



## Southborough's "Desktop" Data Review

Paul Corbett - BLA Certification Field Advisor

February 15th, 2018

### In this issue:

- [Southborough's "Desktop" Data Review](#)
- [Data Highlight of the Month: New Growth](#)

### Important Dates & Information

#### Have you tried out the DLS Municipal Finance Trend Dashboard yet?

In [the last edition of City & Town](#), we highlighted the comprehensive [Municipal Finance Trend Dashboard](#) now available on our website. The dashboard is comprised of key municipal fiscal health indicators and graphically displays trends in revenues and expenditures, municipal operating positions, demographic information, unfunded liabilities, property taxes, Proposition 2 ½ data, and debt. For decades, the DLS [Municipal Databank](#) has served as an invaluable resource for local and state officials, professional associations, academic institutions, bond rating agencies, advocacy organizations, think tanks, the media, and interested taxpayers for research, analysis, and policy development. We are now leveraging that resource to provide

Converting from one computer assisted mass appraisal (CAMA) system to another is an often complex process that introduces the possibility for data loss and errors. In the spring of 2016, Southborough converted its real estate property data from the community Software Consortium (CSC) CAMA to Patriot Property. [Information Guideline Release 17-01 \(Certification Standards\)](#) states that a CAMA conversion requires a full field review, but a desktop review of data (i.e. an in-office review conducted by local assessing staff) could be conducted with the approval of Bureau of Local Assessment (BLA). (See [Certification Standards: Commonly Used Forms - CF-6](#)). Hoping to streamline the process and avoid the cost of a full field review, Southborough's principal assessor, Paul Cibelli, submitted a request asking that Southborough be allowed to do an in-house, or "desktop," review of the converted data. In response, BLA asked Mr. Cibelli to submit a detailed plan for how he intended to accomplish the review. After some deliberation, BLA decided that Southborough would be a good pilot community to test the effectiveness of a desktop data review and approved Mr. Cibelli's plan.

Southborough was a good candidate for the initial desktop review for several reasons. First, the town had just completed its certification year, so that gave the assessing staff the maximum amount of time to deal with conversion-related data problems before the its next certification and revaluation. Also, Southborough had sufficient personnel in the assessor's office to do an in-house data review of the town's approximately 3,700 parcels. It had two full-time employees (Cibelli and a deputy assessor) and a part-time employee (an administrative assistant working 16 hours a week). Additionally, Cibelli had been on the job since 2000 and did his own fieldwork, so his familiarity with local properties was high. Another factor was that Southborough had also re-collected the data for all the single-family properties in town over the last two years, and Cibelli was confident the data was accurate. Finally, the community was running both new and old CAMA systems simultaneously. This made it possible to compare data from the original system to the converted data in the new system on a property-by-property basis, using the property record cards (PRCs).

Southborough followed a very specific plan for the desktop review. The three assessor's office employees were assigned different responsibilities. To begin, the administrative assistant, Tammi Rice, printed all the residential PRCs from both systems and organized them by street address. All commercial, industrial, and condominium properties and those with land classified as agricultural, horticultural or forest land

a transparent and accessible tool to analyze and visualize the fiscal health of Massachusetts' 351 cities and towns. Click [here](#) to see more!

### **Housing Choice Designation Online Application Now Open**

The [Housing Choice Initiative](#) provides incentives, rewards, technical assistance and targeted legislative reform to encourage and empower municipalities to plan and build the diverse housing stock that the Commonwealth needs to continue to thrive.

A Housing Choice Designation rewards communities that are producing new housing and have adopted best practices to promote sustainable housing development. Housing Choice designation provides 1.) Exclusive admission to new Housing Choice Capital Grants, Housing Choice Communities will be eligible for a major new capital grant program and 2.) Bonus Points for many Commonwealth grant and capital funding programs such as MassWorks, Complete Streets, MassDOT capital projects, and LAND and PARC grants.

Recognizing that small towns face different challenges, the Housing Choice Initiative will set aside funding for a competitive capital grant program exclusively for rural towns with populations under 7,000 as of July 2016 US Census Population estimates. \$1M in capital grant monies is expected to be available in the first year and to grow thereafter. Small towns can also apply for Housing Choice Designation.

The [online application](#) contains detailed information about the criteria for designation and submittal requirements. The application period will close on April 30, 2018 at 3:00pm. For more information about the program, please visit

(Chapter Land) were reviewed later in the project. Rice reviewed each PRC to see if the photo of the property converted correctly. She also checked the ownership information on each PRC. Cibelli then conferred with assessors from two adjacent communities (Will Naser from Framingham and Dan Brogie from Northborough) who had gone through the same data conversion the previous year. Cibelli discovered that both communities had found errors in the conversion for properties with finished basement areas. Cibelli instructed Rice to check each PRC for basement finish and to calculate the percentage of basement finish whenever necessary.

