

DOCKET # 323-12

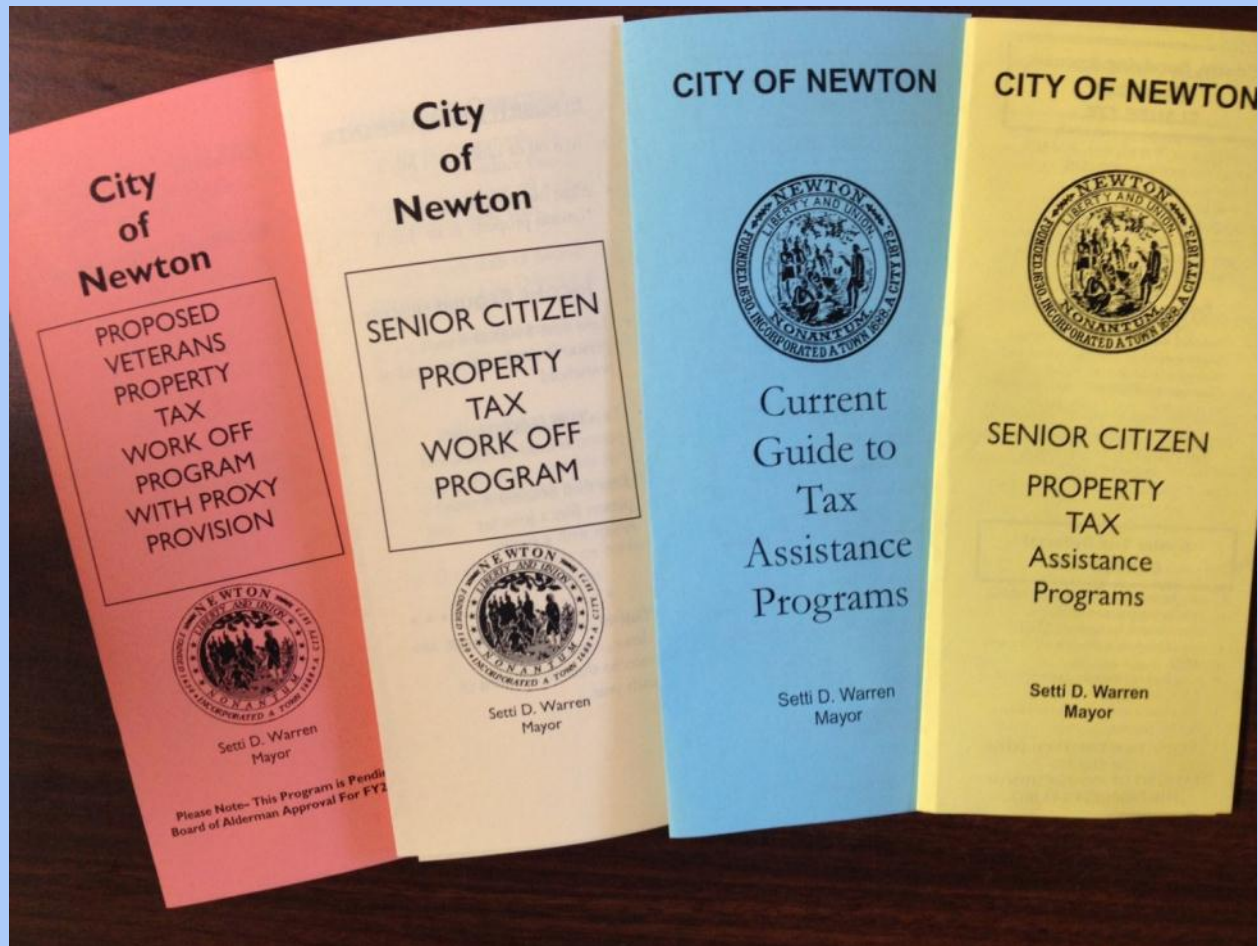
ANSWERING THE QUESTIONS

NOVEMBER 14, 2012

Setti D. Warren, Mayor
City of Newton, Massachusetts



TAX RELIEF



COST OF LIVING INCREASE

CHAPTER 181 ACTS OF 1995 – ACTUAL EXEMPTION AMOUNT

- **The provisions of Chapter 59 section 5 added by Chapter 181 of the Acts of 1995, which authorizes an annual increase in the amount of the exemption granted to senior citizens, surviving spouses and surviving minors under General Laws Chapter 49, Section 5, Clause 17D by up to 100% of the percentage increase in the U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index (CPI) for the previous year as determined by the Commissioner of Revenue, and to fix that annual increase at 100% of the CPI: to be effective for exemptions granted any fiscal year beginning on or after July 1, 2013.**
- **Currently 34 Taxpayers Qualify**

COST OF LIVING INCREASE CHAPTER 181 ACTS OF 1995 – ACTUAL EXEMPTION AMOUNT

- **TAXPAYER WOULD BE ENTITLED TO**

\$175 + C.O.L.A. OF 2.65% OR \$180

***2014 Requirements and exemption will be based on updated COLA**

COST OF LIVING INCREASE 17E - ASSET AMOUNT

- **Chapter 59, Section 5, Clause 17E, which authorizes an annual increase in the asset (the whole estate) limit for exemptions granted to senior citizens, surviving spouses, and surviving minors by the percentage increase in the U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index for the previous year as determined by the Commissioner of Revenue, to be effective for exemptions granted any fiscal year beginning on or after July 1, 2013.**

