



# Worcester County Assessors Association News

[WCAA-ma.org](http://WCAA-ma.org)

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(May 19, 2016)

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## President's Message

John Valade, MAA, Worcester

The weather is not the only thing that's changing. By now, everyone should be aware of the "Proposed (5) Year Certification Cycle. If not, you should check with your "DLS" representative (or on their website) to find out what your new certification (year) cycle will be. Also, Governor Baker's Municipal Modernization Act includes (23) initiatives in (52) sections of the bill that would improve municipal government efficiency, streamline processes, and provide consistency to tax-payers. We shall see!

This year, our Education Committee is Co-Chaired by Cindy Cosgrove, and Mary Oliver, both from Auburn. The education committee always strives to provide the timeliest and up to date educational programs. Our next county meeting will be held on Thursday, April 21, 2016, at the Public House in Sturbridge, MA. The topic is the "Assessors Role After a Disaster". Our speaker for the evening is William Mitchell, RMA, MAA, and Chief Assessor, for the City of Leominster. This event is going to teach you the real nuts and bolts of assessing in a disaster. There will be a barbeque buffet being offered, along with two (2) continuing education credits for attending.

As municipal budgets get tighter, the budgeted allowance for education seems to get

*(Continued on page 6)*

Well, it is nice to have all of the spring snow melted. With spring upon us, it brings new beginnings, and renewed energy. I would like to thank our Site Committee for putting together another great time at our Annual Meeting, which was held at the Salem Cross Inn.

Congratulations and a warm welcome goes out to the associations newest Executive Board members: Jonathan Steinberg, from Westborough; and Molly Reed, from Berlin. I know they will be a beneficial and productive addition to our board.

As we face some of the challenges at the start of a new year...I hope everyone is faring well this abatement season, and that by now you have all your 3ABC's forms, Form of List, 61A's, and 38D's mailed out. It seems like we have more forms than the IRS (okay...maybe not).

Things are certainly changing! With all of the new technology and the different skills needed to do our jobs effectively, it requires us to keep abreast of all these new changes and developments by taking various workshops and classes.



# CLERKS MEETING

**Shrewsbury Town Hall**

**100 Maple St.**

**Shrewsbury, MA**

**Thursday, May 19, 2016**

**8:30 AM – 9:00 AM – Registration and Continental Breakfast**

**9:00 AM – 10:30 AM – Record Retention**

**Speaker Terry French, Secretary of Commonwealth Massachusetts Archives**

Presenting an overview of the Record Retention Laws.

**10:30 AM – 11:45 AM - Trusts – Who Should be Assessed?**

**Speaker Sean Nicholas, Esq. The Fay Law Offices, 14 Wintrop St. Marlboro, MA**

The challenges of the Assessors to discover who should be assessed, where the bill should go, where to find trustees and beneficiaries. The state exemption requirement of finding who the owner is and that the owner has sufficient beneficial interest in the domicile.

**12:00 PM to 1:00 PM – Lunch – from Napoli Deli**

**1:00 PM to 4:00 PM – Motor Vehicle Excise Abatements**

**Speaker Pam Davis, Chief Assessor Everett, MA**

MV Excise abatements, the required documentation and procedures. MV exemptions, DV plates, Veterans Exemptions, leased vehicle exemptions, and abatements.

## 6 Credits

**Registration: FREE for WCAA Members**

**\$38.00 Per Person for non-members**

REGISTRATION WITHOUT PAYMENT AND ANY NO SHOW WILL BE BILLED ACCORDINGLY. CANCELLATION – **NO REFUND**

**PLEASE REGISTER BEFORE May 10, 2016.** Checks should be made payable to: W.C.A.A.

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(508)634-2203 Ext. 224, Fax # (508)634-2200 or e-mail to: [tgonsalves@hopedale-ma.gov](mailto:tgonsalves@hopedale-ma.gov)

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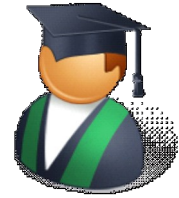
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## EDUCATION COMMITTEE REPORT

By

Mary Oliver and Cindy Cosgrove, Co-Chairs



We want to thank all the members of the Education Committee this year for getting us off to a great start. We have what we think is going to be a great slate of programs to offer this year.

On March 30<sup>th</sup> the WCAA held our Spring Workshop at the Crystal Room in Milford. We had a great attendance for this workshop. Thank you to our speakers for a very informative day.

The morning session was given by Lane Partridge. He gave a wonderful presentation on the Legislative process and the pending updates on the Public Records Bill, the Modernize Municipal Act and tax exemptions on solar.

