



Town of *Wellesley*

FY2018 Budget Request

Board of Assessors Operating Request

Department: 141

Department Head: Donna McCabe, Chief Assessor

DEPARTMENT	FY14 Actual	FY15 Actual	FY16 Actual	FY17 Budget	FY18 Request	\$ Variance FY17-18	% Variance FY17-18
EXPENDITURES							
Personal Services							
Full Time	\$ 233,421	\$ 239,957	\$ 251,857	\$ 257,526	\$ 260,560	\$ 3,034	1.18%
Part Time/Temp/Seasonal	5,674	3,923	3,798	8,906	8,872	(34)	-0.38%
Subtotal, Personal Services	239,095	243,879	255,655	266,432	269,432	3,000	1.13%
Expenses	63,436	79,851	71,290	81,500	82,450	950	1.17%
Encumbered Expended	-	137	-	-	-	-	0.00%
Subtotal, Expenses	63,436	79,988	71,290	81,500	82,450	950	1.17%
TOTAL	\$ 302,531	\$ 323,867	\$ 326,945	\$ 347,932	\$ 351,882	\$ 3,950	1.14%

PERMANENT STAFFING (FTEs)	FY14 Actual	FY15 Actual	FY16 Actual	FY17 Budget	FY18 Request
Position Titles:					
Chief Assessor	1.0	1.0	1.0	1.0	1.0
Assistant Administrator	1.0	1.0	1.0	1.0	1.0
Assessor Technician	1.0	1.0	1.0	1.0	1.0
Secretary/Technical Assistant	1.0	1.0	1.0	1.0	1.0
Part-time (Temporary & clerk)	<u>0.3</u>	<u>0.3</u>	<u>0.3</u>	<u>0.3</u>	<u>0.3</u>
Total Number of Positions	4.3	4.3	4.3	4.3	4.3

Assessor Department FY18 Operating Budget Request

Org	Object	Account # 01-141 Account Title	Explanation	FY14 Actual	FY15 Actual	FY16 Actual	FY17 Budget	FY18 Request	\$ Variance FY17-18	% Variance FY17-18
PERSONAL SERVICES										
01141100	511010	Senior Administrator	Chief Assessor	\$ 97,136	\$ 99,079	\$ 101,447	\$ 103,082	\$ 102,687	\$ (395)	-0.38%
01141100	511220	Other Professionals	Assistant Administrator	53,625	52,551	54,072	55,347	55,134	(213)	-0.39%
01141100	511370	Support Staff	Assessor Technician, Office Assistant	82,659	88,327	96,338	99,096	102,739	3,643	3.68%
01141100	512290	Part-time / Temporary / Seasonal Help	Funds for part-time office clerk	5,674	3,923	3,798	8,906	8,872	(34)	-0.38%
			PERSONAL SERVICE SUBTOTAL	239,095	243,879	255,655	266,432	269,432	3,000	1.13%

EXPENSES										
01141200	517020	Medical Check-up	Medical check-up for new hires	75	-	-	-	-	-	0.00%
01141200	530130	Legal Services-Special Counsel	ATB cost to transfer cases to formal procedures	390	65	-	400	-	(400)	-100.00%
01141200	530500	Training & Development	Appraisal courses & seminars for board of assessors & staff. Board members are required by DOR to take certain courses. Continuing Ed credits to maintain designation; courses for new personnel	1,330	778	1,434	1,500	2,000	500	33.33%
01141200	530600	Appraisals and Surveys	Consultant services for annual analysis and valuation adjustments to all taxable property (FY18 is 3rd yr of three yr contract); Recertification pushed out to FY20 - now every 5 years	45,500	63,000	49,000	49,500	49,500	-	0.00%
01141200	530600	Appraisals and Surveys	Reserve fund - appraisals for appeals to State Appellate Tax Board (10 commercial appeals pending)	-	4,022	2,400	10,000	10,000	-	0.00%
01141200	530800	Computer Software Services	Updates to software and annual license agreements for real estate administrative & valuation software and personal property administrative & valuation software.	6,000	6,000	11,000	8,000	8,000	-	0.00%

Assessor Department FY18 Operating Budget Request

Org	Object	Account # 01-141 Account Title	Explanation	FY14 Actual	FY15 Actual	FY16 Actual	FY17 Budget	FY18 Request	\$ Variance FY17-18	% Variance FY17-18
01141200	534010	Postage	Mailing of forms (abatements, chapter land, excise, sales questionnaires, personal property Form of Lists) and general correspondence.	1,262	1,200	1,272	2,000	2,000	-	0.00%
01141200	534030	Advertising	FY14-advertisement for staff position; FY16-advertisement for valuation services	221	-	42	-	-	-	0.00%
01141200	534040	Printing & Mailing Expense	Printing of forms and brochures listed above plus additional information brochures for the public; subscription	78	-	78	100	100	-	0.00%
01141200	538010	Deed/Abstract Copies	Fee charged by Registry of Deeds for copies of deed transfers, recording of deferral liens and chapter land liens.	252	100	404	500	500	-	0.00%
01141200	542010	Office Supplies	Standard office supplies.	985	1,185	998	1,200	1,300	100	8.33%
01141200	553060	Computer Supplies	Toner for printers.	2,285	180	899	2,000	2,500	500	25.00%
01141200	571010	Travel-Mileage	Use of personal vehicle for field inspections & meetings.	2,204	926	1,678	2,500	2,750	250	10.00%
01141200	571110	Conf/Meetings-Administrators	Board members, chief assessor, and staff attend meetings and conferences of the Mass Association of Assessing Officers and the International Association of Assessing Officers.	1,574	1,116	622	2,000	2,000	-	0.00%
01141200	573010	Dues-Administrators	Dues for 3 board members, chief assessor and senior staff for Mass Association of Assessing Officers and International Association of Assessing Officers.	1,280	1,280	1,465	1,800	1,800	-	0.00%
			EXPENSE SUBTOTAL	63,436	79,851	71,290	81,500	82,450	950	1.17%
	570000	Other Charges & Expenses	Encumbered expenses from prior fiscal year	-	137	-	-	-	-	0.00%
DEPARTMENT TOTAL				\$ 302,531	\$ 323,867	\$ 326,945	\$ 347,932	\$ 351,882	\$ 3,950	1.14%

Assessor Department FY18 Operating Budget Request

Job Title Employee Name	FY17 Rate as of June 30, 2017					
		Group - Step	FY18 Starting Rate	Step Adjustment Date	Adjusted Rate	Total Budget Request
Chief Assessor Donna McCabe	\$ 1,974.75	60	\$ 1,974.75	N/A	N/A	102,687
Assistant Administrator Louise Burns	\$ 1,060.27	52	\$ 1,060.27	N/A	N/A	55,134
Assessor Technician Ellen Muller (DOH 3/18/13)	\$ 1,039.85	49-6	\$ 1,060.65			55,154
Office Assistant Donna M. Thompson (DOH 7/01/2014)	\$ 877.80	47-4 1/1/2017	\$ 895.36	47-5 1/1/18	934.85	47,585
Other - Clerk (Part time - 11hrs.) Judy Keefe	\$ 170.61	DGEN	\$ 170.61	N/A	N/A	8,872

Total Salary \$ 269,432

*Note: FY18 Salary is based on 52 weeks