COST OF LIVING INCREASE 17E - ASSET AMOUNT

- **ASSET LIMIT INCREASED BY 2.65%**

2012: \$40,000 VS. 2013: \$41,060

***2014 Requirements and exemption will be based on updated COLA**

COST OF LIVING ADJUSTMENT 41D – INCOME AND ASSETS

- Chapter 59, Section 5, Clause 41D, which authorizes an annual increase in the income (gross receipts) and asset (whole estate) limits for exemptions granted to senior citizens by the percentage increase in the U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index for the previous year as determined by the Commissioner of Revenue, to be effective for exemptions granted any fiscal year beginning on or after July 1, 2013.
- Currently 146 Taxpayers Qualify

COST OF LIVING ADJUSTMENT 41D – INCOME AND ASSETS

- INCOME AND ASSETS INCREASED BY COST OF LIVING ADJUSTMENT**

2012 Asset Limit	VS.	2013 Asset Limit
Single: \$40,000		Single: \$41,060
Married: \$55,000		Married: \$56,458
2012 Income Limit	VS.	2013 Income Limit
Single: \$20,000		Single: \$20,530
Married: \$30,000		Married: \$30,795

***2014 Requirements will be based on updated COLA**

ESTABLISHING A VETERAN'S TAX WORK-OFF PROGRAM WITH PROXY

- Chapter 59, Section 5N to establish a Veteran's Tax Work-Off Program that will authorize a qualifying veteran or a proxy, if the qualifying veteran is physically unable to perform the work, to work-off up to the maximum reduction of the real property tax bill based on 125 volunteer service hours in a given tax year. .

ESTABLISHING A VETERAN'S TAX WORK-OFF PROGRAM WITH PROXY

- VETERANS TAX WORK-OFF WITH PROXY PROVISION

SENIOR TAX WORK-OFF ADOPTING A PROXY PROVISION

- Chapter 59, Section 5K, (Senior Tax Work-Off Program) and the amendment to Section 27-20 of the Revised Ordinances of the City of Newton 2012 to allow the maximum reduction to be based on 125 hours of service, rather than \$1,000, as well as discussion of adopting a provision to allow a proxy to perform the work on behalf of a qualifying senior who is physically unable to perform the volunteer service.

SENIOR TAX WORK-OFF ADOPTING A PROXY PROVISION

- **ALLOWS FOR A PROXY TO WORK FOR A SENIOR**

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ANSWERING THE QUESTIONS

NOVEMBER 14, 2012

Setti D. Warren, Mayor
City of Newton, Massachusetts



1 PLAN
1 CITY
3 QUESTIONS

QUESTION #1
OPERATING OVERRIDE

\$8,400,000

OPERATING OVERRIDE

- Permanent Increase to the Tax Levy Limit
- In general overrides, is the City required to do the projects stated on the ballot?

COMPONENTS OF THE OPERATING OVERRIDE - \$8.4 MILLION

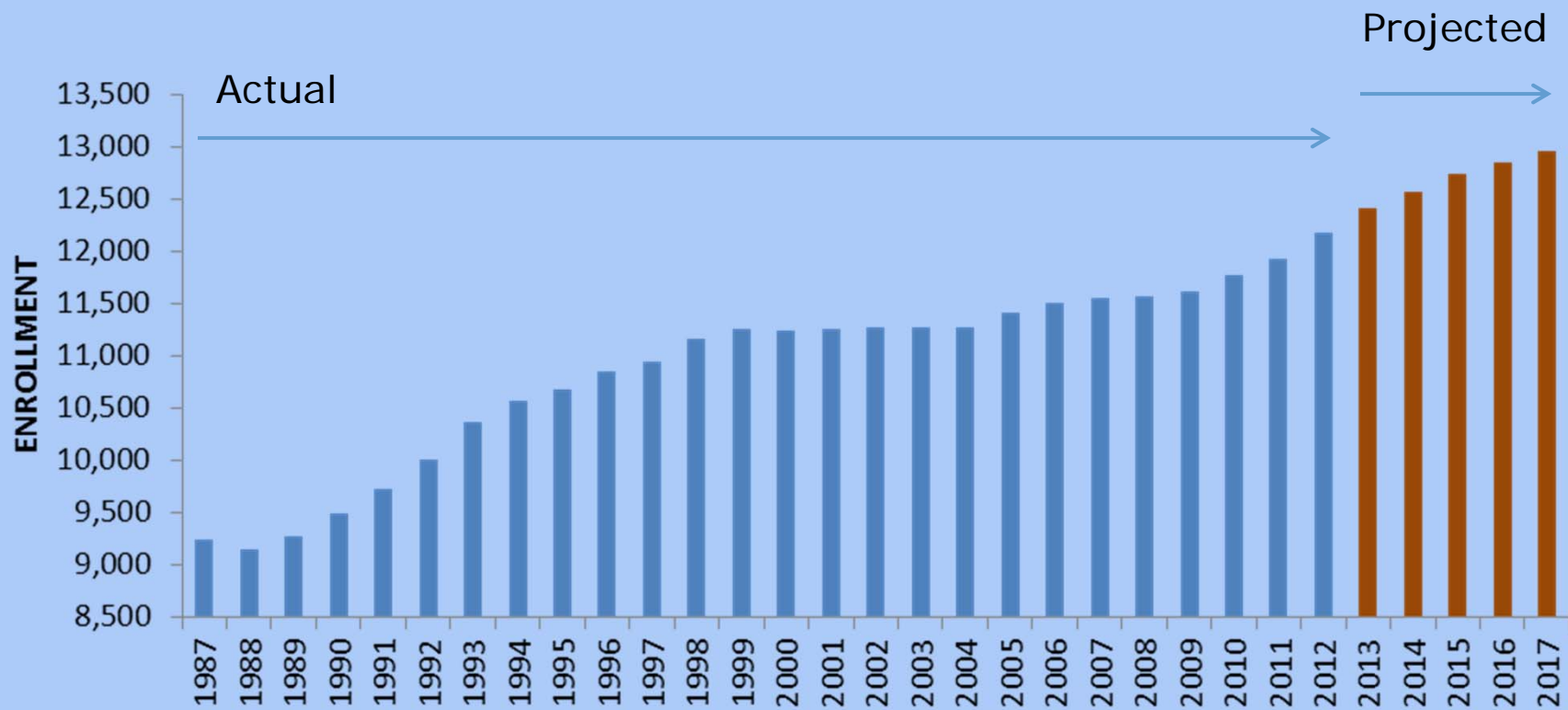
GROWTH IN ENROLLMENT:	\$4.5 MILLION
▪ (Operational Needs & Space Needs)	
STREETS & SIDEWALKS:	\$1.0 MILLION
POLICE STAFFING, ETC:	\$0.5 MILLION
▪ (4 Additional Officers)	
ZERVAS RENOVATION/ADDITION	\$1.6 MILLION
FIRE STATION 3, HEADQUARTERS, WIRES DIV:	\$0.8 MILLION

