



**FY 2016 Accomplishments - Assessing****Outcome #1 - Timely, Full, Fair Cash Values****Target****Result****Strategy #1: Sales Verification**

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

2 Mos  
Annual

Completed  
Completed

**Strategy #2: CAMA Software**

Utilized Computer Assisted Mass Appraisal software to analyze sales to develop formulas to value properties.

Jul 2015

Completed

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

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

Dec 2015

Completed

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

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

April 2016  
Jul 2015

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 2015

Completed

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

Met or exceeded DOR standards for FY2016 certification of values.

Nov 2015

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

Nov 2015  
Jan 2015

Completed  
Completed

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

Utilized required State Form LA-13 for calculations.

Oct 2015

Completed

**Strategy #3: Submit Calculations on Form LA-13 to DOR for Approval**

Submitted by October, so that Tax Classification Hearing could be scheduled.

Oct 2015

Completed

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

Conduct Inspections.  
Meet w/Taxpayers.  
Act within statutorily required 3-month period.

May 2016  
May 2016  
May 2016

Ongoing, expect to meet target  
Ongoing, expect to meet target  
Ongoing, expect to meet target

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

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

Year Round  
Year Round

Ongoing  
Ongoing

**Outcome #4: Tax Assistance Programs Pursuant to Massachusetts Law and City Ordinance****Target****Result****Strategy #1: Publicize Tax Assistance Programs**

Included inserts in 3rd quarter tax bill.  
Provided F.A.Q.'s and application forms on website.

Dec 2015  
Jul 2015

Completed  
Completed

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

Mailed all prior-year recipients applications at start of fiscal year.  
Granted exemptions to qualifying applicants.

Jul 2015  
Dec 2015

Completed  
Completed

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

Act within statutory deadline.

May 2016

Ongoing, expect to meet target

**Outcome #5: 2-Day Turnaround of Timely-Filed, Fully-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 2016

Completed

**Strategy #2: Process Qualifying Abatements as Soon as Supporting Documentation is Supplied**

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

Year Round

Completed

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

Year Round

Completed and ongoing

**FY 2017 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. 2 Months from Deed Receipt  
 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. July 2016

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

Inspect residential, commercial and industrial properties to verify property characteristics and update database. December 2016

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

Send income and expense forms to be returned by owners of these types of properties. April 2016  
 Analyze income and expense forms. July 2016

**Strategy #5: Personal Property**

Mail Forms of List to be returned by businesses to keep the personal property database current for valuation. December 2016

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

Meet or exceed DOR standards for FY2016 certification of values. November 2016

**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. November 2016  
 Photograph all properties with large building permits within 2 weeks of January 1 assessment date. January 2017

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

Utilize required State form LA-13 for calculations. October 2016

**Strategy #3: Submit Calculations on Form LA-13 to DOR for Approval**

Submit by October, so that Tax Classification hearing can be scheduled. October 2016

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

Conduct inspections. May 2017  
 Meet w/ taxpayers. May 2017  
 Act within statutorily required 3-month period. May 2017

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

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

**Outcome #4: Tax Assistance Programs Pursuant to Massachusetts Law and City Ordinance****Target****Strategy #1: Publicize Tax Assistance Programs**

Include information inserts in 3rd quarter tax bill. December 2016  
 Provide F.A.Q.'s and application forms on website. July 2016

**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. July 2016  
 Grant exemptions to qualifying applicants. December 2016

