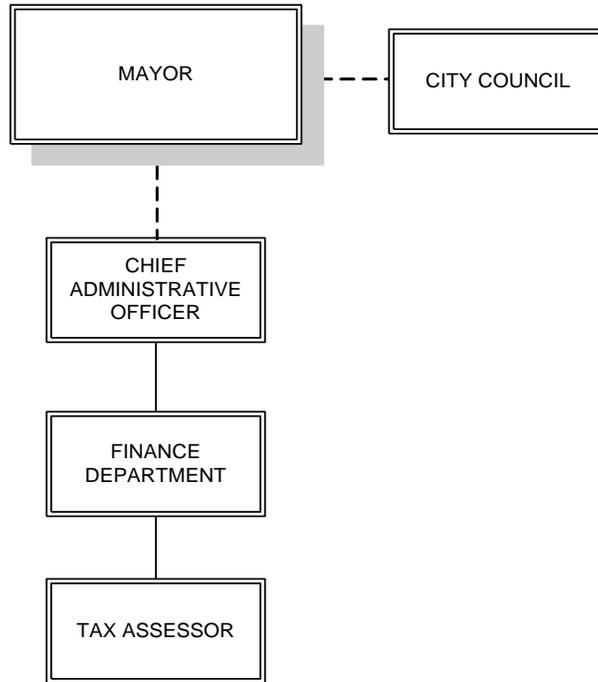


FINANCE DIVISIONS
TAX ASSESSOR

MISSION STATEMENT

The primary statutory responsibility of the Department of Assessment is to develop the annual Grand List of Taxable and Exempt properties and to assure fair valuation and equitable distribution of assessment for all property owners. The statutory obligation of the Assessment Department is to discover, value, and list real and personal property consistent with state law. The Department of Assessment staffed by fifteen full-time employees.

Grand List includes three principal categories: 1) Real Estate; 2) Personal Property; and 3) Motor Vehicles. The net taxable Grand List for October 1, 2006 (FY 2008) was composed of approximately 34,600 parcels of Real Estate, approximately 4,450 Personal Property accounts, and approximately 95,000 Motor Vehicles. Included in the continuous maintenance of the Grand List is the administration of approximately 10,000 personal exemptions, 1,800 elderly tax credits, and approximately 150 Commercial Personal Property Exemptions. There are approximately 1,900 parcels of Tax Exempt Real Property (churches, schools, charitable organizations, etc.) totaling approximately \$2.5 Billion.



GENERAL FUND BUDGET

TAX ASSESSOR

BUDGET DETAIL

Elaine Carvalho
Manager

REVENUE SUMMARY

ORG DESI	OBJECT DESC	FY2009	FY2010	FY2011	VARIANCE TO	
		ACTUAL	BUDGET	MAYOR PROPOSED	FY2011 ADOPTED	FY2010 BUDGET
01041000	TAX ASSESSOR	25,780,129	22,995,278	19,590,209	19,590,209	-3,405,069
	41538 COPIES	4,165	9,000	9,000	9,000	0
	44357 MUNI VIDEO COMPETITION TST REV	8,430	8,000	8,000	8,000	0
	44680 ELDERLY/DISABLEDFREEZETAXREIMB	28,000	19,000	19,000	19,000	0
	44681 DCA TAX ABATEMENT	128,251	0	0	0	0
	44682 ELDERLYEXEMPTION-OWNERSPROGRAM	689,855	650,000	650,000	650,000	0
	44683 ELDERLYEXEMPTION-TOTALLYDISABL	17,471	10,000	10,000	10,000	0
	44684 ELDERLYEXEMPTION-ADDITIONALVET	47,127	40,000	40,000	40,000	0
	44686 TAX EXEMPT HOSPITALS	11,200,500	10,041,445	8,909,623	8,909,623	-1,131,822
	44687 STATE-OWNED PROPERTY PILOT	2,676,768	2,450,950	2,901,662	2,901,662	450,712
	44690 DISTRESSED MUNICIPALITY TAX EXEMP	325,527	325,000	325,000	325,000	0
	44691 MANUFACTURING MACHINERY & EQUIPME	1,094,322	608,000	608,000	608,000	0
	44692 MASHANTUCKET PEQUOT/MOHEGAN FD	9,559,715	8,833,883	6,109,924	6,109,924	-2,723,959

APPROPRIATION SUMMARY

ORG DESC	APPR DESC	FY2009	FY2010	FY2011	VARIANCE TO	
		ACTUAL	BUDGET	MAYOR PROPOSED	FY2011 ADOPTED	FY2010 BUDGET
'01041000	TAX ASSESSOR	1,756,466	1,224,400	1,189,137	1,189,137	-35,263
	1041PS TAX ASSESSOR PERS SVCS	572,546	685,237	665,616	665,616	-19,621
	2041TPS TAX ASSESSOR OTH PERS SVCS	32,537	76,250	85,025	85,025	8,775
	3041FB TAX ASSESSOR FRINGE BENEFITS		152,343	184,087	184,087	31,744
	4041EX TAX ASSESSOR OPER EXPENSES	23,764	76,306	65,414	65,414	-10,892
	6041SS TAX ASSESSOR SPECIAL SERVICE	1,127,619	234,264	188,995	188,995	-45,269

