

# FY 2018 REVENUE WORKSHEET

Fund	Budget Unit	Budget Unit Title	Account	Account Title	FY 16	FY 17	FY 17	FY 18	Increase
					Final Budget	Current Actual	Current Budget	Requested Amount	(Decrease)
100	1552	Tax Assessors	34.1930	Sale of Maps & Publications	\$2,235	\$92	\$500	\$0	(\$500)
					<b>\$2,235</b>	<b>\$92</b>	<b>\$500</b>	<b>\$0</b>	<b>(\$500)</b>

# FY 2018 EXPENSE WORKSHEET

Fund	Budget Unit	Budget Unit Title	Account	Account Title	FY 16 Final Budget	FY 17 Current Actual	FY 17 Current Budget	FY 18 Requested Amount	Increase (Decrease)
100	1552	Tax Assessors	51.1100	Regular Employees	\$564,205	\$241,088	\$606,986	\$597,653	(\$9,333)
100	1552	Tax Assessors	51.1102	Promotional Money	\$0	\$0	\$5,819	\$0	(\$5,819)
100	1552	Tax Assessors	51.1200	Temporary Employee	\$3,650	\$102	\$8,100	\$10,395	\$2,295
100	1552	Tax Assessors	51.1300	Overtime	\$1,912	\$0	\$4,188	\$4,382	\$194
100	1552	Tax Assessors	51.2100	Group Insurance	\$168,632	\$47,764	\$117,114	\$183,808	\$66,694
100	1552	Tax Assessors	51.2200	FICA Contribution	\$33,447	\$14,433	\$39,137	\$38,375	(\$762)
100	1552	Tax Assessors	51.2300	Medicare	\$7,820	\$3,377	\$9,153	\$8,975	(\$178)
100	1552	Tax Assessors	51.2410	Defined Contribution	\$50,438	\$47,169	\$60,820	\$73,612	\$12,792
100	1552	Tax Assessors	51.2700	Worker's Comp	\$12,823	\$6,866	\$14,026	\$17,702	\$3,676
100	1552	Tax Assessors	51.2910	Longevity	\$5,765	\$6,145	\$6,145	\$6,525	\$380
100	1552	Tax Assessors	52.1210	Legal	\$10,482	\$0	\$13,000	\$13,000	\$0
100	1552	Tax Assessors	52.1220	Auditing & Accounting	\$3,369	\$0	\$1,000	\$1,000	\$0
100	1552	Tax Assessors	52.1230	Consulting / Contracted Svc	\$3,095	\$3,833	\$5,500	\$7,500	\$2,000
100	1552	Tax Assessors	52.1250	Mapping	\$53,343	\$4,250	\$10,200	\$10,200	\$0
100	1552	Tax Assessors	52.1270	Computer Systems	\$5,905	\$0	\$5,000	\$6,000	\$1,000
100	1552	Tax Assessors	52.2210	R & M - Vehicles	\$0	\$0	\$950	\$950	\$0
100	1552	Tax Assessors	52.2240	R & M - Service Agreements	\$178	\$188	\$1,500	\$1,500	\$0
100	1552	Tax Assessors	52.2250	R & M - Equipment	\$0	\$0	\$250	\$250	\$0
100	1552	Tax Assessors	52.3200	Communications	\$20,868	\$1,056	\$28,400	\$30,300	\$1,900
100	1552	Tax Assessors	52.3400	Printing & Binding	\$13,425	\$0	\$2,600	\$3,500	\$900
100	1552	Tax Assessors	52.3500	Travel	\$6,484	\$5,766	\$7,526	\$8,445	\$919
100	1552	Tax Assessors	52.3600	Dues & Fees	\$1,660	\$1,752	\$2,000	\$2,000	\$0
100	1552	Tax Assessors	52.3700	Education & Training	\$4,134	\$3,605	\$5,030	\$5,910	\$880
100	1552	Tax Assessors	52.3905	Fees Refunded	\$2,392	\$48	\$0	\$0	\$0
100	1552	Tax Assessors	53.1100	General Supplies & Material	\$6,652	\$1,481	\$7,200	\$7,200	\$0
100	1552	Tax Assessors	53.1270	Gasoline / Diesel	\$2,719	\$1,086	\$3,111	\$2,693	(\$418)
100	1552	Tax Assessors	53.1400	Books & Periodicals	\$2,479	\$638	\$4,190	\$4,820	\$630
100	1552	Tax Assessors	53.1600	Small Equipment	\$2,873	\$0	\$3,200	\$0	(\$3,200)
100	1552	Tax Assessors	53.1700	Other - Uniforms	\$0	\$800	\$840	\$840	\$0
100	1552	Tax Assessors	53.1750	Vehicle / Equipment Parts	\$604	\$332	\$1,425	\$1,425	\$0
100	1552	Tax Assessors	54.2200	Vehicles	\$0	\$43,072	\$0	\$0	\$0
100	1552	Tax Assessors	54.2500	Equipment	\$0	\$0	\$0	\$8,129	\$8,129
					<b>\$989,354</b>	<b>\$434,851</b>	<b>\$974,410</b>	<b>\$1,057,089</b>	<b>\$82,679</b>