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

Act within statutory deadline. May 2017

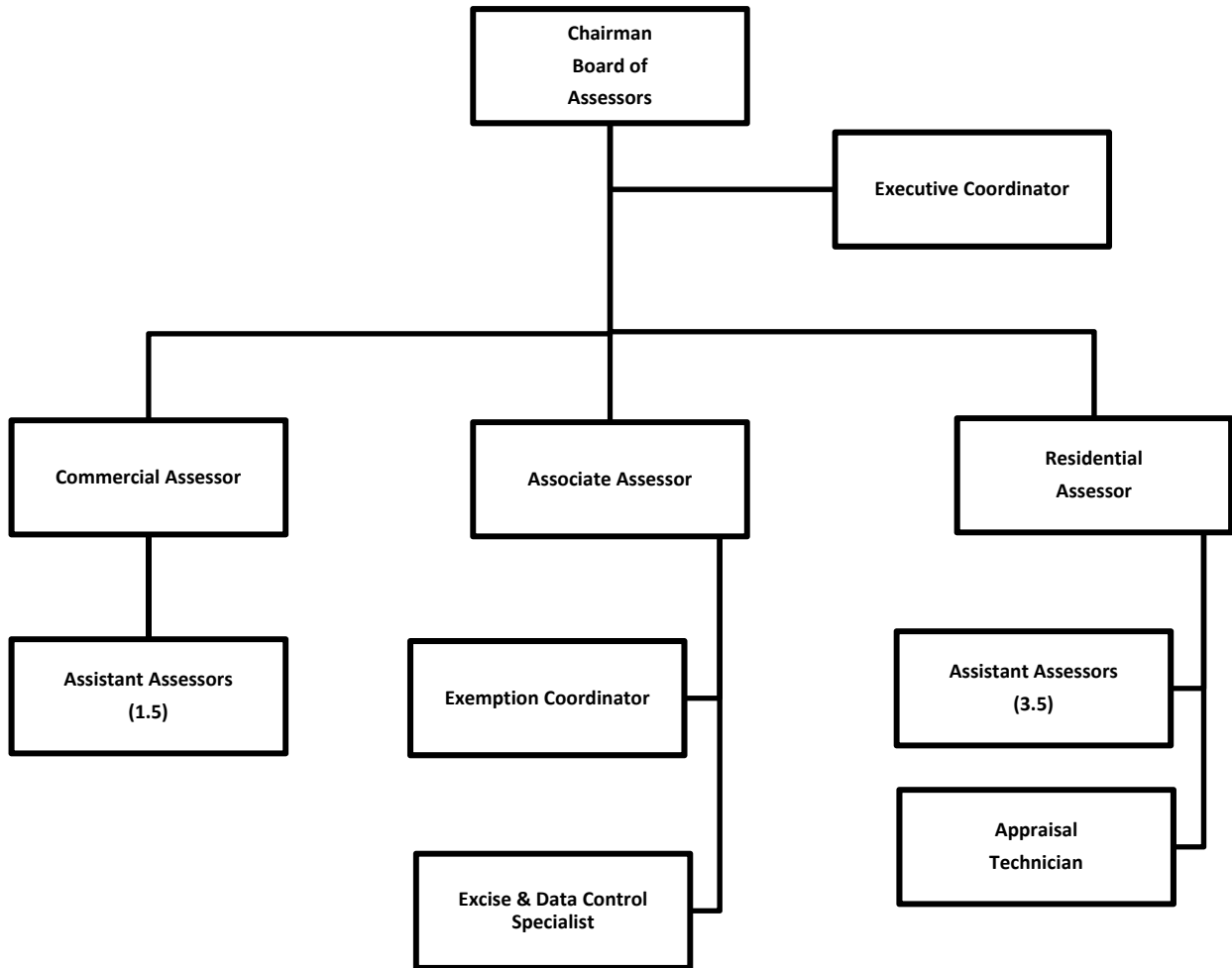
**Outcome #5. 2-Day Turnaround of Timely-Filed, Fully-Documented Excise Requests****Target****Strategy #1: Publicize Requirements for Motor Vehicle Excise Abatements**

Provide F.A.Q.'s and abatement application form on website. Feb 2017

**Strategy #2: Process Qualifying Abatements as Soon as Supporting Documentation is 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 2014	ACTUAL 2015	AMENDED 2016	YTD 4/13/2016	RECOMMENDED 2017	CHANGE 2016 to 2017
<b>BOARD OF ASSESSORS SUMMARY</b>						
51 - PERSONAL SERVICES	1,035,719	1,037,841	1,109,076	843,204	1,060,275	-48,801
52 - EXPENSES	44,634	40,885	58,025	34,244	58,025	0
57 - FRINGE BENEFITS	122,487	117,797	129,070	98,623	143,587	14,517
<b>TOTAL DEPARTMENT</b>	<b>1,202,840</b>	<b>1,196,523</b>	<b>1,296,171</b>	<b>976,072</b>	<b>1,261,887</b>	<b>-34,284</b>
<b>ASSESSING</b>						
51 - PERSONAL SERVICES	1,035,719	1,037,841	1,109,076	843,204	1,060,275	-48,801
52 - EXPENSES	44,634	40,885	58,025	34,244	58,025	0
57 - FRINGE BENEFITS	122,487	117,797	129,070	98,623	143,587	14,517
<b>TOTAL ASSESSING</b>	<b>1,202,840</b>	<b>1,196,523</b>	<b>1,296,171</b>	<b>976,072</b>	<b>1,261,887</b>	<b>-34,284</b>