ENROLLMENT

PRELIMINARY ENROLLMENT 2012-13

- **12,172 Enrolled vs. 11,922 Last Year**
 - **+250 students in one year**
- **3 Consecutive Years of High Growth**
 - **+565 students**
- **8th Year of Consecutive Growth**
 - **+904 students since 2005-06**

THIRTY-YEAR TRENDS

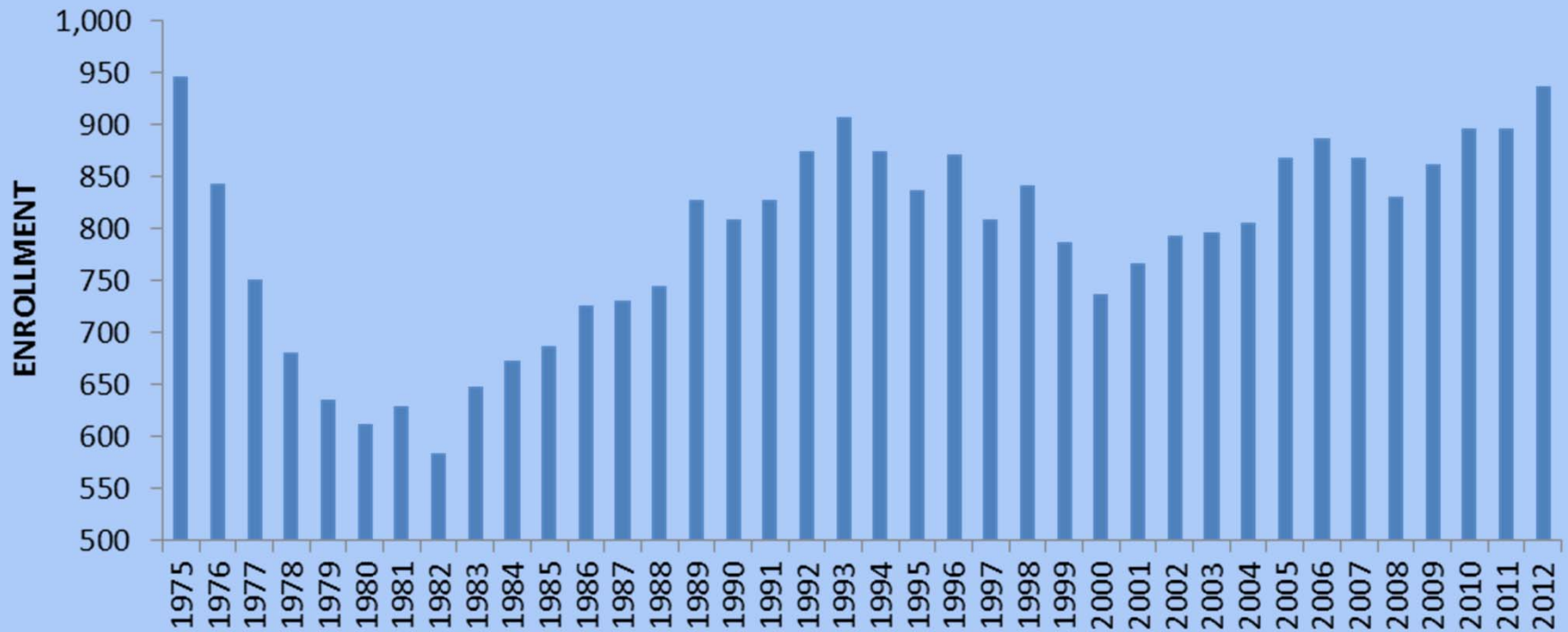


CURRENT GROWTH

Net Increase of +250 students

- Elementary +105
 - Middle School +52
 - High School +93
-
- **+58 students above projection**
 - **+41 Kindergarten students vs. last year**
 - 4% more than expected

