



Worcester County Assessors

December 2017

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President's Message

Kathy M. Stanley, MAA, Paxton

are up to date on current events in the town. I would like to extend many thanks to all our by-law committee members, and a special thank you to Jen Sclar; she is a go to person and has such a vast knowledge of assessing and especially of W.C.A.A. She always seems to make time in her busy schedule to help us. This year she outdid herself with re-working and updating so that this organization can move forward.

We may be small, but we strive to provide educational opportunities at affordable prices throughout the year. You may have noticed we are starting to offer early bird discounts to our members for some of our events. The response so far has been positive and we may continue this in the coming year. We endeavor to implement our mission in an on-going basis, so please be forthcoming with any ideas you have for us to improve. I have rewritten the mission of our organization below.

Our mission, the purpose of this association, is to foster a closer relationship among assessors and provide educational opportunities; to foster a closer relationship among the assessors of Worcester County and their assistants; to

(Continued on page 6)

As we get older, the days just fly by faster and faster, and the older I get, the years do too. . . and this certainly has been an eventful year for everyone both here on the local level and on a global scale. The new challenges that come up that need our attention seem to be never ending. That said, I extend appreciation to all of you and your dedication, which is reflected in the camaraderie of our association. It is truly a joy to be a part of and connect with each other despite our busy lives. This year we lost one of our own with the passing of our dear Bob Elia. Bob served as the Shrewsbury assessor for 24 years and was in Oxford as the assessor before that. He was a past president here at W.C.A.A. and was very dedicated to the profession. He was truly a loved and respected man who went on to serve on the M.A.A.O. as executive director. I had the opportunity to work with him via our education committee and I know he will truly be missed by all.

This year, our by-laws have been rewritten and updated. This is done from time to time to be sure we



(Continued from page 1)

assist in creating efficient and uniform administration of local tax laws; to afford opportunity for discussion of subjects, of current developments and changes pertaining to local taxation; to provide and encourage participation in educational opportunities; to provide methods for encouraging the development of desirable tax laws; and to discourage the adoption of harmful measures, relating to local taxation or to the duties of local taxing officials. In the spirit of our mission and this joyful holiday season, I want to wish you all the best this Christmas and I look forward to a happy and healthy New Year.



****REMINDER****



Our gift baskets for our guest speakers and various raffles will be

" A Taste of Worcester County"

These baskets will now consist of goodies made by local vendors from Worcester County, for example snacks, chocolate, maple syrup, and root beer etc.

If you know of any local vendors that we could use to add to our baskets, please contact:

Mary Oliver 508-839-5335 X 1151

or

oliverm@grafton-ma.gov.

This is a great way to patronize small businesses in Worcester County.

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REPORT OF THE AUDIT BUDGET COMMITTEE

The Audit Budget Committee met Thursday, November 30, 2017 and unanimously approved the following 2018 Budget



| Account | 2018 <i>Proposed</i> | 2017 Budget | 2017 Expended | Variance | 2016 Budget |
|-----------------------------------|-------------------------|----------------|------------------|--------------|----------------|
| Executive Board | \$1,250.00 | \$1,250.00 | \$1,184.11 | \$65.89 | \$1,250.00 |
| Committee (Audit) | \$250.00 | \$200.00 | \$258.13 | (\$58.13) | \$200.00 |
| County Meeting/Workshops | \$1,500.00 | \$625.00 | \$1,930.50 | (\$1,305.50) | \$625.00 |
| Education Comm. (Joint with Site) | \$325.00 | \$500.00 | \$300.22 | \$199.78 | \$500.00 |
| Scholarships | \$1,400.00 | \$1,200.00 | \$920.00 | \$280.00 | \$1,200.00 |
| Postage | \$40.00 | \$60.00 | \$34.81 | \$25.19 | \$60.00 |
| Miscellaneous | \$600.00 | \$800.00 | \$1,546.58 | (\$746.58) | \$800.00 |
| Secretary | \$400.00 | \$400.00 | \$400.00 | \$0.00 | \$400.00 |
| Treasurer | \$400.00 | \$400.00 | \$400.00 | \$0.00 | \$400.00 |
| Newsletter Editors | \$500.00 | \$500.00 | \$500.00 | \$0.00 | \$500.00 |
| State Fees & Tax Return Charge | \$125.00 | \$400.00 | \$125.00 | \$275.00 | \$400.00 |
| Total | \$6,790.00 | \$6,335.00 | \$7,599.35 | (\$1,264.35) | \$6,335.00 |
| | | | | -20.0% | |

