



Local Officials Directory

Municipal Calendar

IGR's & Bulletins

Workshops, Seminars & Events

What's New

DOR 360



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Handfield.**

In this Issue:

- [FY2014 Budget and MMA Highlights](#)
- [Solar PV Valuation Workshop Spots Filling Up](#)
- [News from the Municipal Databank: Upcoming Web Reports!](#)
- [Certification Preparation Workshops Scheduled](#)
- [MassGIS Municipal Workshops](#)

FY2014 Budget and MMA Highlights

Two weeks ago, I joined many of you at the Massachusetts Municipal Association's Annual Meeting and Trade Show at the Hynes Convention Center. I look forward to the event each year as it allows me the opportunity to meet and connect with friends and colleagues from across state and local government. It's also a great opportunity for DLS to highlight our many exciting initiatives and to interact with our municipal counterparts in person.

I'd like to thank Joe Markarian, Tara Lynch, Zack Blake, Melinda Ordway, Martin DiMunah, Jared Curtis, Mike Briggs, and Lisa Juskiewicz, all of whom spent time at our DLS booth answering questions and making people aware of the many ways we support, assist and work with municipalities.

In the afternoon, I joined our new Secretary for Administration and Finance, Glen Shor, and DOR Commissioner Amy Pitter for the "State and Local Economic and Budget Outlook" workshop. In front of a crowd over 150 attendees, Commissioner Pitter discussed the [DOR360 program](#) and both short and long-term revenue projections. Secretary Shor followed with a presentation of Governor Patrick's budget proposal including the recommendation for \$31 Million in new local aid (annual formula local aid) allocated using a new distribution formula. This proposed new formula uses a combined measure of a community's relative property wealth (EQV/capita) and income per capita to distribute this aid. The local aid estimates can be viewed at the link provided below and, as it should be noted, are subject to change as the legislative process unfolds.

<http://www.mass.gov/dor/local-officials/municipal-data-and-financial-management/cherry-sheets/>

The Department of Elementary and Secondary Education (DESE) has published the Chapter 70 aid calculations, minimum contributions and net school spending requirements on the Office of School Finance website at:

http://finance1.doe.mass.edu/chapter70/chapter_14p.html

After the presentations, our panel fielded questions from the audience with additional insights provided by Rick Kingsley, DLS Municipal Data

Management and Technical Assistance Bureau Chief and Pam Kocher, ANF Director of Local Policy. As always, it was great to hear feedback both formally and informally and to receive suggestions and ideas that further our mutual goal of better, more efficient and effective government.

Thanks to everyone who made the day possible including our partners at the MMA. If you weren't able to attend, I'm pleased to announce that we've posted video from the workshop on our DOR Media Youtube page. You can access it by clicking [here](#).

Robert G. Nunes
Deputy Commissioner and Director of Municipal Affairs
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Solar PV Valuation Workshop Spots Filling Up

Marilyn H. Browne - Chief, Bureau of Local Assessment

Thank you for your overwhelming interest in the three upcoming workshops across the state to provide local assessors with the tools and methodology for valuing Solar Photovoltaic (PV) systems for the purpose of local taxation or for negotiation of payment in lieu of taxes (PILOT) agreements. At this point, the Boston workshop has reached capacity. Limited availability for the remaining two workshops is on a first-come, first-serve basis.

Shrewsbury Tuesday, February 26th, 2013
Shrewsbury Town Hall
100 Maple Avenue
Shrewsbury, MA 01545
2pm - 6pm

Springfield Wednesday, February 27th, 2013
State Office Building, Room B42
436 Dwight Street
Springfield, MA 01103
9am - 1pm

Registration is required. Please join us by registering with Emanuela Achin at 617-626-2331 or at bladata@dor.state.ma.us to reserve your seat by location now.

News from the Municipal Databank: Upcoming Web Reports!

Mike Briggs - Data Analyst, Municipal Data Management

Since the May 2012 edition of *City and Town* and the launch of the Community Comparison tool, the Municipal Databank has been working on, and launching, several new web-based data reporting tools. Such reports as [Property Tax Trends](#), [Assessed Values by Class](#), and [Average Single Family Tax Bill](#), to name a few, have completely eliminated the need to update static excel spreadsheets that used to occupy our website. The reports now query our Gateway database directly and simply require routine maintenance, such as adding a

fiscal year once new Schedule As begin pouring in or once the new tax rate season begins. As soon as these events occur, the report queries identify the new data, capture it and present it to the user. Databank team members can now spend more time focusing on meeting the needs of the administration, legislature, communities and other customers, fulfilling their unique individual requests.

The Databank received some positive feedback from our data users after the release of the community comparison report including the following comment from a taxpayer in Wayland:

"I think the Community Comparison report is very useful with 68 indicators being in one place."

Pedge Lynch of the Springfield Assessing office said, *"Kudos to all of you for your latest application on the Community Comparison Report! To Assessors, this is a 'way cool tool!'."*

Furthermore, because reports provide users with real-time data, it allows them to perform real-time analytics. Among the obvious benefits such as speed, flexibility and less room for error, real-time analytics equip Databank users with the ability to make better decisions in less time. For example, if a user wanted to see the average single family tax bill for all communities that have set their FY2013 tax rate, or the average bill for surrounding communities are now just a click away.