KINDERGARTEN: ANOTHER RECORD HIGH 936 STUDENTS – LARGEST SINCE 1975



NOTE ENROLLMENTS HAVE NOT BEEN 100% VERIFIED

ENROLLMENT GROWTH BY GRADE LEVEL

- **+817 Elementary Students over 9 years**
 - **+16% growth**
- **+239 Middle School Students over 5 years**
 - **+10% growth**
- **+69 High School Students over 5 years**
 - **+2% growth**

ENROLLMENT RELATED COST INCREASES

FY14 BUDGET: ENROLLMENT INCREASE	\$3.5 MILLION
REGULAR EDUCATION	\$2.5 MILLION
▪ Elementary Schools	\$600,000
▪ Middle Schools	\$810,000
▪ High Schools	\$810,000
▪ English Language Learners	\$280,000
SPECIAL EDUCATION	\$0.7 MILLION
▪ Special Education Staffing	\$510,000
▪ Special Education Tuition	\$110,000
▪ Special Education Transportation	\$ 40,000
BUILDING SUPPORT / DISTRICTWIDE	\$0.3 MILLION
▪ Technology	\$220,000
▪ Other Expenses	\$ 80,000
SHORT TERM SPACE NEEDS, MODULARS	\$1.0 MILLION
GRAND TOTAL	\$4.5 MILLION

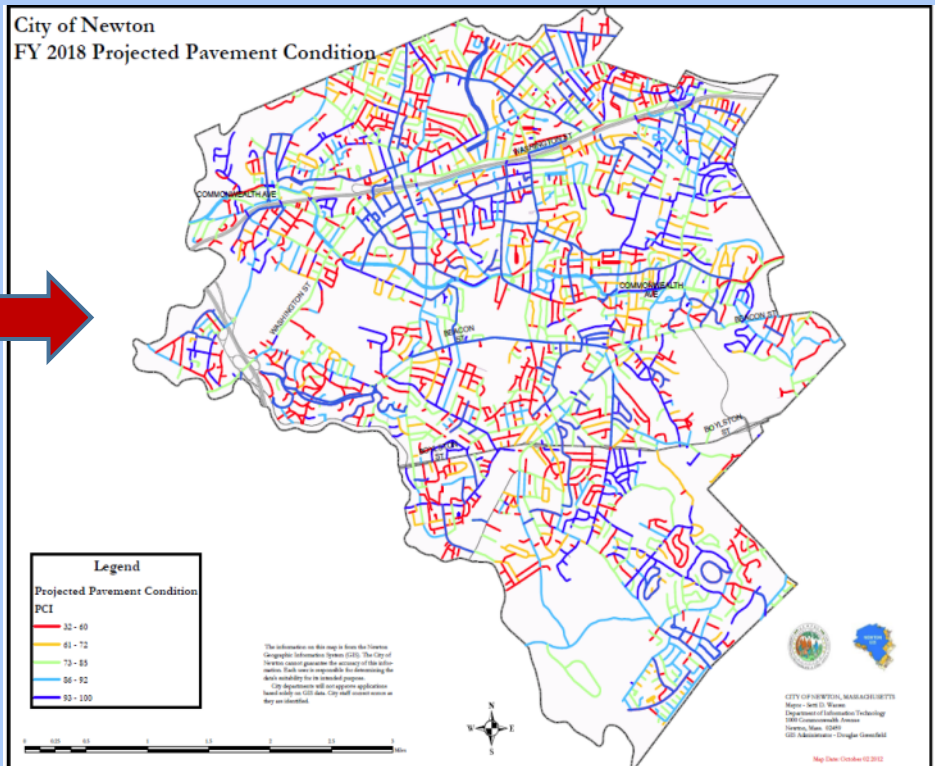
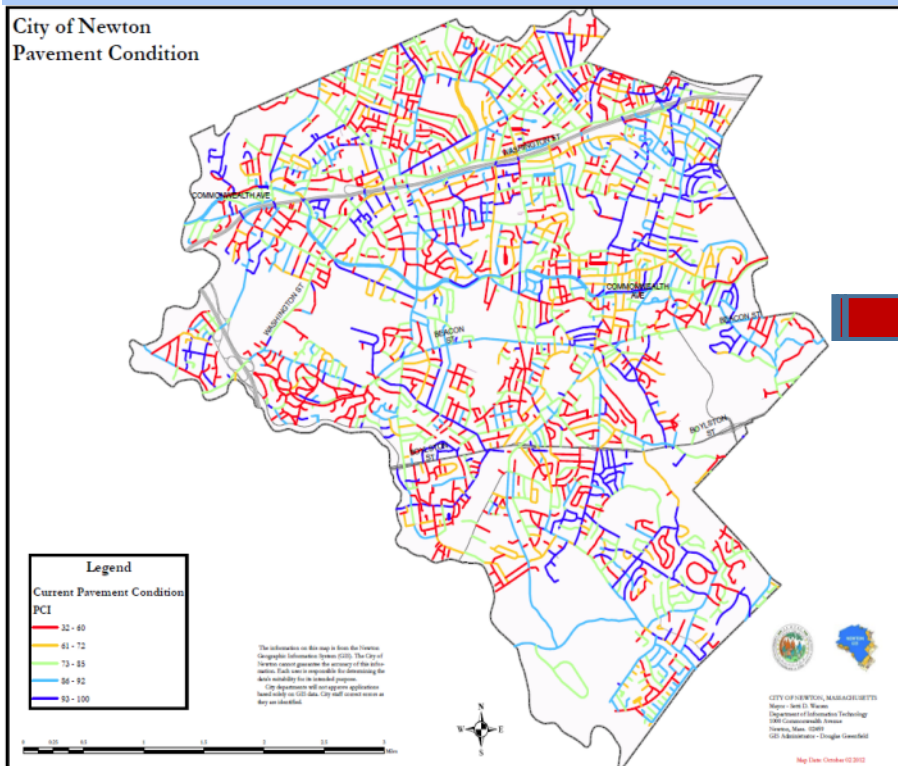
STREETS & SIDEWALKS: \$1,000,000