**Mission, Goals and Objectives  
Fiscal Year 2018**

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Fund:	100
Department Name :	TAX ASSESSORS
Budget Unit:	1552

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**Mission Statement**

To promote integrity & professionalism in assessment administration through positive customer service, honest communication, and a willingness to listen.

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**Goals**

To continue a positive working relationship with all taxing authorities during the early stages of tax digest and budget preparation. This includes the Walton County Board of Commissioners, Board of Education, and all City agencies.

We're also committed to continuing our assistance to the Tax Commissioner's office with motor vehicle appeals

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**Objectives**

Our primary objective is to prepare the annual tax digest for submission by the September 1 deadline. This assures tax bills are issued and collections are in keeping with the budget schedule.

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**Accomplishments and Improvements  
Fiscal Year 2018**

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<b>Fund:</b>	<u>100</u>
<b>Department Name :</b>	<u>TAX ASSESSORS</u>
<b>Budget Unit:</b>	<u>1552</u>

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**1. Describe the major accomplishments of your department in the past fiscal year.**

For the first time in several years, assessment notices were mailed on time and error free. This ultimately lead to the Tax Digest being submitted and approved earlier than any year since 2010.

We also had 5 employees earn higher appraiser certifications from the Department of Revenue.

**2. Describe the major accomplishments of your department in the current fiscal year.**

Restored inner governmental relations with Board of Education, Tax Commissioner, Finance Department, and Board of Equalization. Also able to create new relationships with Clerk of Court, Planning & Development, and other county departments. In addition to this, we have reached out to the cities of Monroe, Social Circle, and Loganville.

**3. Describe the changes and improvements that you propose to make in the operations of your department in the next fiscal year.**

We completed the implementation of new aerials for the new mapping software and web site. With new aerials comes many parcel line corrections and additional mapping layers to be developed. This will enhance the county website for citizens & employees.









