

Assessing Office

	No of Staff	Tn Admin Recommendations	2005 Dept Requests	2004 Expended 12/30/03	2004 Appropriation	2003 Actual	2002 Actual	2001 Actual	2000 Actual	1999 Actual	1998 Actual
Salaries Management	1.0	\$64,144	\$64,144	\$30,848	\$64,144	\$63,899	\$61,800	\$59,168	\$76,373	\$73,034	\$71,302
Salaries Supervisory		\$0	\$0	\$0	\$0	\$0	\$0	\$50,012	\$56,758	\$53,139	\$45,495
Salaries Operational Staff	2.0	\$72,363	\$72,363	\$34,196	\$71,495	\$73,397	\$67,183	\$66,968	\$59,111	\$100,196	\$100,797
Salaries Tech & Professional	2.0	\$103,466	\$103,466	\$51,425	\$156,931	\$105,548	\$142,244	\$77,596	\$71,096	\$80,630	\$77,201
Operational Staff Over-time		\$10,000	\$10,000	\$0	\$1,500	\$0	\$0	\$1,000	\$1,000	\$0	\$500
PERSONAL SERVICES	5.0	\$249,973	\$249,973	\$116,469	\$294,070	\$242,843	\$271,227	\$254,744	\$264,338	\$306,999	\$295,295
Repairs & Maint Equip		\$2,800	\$2,800	\$295	\$2,800	\$2,737	\$2,177	\$1,746	\$981	\$2,156	\$2,006
Rental Office Equipment		\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$484	\$1,400	\$909
In State Travel/Meetings		\$3,000	\$3,000	\$0	\$3,000	\$1,076	\$2,111	\$3,385	\$1,243	\$2,874	\$3,030
Communication Telephone		\$2,800	\$2,800	\$1,184	\$2,800	\$2,352	\$3,124	\$2,407	\$3,815	\$3,211	\$2,412
Education & Training		\$1,500	\$1,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Dues & Subscriptions		\$2,500	\$2,500	\$906	\$2,500	\$2,100	\$3,086	\$1,653	\$2,816	\$1,667	\$1,727
Tax Mapping		\$45,000	\$45,000	\$784	\$30,000	\$52,724	\$49,998	\$69,941	\$42,545	\$41,640	\$12,116
Copy/Mail Center Fees		\$2,200	\$2,200	\$729	\$2,200	\$3,528	\$2,168	\$4,737	\$2,128	\$0	\$0
Communication Postage		\$4,000	\$4,000	\$3,922	\$4,000	\$2,421	\$1,783	\$2,153	\$2,527	\$1,202	\$2,502
PURCHASE OF SERVICES		\$63,800	\$63,800	\$7,819	\$47,300	\$66,938	\$64,447	\$86,023	\$56,539	\$54,150	\$24,703
Real Estate Deed Service		\$1,000	\$1,000	\$59	\$1,000	\$772	\$410	\$700	\$769	\$640	\$694
TECHNICAL & PROFESSIONAL SVS		\$1,000	\$1,000	\$59	\$1,000	\$772	\$410	\$700	\$769	\$640	\$694
Office Supplies		\$4,500	\$4,500	\$341	\$4,500	\$6,416	\$1,962	\$2,758	\$3,907	\$4,496	\$4,165
SUPPLIES		\$4,500	\$4,500	\$341	\$4,500	\$6,416	\$1,962	\$2,758	\$3,907	\$4,496	\$4,165
Revalue of Real Property		\$80,000	\$80,000	\$3,705	\$80,000	\$53,763	\$126,454	\$69,241	\$78,303	\$103,332	\$96,915
OTHER CHARGES/EXPENDITURES		\$80,000	\$80,000	\$3,705	\$80,000	\$53,763	\$126,454	\$69,241	\$78,303	\$103,332	\$96,915
BUDGET TOTAL		\$399,273	\$399,273	\$128,393	\$426,870	\$370,732	\$464,499	\$413,465	\$403,856	\$469,616	\$421,771

TOWN OF NATICK
EMPLOYEE JOB/PAY

Emp #	Employee Name	Actual	Budgetary	Pay Type	Level- Step	Wks	Rate	Hours	Amount	Funding	Total Appropriation	Additional Compensation			Total Add'l Comp
		FY'03 Earnings	FY'04 Scheduled Earnings							(52.2 Wks) FY2005		Longevity	Education	Other	
<u>Assessing:</u>															
<u>Management</u>															
3853	WILLIAM CHENARD	\$63,899.07	<u>\$64,144</u>	BASE	M2-Perf		30.6030	40.0	\$1,224.12	<u>64,143.89</u>					
			\$64,144								\$64,143.89				
<u>Operational</u>															
4060	LORNA CONRAD	\$37,323.00	<u>\$37,466</u>	BASE	5-Max		19.0667	37.5	\$715.00	37,466.00					
41562	LORETTA KEILTY	\$32,093.12	<u>\$33,641</u>	BASE	4-3	32.6	17.1200	37.5	\$661.00	21,548.60					
				BASE	4-Max	19.6	17.6267	37.5	\$681.00	<u>13,347.60</u>					
			\$71,107								\$72,362.20				
<u>Technical/Professional</u>															
41617	DAVID AHNERT	\$52,286.62	\$53,465	BASE	P5-5		25.5083	40.0	\$0.00	0.00					
3849	JANICE DANGELO	\$53,261.23	\$53,465	BASE	P5-Max		25.5083	40.0	\$1,020.33	53,465.40					
	New Hire		<u>\$0</u>	BASE	P5-Start			40.0		<u>50,000.00</u>					
			<u>\$106,931</u>								\$103,465.40				
		<u>\$238,863.04</u>	<u>\$242,181</u>								<u>\$239,971.48</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>