RESULTS OF INVESTMENT

2012

2018



Pavement Condition Index

Blue= Excellent

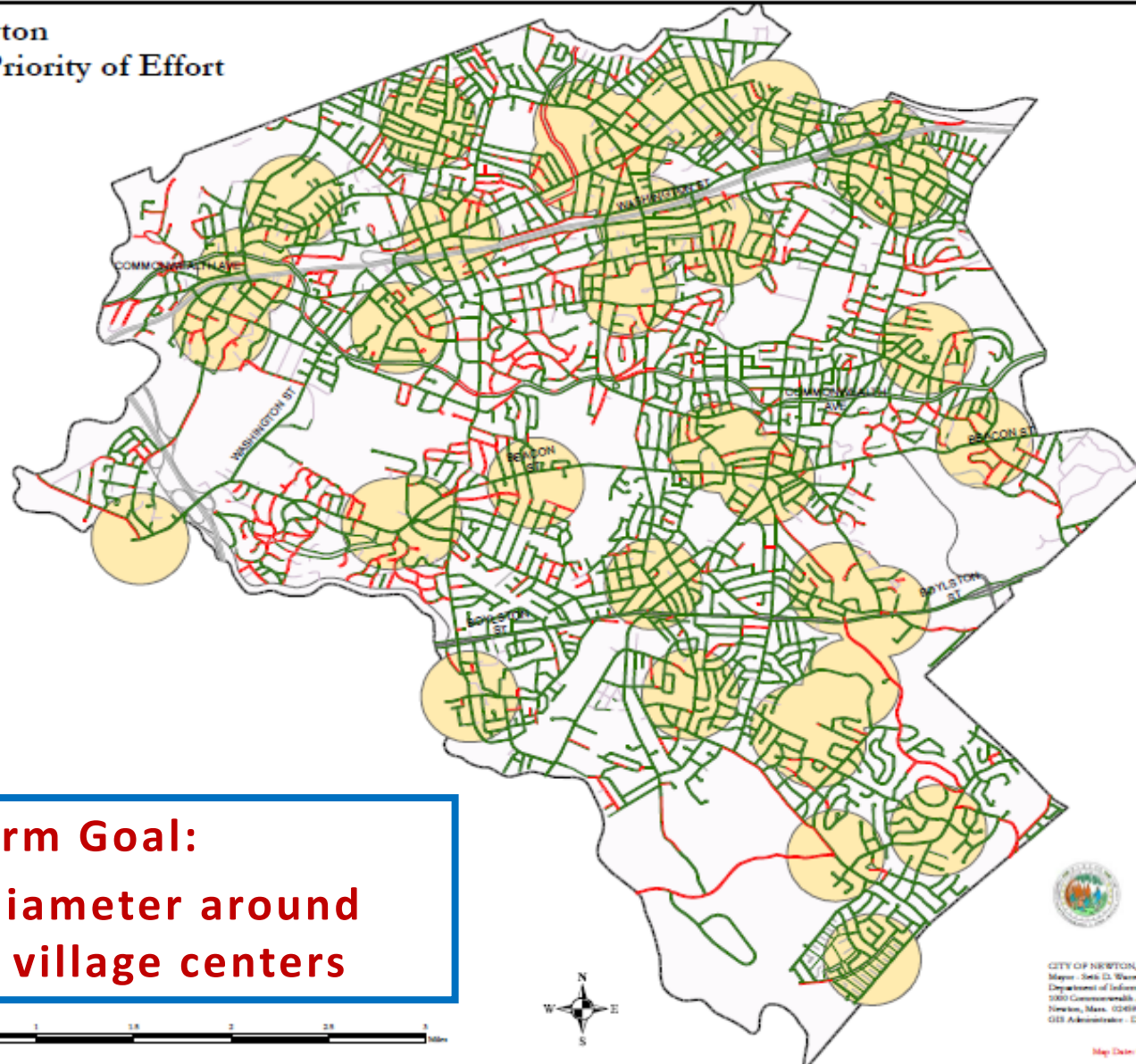
Red= Poor

AND SIDEWALKS



SIDEWALKS – PRIORITY OF WORK

City of Newton Sidewalks-Priority of Effort



- **Short Term Goal:**
- **½ mile diameter around schools, village centers**



CITY OF NEWTON, MASSACHUSETTS
Mayor - Seth D. Warren
Department of Information Technology
200 Commonwealth Avenue
Newton, Mass. 02459
GIS Administrator - Douglas Greenfield

Map Date: October 12 2012

SAFETY CONCERNS ARE INCREASING WHILE # OF SWORN OFFICERS ARE AT ALL TIME LOW

Police Department Scorecard

City of Newton Performance Management Scorecard

October 2012

Traffic Light Key

Green = actual value meeting or exceeding the target
 Yellow = actual value within 10% of meeting target
 Red = actual value worse more than 10% away from meeting target