The Databank just unveiled its next round of reports, which include combined reports for our local options page and a couple of new reports for our debt and other financial indicators page:

Local options [page](#):

- **Local Options Related to Tax Billing:** combines all local option choice of special exemptions, tax billing cycle, and assessment provisions;
- **Local Options for Rooms and Meals:** combines into one report the dates and rates for communities who have adopted the local options for rooms and meals taxes;
- **Property Tax Exemptions:** combines into one report detailed information about Blind, Surviving Spouse and Elderly Person exemptions clauses including adoption dates, caps and a breakout of 41C options and their minimum requirements;
- **Community Preservation Act:** Details which exemptions were locally accepted and the state matching fund percentage (also appears on the Community Preservation Act [page](#)).

Debt and other financial indicators [page](#):

- **Moody's and S&P's Bond Ratings:** Provides community bond ratings as determined by the two major bond rating agencies;
- **Certified Free Cash:** Provides certified free cash amounts for communities;
- **Financial Flexibility:** Financial flexibility report measures available revenue sources, wealth, income, debt and bond ratings for all communities.

In addition to the above reports the Databank is also releasing a new

version of the popular [At A Glance](#) reports, providing data across a multitude of datasets including socioeconomic, tax rate, Schedule A, bond ratings, and estimated cherry sheet data. The report is no longer a static one-time snapshot of a community, but rather a running report that is auto-generated with real-time data every time it is accessed.

While some of this information can be found in the Community Comparison Report, these smaller specialized reports minimize the volume of data retrieved by the user and give the user the ability to generate a multi-year trend, providing the user with a smaller data set, but the multiple year view for their analysis.

Click [here](#) to access the Municipal Databank website. If you have any questions or comments, please contact the Municipal Databank at databank@dor.state.ma.us.

Certification Preparation Workshops Scheduled

Bureau of Local Assessment

There will be four Certification Workshops scheduled for assessors whose communities are scheduled to have their proposed real and personal property values audited by the Bureau of Local Assessment for FY2014. The workshops will be held at the following locations across the Commonwealth:

Boston - Monday, February 11th

Saltonstall Building - 2nd floor Conference Rooms C & D
Boston, MA
10am - Noon

Wareham - Tuesday, February 12th

Wareham Town Hall Auditorium
Wareham, MA
10am - Noon

Worcester - Wednesday, February 13th

Worcester Public Library - Main Branch
3 Salem Square, Saxe Room
Worcester, MA
10am - Noon

Springfield - Thursday, February 14th

436 Dwight Street
Springfield, MA
10am - Noon

Registration is required. Please contact John Gillett at bladata@dor.state.ma.us.

MassGIS Municipal Workshops Seminars, Workshops and Trainings

MassGIS and State 911 will be hosting workshops regarding addressing and GIS. MassGIS, a program in the Information Technology Division of Administration and Finance, provides technical resources and GIS data for local and state government and for the general public. This workshop will review both state and local efforts; at

the state level point address files and other GIS data are being compiled to meet the needs of new 911 systems, which use more accurate address locations to route calls and to support local dispatch.

Greenfield Community College - Downtown Center
[270 Main Street, Greenfield, Massachusetts 01301](#)

1st Floor Meeting Rooms
February 11, 2013
10AM-Noon
(Snow date February 12, 2013)

Stockbridge Town Hall
[50 Main Street](#)

[Stockbridge MA 01262](#)
February 20, 2013
10AM-Noon
(Snow date February 21, 2013)

Lowell - Rogers School Admin Bldg
[43 Highland Street Room 054](#)

[Lowell, MA 01852](#)
February 26, 2013
10AM-Noon
(Snow date February 28, 2013)

Auburn Town Hall
[104 Central Street](#)

[Auburn MA 01501](#)
March 4, 2013
10AM-Noon
(Snow date March 7, 2013)

RSVP to following:

911 Addressing Coordinator Michael Warner
notify911address@state.ma.us
[617-626-4617](tel:617-626-4617)

General MassGIS Outreach Paul Nutting
notify911address@state.ma.us
[617-619-5611](tel:617-619-5611)

February Municipal Calendar

1	Taxpayer	Deadline for Payment of 3rd Quarterly Tax Bill Without Interest According to M.G.L. Ch. 59, Sec. 57C, this is the deadline for receipt of the 3rd Quarter actual tax payment without interest, unless the actual tax bills were mailed after December 31. If mailed after December 31, the actual tax is due as a single installment on May 1, or 30 days after the bills were mailed, whichever is later.
1	Taxpayer	Quarterly Tax Bills - Application Deadline for Property Tax Abatement According to M.G.L. Ch. 59, Sec. 59, applications for abatements are due on Feb. 1 unless actual tax bills were mailed after December 31. In that case they are due May 1, or 30 days after mailing, whichever is later.
28	Finance Committee	Continue Budget Review and Develop Recommendations This date will vary depending on dates of town meeting.