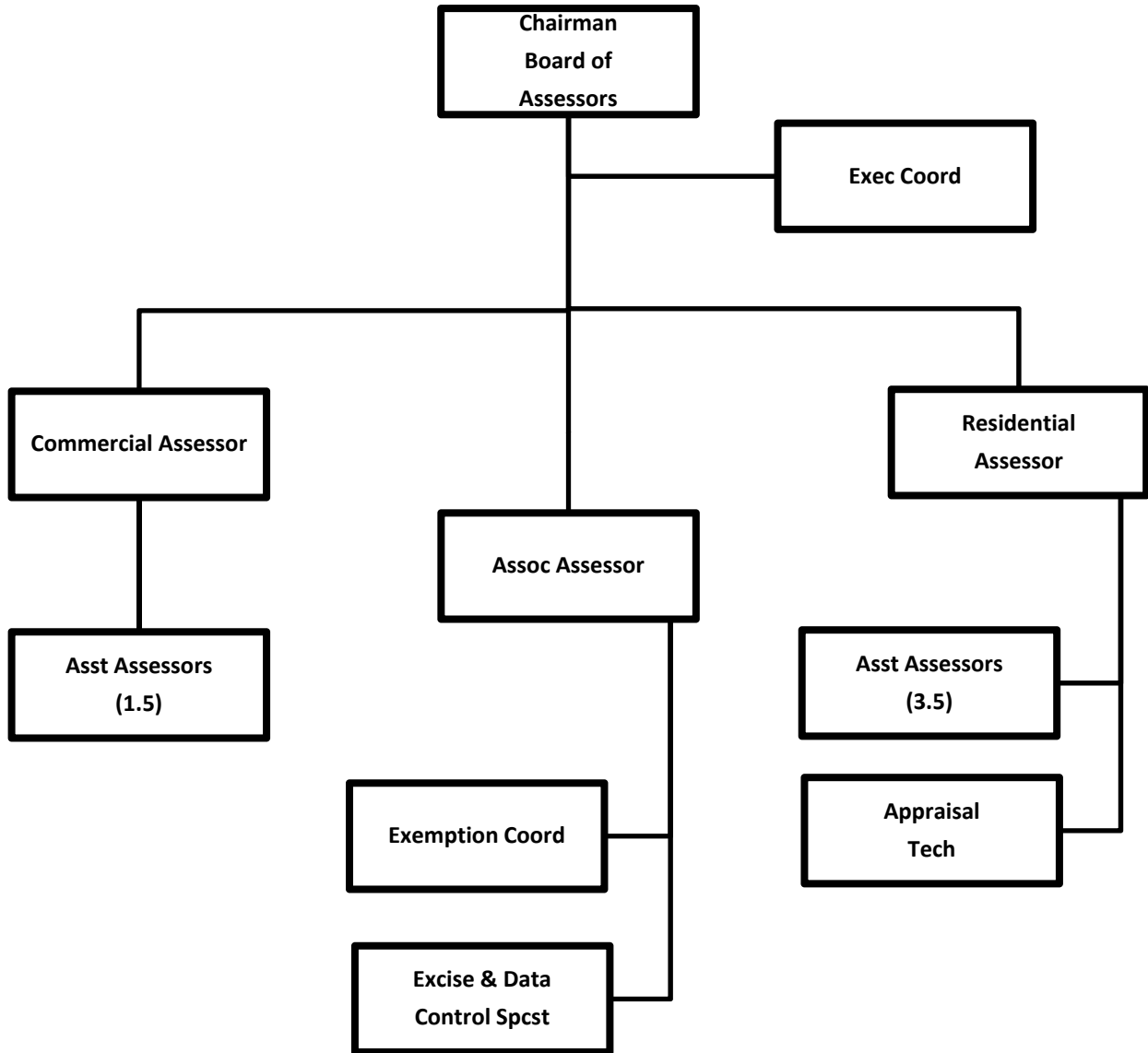
Cross train staff so that 2-day turnaround goal can continue to be met during high-demand and low-staffing periods.

Year round

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

Year round

# ASSESSING



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

**CITY OF NEWTON BUDGET  
DEPARTMENT LEGAL LEVEL OF CONTROL**

	ACTUAL 2015	ACTUAL 2016	AMENDED 2017	YTD 4/4/2017	RECOMMENDED 2018	CHANGE 2017 to 2018
<b>BOARD OF ASSESSORS SUMMARY</b>						
51 - PERSONAL SERVICES	1,036,941	1,054,880	1,060,275	766,289	1,061,516	1,241
52 - EXPENSES	40,885	40,843	58,025	27,062	62,175	4,150
57 - FRINGE BENEFITS	117,797	125,999	143,587	104,076	153,042	9,455
<b>TOTAL DEPARTMENT</b>	<b>1,195,623</b>	<b>1,221,722</b>	<b>1,261,887</b>	<b>897,427</b>	<b>1,276,733</b>	<b>14,846</b>
<b>ASSESSING</b>						
51 - PERSONAL SERVICES	1,036,941	1,054,880	1,060,275	766,289	1,061,516	1,241
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FUND: 01 - GENERAL FUND  
DEPARTMENT: 106 - BOARD OF ASSESSORS

