



Worcester County Assessors Association Newsletter

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President's Message

Kathy M. Stanley, MAA, Paxton

I want to express my deepest thanks that you have extended me the privilege to serve for two years as your WCAA President! It has been an enjoyable and enlightening experience. I have gained much respect for the people who dedicate their time to help promote and deepen all our understanding of the assessment field. I mean that both on the local and state level. I hope you have been able to participate and enjoy the offerings this year as much as we did. There are a lot of these opportunities, however I have found the camaraderie and support exceptional and truly worth the effort to attend when you can.

I am including again below the mission of our organization, of which we are all a part of. I have heard that Worcester County is known to have excellent educational opportunities and we will strive to live up to and continue that trend, and at the most affordable prices we can offer. The early bird discounts have continued to be a success and benefit for our members. We endeavor to implement our mission in an on-going basis, so please be forthcoming with any ideas you have for us to improve.

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 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.

Please remember we are here for you and always ready to hear any thoughts, comments or suggestions. I am pleased that this year we have acted on past suggestions of an alternative meeting place for our annual meeting. Although I love the Salem Cross Inn as much as many of you do, it is admittedly quite a hike for a lot of the county. We have enjoyed many good years there and so it was time to open it up to another geographical

(Continued on page 2)

area for others to come. It was a lot more challenging than we thought to match what they offer so I hope you can show your support and enjoy the new venue at the Castle Restaurant in Leicester. Hey change is good, and we can always go back one day!

I know we are all in our busy season now with valuation, new growth and tax rates to be approved and bills to get out in the mail! Perhaps you are in a certification year and even busier than usual, but the benefit of entering into the five-year cycle is good!

Lastly, I want to extend again my thanks and appreciation for your support and wish you all the best this Holiday season and a Happy and Healthy New Year.

Merry Christmas



****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@graffton-ma.gov.

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

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Education Committee Report

By Jonathan Steinberg, Education Chairman



This year we danced around the complex schedules of the MAAO and the Northeast Regional Assessor's Conference in Quincy to provide our members with quality education opportunities. While there was one less program than in past years, I think the quality of the programs resulted in high attendance and a good year advancing the education of our members.

For our Spring Symposium, we fought Mother Nature at the Leicester Country Club. We had attendees from as far as Somerville, Peru, and Yarmouth. Unfortunately, due to the weather, Alycelee Pigman from Tisbury was the only person who couldn't make it due to the Ferry. John Valade began the session discussing commercial data collection. Always the gentleman, he was gracious when his time was cut a bit short to accommodate Mike Tarello's schedule. Mike Tarello, covered Commercial Field Review and data evaluation. After lunch, Don Gorton from Department of Revenue Bureau of Municipal Finance Law gave an in-depth explanation into personal property corporate classification. Don demystified any confusion between types of corporations and what assets are taxable. His years of experience with the DLS and as a former Appellate Tax Board Commissioner offered fantastic insight into some of the historic cases that clarified why a company that chops lettuce can be a manufacturer....

Once again, we were pleased to be able to offer a Clerk's Workshop free for members. This year's meeting was held in May at the Grafton Police Station. Mary Oliver and Cindy Cosgrove tag teamed the morning covering a wide range of topics from exemptions, deferrals, motor vehicle excise as well as the different clauses for exemptions and local options available to change eligibility requirements. Also discussed was tracking and maintaining databases and

folders for important documents such as Income and Expense, Exemption and Abatement Applications as well as Chapter 61, 61A and 61B Applications. For the afternoon, we were pleased to have Debra Gremo, the Clerk from Auburn, for the afternoon to cover the Open Meeting Law and best practices for minutes. This was followed by a discussion about the specifics of Assessor's records and what is and isn't public record.

We wrapped up the year with a full house at Chucks Steakhouse in Auburn for a Dinner Workshop with Sean Nicholas Fay, Esquire giving a presentation about trusts as they relate to ownership and exemptions. Sean provided great insight into the different forms of trusts and types of documentation that exist in the formation of each. The attendees came ready with questions and hopefully left with a clearer understanding of ownership rights as they relate to exemption qualification.

I'd like to thank Kathy Stanley for her leadership, Cindy Cosgrove for her help in coordinating the site for the Chuck's Dinner, Bill Connor for his excellent work coordinating the Leicester Country Club, Mary Oliver for her arrangements at the Grafton Police Station and the entire Education Committee and Executive Board for all of their work and assistance over the year.