The afternoon session was a joint effort given by Cindy Cosgrove, Jon Steinberg, Chris Reidy and Bill Ford. Cindy presented The Appeal Process, Jon spoke on Personal Property, Chris gave great presentation on Tips and Tricks using the mass.gov LA3 program to gather data and find comparables. The afternoon was topped off by a presentation by Bill Ford on How to present your case at the ATB.

New for this year, all the presentations that are given at any of our workshops and dinner meetings will be available on our new website. The link is [www.wcaa-ma.org](http://www.wcaa-ma.org) and you will find all the presentations are available on the Presentations and Publications Page. We hope you will visit the new site, and give us some ideas and comments on what you would like to see there.

Thursday, April 21 we will be holding our dinner meeting at The Public House in

Sturbridge. William Mitchell will be speaking from his firsthand experience on Assessing after a Disaster. We hope to see many of you there.

The Clerks Meeting is scheduled for May 19, 2016, and a copy of the program and signup sheet is inside your newsletter. We are pleased to be able to offer this full day workshop (including lunch) for free to our members as a thank you for all your support. Make sure you sign up early, as space is limited and will fill up early.

The next event scheduled is a Dinner Meeting on September 22<sup>nd</sup> at the Grill on the Hill in Worcester. Ellen Blanchard – Chief Assessor from Carver is scheduled to be our speaker for the meeting, and the topic is going to be Chapter 61A.

The final workshop for the year will be held on October 20<sup>th</sup> at the Wachusett County Club in West Boylston. The planned topics for the day will be Land Valuation and Residuals, Marshall and Swift Reconciliation, and Income and Cost Reconciliation.



# Annual County Meeting

## 2015



Arthur Holmes



Certificate of Achievement Awards  
Mary Lowell & Mary Oliver



Reedy Nealer  
Jean Contino & Carol Nealer



Farewell to Linda Swadel  
Congratulations on her Retirement!



Lane Partridge  
Legislature Update



## New WCAA Website

By Cindy Cosgrove

This year Worcester County Assessors Association has launched a new website. We wanted to give you a place to go for County News, copies of presentations, and a place to share information with other members.

Our website is still in the beginning phases, but we hope that you will take the time to visit our new site at [www.wcaa-ma.org](http://www.wcaa-ma.org) and share your thoughts with us, and post any comments you may have. Tell us what you would like to see.

Right now, when you visit the site you can see upcoming events, download copies of the presentations from the March Workshop, access newsletters, and access a page with commonly used links and the WCAA Bylaws. We will be adding a place soon to sign-up new assessors for newsletters, change your WCAA Contact information and in the near future are hoping to accommodate on-line signup for workshops and dinner meetings.

Also in the plans is to make a place where we can share information, forms and spreadsheets. We hope you give us some insight as to things you might like to see. If you have any ideas contact website committee Chairman [Bill Mitchell](#), Leominster or [Jonathan Steinberg](#), Westborough [Cindy Cosgrove](#), Auburn and [Lisa Berg](#), Dudley



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(Continued from page 1)

smaller. So, please don't forget, that the WCAA offers scholarships that can be used for any workshop or course that may be offered by the WCAA or MAAO. An application can be found in this newsletter. (One of our goals for this year was to develop and implement a Worcester County website for our members. I was able to form a new Website Sub-Committee whose main focus is to brainstorm and to improve the look, layout, and functionality of the county website. If anyone has any ideas regarding what they would like to see included on the site (i.e.-information, links, etc.), please let us know.

A great association is only as good as its members and volunteers. I would like to welcome all of you to consider joining the Executive Board, or volunteering for one of our committees. We are always looking for volunteers, with new and fresh ideas. As mentioned already by others, we need to recruit new members and mentors in order to keep our great association thriving.

I am confident that with everyone's help, we will have a very productive and successful year.

### **April 21, 2016—Dinner Meeting**

#### **Publick House**

**Assessors Role After a Disaster**

**William Mitchell, Leominster**

### **May 19, 2016—Clerks Meeting**

**Shrewsbury Town Hall**

**Record Retention, Terry French**

**Secretary of Commonwealth MA Archives**

**Trusts—Who Should be Assessed?**

**Sean Nicholas, Esq, TheFay Law Offices**

**Motor Vehicle Excise Abatements**

**Pam Davis, Everett MA**

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**\*\*\*REMINDER SCHOLARSHIPS ARE AVAILABLE\*\*\***

**T. M. Gonsalves**

**The Worcester County Assessors Association has available funds for scholarships. To apply you only need to be a paid member of the WCAA, the scholarships are available to new and seasoned office staff and Assessors. A community may not receive more than one scholarship in a given year. The maximum amount of any awarded scholarship cannot exceed \$450. The scholarships are available for the summer conference and the classes offered at UMASS each summer. However, a scholarship can only be used for tuition not room and board.**

