



# Town of *Wellesley*

## FY2019 Budget Request

### Board of Assessors Operating Request

Department: 141

Department Head: Donna McCabe, Chief Assessor

DEPARTMENT	FY15 Actual	FY16 Actual	FY17 Actual	FY18 Budget	FY19 Request	\$ Variance FY18-19	% Variance FY18-19
<b>EXPENDITURES</b>							
Personal Services							
Full Time	\$ 239,957	\$ 251,857	\$ 257,512	\$ 263,717	\$ 267,927	\$ 4,210	1.60%
Part Time/Temp/Seasonal	3,923	3,798	4,141	8,872	5,646	(3,226)	-36.36%
Overtime	-	-	-	-	4,020	4,020	0%
<b>Subtotal, Personal Services</b>	<b>243,879</b>	<b>255,655</b>	<b>261,653</b>	<b>272,589</b>	<b>277,592</b>	<b>5,004</b>	<b>1.84%</b>
Expenses	79,851	71,290	79,064	82,450	83,050	600	0.73%
Encumbered Expended	137	-	-	-	-	-	0.00%
<b>Subtotal, Expenses</b>	<b>79,988</b>	<b>71,290</b>	<b>79,064</b>	<b>82,450</b>	<b>83,050</b>	<b>600</b>	<b>0.73%</b>
<b>TOTAL</b>	<b>\$ 323,867</b>	<b>\$ 326,945</b>	<b>\$ 340,717</b>	<b>\$ 355,039</b>	<b>\$ 360,642</b>	<b>\$ 5,604</b>	<b>1.58%</b>

PERMANENT STAFFING (FTEs)	FY15 Actual	FY16 Actual	FY17 Actual	FY18 Budget	FY19 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>
<b>Total Number of Positions</b>	<b>4.3</b>	<b>4.3</b>	<b>4.3</b>	<b>4.3</b>	<b>4.3</b>

**Assessor Department FY19 Operating Budget Request**

Org	Object	Account # 01-141 Account Title	Explanation	FY15 Actual	FY16 Actual	FY17 Actual	FY18 Budget	FY19 Request	\$ Variance FY18-19	% Variance FY18-19
<b>PERSONAL SERVICES</b>										
01141100	511010	Senior Administrator	Chief Assessor	\$ 99,079	\$ 101,447	\$ 103,082	\$ 104,741	\$ 104,741	\$ -	0.00%
01141100	511220	Other Professionals	Assistant Administrator	52,551	54,072	55,346	56,237	56,237	(0)	0.00%
01141100	511370	Support Staff	Assessor Technician, Office Assistant	88,327	96,338	99,083	102,739	106,949	4,210	4.10%
01141100	512290	Part-time / Temporary / Seasonal Help	Part-time office clerk	3,923	3,798	4,141	8,872	5,646	(3,226)	-36.36%
01141100	513120	Scheduled Overtime	Assessor Technician	-	-	-	-	4,020	4,020	0%
			<b>PERSONAL SERVICE SUBTOTAL</b>	<b>243,879</b>	<b>255,655</b>	<b>261,653</b>	<b>272,589</b>	<b>277,592</b>	<b>5,004</b>	<b>1.84%</b>

<b>EXPENSES</b>										
01141200	530130	Legal Services-Special Counsel	ATB cost to transfer cases to formal procedures	65	-	-	-	-	-	0.00%
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	778	1,434	565	2,000	2,000	-	0.00%
01141200	530600	Appraisals and Surveys	Consultant services for annual analysis and valuation adjustments to all taxable property (RFP will be request in Feb 2018 for three year contract); Recertification pushed out to FY20 - now every 5 years	63,000	49,000	48,650	49,500	53,000	3,500	7.07%
01141200	530600	Appraisals and Surveys	Reserve fund - appraisals for appeals to State Appellate Tax Board	4,022	2,400	10,000	10,000	8,000	(2,000)	-20.00%
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	11,000	6,000	8,000	7,000	(1,000)	-12.50%

**Assessor Department FY19 Operating Budget Request**

<b>Org</b>	<b>Object</b>	<b>Account # 01-141 Account Title</b>	<b>Explanation</b>	<b>FY15 Actual</b>	<b>FY16 Actual</b>	<b>FY17 Actual</b>	<b>FY18 Budget</b>	<b>FY19 Request</b>	<b>\$ Variance FY18-19</b>	<b>% Variance FY18-19</b>
01141200	534010	Postage	Mailing of forms (abatements, chapter land, excise, sales questionnaires, personal property Form of Lists) and general correspondence.	1,200	1,272	1,196	2,000	2,000	-	0.00%
01141200	534030	Advertising	FY14-advertisement for staff position; FY16-advertisement for valuation services	-	42	-	-	-	-	0.00%
01141200	534040	Printing & Mailing Expense	Printing of forms and brochures listed above plus additional information brochures for the public; subscription	-	78	7	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.	100	404	76	500	500	-	0.00%
01141200	542010	Office Supplies	Standard office supplies.	1,185	998	1,115	1,300	1,400	100	7.69%
01141200	553060	Computer Supplies	Toner for printers.	180	899	7,586	2,500	2,500	-	0.00%
01141200	571010	Travel-Mileage	Use of personal vehicle for field inspections & meetings.	926	1,678	1,264	2,750	2,750	-	0.00%
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.	1,116	622	1,057	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	1,465	1,549	1,800	1,800	-	0.00%
			<b>EXPENSE SUBTOTAL</b>	<b>79,851</b>	<b>71,290</b>	<b>79,064</b>	<b>82,450</b>	<b>83,050</b>	<b>600</b>	<b>0.73%</b>
	570000	Other Charges & Expenses	Encumbered expenses from prior fiscal year	137	-	-	-	-	-	0.00%
<b>DEPARTMENT TOTAL</b>				<b>\$ 323,867</b>	<b>\$ 326,945</b>	<b>\$ 340,717</b>	<b>\$ 355,039</b>	<b>\$ 360,642</b>	<b>\$ 5,604</b>	<b>1.58%</b>

**Assessor Department FY19 Operating Budget Request**

Job Title Employee Name	FY18 Rate as of June 30, 2018					
		Group - Step	FY19 Starting Rate	Step Adjustment Date	Adjusted Rate	Total Budget Request
Chief Assessor Donna McCabe	\$ 2,014.25	60	\$ 2,014.25	N/A	N/A	104,741
Assistant Administrator Louise Burns	\$ 1,081.48	52	\$ 1,081.48	N/A	N/A	56,237
Assessor Technician Ellen Muller (DOH 3/18/13)	\$ 1,060.50	49-6	\$ 1,081.71	N/A	N/A	56,249
Office Assistant Donna M. Thompson (DOH 7/01/2014)	\$ 934.85	47-5 1/1/18	\$ 953.55	47-6 1/1/19	996.80	50,700
Other - Clerk (Part time - 7 hrs.) Judy Keefe	\$ 108.57	DGEN	\$ 108.57	N/A	N/A	5,646
Scheduled Overtime (5 hrs per week for 1/2 year)	\$ 154.60		\$ 154.60	N/A	N/A	4,020

**Total Salary \$ 277,592**

\*Note: FY19 Salary is based on 52 weeks