**Maintenance, Service, Lease Agreements and Contracts  
Fiscal Year 2018**

Fund: 100  
 Department Name: TAX ASSESSORS  
 Budget Unit: 1552

Type of Contract (service, maintenance, etc)	Vendor Name	New or Continuation for FY 2017	Number months in FY 2018	Total FY 2018 Amount	Description/Purpose of Agreement, Lease or Contract	Account #	Account Title
service	Harold Palmer	continuation	12	2,500	timber extraction	52.1230	contracted services
maintenance	GIS1.net	continuation	12	10,200	tax mapping (splits/combos, new parcels & S/D)	52.1250	mapping systems
service	GIS1.net	continuation	12	4,000	deed clarification, CUVA soil corrections, etc.	52.1230	consulting services
service	Governmental Systems Inc	new	12	6,000	conversion of assessment data/digest estimate	52.1270	computer systems analysts
service	Xerox	new	12	500	copy machine	52.2240	R&M Service Agreements
maintenance	The Gap Group	continuation	12	2,000	appraisal software dues / GAAO Dues	52.3600	Dues & Fees
service	Governmental Systems Inc	new	12	30,300	assessment notices (real property) conversion of assessment data, postage, printing, sealing	52.3200	Communications
service	Harris	continuation	12	3,500	assessment notices (personal property) postage, printing, sealing	52.3400	Printing & Binding
service	obtain quotes	new	12	1,000	Fee Appraisal	52.1230	consulting services
service	Loopnet	new	12	2,460	Commercial Sales search for appeals	53.1400	books & periodicals
service	ABOS, NADA, AIRCRAFT	continuation	12	2,270	valuation guides for boats, mobile homes, airplanes	53.1400	books & periodicals
service	Walton Tribune	continuation	12	90	newspaper subscription	53.1400	books & periodicals
service	Atlonim	continuation	12	1,000	old copy machine	52.2240	R&M Service Agreements
				65,820			

Additional Details as needed:

7,500  
 10,200  
 6,000  
 4,820  
 1,500  
 30,300  
 3,500  
 2,000  
65,820

52.1230	contracted services
52.1250	mapping systems
52.1270	computer systems analysts
53.1400	books & periodicals
52.2240	R&M Service Agreements
52.3200	Communications
52.3400	Printing & Binding
52.3600	Dues & Fees

Finance Use Only:	Date
Initial Request Received	
Initial Request Entered	
Budget Request Presented	
Recommended Budget Entered	
Review by Finance	



**Hardware and Software Request  
Fiscal Year 2018**

	<b>Check One</b>		
This hardware/software benefit, either directly or indirectly?	Entire Community	A target limited group	Government Departments
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Does this require additional training? If so, what is estimated cost?		Yes	No
		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Does it support or encourage current business and industry? If so, how?		Yes	No
		<input type="checkbox"/>	<input checked="" type="checkbox"/>
Is this request a result of a legal mandate by Federal or State law or regulation? Explain		Yes	No
		<input type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Funding Source (check those that apply):</b>			
<input type="checkbox"/>	General Fund		
<input type="checkbox"/>	Grant		
<input type="checkbox"/>	SPLOST		
<input type="checkbox"/>	Impact Fees		
<input type="checkbox"/>	Enterprise Fund		
<input type="checkbox"/>	Special Revenue Fund		
<input type="checkbox"/>	Other - Explain		
		<b>Finance Use Only:</b>	
			Date
		Initial Request Received	_____
		Initial Request Entered	_____
		Budget Request Presented	_____
		Recommended Budget Entered	_____
		Review by Finance	

**Capital Equipment Request  
Fiscal Year 2018**

Fund: 100  
 Department Name: TAX ASSESSORS  
 Budget Unit: 1552

Specify Capital Equipment requests. Add additional rows as needed.

Rank	N or R *	Capital Equipment Requested	Description	Quantity	Cost per Item	Total Cost
1	R	copier	replace current copier (2004 model)	1	8,129	8,129
2			w/XEROX W7855PT (lowest quote)			
3						
4						
5						
6						
7						
8						
Total Cost of Capital Equipment Request						8,129

\* New or Replacement

**Project Justification:**

**Funding Source (check those that apply):**

- General Fund
- Grant
- SPLOST
- Impact Fees
- Enterprise Fund
- Special Revenue Fund
- Other

Finance Use Only:	Date
Initial Request Received	_____
Initial Request Entered	_____
Budget Request Presented	_____
Recommended Budget Entered	_____
Review by Finance	_____

Walton County Board of Tax Assessors



DATE: January 25, 2017  
TO: Karen Fraser  
FROM: Tommy Knight, Chief Appraiser  
RE: FY2018 Tax Assessor Staffing Request

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The Tax Assessors office is seeking an additional Appraiser II position for FY2018. The entire county, including the cities, is experiencing growth with new construction and remodeling. I add the cities to this conversation because we are required to work their building permits the same as we do the county permits. The following will show the increase over the past year:

	<u>2015</u>	<u>2016</u>
WALTON COUNTY:	977	1140
MONROE:	455	538
SOCIAL CIRCLE:	31	44
LOGANVILLE:	296	364

We anticipate this count to continue growing. Given this scenario along with current regulations having us physically review the existing 39,000+ parcels every at least once every 3 years, the additional appraiser position would hit the ground running.