**If you have a financial need for a scholarship please complete an application (found within the end of the news letter) and send the completed application to**

**WCAA Scholarship Committee  
John Valade  
Worcester Assessor's Office  
455 Main Street  
City Hall, Room 209  
Worcester, MA 01608**

**Continuing education is important to Assessors and the office staff. By attending workshops, meetings and conferences you have the opportunity to share your knowledge and experiences, as well as learning various ways to deal with some of the unique and sometimes interesting problems they we encounter.**

**The WCAA Board would like to thank all of the members for their participation in our origination.**

**WORCESTER COUNTY ASSESSORS ASSOCIATION****SCHOLARSHIP APPLICATION FORM**

The Worcester County Assessors Association Scholarship Fund was established to help Assessors or their office staff, who are members of the WCAA further their knowledge in the field of assessing when they have no funding available to them in their own budgets. These scholarships are available for all courses that offer credits towards a designation or recertification, including IAAO courses.

Scholarships cover the cost of tuition only. Scholarships are awarded during the year and are based upon financial and educational need.

**Scholarship Conditions:**

- ☐ Applicants must be employed by a town/city participating in the WCAA
- ☐ Scholarships are open to new & seasoned office staff and Assessors
- ☐ Scholarships are for course tuition only, not room & board
- ☐ Only one scholarship will be available per community
- ☐ \$450.00 will be the maximum amount an applicant will receive

Please Complete the Following:

Last Name: \_\_\_\_\_ First Name: \_\_\_\_\_ M.I. \_\_\_\_\_

Business address: \_\_\_\_\_ City/Town: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Position: \_\_\_\_\_

Home Address: \_\_\_\_\_ City/Town: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Home Phone: \_\_\_\_\_

How long have you been in the Assessing Field? \_\_\_\_\_

Do you have your MAA designation? \_\_\_\_\_

Which course do you wish to take? \_\_\_\_\_

What are the course date(s) and location(s)? \_\_\_\_\_

What is the cost of tuition/registration? \_\_\_\_\_

How much money is budgeted for educational purposes in your dept.? \_\_\_\_\_

Why do you wish to take this course, and why do you need a scholarship? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

(Attach additional sheets if necessary)

I hereby certify that the above information is accurate & complete.

Applicant's Signature \_\_\_\_\_ Date \_\_\_\_\_

Supervisor's Signature \_\_\_\_\_ Date \_\_\_\_\_

Mail to:

**WCAA Scholarship Committee**

**Attn: John Valade**

**Worcester Assessors Office**

**455 Main Street**

**City Hall, Room 209**

**Worcester, MA 01608**



## **MINUTES OF ANNUAL COUNTY MEETING**

### **December 2, 2015 (cont.)**

Bill Mitchell called the meeting of the Worcester County Assessors Association to order at 6:41 P.M. at the “Salem Cross Inn”, West Brookfield, on December 2, 2015 for President Arthur K. Holmes with 109 members registered for this meeting.

Bill welcomed our honorary guests, the family for Reedy J. Nealer Jr. and retired assessor Linda Swadel.

A motion was made, seconded and voted unanimously to accept the Minutes of the April 30<sup>th</sup> meeting as written in the December Newsletter.

A motion was made, seconded and voted unanimously to accept the Treasurer’s Report as written in the December Newsletter.

A motion was made, seconded and voted unanimously to accept the Budget for 2016

Nominating Committee Chair William Mitchell read the proposed Slate of Officers for 2016; a motion was made, seconded and voted unanimously to accept the slate for 2015.

President:	John Valade, MAA, Worcester
Vice President:	Kathleen Stanley, Paxton
Treasurer:	Teri Gonsalves, MAA, Hopedale
Secretary:	Priscilla A. Johnson, MAA, North Brookfield
Executive Board:	William B. Mitchell, RMA, MAA, Leominster Christopher R. Reidy, MAA, Shrewsbury Dan C. Brogie, MAA, Northborough Rosemary Scully, Holden Cindy A. Cosgrove, MAA, Auburn Molly Reed, MAA, Berlin Jon Steinberg, MAA, Westborough
	Past President: Arthur K. Holmes, MAA, Southborough

A “Legislative Update” was given by Lane Partridge of MAAO, who reported that the “Public Records Law” has gone through the House and is now in the Senate. This requires a response for information within 10 days, 75 days to provide the information, the first two hours of research are free and copies are 5 cents.

The Governor will file a Bill on Monday December 7, 2015 making the Recertification Cycle a 5 years cycle, anyone who is able to is encouraged to attend to show support for this bill.