Trend Key

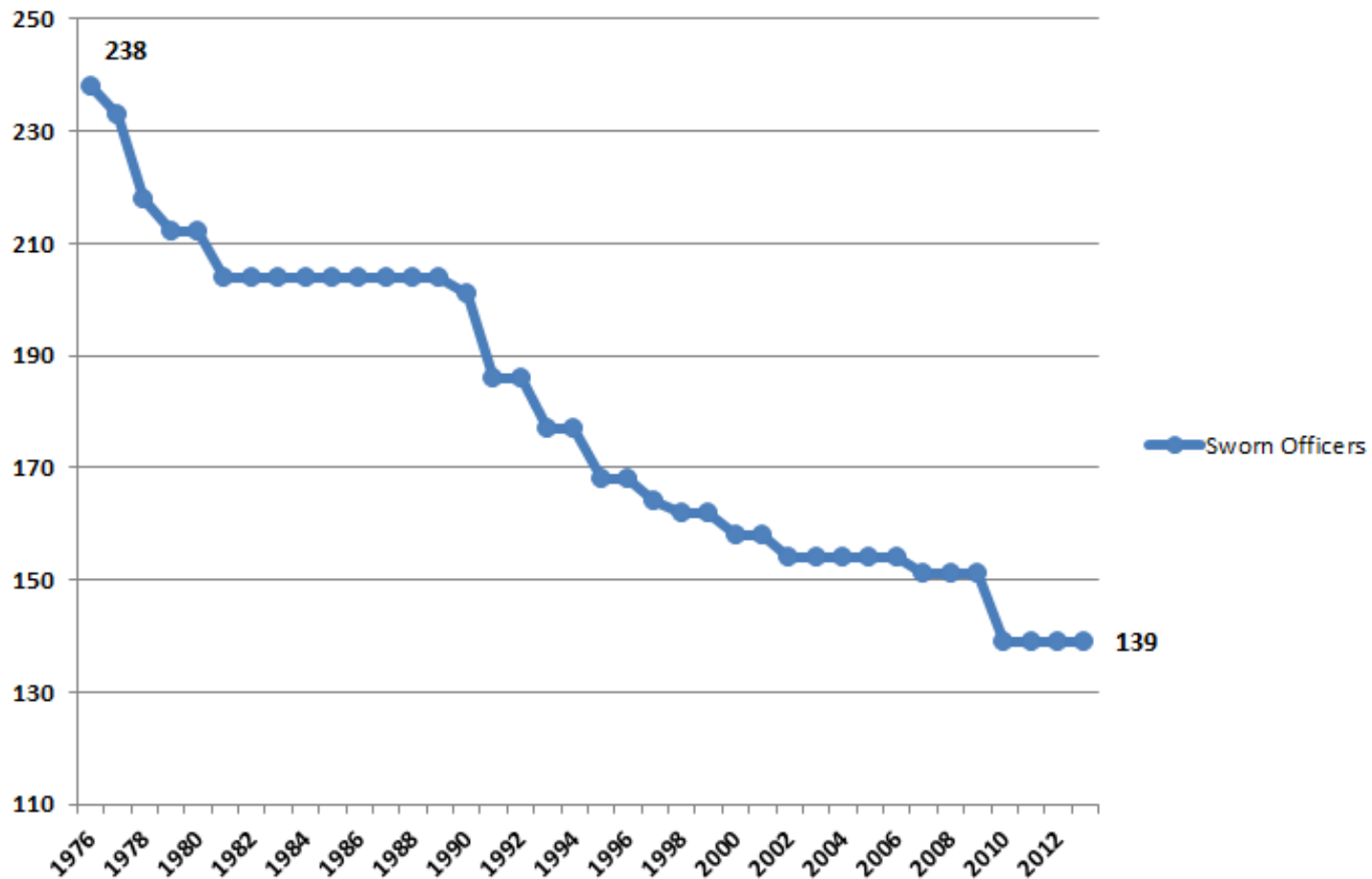
Green = cumulative Year-to-Date better than Last Year-to-Date
 Yellow = cumulative Year-to-Date the same as Last Year-to-Date
 Red = cumulative Year-to-Date worse than Last Year-to-Date

Metrics measured monthly unless otherwise noted

Metric	Metric Goal	Monthly				Yearly		Trend
		Oct-12	Target	Actual	Result	LYTD (Calendar)	YTD (Calendar)	
1. Enforce the law and prevent crime in the City								
Directed patrols	Keep directed patrol levels at or below their monthly average	1354	1354	1236	1236	13692	13764	
Homicides		0	0	0		0	0	
Rapes		0	0	0		4	3	
Robberies		2	2	0		14	14	
Aggravated assaults	Keep crime levels at or below their monthly average	4	4	7		40	48	
Burglaries		29	29	16		159	166	
Larcenies		87	87	86		790	598	
Vehicle thefts		5	5	15		21	15	
Total Part 1 crimes		127	127	110		1028	844	
2. Promote and enforce traffic safety								
Total traffic accidents		120	120	116		1055	1037	
Vehicle - vehicle accidents		113	113	109		1000	951	
Vehicle - cyclist accidents	Keep accident levels at or below their monthly average	2	2	4		28	41	
Vehicle - pedestrian accidents		5	5	3		27	45	