PROPOSED BY-LAW CHANGES

Changes Include:

COVER PAGE: *Added* date the association was established

ARTICLE I – NAME: *Added* that the association can be referred to as W.C.A.A.

ARTICLE II – PURPOSE: *Added* “to provide and encourage participation in educational opportunities” to the stated purpose of the **Association**

ARTICLE III – MEMBERSHIP, Section 1B – Regular Membership: *Revised* the definition of Regular membership to include town employees administering tax laws, and adding support staff.

Section 2C & 2E: *Added* Assessors outside of Worcester County to Associate **membership** and clarified retirees and former members are included.

Section 3: *Added* tier for Subscribing Membership to include businesses and vendors.

ARTICLE IV – VOTING RIGHTS: *Created* a section for voting rights, Regular and Honorary can vote

ARTICLE V – DUES: *Created* section for dues, Honorary Members don’t pay, and extended payment of dues from January 1 to January 15.

ARTICLE VI – OFFICERS: *Added* that officers shall be Regular Members at the time of election and throughout their term and removed “and may appoint all committees if so desired” from President duties. It is stated elsewhere.

ARTICLE VI – OFFICERS; DUTIES OF OFFICERS Section 3: *Added* Treasurer’s responsibility to file tax returns

ARTICLE VI – OFFICERS; DUTIES OF OFFICERS Section 2: *Added* Secretary’s responsibility to file reports annually with the Secretary of State

ARTICLE VII – EXECUTIVE BOARD:

Reduced Executive Board maximum additional members from 11 to 9

Added the Executive Board shall establish the compensation of the Secretary, Treasurer and Newsletter Committee Members.

ARTICLE VIII COMMITTEES: Section 1: *Removed* site committee and incorporated duties into Education Committee

ARTICLE VIII – COMMITTEES Section 2: *Further defined* legislative representative

ARTICLE VIII – COMMITTEES Section 3: *Reduced* submission of slate of officers from 30 to 20 days.

ARTICLE VIII – COMMITTEES Section 8: *Added* Newsletter Committee and responsible for design and distribution of newsletter and maintenance of association website.

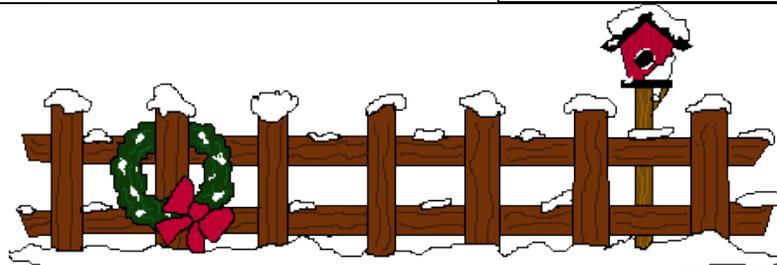
ARTICLE IX – THE YEAR Section 5: *Changed* notice of meetings from by mail to by email

ARTICLE X – OTHER PROVISIONS Sections 3 & 4: *Added* language if association were to dissolve and a saving clause if any bylaw provisions are invalid or unconstitutional then all other portions remain in full force and in effect.