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

CITY OF NEWTON BUDGET  
DEPARTMENTAL DETAIL

	ACTUAL FY2014	ACTUAL FY2015	AMENDED 2016	YTD 4/13/2016	RECOMMENDED 2017	CHANGE 2016 to 2017
<b>106 - BOARD OF ASSESSORS</b>						
<b>0110601 - ASSESSING</b>						
<b>PERSONAL SERVICES</b>						
511001 FULL TIME SALARIES	992,903	992,109	1,042,764	783,108	1,019,219	-23,545
514001 LONGEVITY	10,700	12,908	12,500	13,092	8,825	-3,675
514309 OTHER STIPENDS	30,116	29,923	30,231	23,423	30,231	0
515003 SPECIAL LEAVE BUY BAC	0	0	8,954	8,954	0	-8,954
515005 BONUSES	0	900	0	0	0	0
515006 VACATION BUY BACK	0	0	12,127	12,127	0	-12,127
515102 CLEANING ALLOWANCE	2,000	2,000	2,500	2,500	2,000	-500
<b>TOTAL PERSONAL SERVICES</b>	<b>1,035,719</b>	<b>1,037,841</b>	<b>1,109,076</b>	<b>843,204</b>	<b>1,060,275</b>	<b>-48,801</b>
<b>EXPENSES</b>						
52401 OFFICE EQUIPMENT R-M	1,258	1,183	2,000	1,408	2,000	0
52403 MOTOR VEHICLE R-M	400	500	500	0	500	0
52405 COMPUTER EQUIPMT R-M	2,300	0	500	0	500	0
52410 SOFTWARE MAINTENANC	10,333	11,945	16,750	12,863	16,750	0
5319 TRAINING EXPENSES	4,009	3,604	4,000	2,383	4,000	0
53401 TELEPHONE	1,682	1,741	2,200	1,169	2,200	0
53404 INTERNET ACCESS CHAR	869	884	1,075	429	1,075	0
5341 POSTAGE	11,079	10,423	14,000	9,740	14,000	0
5342 PRINTING	1,560	3,372	4,000	1,515	4,000	0
5343 ADVERTISING/PUBLICATIO	0	492	500	0	500	0
5420 OFFICE SUPPLIES	4,721	2,342	5,000	1,816	5,000	0
5480 GASOLINE	1,500	1,150	1,700	608	1,700	0
5523 PAPER GOODS & SUPPLIE	358	0	500	482	500	0
5592 BOOKS/MANUALS/PERIODI	333	438	500	48	500	0
5710 VEHICLE USE REIMBURSE	207	494	500	31	500	0
5711 IN-STATE CONFERENCES	2,276	419	2,500	244	2,500	0
5730 DUES & SUBSCRIPTIONS	1,750	1,900	1,800	1,510	1,800	0
<b>TOTAL EXPENSES</b>	<b>44,634</b>	<b>40,885</b>	<b>58,025</b>	<b>34,244</b>	<b>58,025</b>	<b>0</b>
<b>FRINGE BENEFITS</b>						
57DENTAL DENTAL INSURANCE	3,040	3,058	3,143	2,460	3,108	-35
57HLTH HEALTH INSURANCE	104,004	99,455	108,460	82,351	120,014	11,554
57LIFE BASIC LIFE INSURANCE	562	514	511	345	397	-114
57MEDA MEDICARE PAYROLL TAX	14,881	13,959	14,712	11,737	12,491	-2,221
57OPEB OPEB CONTRIBUTION	0	810	2,244	1,730	7,577	5,332
<b>TOTAL FRINGE BENEFITS</b>	<b>122,487</b>	<b>117,797</b>	<b>129,070</b>	<b>98,623</b>	<b>143,587</b>	<b>14,517</b>
<b>TOTAL ASSESSING</b>	<b>1,202,840</b>	<b>1,196,523</b>	<b>1,296,171</b>	<b>976,072</b>	<b>1,261,887</b>	<b>-34,284</b>
<b>TOTAL BOARD OF ASSESSORS</b>	<b>1,202,840</b>	<b>1,196,523</b>	<b>1,296,171</b>	<b>976,072</b>	<b>1,261,887</b>	<b>-34,284</b>

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

CITY OF NEWTON BUDGET  
 PERSONAL SERVICES SUMMARY

ACCOUNT	POSITION TITLE	2016			2017		
		RANGE	FTE	SALARY	RANGE	FTE	SALARY
511001	APPRAISAL TECH	S07	1.0	54,843	S07	1.00	56,269
	ASSESSOR	H11	2.0	221,610	H11	2.00	227,386
	ASSOCIATE ASSESSOR	H10	1.0	105,913	H09	1.00	72,335
	ASST COMRCL ASSESSOR	H07	2.0	157,315	H07	2.00	161,411
	ASST RESID ASSESSOR	H07	3.0	202,555	H07	3.00	207,817
	CHAIRMAN - ASSESSORS	H13	1.0	127,159	H13	1.00	130,474
	EXCISE DATA CONTROL SPE	S06	1.0	43,972	S06	1.00	44,625
	EXECUTIVE COORDINATOR	S07	1.0	62,638	S07	1.00	64,271
	EXEMPTION COORDINATOR	S07	1.0	53,251	S07	1.00	54,630
	<b>Account Totals:</b>		<b>13.0</b>	<b>1,029,255</b>		<b>13.00</b>	<b>1,019,219</b>
	<b>Report Totals:</b>		<b>13.0</b>	<b>1,029,255</b>		<b>13.00</b>	<b>1,019,219</b>