\$500,000 - 4 SWORN OFFICERS AND RESOURCES

City of Newton- Sworn Officers

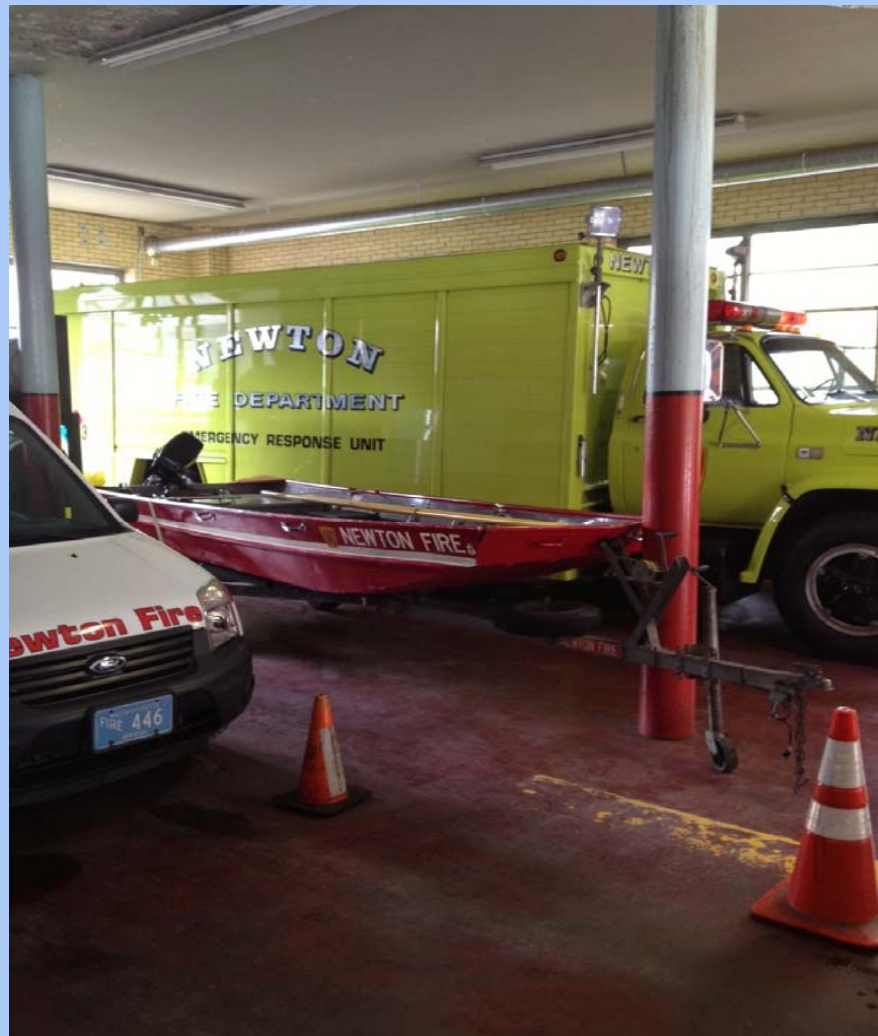


FIRE DEPARTMENT WIRES DIVISION, STATION 3, HEADQUARTERS



PROJECT ESTIMATE: \$17,500,000

STATION 3 – NEWTON CENTRE



FIRE STATION 3 ACCESS



FIRE STATION 3 ACCESS

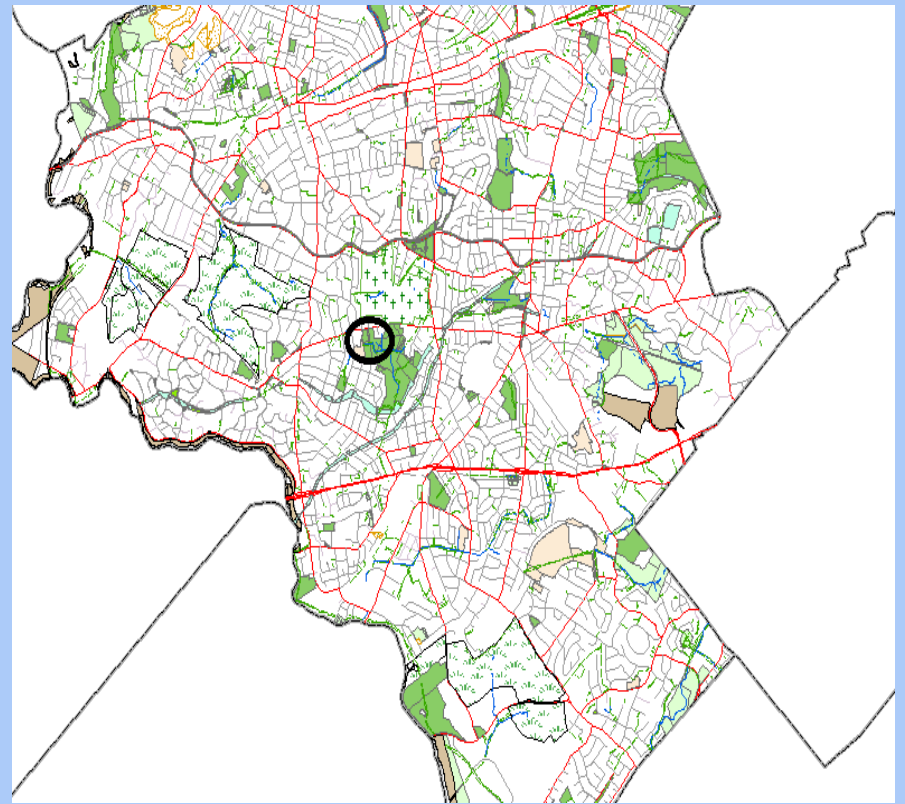


**ZERVAS ELEMENTARY SCHOOL
EXPANSION/RENOVATION – 80,000 SQ FT**



PROJECT BUDGET: \$40,000,000

ZERVAS ELEMENTARY SCHOOL



Year of Construction- 1954
Enrollment- 320 Students
Gross Building Area- 40,291

QUESTION #2
DEBT EXCLUSION

ANGIER ELEMENTARY

DEBT EXCLUSION

- Term of the Debt – 30 years
- What is the **timing of raising the taxes** in debt exclusion overrides? Does it wait until the project actually starts or the debt is incurred?
- For debt exclusion overrides, while the cost of the project is not on the ballot, **if the cost rises substantially** from what is said to be the cost, do the voters vote a second time to authorize the project?