[For full copy of the amended bylaws please click here](#)

Annual Income & Expense Summary 2016-2017

| <u>Income Items</u> | <u>Income Total</u> |
|--|---------------------------|
| - | - |
| Dinner Meetings & Workshops | \$8,102.50 |
| Dues 2017 (adjusted -\$54.00 counted twice) | \$3,909.00 |
| Raffle | \$155.50 |
| Reimbursement drinks at Audit Meeting | \$40.00 |
| October Workshop in 2016 collected in 2017 Fiscal Year | \$185.00 |
| Total | \$12,392.00 |
| | |
| <u>Expense Items</u> | <u>Expense Total</u> |
| Dinner Meetings & Workshops | \$10,033.00 |
| Audit Meeting | \$258.13 |
| E- Board Meetings | \$1,184.11 |
| Education Meeting | \$300.22 |
| Miscellaneous Expenses | \$1,581.39 |
| Staff | \$1,300.00 |
| Scholarships | \$920.00 |
| Why Me, Inc (from Fireside Feast Raffle) | \$155.50 |
| Total | \$15,732.35 |
| | |
| <u>Annual -Gain/Loss</u> | <u>-\$3,340.35</u> |



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*****REMINDER SCHOLARSHIPS ARE AVAILIABLE*****

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
Molly Reed
Berlin Assessor's Office
23 Linden Street
Berlin MA 01503**

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.

Click [HERE](#) for a PDF version of our application

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: Molly Reed

Berlin Assessors Office

23 Linden Street

Berlin, MA 01503

Treasurers Report

Treasurer - Teri Gonsalves, Hopedale

Information as of August 31, 2017

| | | |
|---|-------------------|--------------------|
| Account Balance as of March 31, 2017 | \$5,311.11 | |
| Income 4/1/17 to 8/31/17 | \$1,297.50 | |
| Total | \$6,608.61 | |
| | | |
| Less Expenses 4/1/17 to 8/31/17 | \$4,331.36 | \$2,277.25 |
| | | |
| Certificates of Deposits (6 month CD) | | |
| Milford Federal Savings & Loan Association (maturity) | \$16,984.96 | \$16,984.96 |
| | | |
| Savings Account | | |
| Milford Federal Savings and Loan Association Account (opened 10/3/08) | \$1,123.58 | \$1,123.58 |
| | | |
| Total CD and Savings Value | | \$18,108.54 |
| | | |
| Total available cash as of 8/31/17 | | \$20,385.79 |

Statement August 31, 2017

| Account | Income | Expense |
|--|-------------------|-------------------|
| March Meeting | \$172.50 | |
| April Meeting | \$985.00 | |
| May Meeting (free to members) | \$140.00 | |
| Public House (E-Board Meeting) | | \$221.57 |
| Chuck's Steak House (April Dinner Meeting) | | \$1,798.32 |
| Wachusett Country Club (Deposit for 11-1-17 Meeting) | | \$500.00 |
| Lisa Berg (Scholarship) | | \$195.00 |
| Kathy Stanley (Items for May's Meeting) | | \$120.74 |
| Lunch Box Catering (May Meeting) | | \$304.50 |
| Cindy Cosgrove (Laptop & Projector) | | \$616.23 |
| UMass Conference (Scholarship T Gonsalves) | | \$450.00 |
| CAN Surety (Bond Surety) | | \$125.00 |
| Total | \$1,297.50 | \$4,331.36 |



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Worcester County Assessors Association

Serving Sixty Cities And Towns

Date: August 24, 2017
To: All WCAA Members

From: 2017 Nominating Committee
William Mitchell, Kathleen Stanley, Cindy Cosgrove

The Nominating Committee brought to the table all candidates which were presented for consideration for Officer and Executive Board positions for Fiscal Year 2018. **Please provide a copy of this ballot to all members of the Worcester County Assessors Association in your office.**

The Nominating Committee would like to present the following slate of Officers and Executive Board Members at the Annual Meeting of the WCAA to be held on December 6, 2017, at the Salem Cross Inn, West Brookfield. The Committee is confident that the members chosen to serve our Association will have your full support in the coming year.

