



## Department of Local Government Finance

### Role of the DLGF

SBOA/AIC Newly Elected Officials Training

12/12/24

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## DLGF Mission & Values

### Mission Statement

- The mission of the Department is to ensure a fair and equitable property tax system for Indiana taxpayers

### Core Values

1. Put Taxpayers First
2. Respect Local Control
3. Excellence in all that we do

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## Agenda

- Each DLGF Division
  - Staff Overview
  - Major Topics
  - Quick take-aways for NEOs

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## Assessment Division – Staff Overview

- Barry Wood – Division Director
  - 2 Statistician
  - 2 Utility Specialists
  - 8\* Assessment Field Representatives
    - One for each AIC Assessment Region
    - <https://www.in.gov/dlgf/files/maps/Field-Rep-Map-Assessment.pdf>

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## Assessment Division – Major Topics

- Providing Continuing Education Opportunities
- Proctoring Certification Exams
- State Assessed Property
  - Personal Property
  - Utility Property
- Review and Approval of:
  - Annual Ratio Studies
  - Land Order Reviews
  - Cyclical Reassessment Plans

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## Assessment Division – Quick Take-Aways

- Get to know your assessor
- Understand your tax base

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## Budget Division – Staff Overview

- Jamie Bolser – Division Director
- Miranda Bucy – Assistant Division Director
- Ryan Burke – Assistant Division Director
  
- 10 Budget Field Representatives
  - Assigned by County
  - <https://www.in.gov/dlgf/files/maps/Field-Rep-Map-Budget.pdf>

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## Budget Division – Major Topics

- Providing support for local officials/fiscal officers
- Providing education opportunities through local presentations & webinars
- Review and Approval of:
  - Annual Estimates of Revenues, Maximum Levies, LIT, etc.
  - Budget Workshops
  - Budget Checking
  - Additional Appropriations
  - Debt Submissions

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## Budget Division – Quick Take-Aways

- Your DLGF Budget Field Rep is usually the person at DLGF Auditors will interact with the most.
  - Cannot give financial or legal advice.
- Understanding your deadlines is one of the most important things you can learn in the first year.
  - <https://www.in.gov/dlgf/news-and-calendar/calendar-memos/>
- Budget Workshops are incredibly valuable if you have not been through the process before.
- Common Budget Mistakes and How to Avoid Them
  - [https://youtu.be/9eakP7\\_3rD0](https://youtu.be/9eakP7_3rD0)

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## Communications Division – Staff Overview

- Jenny Banks – Communications Director
  - 1 Administrative Assistant
  - 1 Support Specialist
- [Support@DLGF.in.gov](mailto:Support@DLGF.in.gov)
- (317) 232-3777

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## Communications Division – Major Topics

- Providing Support for Local Officials, General Public
- Tracking Continuing Education Credits and Proctoring Certification Exams
- Communication of Deadlines, Trainings, Memos, Presentations, Reports, etc.
- Working to schedule local visits, presentations, and general outreach with associations and local partners.

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## Communications Division – Quick Take-Aways

- Sign up for DLGF Emails on our website
- Sign up for a new Gateway Account
  - Official Email
  - Position
  - Unit
  - County

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## Data Division – Staff Overview & Major Topics

- Josh Jacoboski – Division Director
  - 2 Tax Data Analysts

### Main Responsibilities:

- Completing Data Compliance Reviews on
  - Sales Data, Tax Bill Data, and Assessment Data
- Status Tracking throughout the Calendar Year
- Software Certification process for:
  - CAMA Software Vendors
  - Tax and Billing Software Vendors
  - Sales Disclosure Software Vendors

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## Data Division – Quick Take-Aways

- Keep an eye on our status maps to make sure you understand if you're falling behind
- Take data compliance seriously – it can really sneak up on you and completely derail your year if you don't complete the necessary updates.

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## IS Division

- Josh Jacoboski – Division Director
  - 4 Programmers, 1 Business Systems Consultant, 1 Data Scientist, 1 IT Specialist, and 1 Quality Analyst

### **Main Responsibilities:**

- Development of Gateway Applications
- Support of DLGF Technology Resources
- Requirements Gathering from local officials
- Review and Analysis of various data sets submitted to the Department.

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## Legal Division

- Emily Crisler – General Counsel
  - Two Deputy General Counsels
- Legal staff cannot give legal advice but can answer general questions about the laws governing Indiana property taxation.
- Public information requests should be directed to the legal staff.

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