

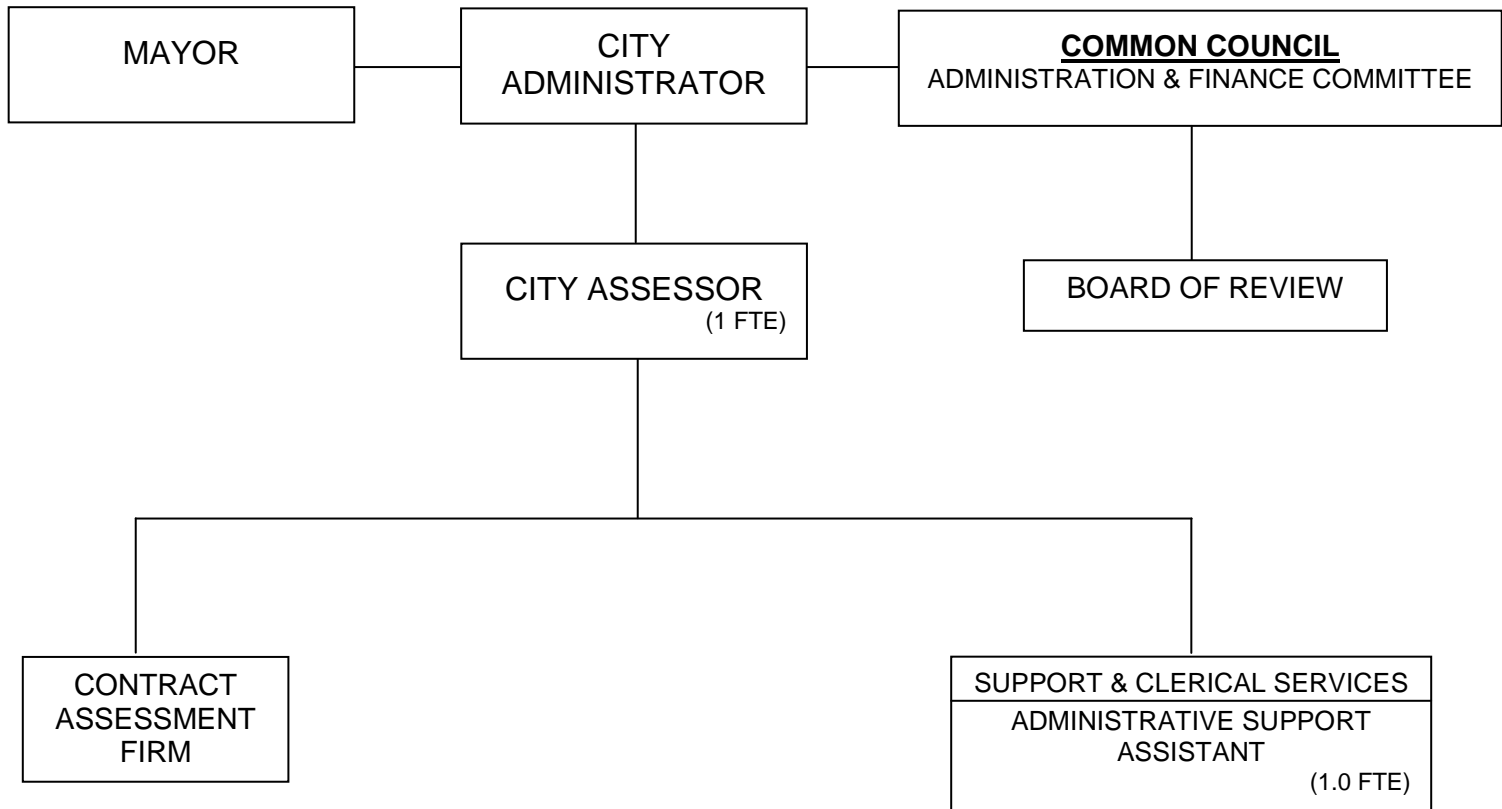
City of West Allis  
City Assessor  
2018 Budget