Walton County Board of Tax Assessors



DATE: January 25, 2017

TO: Karen Fraser

FROM: Tommy Knight, Chief Appraiser

RE: FY2018 Tax Assessor Budget Request

With your help, we had five employees earn higher certifications in FY2017. They were recognized for their accomplishments with promotional increases. In an effort to encourage and continue staff knowledge, we're seeking promotional increases for FY2018. The following is a list of employee names, current position/job title, current grade, and proposed position/job title, proposed grade:

<u>NAME</u>	<u>CURRENT POSITION / GRADE</u>	<u>PROPOSED POSITION / GRADE</u>	<u>*AS OF DATE</u>
Donna Youngblood	Appraiser III / grade 16	(NEW) Pers Prop Auditor / 18	07/2017
Richard Terry	Appraiser II / grade 14	Appraiser III / 16	07/2017
Julie Gattis	Dept Admin Asst / grade 12	Appraiser II / 14	08/2017
Alice Moody	Appraiser II / grade 14	Appraiser III / 16	11/2017

\*Based on Previous Year Department of Revenue Training Schedule / New schedule not available until 07/2017

\*Test/Certification Dates may alter based on new schedule

Please let me know if there's any additional information I need to provide.

## FY2018 PERSONNEL REQUESTS SUMMARY SHEET

ORIGINAL 2/8/2017

Dept #	Department Name	Request Type	Job Title	Status	Job Class	Pay Grade	# of POS	Annual Salary or Annual Difference	Benefit Cost	Total Impact	Comments
1552	Tax Assessors	Reclassification	Personal Property Auditor	F	1720	18	1	\$2,038.40	\$960.70	\$2,999.10	Reclass from Appraiser III - New Pos (Butler)
		Addition	Appraiser II	F	1711	14	1	\$23,433.84	\$12,040.31	\$35,474.15	Appraiser II due to increase demands eff 10/1/17
		Promotion	Appraiser III	F	1717	16	1	\$2,121.60	\$999.91	\$3,121.51	Promotion from Appraiser II eff 7/1/17 (Terry)
		Promotion	Appraiser II	F	1711	14	1	\$1,692.80	\$840.14	\$2,532.94	Promotion from Dept.Admin.Asst. eff 8/1/17 (Gattis)
<b>TOTAL IMPACT:</b>								\$29,286.64	\$14,841.05	<b>\$44,127.69</b>	

<i>POSITION</i>	<i>TRAINING CLASS</i>	<i>LOCATION</i>	<i>TUITION</i>	<i>LODGING</i>	<i>MEALS</i>	<i>MILES</i>
5 BOA Members 2 Staff Members	C.A.V.E.A.T.	Athens	\$2,450	N/A	N/A	\$400
4 RP Appraisers	GAAO Seminar	Macon / Unicoi	\$700	N/A	N/A	\$350
Asst Chief Appraiser	Leadership Walton	various	\$650	N/A	N/A	\$0
Appraisal Clerk	Course 1A: Assessment Fundamentals	Cordele	\$100	\$500	\$255	\$162
BOA Member	Specialized Assessments	Leesburg	\$100	\$500	\$255	\$225
PP Appraiser	Course IV: Management	Dahlonega	\$100	\$500	\$255	\$104
GIS Analysts	Intoduction to GIS	Charlotte, NC	\$1,010	\$500	\$290	\$245
2 RP Appraiser	Review of Income	Tifton/Moultrie	\$200	\$650	\$255	\$490
various	EXAMS	Atlanta	\$400	N/A	N/A	\$350
1RP Appraiser	APM / Digest Review	Macon	\$100	\$500	\$255	\$324
2RP Appraiser	Course IV: Cost Approach	Macon/Atlanta	\$100	\$500	\$255	\$325
		<b>Sub-totals</b>	<b>\$5,910</b>	<b>\$3,650</b>	<b>\$1,820</b>	<b>\$2,975</b>
		<b>TUITION</b>	<b>\$5,910</b>			
		<b>LODGE /MEAL / MILES</b>	<b>\$8,445</b>			
All of the training stated herein serves as required education standards as administered by The Georgia Department of Revenue.						



