ARLINGTON FINANCE COMMITTEE
MINUTES OF MEETING
COMMUNITY SAFETY BUILDING O'NEILL ROOM
3/11/19 7:30 PM

ATTENDEES:

Gibian	White*		Kellar*	McKenna*
	Wallach*	Harmer*	Tosti*	
Ellis*	Foskett*	Deyst*	Duvadie	
	Beck*	Jones*	Deshler*	
Franclemont*	Howard*	LaCourt*	Carman*	Diggins*

*Indicates present

VISITORS: None

1. MINUTES of 3/6/19 approved as presented. Unanimous

2. BUD 7 TREASURER: Finance SubCom Beck, noting that the vacant position had been filled, adjusted the total for the actual salary, $72,957.
VOTED $729,544. Unanimous (Former Treasurer Dean Carman did not participate in the discussion nor did he vote.)

3. BUD 8 POSTAGE: Finance SubCom Beck recommended the budget as printed. The increases are caused by increases in the postage rates.
VOTED $187,586 Unanimous

4. Bud 9 ASSESSOR: Finance SubCom Kellar revised the printed budget to account for a personnel change (Ref 1). He also provided a copy of the bill for 5206 Computer Maintenance (Ref 2).
VOTED $331,950 Unanimous
Kellar also provided the Patriot Properties proposal for work to be done in FY20 (Ref 3), not part of this budget. Members discussed the recent reassessment and differences on the border between assessment regions. The number of complaints to Town Hall was modest compared to the public discussion. Also discussed were illegal apartments and the possibility of data mining to find them. A recent administrative change may help this problem as all departments begin to use the assessor's property number to identify that property.

5. BUD 18 FACILITIES: PubWks SubCom Deshler noted that this department is still in flux. The expenses have been shifted between the line items to better group like items. The Parmenter & Dallin Library have been moved to this budget from the ARB. Some building energy budgets are in this budget. Deshler recommended the budget as printed.
VOTED $750,907 Unanimous

6. LIBRARIES: Lib SubCom Deyst reported the change in salary from FY19 to FY20 for all the employees. In almost every case the change was a single step. One new person started at Step 1.

7. AYCC: EF SubCom Franclemont, saying the increases were caused by increased hours of treatment, recommended the budget as printed. The fund balance on 6/31/18 was $36,214.
VOTED Expenses $740,358, Revenue $740,358 Unanimous

8.RINK: EF SubCom Franclemont recommended the budget as printed. The budget is balanced with a $25k transfer from the General Fund. The fund balance on 6/30/18 was $49,256,
VOTED Expenses $655,853, Revenue $655,853 Unanimous

9. RECREATION EF SubCom Franclemont recommended the budget as printed. The fund balance on 6/30/18 was $683,956.
VOTED Expenses$1,884,892, Revenue $1,884,892 Unanimous

10. ART 64 COMMITTEES & COMMISSIONS: TAC is scheduled for a hearing. Tosti will ask ACAC for a expense & revenue budget.
VOTED to appropriate the same amount as last year to all others. Unanimous

11 ART 70 PENSION ADJUSTMENTS FOR DISABLED: This is the annual vote to ensure the pensions of certain retirees do not fall below a certain amount.
VOTED favorable action. Unanimous

12. ART 72 OVERLAY RESERVE: The Fin SubCom Foskett recommended the usual amount.
VOTED $200,000 Unanimous

13. ART 74 USE OF FREE CASH: The Chair recommended we appropriate half the amount certified last summer.
VOTED $5,559,782 Unanimous

14. ART 75 CANNABIS MITIGATION STABILIZATION FUND: The FinCom has no requests for this article.
VOTED $1 Unanimous

15. GRANT AUTHORITY: Carman moved that the Chair Tosti & Vice Chair Jones be authorized to make small changes in the Committee's votes as needed in the Committee's report as required to balance the budget. So voted. Unanimous

16. COMMITTEE: Members asked to have budgets ready for Wed and next week. There are no meetings scheduled in April until 4/22 at 7:30 in the Lyons Room before Town Meeting. Members were asked to be prepared for a meeting on 4/10 in case the House Ways & Means budget has unexpected contents.

Meeting adjourned at 9:35 PM

Peter Howard 3/12/19
Revised 3/14/19

Ref 1 Assessor Budget (revised)
Ref 2 Bill from Patriot Properties for Software (5206)
Ref 3 Proposal Patriot Properties Services

Revision 3/8/19

	2017 Actual	2018 Actual	2019 Budget	2020 Budget	$ Change	% Change
0113781 ASSESSOR SALARIES						
5100 SALARIES & WAGES	270,331	279,891	293,543	294,788	1,245	0.42%
5103 OVERTIME	-	-	1,000	1,000	-	0.00%
5156 LONGEVITY	800	800	800	1,639	839	104.88%
5160 STIPENDS	600	900	900	1,275	375	41.67%
0113781 ASSESSORS SALARIES	**271,131**	**281,591**	**296,243**	**298,702**	**2,459**	**0.83%**
0113782 ASSESSOR EXPENSES						
5206 COMPUTER MAINTENANCE	18,000	19,000	19,000	20,500	1,500	7.89%
5209 IN-STATE TRAVEL	3,103	2,532	3,148	3,148	-	0.00%
5219 CONSULTING	2,952	3,755	4,500	4,500	-	0.00%
5223 OFFICE SUPPLIES	3,794	2,686	3,900	3,900	-	0.00%
5299 OTHERWISE UNCLASSIFIED	1,200	964	1,200	1,200	-	0.00%
0113782 ASSESSORS EXPENSES	**29,049**	**28,937**	**31,748**	**33,248**	**1,500**	**4.72%**
ASSESSORS TOTAL	**300,180**	**310,528**	**327,991**	**331,950**	**3,959**	**1.21%**