PERSONNEL SUMMARY

Job Description	FTE FY	FTE FY	VAC	NEW	UNF	FY 2010	FY 2011	VARIANCE	
	2010	2011				CURRENT	ADOPTED		
TAX ASSESSOR	1.0	1.0				104,577	96,589	-7,989	
DEPUTY TAX ASSESSOR	1.0	1.0				89,439	85,367	-4,072	
TAX ASSESSMENT PROFESSIONAL	1.0	1.0	1.0			56,631	49,173	-7,458	
TAX ASSESSMENT CLERK (35 HOURS)	2.0	2.0				84,086	83,764	-322	
PROPERTY APPRAISER I (35 HOURS)	2.0	2.0				93,291	92,932	-359	
TAX ASSESSMENT CLERK (35 HOURS)	1.0	1.0				42,043	41,882	-161	
PROPERTY APPRAISER I (35 HOURS)	2.0	2.0				93,291	90,263	-3,028	
TAX ASSESSMENT CLERK (35 HOURS)	3.0	3.0				121,879	125,646	3,767	
	13.0	13.0	1.0			TOTALS	685,237	665,617	-19,620

GENERAL FUND BUDGET

TAX ASSESSOR

PROGRAM HIGHLIGHTS

SERVICE INDICATORS	ACTUAL 2005	ACTUAL 2006	ACTUAL 2007-2008	ACTUAL 2008-2009	ESTIMATED 2009-2010
TAX ASSESSOR					
Real estate parcels	34,397	34,489	34,658	34,737	34,746
Income and expense analysis	2,833	2,951	2,697	2,701	2,640
Real estate adjustments value adds	2,588	2,612	2,628	2,050	2,635
Real estate adjustments value deletes	2,117	1,387	1,402	1,440	1,905
Real estate adjustments changes	4,705	3,999	3,825	3,650	3,525
Deed transfers	5,928	5,700	3,600	3,250	2,875
Fire and demolition activity reviews	98	134	147	175	186
Tax map changes	92	118	87	85	79
New Building permits reviewed	668	636	465	398	285
Active Building permits (open)	2,372	2,563	2,478	2,020	2,100
Exempt applications	426	80	62	65	410
Exemption prorates	9	6	16	27	32
Certificates of occupancy/prorates	166	135	208	158	140
Personal Property Accounts	3,341	4,028	5,280	5,281	4,650
Pers. Prop. Accts. Audit	60	95	60	150	200
Pers. Prop. Accts. Adds (Net Change)	43	687	640	642	1,550
Pers. Prop. Accts. Value Changes	3,340	3,989	5,280	5,281	4,650
Motor Vehicles	94,886	92,789	73,837	72,659	70,678
Motor vehicles add-ons - By Referrals	565	232	289	280	255
Motor vehicles add-ons - By Discovery	235	1,275	1,350	890	725
Motor vehicles deletes	6,250	4,235	4,150	3,125	4,080
Motor vehicles changes Pro-rates	10,937	8,487	8,120	7,690	6,956
Elderly tax relief # of annual apps	1,348	1,350	1,186	1,225	1,350
Economic development programs	51	61	53	59	59
Veteran exemptions, SS, & Blind	7,552	7,461	7,345	7,020	6,480
<i>Information requests</i>					
Telephone	124,410	136,851	137,690	138,450	135,075
Mail/fax/Email	5,200	4,100	4,500	5,100	4,355
Walk-in Requests for Information	36,076	34,234	34,658	33,790	29,580
Revaluation Activity:					
GRAND LIST					
Assessor's Grand List	\$5.4 Billion	\$5.5 Billion	\$5.6 Billion	\$6.99 Billion	\$7 Billion
Exempt property activity	\$2.4 Billion	\$2.4 Billion	\$2.5 Billion	\$3. Billion	\$2.99 Billion
Exemptions (personal) activity	\$75.1 Million	\$86.3 Million	\$87. Million	\$100. Million	\$100. Million
Board of Assessment Appeal changes	(\$14.1 Million)	(\$7.1 Million)	(\$14. Million)	(\$14. Million)	(\$14. Million)
Increases in Grand List	\$63.4 Million	\$80.4 Million	\$230. Million	\$112.2 Million	\$112.2 Million
Final net taxable Grand List	\$5.3 Billion	\$5.4 Billion	\$5.6 Billion	\$6.9 Billion	\$6.95 Billion

Please note: Changes in the Grand List, in light of the current conditions in the housing market and economy, are hard to predict.