Next, the PRCs were passed on to Cibelli and the deputy assessor, Cynthia McLeod. They split the work, and once again, reviewed the PRCs from both systems on a property-by-property basis. Their reviews included the whole property descriptions as they appeared on the PRCs. They verified sketch dimensions, story heights and building areas and reviewed building descriptions for correct grade, condition, room counts, and number of bathrooms. They also checked the land records for land size, segmentation, neighborhood, zoning, and reviewed all the detached structure records.

The residential review took approximately three to four months. When data problems were discovered, they were corrected on a property-by-property basis. In only a few instances was field work necessary to resolve the problem. Generally, aside from the anticipated basement finish problem, there were some random sketch-related problems with second floor areas and story height percentages. The condo property data was reviewed with the same in-house desktop review process as the other residential property. Southborough has mostly townhouse-style condominiums, and the data conversion worked well between CAMA systems. However, the condos did have the same problems with finished basement area as the other residential properties.

With the residential phase complete, Cibelli and McLeod moved on to commercial and industrial properties, which were reviewed over a period of three weeks. Paul knew from his conversations with the Framingham and Northborough assessors that because of the unique way commercial and industrial buildings are described in the CSC system, he would have to do a field review of approximately 130 commercial/industrial buildings in Southborough.

Once the residential and commercial/industrial classes had been reviewed, Cibelli was able to devote time to the Chapter Land parcels, finishing the review soon after.

In August of 2016, after the desktop data review, Paul Cibelli and I conducted a field review of a random sample of converted property descriptions throughout the town and found them to be consistently accurate. Southborough successfully completed the interim-year review process and produced timely tax bills for Fiscal Year 2017. After our field work, I asked Paul if he would comment on his experience with the desktop review:

"The cost of a field review would have been \$21,000, and [in Southborough] many of the houses cannot be seen from the road. I believe the desktop review was more effective, and it saved the town

<https://www.mass.gov/housingchoice>  
[e](#)

MUNICIPAL  
**Databank**



**Other DLS Links:**

[Local Officials Directory](#)

[Information Guideline Releases \(IGRs\)](#)

[Bulletins](#)

[Publications & Training Center](#)

[Tools and Financial Calculators](#)

money. A desktop review may not work for every community, but it worked for Southborough.”

I then asked Paul what the most difficult part of the project was:

“It was the tedious nature of the review work. We could only do it for so long each day and then we needed to take a break.” However, in the end Paul was “happy with the quality of the data and happy the town saved money.” He also believes “the in-house desktop review sped up the learning curve on their new Patriot Property system.”

Whether to conduct a field review or an office review of the values generated is a critical decision. Because of Southborough’s size and in-house resources, as well as sound planning and diligent hard work, Paul Cibelli and his staff made the first desktop review a success.

**Data Highlight of the Month:**  
[New Growth](#)

**Anthonia Bakare - Municipal Databank**

The DLS Municipal Finance Databank compiles a [New Growth Analysis](#) that includes a table

consisting of residential new growth value, residential new growth applied to the levy limit, total new growth value, total new growth applied to levy limit, residential new growth as a percent of total new growth, prior year's levy limit, and total new growth applied to limit as a percent of prior year levy limit, and three related Trends in New Growth charts. One chart illustrates residential, open space and CIP values, the second shows new growth applied to the levy limit, and the third displays trends in new growth applied to the levy limit as a percent of the previous year's levy limit. The table displays data from FY03-18, while the charts are in FY12-18. All charts can be exported to PDF. The table can be exported to Excel.

New growth data is also included in the new [Municipal Finance Trend Dashboard](#). It is under [Category Three](#), new growth value by property class and new growth by class applied to the levy limit. It includes charts and data tables by community.

We hope you become better acquainted with the data the Division of Local Services has to offer through the *Data Highlight of the Month*. For more information, contact us directly at [databank@dor.state.ma.us](mailto:databank@dor.state.ma.us) or (617) 626-2384.

## February Municipal Calendar

- |    |                 |   |
|----|-----------------|---|
| 1  | Taxpayer        | <b>Deadline to Pay 3rd Quarter Tax Bill</b><br>Per <a href="#">M.G.L. c. 59, § 57C</a> , this is the deadline to pay the 3rd quarter actual tax bill without interest unless the 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        | <b>Quarterly Tax Bills – Deadline to Apply for Property Tax Abatement</b><br>According to <a href="#">M.G.L. c. 59, § 59</a> , abatements applications are due on February 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.  |
| 31 | State Treasurer | <b>Notification of Monthly Local Aid Distributions</b> , see <a href="#">IGR 17-17</a> for more cherry sheet payment information, monthly breakdown by program is available <a href="#">here</a> .  |

**Editor:** Dan Bertrand

**Editorial Board:** Sean Cronin, Anthonia Bakare, Linda Bradley, Deb Joyce, Theo Kalivas, Patricia Hunt and Tony Rassias

Contact *City & Town* with questions, comments and feedback by emailing us at [cityandtown@dor.state.ma.us](mailto:cityandtown@dor.state.ma.us).

To unsubscribe to *City & Town* and all DLS alerts, email [dls\\_alerts@dor.state.ma.us](mailto:dls_alerts@dor.state.ma.us).