I'm looking forward to going Medieval this year at the Castle!



Legislative Report 2018

Annual Meeting

This past year has been an active year legislatively and was the end of the two year legislative session. The MAAO had filed six bills and although none of them passed a lot of progress was made informing the legislature of needed change.

We made great strides on the re-write of clause 45 (the Solar Exemption) S1615 passed the Senate and made it all the way to the Third reading Committee in the House, where it got stuck. This bill will be re-filed for the next session along with all our bills.

The list of the bills to be refiled is as follows:

SOLAR TAX EXEMPTION MODERNIZATION

STREAMLINE CHAPTER LAND FILING DEADLINE DATES (revaluation and recertification)

BOAT MODERNIZATION BILL/ An Act RELATIVE TO MARINE VESSELS

RIGHT of FIRST REFUSAL FOR TAX EXEMPT PROPERTY

CONDOMINIUM PHASE-IN BILL TAX INCREMENT FINANCING REFORM BILL

In addition to the above list, the MAAO Legislative Committee has looked at a list of ideas for change from Assessors across the commonwealth. They have chosen to submit 6 proposals as bills to add to the six re-files.

The list of new bills to be filed is as follows:

Property Access Bill

Salary increase based on all three MAAO designation

Reduction of the ATB interest rate

Increase the Apartment 38D fine to \$250

A local option Senior Means tested Exemption

Electric Filing of required forms

Please be looking for a summary of these bills to be released soon.

The MAAO Legislative Committee is also planning another day on the Hill for May 8th. This is a lot of fun and if you have never been to the State House this is a great opportunity to come in with a group to do a little promotion of our bills. Please save the date and plan to come in to Boston.

There was one bill that was passed this session that does affect the Assessing world and it was the Brave Act (S2632). This bill was primarily focused on benefits for Veterans, but it did change some of the rules for the clause 22 exemptions.

It changes the eligibility from 5 years in state to 2 years.

Allows a local option to increase the Veterans exemption up to the cost of living adjustment.

Adds POW's to qualify for the 22 exemption

By Local option it allows Municipalities to allow a clause 22 exemption to property owned in trust for a veteran.

Gives parents of in Service and Veterans who died as of a result of an illness or injury, a full exemption. The same as 22D, but for Parents.

We are hoping that the DOR will release an IGR on this bill soon.

Thank you

We at PCAA would like to thank the Legislative committee members of the MAAO who work so diligently on our behalf, a big thank you also needs to go to the MAAO's Legislative Agent, Charlie Stefanini. The access he obtains for the Assessors at the State House is amazing. With his help all Assessors are recognized as the experts in local taxation on the Hill and many legislators contact us



MINUTES OF THE SPRING SYMPOSIUM MEETING **March 22, 2018**

Due to a snow storm, the Spring Symposium at the Leicester Country Club was postponed until 10:00 AM. Kathy Stanley called the meeting to order at 10:00 AM.

A motion was made by Jonathan Steinberg and seconded by Kathy Stanley to accept the Minutes of the December 6, 2017 meeting. All were in favor.

John Valade gave a short presentation on Commercial Data Collection. Lunch was then served. Mike Tarello gave a talk about the Commercial Field Review –Data evaluation and consistency.

The motion was made and seconded to dissolve the meeting at 3:00pm

Legislative Report

November 2018

T. M. Gonsalves

The 2017-2018 Legislative Session will be ending in December and the new two-year session will begin in January 2019.

The Legislative Committee will be resubmitting 5 to 6 bills if not approved during this session, ***yes there is still a small window of time for approval.*** The bills to be resubmitted will include the solar bill, the chapter land bill, the boat bill, the right of first refusal, the condominium phase in bill (some language changes) and the tax increment reform bill.

The committee is reviewing additional bills for the upcoming session which include language for Chapter 59 §2A for Assessors to enter onto property after reasonable notice to collect physical and functional data (not to include entering buildings) to establish fair cash value and such entry would not be considered trespassing, a bill giving communities the option to approve additional compensation to an assessor or assistant assessor who has been awarded a designation certificate by the IAAO or MAAO, a bill to reduce the interest rate earned to 4% when an ATB case is continued, a bill to increase the 38D fee from \$50 to \$250 on residential property if requested information is not received, a bill to allow electronic filing of certain forms used in property valuation and a bill (local option) for a senior property tax exemption based owners prior years income making them eligible and receiving the circuit breaker income tax credit.