DEBT EXCLUSION: ANGIER ELEMENTARY SCHOOL APPROX 75,000 SQ FT



Projected Total Cost: \$37 Million
Anticipated State Reimbursement: \$ 10 Million
Budgeted Local Share: \$27,500,000

DEBT EXCLUSION

CABOT ELEMENTARY

DEBT EXCLUSION: CABOT ELEMENTARY SCHOOL 85,000 SQUARE FEET






Projected Total Cost: \$45 Million
Anticipated State Reimbursement: \$ 10 Million
Budgeted Local Share: \$35,000,000

**HOW DID WE ESTABLISH
OUR COST
PROJECTIONS???**

COMPARABLE PROJECTS- DINISCO DESIGN

<u>School</u>	<u>Design</u>	<u>Project Cost</u>	<u>Gross Square Foot</u>	<u>Cost Per Square Foot</u>
Estabrook Elementary (Lexington, MA)		\$40,700,000	91,840 SF	\$443
Howe-Manning Elementary (Middleton, MA)		\$31,500,000	83,500 SF	\$377
Douglas Elementary (Douglas, MA)		\$32,200,000	83,000 SF	\$388

COMPARABLE PROJECTS

<u>Architect</u>	<u>School</u>	<u>Design</u>	<u>Cost</u>	<u>Gross Square Foot</u>	<u>Cost Per Square Foot</u>
Perkins Eastman	Martin Luther King, Jr. School (Cambridge)		\$81,500,000* 2 Bldgs	156,000 SF	\$522
Schwartz/Silver Architects	Bancroft Elementary School (Andover)		\$44,700,000	106,486 SF	\$419
Jonathan Levi	Wellington Elementary (Belmont)		\$39,800,000	88,000 SF	\$452

ESTIMATING THE COST

<u>School</u>	<u>Current Building</u>	<u>Estimated Total Project Cost</u>	<u>Gross Square Feet</u>	<u>Cost Per Square Foot</u>	<u>Projected City Cost</u>
Angier Elementary School		\$37,000,000	75,000 SF	\$493	\$27,500,000
Zervas Elementary		\$40,000,000	80,000 SF	\$500	\$40,000,000
Cabot Elementary School		\$45,000,000	85,000 SF	\$529	\$35,000,000

**HOW MUCH WILL THIS
COST OUR
TAXPAYERS???**

OVERRIDE CALCULATOR

THE OFFICIAL CITY WEBSITE
NEWTON
MASSACHUSETTS

The Garden City

ABOUT NEWTON | CITY GOVERNMENT | RESIDENTS | BUSINESSES | SCHOOLS | HOW DO I?

FEATURED

- Newton 311
- Assessor's Database
- Beautiful Newton
- Bids & RFPs
- CRA Grant Priorities
- Electronic Posting Board
- Financial Information
- Form Listing
- Performance Management
- Online Bill Payment

WELCOME TO NEWTON

Mayor Setti D. Warren
Welcomes You.

Read a special introductory message...

BOARD OF ALDERMEN

- » BOA Calendar
- » Committees of the Board
- » Friday Packet
- » Volunteer for a Board or Commission

SEARCH THE CITY

Search...

MOST VISITED

- > Newton Free Library
- > Schools
- > Trash & Recycling

CITY NEWS

Override Calculator
October 15, 2012 On Monday, October 15th, Mayor Warren announced a proposed override package to address Newton's critical needs in public safety, education, and infrastructure. To find out how much you would be asked to contribute if the override package passes, [click here](#).

Historic Newton Announces New Exhibition Opening Begins October 3
September 24, 2012
More...

ONLINE SERVICES

SIGN-UP FOR ALERTS

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SERVICES

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NEWTON 311

FOR A SERVICE REQUEST

- Assessor FAQs
- Boards, Comm's & Openings
- City Ordinances
- Contact Us
- Directions to City Hall
- Neighborhood Area Councils
- On-Line Bill Payment
- Property Lookup

CITY EVENTS | **COMMUNITY EVENTS**

EVENTS | **CALENDAR**

Thursday, October 15, 2012 - 7:30 PM - 10:00 PM

<< October 15, 2012 >>

OVERRIDE CALCULATOR

City of Newton, Massachusetts Estimated Residential Property Tax Increase Resulting From An Affirmative Vote on March 12, 2013

Please Note:

This information is being provided as an estimate only
Assessed Value reflects current Fiscal Year 2012 Value
Property Values will be updated when available (Est Dec 2012)

Please enter an address below:

House Number

Street Name

ABBOTT ST



Unit (if applicable)

Search for this Property

TAX IMPACT

\$0.50

Per

THOUSAND DOLLARS OF VALUATION

TAX IMPACT

Median Single Family Value

\$686,000

IMPACT

\$343 per year

QUESTIONS???