OPERATIONAL OBJECTIVES

<u>STAFF</u>	<u>No. Positions</u>
Management	1
Supervisory	0
Technical & Professional	2
Operational Staff	2

Fiscal Year 2005 will continue to test the skills of the Assessors Staff. We are concentrating on professional education during the coming year. It is our goal to complete more of the revaluation work in house using contractors only when absolutely necessary or when it is clearly a cost savings to the town. New requirements from the Massachusetts Department of Revenue now require Assessors to calculate statistics and update values annually. This change impacts the workload in the office. Although we typically calculated statistics and updated values on a regular basis, the reporting requirements were minimal. We now must report to the DOR annually.

Changes in staff levels will require other staff members to complete some of the work previously accomplished by additional staff. Some of the work accomplished will be completed by contractors. An analysis of the cost to complete the work by contracting a portion and training other staff to complete a portion demonstrated the need to remove one position. The result is a budget reduction of over \$33,000.

Internet applications and other technical changes are anticipated to save additional funds in the future. During FY2005 we will test other cost saving measures. We hope that additional training and efficiency reviews will help cut revaluation costs.

**Assessment Administration
Fiscal Year 2005**

LINE ITEM EXPLANATION

Salaries Management: Salary to fund the full time Director of Assessing. This position manages the day to day operations of the Assessors Office including: commercial valuation, residential valuation, personal property valuation, tax mapping, excise tax, personal exemptions, building permit and sales inspections, special assessments, abatements, and Appellate Tax Board appeals. Also responsible for Database and computer systems design and management for Landisc (assessors document archiving and picture storage software), Unifers and AssessPro (CAMA and personal property valuation software), Assessors ArcGis (mapping and GIS), Point Software (abatements and excise), the Assessors management package, and the abutters program. Primary person for internet and website design and updates. This position is the liaison between the Board of Assessors and other boards, administrative offices, and the Department of Revenue.

Salaries Technical & Professional: Salaries for two full time Assistant Assessors.

The first Assistant Assessor is responsible for the following:

- 40% Residential Data Collection
- Assists w/ large commercial data collection
- Residential Value Review
- 50% Sales Inspections
- 25% Building Permit Inspections
- Abatement Inspections
- Abatement Application Control
- Betterment & Lien Management
- Personal Exemptions and the Senior Work Program
- ATB setup
- Excise Abatement Reconciliation
- Real Estate Abatement Reconciliation
- Deed Coding
- 50% Personal Property
- Data Entry

The second Assistant Assessor is responsible for the following:

- Deed Storage and Control
- Plan and Subdivision Cuts and Combos
- 40% Residential Data Collection
- 50% Sales Inspections
- 50% Building Permit Inspections
- Abatement Inspections
- Updates Landisc (document archiving and picture management)
- Assessors Map Update Coordinator
- Supports other Departments and the public with assessors' information requests
- Data Entry

Salaries Operational Staff: Salaries for two full time Administrative Assistants. The primary responsibilities are:

Admin Asst 1

- Personal Property Data Entry
- Real Estate Data Entry
- Deed Data Entry
- Customer Support (Counter and Phone)
- Taxpayer Mailings
- Form of List Mailings

Admin Asst 2

- Customer Assistance (Counter and Phone)
- Excise Abatements
- Initial Building Permit Entry
- Mail
- Taxpayer Mailings
- Real Estate Data Entry

Operational Staff Overtime: This item is related to overtime requirements related to peak periods during property revaluations. The Assessors office is attempting to offset our outside revaluation costs by completing the tasks in house. The overtime hourly rate for administrative assistants is less expensive than using a consultant to complete the same work.

Repairs & Maint Equip: This fund is used to repair and /or replace existing equipment required for the day to day operations of the Assessors Office. Time Clock (used to date stamp official documents), Fax Machine, and other miscellaneous equipment.

In State Travel/Meetings: This fund is used by the Assessors Staff and the Board of Assessors to attend training and professional meetings.

Education: This item is designed to offset the cost of professional education. The Massachusetts Association of Assessing Officers requires continued education for certification. The typical IAAO course cost is \$525. The typical MAAO course ranges from \$50 for seminars to over \$500 for most formal courses. Continued professional education is a key to maintaining a knowledgeable staff.

Communications Postage: Costs for phone service and postage related to the Assessors Office.

Dues & Subscriptions: This fund is used to maintain current status for the Town of Natick Assessing Staff and the Board of Assessors in the International Association of Assessing Officers, Massachusetts Association of Assessing Officers., and the Middlesex County Association of Assessing Officers. This allows the office to receive valuable training at discounted rates, newsletters and updates regarding the assessing profession.

Tax Mapping: This fund is used for professional services related to tax mapping. The town must update tax maps to receive certification from the Department of Revenue to tax property.

Copy/Mail Center Fees: This fund is used to support the assessor's share of the copy and mail center.

Real Estate Deed Service: This fund is used to receive deeds from the Registry of Deeds. This is the primary source for legal property transfers. The Assessors must maintain current owner for tax billing.

Office Supplies: Cost for office supplies related the Assessors Office.

Revaluation of Property: This fund is used to support the primary costs related to the revaluation of property required under the provisions of Massachusetts General Laws Chapter 59. This is used to augment the work of the assessing staff and for software/hardware costs not covered by the information technology budget that are dirtectly related to property revaluation.