Pages	B&W/ Color	Market Code	Product Description	Purchase				Lease				
				Contract Price	Maint. Cost Per Month	1st year Maint. Cost	Subsequent Years Maint. Cost	Click Rates (Mono/Color) for Maint. Plan	36 Month Lease Cost	48 Month Lease Cost	60 Month Lease Cost	Click Rates (Mono/Color) for Lease Plan
55	Color	W7855PT	WC7855 APT Copier/Printer	\$7,161	\$0	\$0	\$0	.006/.0590	\$217.34	\$172.13	\$145.25	.006/.0590
			OFCFINRLX -Office Finisher	\$608					\$20.53	\$16.25	\$13.71	
			PROFNLFN -Professional Finisher	\$1,919					\$64.77	\$51.30	\$43.29	
			LINE1FAX -Single Line Fax Kit	\$200					\$6.75	\$5.35	\$4.51	
			LINE2FAX -Dual Line Fax Kit	\$640					\$21.61	\$17.11	\$14.44	
			EFINTSVR -EFI Integrated Network Server	\$2,636					\$88.98	\$70.48	\$59.47	
			EFIPACK -EFI Productivity Pack	\$1,663					\$56.14	\$44.46	\$37.52	
			ENVLPTRY -Envelop Tray	\$191					\$6.45	\$5.10	\$4.31	
			ETHUBKIT -Ethernet Hub Option Kit	\$396					\$13.37	\$10.58	\$8.93	
			FINLX-3HP -2/3-Hole Punch	\$160					\$5.40	\$4.28	\$3.61	
			FINLX-BM -Booklet Maker Unit	\$511					\$17.25	\$13.66	\$11.53	
			GBK -High Capacity Feeder	\$512					\$17.28	\$13.69	\$11.55	
			MCAFEIIC -McAfee Integrity Control Enablement	\$319					\$10.77	\$8.53	\$7.20	
			SA1-HID -Secure Access s/w w/ HID 125KHz Reader	\$500	\$8	\$48	\$96		\$24.88	\$21.37	\$19.28	
			SA1-INDAL -Secure Access USB with INDALA	\$500	\$8	\$48	\$96		\$24.88	\$21.37	\$19.28	
			SA1-MAG -Secure Access s/w w/ Mag Stripe Reader	\$428	\$7	\$42	\$84		\$21.45	\$18.44	\$16.65	
			SA1-MIFAR -Secure Access s/w w/ MiFare Reader	\$500	\$8	\$48	\$96		\$24.88	\$21.37	\$19.28	
			SCN2SE25 -Scan to PC Desktop 25 Seats	\$266					\$8.98	\$7.11	\$6.00	
			SCNPRO25 -Scan to PC Desktop PRO 25 Seats	\$1,352					\$45.64	\$36.14	\$30.50	
			SMARTCRD -Smart Card Kit (CAC)	\$111					\$3.75	\$2.96	\$2.50	
			SMARTRDR -Smart Card Enable w Reader (GSA only)	\$127					\$4.29	\$3.39	\$2.86	
			UNICODE -Unicode Kit	\$191					\$6.45	\$5.10	\$4.31	
			XPS-ENBL -XPS Enablement Kit	\$239					\$8.06	\$6.39	\$5.39	
			YRC -Foreign Interface Kit	\$112					\$3.78	\$2.99	\$2.52	