Other bills are:

- Solar Tax Exemption Modernization

- Streamline Chapter Land filing deadline dates

- Create Uniformity on Tax Exemption Application due dates

- Boat Modernization Bill/An Act Relative to Marine Vessels

- The Right of first refusal for exempt properties going to taxable.

- Condominium Phase-in Bill

- Fairness and uniformity for Supplemental Real Estate Taxes

Awards Committee Chairman Cindy Cosgrove presented an honorary award to Reedy J. Nealer’s daughters. Recognition Awards were also given to Mary Oliver from Auburn, Mary Lowell from Shrewsbury and Mary Carey from Leominster for their contributions to the association.

A Special Recognition Award was given to retiring assessor Linda Swadel from Westborough for all her years of service.

Teri Gonsalves received the “Fred Grabert Award” for her exemplary service to the WCAA Executive Board.

Outgoing President Arthur K. Holmes was presented with a plaque for his service to the Executive Board and it was noted that Arthur has 50 years of service to the assessing profession.

Bill Mitchell introduced incoming President John Valade of Worcester who acknowledged Arthurs many accomplishments over the years.

John informed the association of our new Website WCAA-MA.ORG that will bring the association into the future.

John’s choice of charity is “Veterans Inc.” which helps veterans with housing, work, health, and food.

Numerous door prizes were raffled to members and the 50/50 raffle was won by retired assessor Priscilla Hogan.

With no further business, a motion was made and seconded to dissolve the meeting at 8:10 P.M.

Respectfully Submitted,

Priscilla A. Johnson, Secretary

## Treasurers Report

Treasurer - Teri Gonsalves, Hopedale

March 31, 2016

Account Balance as of January 1, 2016	\$9,107.88	
Income 1/1/2016 - 3/31/2016	\$3,704.00	
<b>Total</b>	<b>\$12,811.88</b>	<b>\$12,811.88</b>
Less Expenses 1/1/2016 - 3/31/2016	<b>\$4,744.50</b>	
Available Checking Account Funds as of 12/31/15	<b>\$8,067.38</b>	
<b>Certificates of Deposits (6 month CD)</b>		
Milford Federal Savings & Loan Association	12/31/2015	\$16,900.29
<b>Savings Account</b>		
Milford Federal Savings and Loan Association Account (opened 10/3/08)	12/31/2015	\$1,121.68
<b>Total Cd and Savings Value</b>		<b>\$18,021.97</b>
<b>Total available cash as of 3/31/2016</b>		<b>\$18,021.97</b>

## Statement - March 31, 2016

(Information Thru February 21, 2016)

Account	Income	Expense
Deposit (Fireside Feast )	\$1,065.00	
Deposit (2016 Dues)	\$1,667.00	
Deposit (March Workshop Crystal Room)	\$972.00	
John Valade (books for E-Board Members)		\$142.13
O'Connor's (January E-Board Meeting)		\$246.31
O'Connors (education meeting)		\$315.16
United States Treasury (filing fee for exemption recognition)		\$850.00
Hopedale Postmaster (mailing exemption recognition request)		\$9.43
adjustment for check # 482		\$4.00
Public House (deposit for April Dinner Meeting)		\$200.00
Crystal Room (deposit for March Workshop)		\$400.00
Grill on the Hill (deposit for September Dinner Meeting)		\$100.00
Melanson Heath (payment for preparation of tax exempt recognition forms)		\$820.00
Cindy Cosgrove (education meeting at O'Connor's)		\$224.27
Brookfield Orchards (March Workshop)		\$68.00
Crystal Room (balance for March Workshop)		\$1,365.20
<b>Total</b>	<b>\$3,704.00</b>	<b>\$4,744.50</b>



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# Worcester County Education Committee Association

## 2016 OFFICERS

**President:** [John Valade, MAA, Worcester](#)  
**Vice-President:** [Kathleen M. Stanley, MAA, Paxton](#)  
**Treasurer:** [Teri Gonsalves, MAA Hopedale](#)  
**Secretary:** [Priscilla A. Johnson, MAA, North Brookfield](#)

**Executive Board:** [William Mitchell, RMA, MAA, Leominster](#)  
[Christopher Reidy, MAA, Shrewsbury](#)  
[Cindy Cosgrove, MAA, Auburn](#)  
[Dan C. Brogie, MAA, Northborough](#)  
[Molly Reed, MAA, Berlin](#)  
[John Steinberg, MAA Westborough](#)  
[Rosemary Scully, MAA Holden](#)

**Past President:** [Arthur K. Holmes, MAA, Southborough](#)

### Newsletter Editors

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Cindy Cosgrove, Auburn [ccosgrove@town.auburn.ma.us](mailto:ccosgrove@town.auburn.ma.us)

Your Ideas and Input  
are always  
Welcome!