<b>EXPENDITURES</b>	<b>2015 Actual</b>	<b>2016 Actual</b>	<b>2017 Budget</b>	<b>2017 Adjusted Budget</b>	<b>2017 Year-to-Date</b>	<b>2018 Request</b>	<b>2018 Additions/ Deletions</b>	<b>2018 Budget</b>	<b>Change</b>	<b>% Change</b>
Salaries	\$ 349,349	\$ 347,857	\$ 344,900	\$ 344,900	\$ 141,360	\$ 129,501	\$ -	\$ 129,501	\$ (215,399)	
Misc Other Pay	\$ 2,838	\$ 2,038	\$ 2,400	\$ 2,400	\$ 278	\$ 750	\$ -	\$ 750	\$ (1,650)	
Overtime	\$ -	\$ -	\$ -	\$ -	\$ 1,201	\$ 1,000	\$ -	\$ 1,000	\$ 1,000	
Payroll Taxes	\$ 25,786	\$ 25,775	\$ 26,400	\$ 26,400	\$ 10,722	\$ 9,601	\$ -	\$ 9,601	\$ (16,799)	
Pension	\$ 29,670	\$ 28,186	\$ 23,500	\$ 23,500	\$ 8,050	\$ 8,677	\$ -	\$ 8,677	\$ (14,823)	
Health Insurance	\$ 109,830	\$ 77,893	\$ 93,600	\$ 93,600	\$ 28,013	\$ 37,042	\$ -	\$ 37,042	\$ (56,558)	
Dental Insurance	\$ 6,584	\$ 6,099	\$ 6,500	\$ 6,500	\$ 2,046	\$ 2,503	\$ -	\$ 2,503	\$ (3,997)	
Life Insurance	\$ 1,343	\$ 1,129	\$ 700	\$ 700	\$ 153	\$ 91	\$ -	\$ 91	\$ (609)	
Professional Services	\$ 4,742	\$ 5,019	\$ 6,925	\$ 6,925	\$ 4,694	\$ 198,217	\$ -	\$ 198,217	\$ 191,292	
Maintenance Contracts	\$ 9,935	\$ 9,907	\$ 11,050	\$ 11,050	\$ 9,452	\$ 12,630	\$ -	\$ 12,630	\$ 1,580	
Utilities	\$ 389	\$ 505	\$ 550	\$ 550	\$ (3)	\$ -	\$ -	\$ -	\$ (550)	
Supplies	\$ 3,360	\$ 3,117	\$ 6,350	\$ 17,303	\$ 2,265	\$ 9,050	\$ -	\$ 9,050	\$ 2,700	
Books & Periodicals	\$ 1,890	\$ 1,870	\$ 2,345	\$ 2,345	\$ 2,321	\$ 8,455	\$ -	\$ 8,455	\$ 6,110	
Printing	\$ 507	\$ 6	\$ 550	\$ 2,060	\$ -	\$ 550	\$ -	\$ 550	\$ -	
Training & Travel	\$ 2,106	\$ 2,518	\$ 4,350	\$ 4,350	\$ 162	\$ 3,370	\$ -	\$ 3,370	\$ (980)	
Regulatory & Safety	\$ 60	\$ 20	\$ 100	\$ 100	\$ 60	\$ 330	\$ -	\$ 330	\$ 230	
<b>TOTAL EXPENDITURES</b>	<b>\$ 548,388</b>	<b>\$ 511,938</b>	<b>\$ 530,220</b>	<b>\$ 542,683</b>	<b>\$ 210,773</b>	<b>\$ 421,767</b>	<b>\$ -</b>	<b>\$ 421,767</b>	<b>\$ (108,453)</b>	<b>-20.45%</b>

**2018 BUDGET NOTES:**

The changes in the Assessor budget reflect the 2017 restructuring of the department from a staff of 5.5 FTE to a staff of 2 FTE with a professional services contract for assessment and revaluation services.

