

## **Narrative**

### **Town of Natick**

#### **Assessing Department**

##### **I. Main Purpose of the Department**

The Department is responsible for the assessment of all taxable property within the community. This includes residential real estate, commercial and industrial real estate, motor vehicle excise, personal property, and boat excise tax. The Department also manages betterment assessments, personal exemptions, abatements and tax appeals. The assessors are also required to update assessors' maps annually. The Department also serves as an advisory department to the Board of Assessors.

##### **II. Recent Developments**

New Department of Revenue reporting requirements will place an additional workload on the Department's staff. The DOR now requires interim year adjustments and a complete statistical analysis each year. This change impacts the workload in the office and will continue to test the skills of the Assessor staff. Although we calculate statistics and updated values on a regular basis, the prior reporting requirements were less rigorous. New DOR reporting requirements are specific and more frequent.

Multiple changes to Massachusetts statutes will require additional staff time in FY2006. These include: new statistical reporting for interim year adjustments, new excise abatement procedures, new procedures for certifying manufacturing and foreign corporations, changes to the corporation exemption for personal property, changes to the boat excise tax procedures, changes to the state owned land valuation procedures, and changes to the veterans exemption qualification guidelines.

##### **III. Current Challenges**

- Hiring a new assistant assessor to fill a vacant position.
- The number of building permit inspections continues to grow. The staff is required to inspect all building permits when the work is complete or a certificate of occupancy is issued. The certificate of occupancy program increased revenue collection but requires the Department to inspect each property prior to the issuance of a certificate of occupancy. This also requires the creation and generation of a new commitment and billing.

##### **IV. Significant Proposed Changes for the Upcoming Fiscal Year and Budget Impact**

The excise change now provides multiple years to file excise tax abatement. The previous statute set the deadline at the December following the year of the commitment. This allowed the taxpayers over a year to appeal their values. The new statute will allow a minimum of three years, more in many cases.

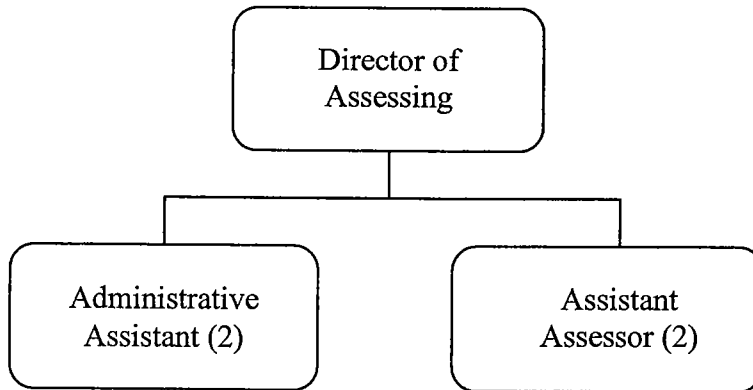
**V. On the Horizon** – Fiscal year 2007 is a triennial certification year. The assessors must plan for the audit and review by the Department of Revenue. We must continue to conduct property inspections and sales review.

FY2006 Budget Presentation

Trends in Major Departmental Activities by Fiscal Year						
Activities	2001	2002	2003	2004	Approved 2005	Proposed 2006
1 Real Estate Tax Billing	12,661	12,667	12,707	12,730	12,725	12,775
2 Personal Property Tax Billing	1,303	1,460	1,422	1,454	1,537	1,500
3 Abatement Exemptions (RE/PP)	145/453	45/435	59/443	153/423	60/359 (as of 12/2004)	60/460
4 Building Permits, Inspections/Cert. of Occup.	1,256	1,702	1,853	1,902 (est)	2,000	2,100

Fiscal Year 2006 Organization

**Assessor's Office**



**Leadership Profile:**

**Jan Dangelo, Director of Assessing**

2004-Present: Director of Assessing

1995-2004: Assistant Assessor

1987-1995: Appraisal Technician

Certified Assessor by the Massachusetts Association of Assessors

Member of the Middlesex County, Massachusetts and International Associations of Assessing Officers