Lane Partridge, the Chair of the Legislative Committee will be speaking at WCAA's annual meeting on December 5th regarding the various bills currently on the Hill and proposed bills for the next session.

I would like to thank my fellow members of the Legislative committee for the work they continue to do for the Massachusetts Assessors and the communities we serve.

Wishing all a season of happiness and joy



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 on WCAA's web site www.wcaa-ma.org) and send the completed application to the address listed at the bottom of the application. The on line application is a fillable form.

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.

Education is not only important to the members, it is also important to the public. Education and updated information helps make our jobs easier.

REPORT OF THE AUDIT BUDGET COMMITTEE

The Audit Budge Committee met Thursday, November 7, 2018 and unanimously approved the following 2019 Budget

Account	2019 Proposed	2018 Budget	Amount Changed
Executive Board	\$ 1,250.00	\$ 1,250.00	
Audit Committee	\$ 300.00	\$ 300.00	
County Meeting/Workshops	\$ 2,300.00	\$ 2,300.00	
Education/Site Committee	\$ 500.00	\$ 500.00	
Scholarships	\$ 1,500.00	\$ 1,500.00	
Postage	\$ 60.00	\$ 60.00	
Miscellaneous	\$ 1,250.00	\$ 1,500.00	(\$250.00)
Secretary	\$ 500.00	\$ 500.00	
Treasurer	\$ 500.00	\$ 500.00	
Newsletter Editors	\$ 500.00	\$ 500.00	
(This is split between 2 people)	\$ 125.00	\$ 125.00	
State Fees & Tax Return Charge			
Total	\$ 8,785.00	\$ 9,035.00	(\$250.00)



Income and Expense

Information as of October 31, 2018

Account Balance as of September 1, 2018	\$2,266.13	
Income 9/1/2018 - 10/31/2018	\$1,755.00	
Total	\$4,021.13	
Less Expenses 9/1/2018 - 10/31/2018	\$3,352.98	\$668.15
Available Checking Account Funds as of 10/3/18	\$668.15	
Certificates of Deposits (6 month CD)		
Milford Federal Savings & Loan Association	10/31/201	\$12,020.47
Savings Account		
Milford Federal Savings and Loan Association Account	10/31/201	\$5,342.47
Total CD and Savings Value		\$17,362.94
Total available cash as of 10/31/2018		\$18,031.09

Account	Income	Expense
October Dinner Meeting	\$1,755.00	
Postmaster Hopedale Stamps		\$10.00
Chucks Steak House (balance of October Dinner Meeting)		\$1,798.22
Cindy Cosgrove (co-editor)		\$250.00
Lisa Berg (co-editor)		\$250.00
Donna Wentzel (secretary)		\$500.00
Teri Gonsalves (treasurer)		\$500.00
Mary Oliver (items for gift baskets)		\$44.76
Total	\$1,755.00	\$3,352.98





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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



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Worcester County Assessors Association

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Date: November 8, 2018
To: All WCAA Members

From: 2018 Nominating Committee
William Mitchell, Helen Townsend, John Valade

The Nominating Committee brought to the table all candidates which were presented for consideration for Officer and Executive Board positions for Fiscal Year 2019. **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 5, 2018, at the Castle Restaurant, Leicester. The Committee is confident that the members chosen to serve our Association will have your full support in the coming year.

President:	Jonathan Steinberg, MAA, Westborough
Vice-President:	Mary Oliver, MAA, Grafton
Treasurer:	Teri Gonsalves, MAA, Hopedale
Secretary:	Donna Wentzell, MAA, East Brookfield

Executive Board:	William Connor, MAA, Leominster
	Seth Woolard, MAA, Auburn
	John Valade, Worcester
	Arthur K. Holmes, MAA, Southborough
	Christopher Reidy, MAA, Shrewsbury
	Cynthia Cosgrove, MAA, Auburn
	Rosemary Scully, MAA, Holden
	Molly Reed, MAA, Berlin
	Tracey Tardy, MAA, Upton

Past President:	Kathleen Stanley, MAA, Princeton & Paxton
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Worcester County Education Committee Association

2018 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
- Tracey Tardy, MAA, Upton

Past President: John Valade, MAA, Worcester

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

Your Ideas and Input
are always
Welcome!