**ORGANIZATIONAL CHART  
ASSESSOR**



CITY FUNDED FTEs: 2.0

# 2018 ASSESSOR BUSINESS PLAN

Department	Director	Fund and Dept. Group
Assessor	Jason Williams	General Fund 100-04
Mission/Overview		
<p><b>Vision:</b> The Assessor's Office strives to ensure uniformity of assessments and a fair and equitable distribution of the tax burden to the taxpayers of West Allis.</p> <p><b>Overview:</b> The Assessor's Office is responsible for the discovery, listing, and valuation of all taxable property within the City, review and approval of property tax exemption requests, maintenance of ownership information, and conducting all process related to property valuation, including tax appeals. Duties are performed in accordance with Chapter 70 of the Wisconsin State Statutes and the Wisconsin Property Assessment Manual.</p>		
Performance Measures		
<ol style="list-style-type: none"> <li>1. Level of assessment as determined by the State of Wisconsin, which is within 10% of estimated market value, i.e., (90% to 110% of market value)</li> <li>2. Coefficient of Dispersion – measurement of statistical analysis relating to uniformity. Recommended target range 15% or less</li> <li>3. Price-Related Differential – measurement of statistical analysis relating to uniformity. Recommended target range 98% to 103%</li> <li>4. Annual list of all Requests-for-Review, Open Book appointments, tax appeals and the total amount of challenged tax base.</li> </ol>		
Position Information*		
Titles	Number	Funding Source(s)
City Assessor	1.0	General Fund
Administrative Support Assistant	1.0	General Fund
Vacant Positions*		
Title	Length of Vacancy	2018 Plan/Current Status
None for 2018		

Services Provided*					
Service	Funded by	Frequency	Shared Service <small>(list Partners)</small>	Contracted	Statutory <small>(Federal, State, Local)</small>
Annual Assessor Requirements, including the discovery, listing, and valuing of properties, review records and values related to		Annually	No	Partial	Chapter 70

building activity.					
Revaluation Requirements		Periodically	No	Partial	Chapter 70
Review local tax appeals, educate and assist public in tax appeal rights, and defend values during open book and at board of review.		Annually	No	Partial	Chapter 70
Public Relations: both internal and external (realtors, appraisers, business owners, taxpayers)		Annually	No	Partial	None
Inter-Department RE Consultant		Annually	No	No	None

**1. Strategic Plan Goal #5 – Excellence in Government, calls for operational analysis/audit/alternative service delivery options, continuous improvement and a culture of innovation. To assist with accomplishing this goal, identify the top three services provided (by time or money spent) and 2018 efforts to improve service delivery (quality and/or resources allocated)**

1. Annual Assessor Requirements – staff will be working with a contract assessing firm to improve sales validation, full inspections of real and personal property, discovery and listing of underreported personal property assets, and implementation of best appraisal practices per Chapter 70, Wisconsin Property Assessment Manual and generally accepted appraisal practices.
2. Revaluation Requirements – staff will be working with a contract assessing firm to perform a full revaluation of all commercial properties. Preparatory work will begin August 1, 2017 with a single full-revaluation in 2019.
3. Public Relations and Communication – the statutory assessor will continue to maintain a presence at City meetings and transparency of Assessor’s Office activities and performance measures. Additionally, staff will provide opportunities to educate interested parties about the assessment process.

**2. Describe any additional proposed changes to service delivery. (new initiatives should be documented on the new initiative form)**

No new initiatives are identified for the 2018 budget cycle.

**3. 2017 Accomplishments (include Strategic Plan and other approved plans accomplishments)**

Re-organized the Assessor’s Office to provide a more efficient and higher quality level of service to the taxpayers of West Allis.

**4. 2018 Priorities/Goals (include Strategic Plan and other approved plans goals)**

1. Rebuild the Assessor’s Office in terms of compliance with City policies, State Statute Chapter 70, the Wisconsin Property Assessment Manual, and generally acceptable appraisal practices.
2. Maintain transparency of Assessor’s Office activities, tax base challenges and performance measurements with city decision-makers.
3. Development of a concise and meaningful City Academy 101 for the Assessment Process.

ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
City Assessor							
Regular Employees							
100-0501-517.11-01	Salary & Wages	293,192	277,578	344,900	129,501	129,501	215,399-
LEVEL	TEXT	TEXT AMT					
CCBG	CITY ASSESSOR						
	ADMINISTRATIVE SUPPORT ASSISTANT	129,501					
		129,501					
100-0501-517.11-02	Vacation	26,822	22,324	0	0	0	0
100-0501-517.11-03	Holidays	16,038	14,113	0	0	0	0
100-0501-517.11-04	Sick Leave	12,921	32,399	0	0	0	0
100-0501-517.11-06	Funeral Leave	376	1,110	0	0	0	0
100-0501-517.11-07	Jury Duty	0	197	0	0	0	0
100-0501-517.11-12	Comp Time Used	0	136	0	0	0	0
* Regular Employees		349,349	347,857	344,900	129,501	129,501	215,399-
Overtime							
100-0501-517.13-01	Overtime Pay	0	0	0	1,000	1,000	1,000
* Overtime		0	0	0	1,000	1,000	1,000
Misc Additional Pays							
100-0501-517.14-10	Car Allowance	2,838	2,038	2,400	750	750	1,650-
* Misc Additional Pays		2,838	2,038	2,400	750	750	1,650-
Insurance							
100-0501-517.21-01	Health Insurance	109,830	77,893	93,600	37,042	37,042	56,558-
100-0501-517.21-04	Life Insurance	1,343	1,129	700	91	91	609-
100-0501-517.21-07	Dental Insurance	6,584	6,099	6,500	2,503	2,503	3,997-
* Insurance		117,757	85,121	100,800	39,636	39,636	61,164-
Payroll Taxes							
100-0501-517.22-01	Social Secrty-OASDI 6.2%	20,898	20,898	21,400	7,781	7,781	13,619-
100-0501-517.22-02	Social Security-HI 1.45%	4,888	4,877	5,000	1,820	1,820	3,180-
* Payroll Taxes		25,786	25,775	26,400	9,601	9,601	16,799-
Retirement							
100-0501-517.23-01	Retirement-General	23,731	22,416	23,500	8,677	8,677	14,823-
* Retirement		23,731	22,416	23,500	8,677	8,677	14,823-
Retirement-Unfunded Liab							
100-0501-517.24-01	Retirement-General	5,939	5,770	0	0	0	0
* Retirement-Unfunded Liab		5,939	5,770	0	0	0	0
Professional Services							
100-0501-517.30-02	Consultants	120	180	500	500	500	0
LEVEL	TEXT	TEXT AMT					

ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
CCBG	ASSESSMENT TECHNOLOGIES			500 500			
100-0501-517.30-04	Other	4,622	4,839	6,425	197,717	197,717	191,292
LEVEL	TEXT			TEXT AMT			
CCBG	DEPT OF REVENUE - MFG TYLER MARKET DRIVE			6,425 190,792 500 197,717			
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*	Professional Services	4,742	5,019	6,925	198,217	198,217	191,292
	Maintenance Contracts						
100-0501-517.32-01	Computer Equip/Software	682	685	1,500	1,515	1,515	15
LEVEL	TEXT			TEXT AMT			
CCBG	SOFTWARE			1,500 1,500			
100-0501-517.32-04	Other	9,253	9,222	9,550	11,115	11,115	1,565
LEVEL	TEXT			TEXT AMT			
CCBG	MARKET DRIVE MAINTENANCE COPIER MAINTENANCE			9,300 250 9,550			
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*	Maintenance Contracts	9,935	9,907	11,050	12,630	12,630	1,580
	Utility Services						
100-0501-517.41-06	Telephone/Internet	389	505	550	0	0	550-
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*	Utility Services	389	505	550	0	0	550-
	General Supplies						
100-0501-517.51-01	Postage	2,823	2,824	5,300	8,000	8,000	2,700
LEVEL	TEXT			TEXT AMT			
CCBG	DIRECT MAILINGS			5,300 5,300			
100-0501-517.51-02	Office Supplies	537	294	1,050	1,050	1,050	0
LEVEL	TEXT			TEXT AMT			
CCBG	OFFICE SUPPLIES			1,050 1,050			
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*	General Supplies	3,360	3,118	6,350	9,050	9,050	2,700



ACCOUNT NUMBER	ACCOUNT DESCRIPTION	2015 Actual	2016 Actual	2017 Original Budget	2018 Mayor's Budget	2018 CC BUDGET	2018 Dollar Change
	WAAO			200			
	SEWAA			100			
	MLS			200			
				850			
100-0501-517.57-02	Registration Fees	20	0	700	1,295	1,295	595
LEVEL	TEXT			TEXT	AMT		
CCBG	WAAO				200		
	TRAINING				300		
					500		
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*	Education & Training	847	1,030	1,550	2,220	2,220	670
	Regulatory Expenses						
100-0501-517.58-01	Certification-Permits-Lic	60	20	100	330	330	230
LEVEL	TEXT			TEXT	AMT		
CCBG	DOR CERTIFICATION				100		
					100		
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*	Regulatory Expenses	60	20	100	330	330	230
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**	City Assessor	548,389	511,940	530,220	421,767	421,767	108,453-