### Assessing Office

	<b>No of Staff</b>	Tn Admin Recommendations	2006 Dept Requests	2005 Expended 12/31/04	2005 Appropriated	2004 Actual	2003 Actual	2002 Actual	2001 Actual
Salaries Management	<b>1.0</b>	63,329.34	63,329.34	29,007.07	64,144.00	63,220.49	63,899.07	61,799.92	59,167.88
Salaries Supervisory		0.00	0.00	0.00	0.00	0.00	0.00	0.00	50,012.04
Salaries Operational Staff	<b>2.0</b>	75,875.77	75,875.77	34,978.18	74,137.10	71,479.20	73,396.52	67,182.54	66,968.02
Salaries Tech & Professional	<b>2.0</b>	107,225.02	107,225.02	24,803.69	103,466.00	100,173.32	105,547.85	142,244.07	77,596.22
Operational Staff Overtime		5,000.00	5,000.00	205.21	10,000.00	0.00	0.00	0.00	1,000.00
<b>PERSONAL SERVICES</b>	<b>5.0</b>	<b>251,430.13</b>	<b>251,430.13</b>	<b>88,994.15</b>	<b>251,747.10</b>	<b>234,873.01</b>	<b>242,843.44</b>	<b>271,226.53</b>	<b>254,744.16</b>
Repairs & Maint Equip		2,800.00	2,800.00	56.66	2,800.00	1,124.07	2,736.53	2,176.82	1,746.20
In State Travel/Meetings		3,000.00	3,000.00	970.00	3,000.00	2,398.85	1,075.50	2,111.16	3,385.45
Communication Telephone		2,800.00	2,800.00	728.49	2,800.00	2,161.97	2,352.22	3,123.96	2,407.21
Education & Training		1,500.00	1,500.00	0.00	1,500.00	0.00	0.00	0.00	0.00
Dues & Subscriptions		2,500.00	2,500.00	1,216.95	2,500.00	1,479.45	2,099.95	3,086.30	1,652.85
Tax Mapping		45,000.00	45,000.00	342.40	45,000.00	12,583.00	52,724.20	49,997.80	69,941.13
Copy/Mail Center Fees		2,200.00	2,200.00	772.39	2,200.00	2,006.28	3,528.08	2,167.61	4,736.64
Communication Postage		4,000.00	4,000.00	493.51	4,000.00	4,718.06	2,421.05	1,783.31	2,153.42
<b>PURCHASE OF SERVICES</b>		<b>63,800.00</b>	<b>63,800.00</b>	<b>4,580.40</b>	<b>63,800.00</b>	<b>26,471.68</b>	<b>66,937.53</b>	<b>64,446.96</b>	<b>86,022.90</b>
Real Estate Deed Service		1,000.00	1,000.00	0.00	1,000.00	81.90	772.40	409.65	699.70
<b>TECHNICAL &amp; PROFESSIONAL SVS</b>		<b>1,000.00</b>	<b>1,000.00</b>	<b>0.00</b>	<b>1,000.00</b>	<b>81.90</b>	<b>772.40</b>	<b>409.65</b>	<b>699.70</b>
Office Supplies		4,500.00	4,500.00	1,085.29	4,500.00	2,916.32	6,415.52	1,961.83	2,757.67
<b>SUPPLIES</b>		<b>4,500.00</b>	<b>4,500.00</b>	<b>1,085.29</b>	<b>4,500.00</b>	<b>2,916.32</b>	<b>6,415.52</b>	<b>1,961.83</b>	<b>2,757.67</b>
Revalue of Real Property		80,000.00	80,000.00	4,498.35	80,000.00	18,376.21	53,762.99	126,453.88	69,240.73
<b>OTHER CHARGES/EXPENDITURES</b>		<b>80,000.00</b>	<b>80,000.00</b>	<b>4,498.35</b>	<b>80,000.00</b>	<b>18,376.21</b>	<b>53,762.99</b>	<b>126,453.88</b>	<b>69,240.73</b>
<b>BUDGET TOTAL</b>		<b>\$400,730.13</b>	<b>\$400,730.13</b>	<b>\$99,158.19</b>	<b>\$401,047.10</b>	<b>\$282,719.12</b>	<b>\$370,731.88</b>	<b>\$464,498.85</b>	<b>\$413,465.16</b>

TOWN OF NATICK  
EMPLOYEE JOB/PAY

Emp #	Employee Name	Actual FY'04 Earnings	Budgetary FY'05 Scheduled Earnings	Pay Type	Level- Step	Wks	Rate	Hours	Amount	Funding (52.2 Wks) FY2006	Total Appropriation	Additional Compensation			Total Add'l Comp
												Longevity	Education	Other	
<u>Assessing:</u>															
<u>Management</u>															
3849	JANICE DANGELO	\$54,987.25	\$61,055.38	BASE	M2-Perf		30.6030	40.0	\$1,213.21	63,329.34					
			\$61,055.38						\$63,086.70		\$63,329.34				
<u>Operational</u>															
40060	LORNA CONRAD	\$37,466.00	\$38,256.40	BASE	5-Max		19.0667	37.5	\$751.20	39,212.64					
41562	LORETTA KEILTY	\$34,013.20	\$35,367.13	BASE	4-3	32.6	17.1200	37.5	\$694.47	22,639.72					
				BASE	4-Max	19.6	17.6267	37.5	\$715.48	14,023.41					
			\$73,623.53								\$75,875.77				
<u>Technical/Professional</u>															
42392	RONALD KEOHAN JR	\$6,098.88	\$52,632.46	BASE	P5-4		26.1459	40.0	\$1,045.84	54,592.60					
	Vacancy			BASE	P5-3		25.2071	40.0	\$1,008.28	52,632.42	\$107,225.02				
			\$52,632.46												
		<u>\$132,565.33</u>	<u>\$187,311.37</u>								<u>\$246,430.13</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>	<u>\$0.00</u>