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL FY2015	ACTUAL FY2016	AMENDED 2017	YTD 4/4/2017	RECOMMENDED 2018	CHANGE 2017 to 2018
<b>106 - BOARD OF ASSESSORS</b>						
<b>0110601 - ASSESSING</b>						
<b>PERSONAL SERVICES</b>						
511001 FULL TIME SALARIES	992,109	984,857	1,013,219	720,358	1,017,501	4,282
514001 LONGEVITY	12,908	13,350	8,825	8,258	11,900	3,075
514309 OTHER STIPENDS	29,923	30,231	30,231	22,039	30,115	-116
515003 SPECIAL LEAVE BUY BAC	0	8,954	6,000	6,000	0	-6,000
515006 VACATION BUY BACK	0	14,988	0	7,634	0	0
515102 CLEANING ALLOWANCE	2,000	2,500	2,000	2,000	2,000	0
<b>TOTAL PERSONAL SERVICES</b>	<b>1,036,941</b>	<b>1,054,880</b>	<b>1,060,275</b>	<b>766,289</b>	<b>1,061,516</b>	<b>1,241</b>
<b>EXPENSES</b>						
52401 OFFICE EQUIPMENT R-M	1,183	1,405	2,000	762	2,000	0
52403 MOTOR VEHICLE R-M	500	500	500	0	500	0
52405 COMPUTER EQUIPMT R-M	0	0	500	0	500	0
52410 SOFTWARE MAINTENANC	11,945	13,299	16,750	12,529	24,300	7,550
5319 TRAINING EXPENSES	3,604	3,468	4,000	2,833	4,000	0
53401 TELEPHONE	1,741	1,734	2,200	947	1,500	-700
53404 INTERNET ACCESS CHAR	884	652	1,075	447	1,075	0
5341 POSTAGE	10,423	10,419	14,000	2,353	12,000	-2,000
5342 PRINTING	3,372	2,503	4,000	1,378	4,000	0
5343 ADVERTISING/PUBLICATIO	492	0	500	0	500	0
5420 OFFICE SUPPLIES	2,342	3,103	5,000	2,486	5,000	0
5480 GASOLINE	1,150	906	1,700	355	1,200	-500
5523 PAPER GOODS & SUPPLIE	0	477	500	0	500	0
5592 BOOKS/MANUALS/PERIOD	438	173	500	200	300	-200
5710 VEHICLE USE REIMBURSE	494	31	500	380	500	0
5711 IN-STATE CONFERENCES	419	664	2,500	867	2,500	0
5730 DUES & SUBSCRIPTIONS	1,900	1,510	1,800	1,525	1,800	0
<b>TOTAL EXPENSES</b>	<b>40,885</b>	<b>40,843</b>	<b>58,025</b>	<b>27,062</b>	<b>62,175</b>	<b>4,150</b>
<b>FRINGE BENEFITS</b>						
57DENTAL DENTAL INSURANCE	3,058	3,151	3,108	2,756	2,369	-739
57HLTH HEALTH INSURANCE	99,455	105,086	120,014	86,527	129,396	9,382
57LIFE BASIC LIFE INSURANCE	514	434	397	227	342	-55
57MEDA MEDICARE PAYROLL TAX	13,959	14,869	12,491	10,447	12,332	-159
57OPEB OPEB CONTRIBUTION	810	2,459	7,577	4,120	8,602	1,026
<b>TOTAL FRINGE BENEFITS</b>	<b>117,797</b>	<b>125,999</b>	<b>143,587</b>	<b>104,076</b>	<b>153,042</b>	<b>9,455</b>
<b>TOTAL ASSESSING</b>	<b>1,195,623</b>	<b>1,221,722</b>	<b>1,261,887</b>	<b>897,427</b>	<b>1,276,733</b>	<b>14,846</b>
<b>TOTAL BOARD OF ASSESSORS</b>	<b>1,195,623</b>	<b>1,221,722</b>	<b>1,261,887</b>	<b>897,427</b>	<b>1,276,733</b>	<b>14,846</b>

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

**CITY OF NEWTON BUDGET  
 PERSONAL SERVICES SUMMARY**

ACCOUNT	POSITION TITLE	2017			2018		
		RANGE	FTE	SALARY	RANGE	FTE	SALARY
511001	APPRAISAL TECH	S7-4	1.0	52,058	S7-5	1.00	52,839
	ASSESSOR	H11-21	2.0	226,590	H11-23	2.00	233,413
	ASSOC ASSESSOR	H9-1	1.0	72,058	H9-3	1.00	74,220
	ASST COM ASSESS	H7-24	1.0	86,958	H7-26	1.00	89,567
	ASST RES/COM ASSESS	H7-13	1.0	73,872	H7-15	1.00	76,083
	ASST RESID ASSESS	H7-1	3.0	203,259	H7-3	3.00	209,346
	CHAIRMAN	H13-24	1.0	130,031	H13-26	1.00	133,932
	EXCISE/DATA CONTROL CLE	S6-1	1.0	43,636	S6-2	1.00	43,964
	EXEC COORD	S7-1	1.0	49,641	S7-2	1.00	48,080
	EXEMPTION COORD	S7-6	1.0	54,424	S7-7	1.00	56,057
	<b>Account Totals:</b>		<b>13.0</b>	<b>992,528</b>		<b>13.00</b>	<b>1,017,501</b>
	<b>Report Totals:</b>		<b>13.0</b>	<b>992,528</b>		<b>13.00</b>	<b>1,017,501</b>