| | |
|-----------------|---------------------------------------|
| President: | Kathleen M. Stanley, MAA – Paxton |
| Vice-President: | Jonathan Steinberg, MAA - Westborough |
| Treasurer: | Teri Gonsalves, MAA - Hopedale |
| Secretary: | Donna Wentzell, MAA - East Brookfield |

| | |
|------------------|--------------------------------------|
| Executive Board: | Arthur K. Holmes, MAA - Southborough |
| | Christopher Reidy, MAA – Shrewsbury |
| | Cindy Cosgrove, MAA - Auburn |
| | Rosemary Scully, MAA – Holden |
| | Molly Reed, MAA – Berlin |
| | Tracey Tardy, MAA - Upton |
| | Mary Oliver, MAA—Grafton |
| | Bill Connor, MAA—Leominster |
| | Seth Woolard, MAA—Auburn |

| | |
|-----------------|------------------------------|
| Past President: | John Valade, MAA – Worcester |
|-----------------|------------------------------|

MINUTES OF THE ANNUAL COUNTY MEETING December 7, 2016

President John Valade called the meeting of the Worcester County Assessors Association to order at 6:40 P.M. at the "Salem Cross Inn", West Brookfield, on December 7, 2016 with 83 members registered for this meeting.

A motion was made, seconded and voted unanimously to accept the Minutes of the September 22nd 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 2017.

A "Legislative Update" was given by Jennifer Sclar, who reported that the last year has been active and gave an overview of the "Municipal Modernization Act"

Nominating Committee Chair William Mitchell read the proposed Slate of Officers for 2017; a motion was made, seconded and voted unanimously to accept the slate for 2017.

President: Kathy M. Stanley, MAA, Paxton
 Vice President: Jon Steinberg, MAA, Westborough
 Treasurer: Teri Gonsalves, MAA, Hopedale
 Secretary: Mary Oliver, MAA, Auburn

Executive Board: Arthur K. Holmes, MAA, Southborough
 Christopher R. Reidy, MAA, Shrewsbury
 Cindy A. Cosgrove, MAA, Auburn
 Rosemary Scully, Holden
 Molly Reed, MAA, Berlin
 Donna Wentzell, MAA, East Brookfield
 Tracey Tardy, MAA, Upton

Past President: John Valade, MAA, Worcester

Awards Committee Chairman Christopher Reidy presented awards to William Mitchell of Leominster, Dan Brogie of Northborough for their contributions to the Executive Board. The "Fred Grabert Award" was given to retiring secretary Priscilla Johnson.

Outgoing President John Valade was presented with a Plaque and Apple Basket for his service to the Executive Board.

John Valade introduced incoming President Kathy Stanley, of Paxton. Kathy's choice of charity is "Why Me, Sherry's House." which provides support services for families with childhood cancer.

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

With no further business, a motion was made and seconded to dissolve the meeting at 8:30 P.M.

Respectfully Submitted,
 Priscilla A. Johnson, Secretary



Worcester County Education Committee Association

2017 OFFICERS

President: Kathy M. Stanley, MAA, Paxton

Vice-President: Jon Steinberg, MAA, Westborough

Treasurer: Teri Gonsalves, MAA Hopedale

Secretary: Mary Oliver, MAA, Grafton

Executive Board: Arthur K. Holmes, MAA, Southborough
 Christopher Reidy, MAA, Shrewsbury
 Cindy Cosgrove, MAA, Auburn
 Molly Reed, MAA, Berlin
 Donna Wentzell, MAA East Brookfield
 Rosemary Scully, Holden
 Tracy Tardy, MAA, Upton

Past President: John Valade, MAA, Worcester

Newsletter Editors

Lisa Berg—Dudley lisab@dudleyma.gov

Cindy Cosgrove, Auburn ccosgrove@town.auburn.ma.us

Your Ideas and Input
are always
Welcome!