Ref 1

FY 2020 SALARY DETAIL

ASSESSORS	Previous	Job	FY2020 FTE	BU	Grade	Step	Min	Max	FY2019 Budget Book	Ratified	FY2020 New Pay	Base	Step	Longevity	Total
TIERNEY		DIRECTOR OF ASSESSMENT	1.00	MGMT	1	5	87,079	125,834	107,154	109,247	113,932	111,432	2,500	1,139	115,071
DALLAS		OFFICE MANAGER	1.00	ATP	5	8	54,634	71,710	66,723	69,629	71,528	71,528	0	500	72,028
MANN		DATA COLLECTOR	1.00	OFFA	7	8	47,072	62,488	55,407	57,554	60,201	57,646	2,555	0	60,201
O'ROURKE	KELLY	SR CLERK TYPIST	1.00	OFFA	2	2	33,182	44,159	41,269	42,413	34,427	34,427	0	0	34,427
FEELEY		ASSESSOR		NONE			4,900	4,900	4,900	4,900	4,900	4,900	0	0	4,900
OCONNOR		ASSESSOR		NONE			4,900	4,900	4,900	4,900	4,900	4,900	0	0	4,900
GREELEY		ASSESSOR		NONE			4,900	4,900	4,900	4,900	4,900	4,900	0	0	4,900
		TAXATION TOTAL:	4.00						285,253	293,543	294,788	289,733	5,055	1,639	296,427

Ref 2

Patriot Properties, Inc.

123 Pleasant Street
Marblehead, MA 01945
781-586-9670
781-586-9667

Invoice No. 14284

Date 7/1/18

Sold To:
Board of Assessors
Town Hall
730 Massachusetts Ave.
Arlington, MA 02476

Due Date 7/31/18
Terms Net 30 Days

Arlington BOA
Purchase Order No.

Unit/Hrs.	*Item*	*Description*	*Price Per*	*Amount*
1.00	Lic/Supp - AssessPro	Software License and Support (07/01/18 - 06/30/19)	19,850.00	19,850.00

Freight Charges

We appreciate your business

Total Due $19,850.00

Ref 3

patriot PROPERTIES, INC.

Patriot Properties, Inc.
123 Pleasant Street, Marblehead, MA 01945
Ph: (781) 586-9670 // Fx: (781) 586-9667
www.patriotproperties.com

TOWN OF ARLINGTON, MA

PROPOSAL

Paul Tierney, MAA Director of Assessments
730 Massachusetts Ave, Arlington, Ma 02476
ptierney@town.arlington.ma.us
(781) 316-3061 phone // (781) 316-3059 fax

Date: February 14, 2019

1. **Scope of Services**

In consideration of the compensation set forth herein, Patriot Properties offers to provide the following services:

2. **FY2020 Commercial and Industrial Certification:**

A. Analyze and evaluate the data on those improved parcels located throughout the Town that sold in Calendar Years 2017, 2018.and 2019 The purpose of this analysis is to validate arm's-length sales and inventory status as of date of sale.

B. Analyze all vacant land sales that occurred during calendar years 2017, 2018, and 2019.

C. Provide the data entry of all "Income and Expense Forms "

D. Analyze all available income and expense statements for the purpose of applying the income approach to the Commercial and Industrial properties. A minimum of two (2) approaches to value will be utilized on the Commercial and Industrial property where applicable.

E. Adjust all value tables, depreciation tables, land tables, and any other requirements of the system, to insure equitable assessments on all Apartments, Mixed Use, and Commercial/Industrial Real Property for fiscal year 2020.

F. Generate all required spreadsheets, reports, or other documentation necessary to have the proposed assessments certified by the Massachusetts Department of Revenue for Fiscal Year 2020.

G. Assist the Assessor's office with the Certification process and attend meetings with the Department of Revenue pertaining to the Commercial, Industrial, Apartment or Mixed-Use property when requested.

H. Complete all of the above on or before October 1, 2019.

The cost to the Town of Arlington for the above "Commercial & Industrial services" will be:

$24,800.00 ✓

3. **FY2020 Personal Property Certification & Full Data Collection:**

A. Analyze the Forms of List returned by the owners of the existing Taxable Personal Property and validate the information by reviewing the data in the Personal Property system and making the necessary changes to the tax base.

B. Review the telecommunication and gas line companies listing submitted by the Department of Revenue and update the taxable inventory accordingly.

C. Manually research local phone book and business listings for verification of existing and potentially new Taxable Personal Property accounts.

D. All Existing Taxable Personal Property accounts (Up to 330 Accounts) will be visited for determination of taxability status.

E. All new Taxable Personal Property accounts discovered will be listed, priced and added to the tax base each fiscal year.

F. All businesses determined to be exempt from taxation during the discovery program will be entered into the Personal Property system for future reference.

G. Generate all required spreadsheets, reports, or other documentation necessary for the "Certification" of the Personal Property by the Massachusetts Department of Revenue for the valuation date of January 1, 2019.

H. Adjust all value and depreciation tables insure equitable assessments on all Taxable Personal Property for fiscal year 2020.

The cost to the Town of Arlington for the above "Personal Property Services" will be:

$22,500.00 ✓

4. **FY2020 Residential Consulting Services:**

A. Patriot Properties will provide the town of Arlington up to (5) days of Residential Consulting Services for the FY2020 "Certification".

The cost to the Town of Arlington for the above "Residential Property" services will be:

$10,000.00 ✓

Note: **If additional "Residential Revaluation Consulting services" are requested by the town, they will be provided at the per diem rate of: $2,000.00 per day.**

TOTAL = $57,300

Submitted by:
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