FY 2010-2011 GOALS

- 1) Defend 300+ tax appeals, attend pre-trials, negotiate settlements and attend trials.
- 2) Aggressively review and audit personal property accounts.
- 3) Frequently update information on the City's Website to accommodate the public.
- 4) Continue to maintain a close liaison with the Administration and Department Heads to provide essential data and reports in a timely fashion.
- 5) Continue a cooperative and effective alliance with the Tax Collector's Office in order to streamline processes and customer service between the offices, and to initiate, along with Tax Collector, group meetings with all staff members.
- 6) Encourage the staff to be aware of the importance of sustainability in the office and in their individual homes.
- 7) Meet with the public and tax exempt entities, when necessary, to address their individual concerns.

GENERAL FUND BUDGET

TAX ASSESSOR

PROGRAM HIGHLIGHTS

FY 2009-2010 GOAL STATUS

- 1) Completion of the city-wide state-mandated Real Property Revaluation.
6 MONTH STATUS: Completed.

- 2) Improve customer service for taxpayers.
6 MONTH STATUS: Achieved and ongoing.

- 3) Disseminate accurate information to the general public.
6 MONTH STATUS: Achieved and ongoing.

- 4) Have a positive relationship with the Board of Assessment Appeals.
6 MONTH STATUS: Achieved and ongoing.

FY 2009-2010 ADDITIONAL ACCOMPLISHMENTS

- 1) We have changed the perception of the Tax Assessor's Office and Tax Assessor to the general public, media and taxpayers with an open door policy to achieve solutions, while showing each other mutual respect.

GENERAL FUND BUDGET

TAX ASSESSOR

APPROPRIATION SUPPLEMENT

ORG	OBJECT DESC	FY2009 ACTUAL	FY2010 BUDGET	FY2011 MAYOR PROPOSED	FY2011 COUNCIL ADOPTED	VARIANCE TO FY2010 BUDGET
'01041000	TAX ASSESSOR	1,756,466	1,224,400	1,189,137	1,189,137	-35,263
	'51000 FULL TIME EARNED PAY	506,623	685,237	665,616	665,616	-19,621
	51004 FULL TIME VACATION PAY	33,130	0	0	0	0
	51006 FULL TIME SICK PAY	21,659	0	0	0	0
	51008 FULL TIME PERSONAL PAY	8,467	0	0	0	0
	51014 FULL TIME BEREAVEMENT PAY	1,525	0	0	0	0
	51016 FULL TIME JURY DUTY PAY	790	0	0	0	0
	51028 FT RETROACTIVE PAY	806	0	0	0	0
	51032 FT DOCKING PAY	-456	0	0	0	0
	51102 LONG TERM ACTING PAY	16,696	0	0	0	0
	'51140 LONGEVITY PAY	0	0	8,775	8,775	8,775
	'51403 ASSESSMENT APPEALS STIPENDS	15,841	76,250	76,250	76,250	0
	'52360 MEDICARE	0	9,936	9,147	9,147	-789
	'52385 SOCIAL SECURITY	0	0	8,342	8,342	8,342
	'52504 MERF PENSION EMPLOYER CONT	0	51,393	64,068	64,068	12,675
	'52917 HEALTH INSURANCE CITY SHARE	0	91,014	102,530	102,530	11,516
	'53605 MEMBERSHIP/REGISTRATION FEES	820	4,733	3,769	3,769	-965
	'53610 TRAINING SERVICES	1,235	8,945	6,786	6,786	-2,159
	'53705 ADVERTISING SERVICES	1,261	2,301	1,818	1,818	-483
	'53720 TELEPHONE SERVICES	0	1,850	1,388	1,388	-463
	'53905 EMP TUITION AND/OR TRAVEL REIM	2,093	2,883	2,252	2,252	-631
	'54555 COMPUTER SUPPLIES	0	2,880	2,160	2,160	-720
	'54595 MEETING/WORKSHOP/CATERING FOOD	0	922	767	767	-155
	'54640 HARDWARE/TOOLS	0	270	203	203	-68
	'54675 OFFICE SUPPLIES	4,279	7,449	7,449	7,449	0
	'54705 SUBSCRIPTIONS	-296	4,100	3,229	3,229	-871
	'54720 PAPER AND PLASTIC SUPPLIES	0	67	50	50	-17
	'54725 POSTAGE	10,657	15,307	15,307	15,307	0
	'55055 COMPUTER EQUIPMENT	0	4,549	3,412	3,412	-1,137
	'55145 EQUIPMENT RENTAL/LEASE	0	9,300	6,975	6,975	-2,325
	'55150 OFFICE EQUIPMENT	0	3,600	2,700	2,700	-900
	'55155 OFFICE EQUIPMENT RENTAL/LEAS	3,715	7,150	7,150	7,150	0
	'56040 BOOKBINDING SERVICES	582	14,914	11,212	11,212	-3,702
	'56055 COMPUTER SERVICES	1,750	16,505	13,238	13,238	-3,267
	'56095 APPRAISAL SERVICES	7,000	6,750	6,750	6,750	0
	'56100 AUDITING SERVICES	995	995	746	746	-249
	'56175 OFFICE EQUIPMENT MAINT SRVCS	0	1,800	1,350	1,350	-450
	'56180 OTHER SERVICES	1,117,292	193,300	155,699	155,699	-37,601

GENERAL FUND BUDGET

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