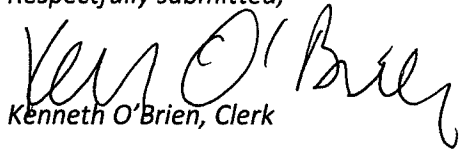


EXECUTIVE SESSION MINUTES OF MEETING-----FEBRUARY 12, 2024

The Board discusses a phone call Chairman Rudden received from the Selectboard Chairman Michael Merolli regarding the retirement of Principal Assessor Jean Berthold and Chairman Merolli's desire to have the Office of the Assessors restructured.

Motion made by Ken and seconded by Kevin to replace the Principal Assessor with a full-time Principal Assessor and leave the structure of the Assessor's office as is. Roll Call vote, O'Brien, aye, Rudden, aye.

Respectfully submitted,


Kenneth O'Brien, Clerk

MINUTES APPROVED: 2/29/2024

W/ATTACHMENTS

The Board of Assessors recently met to discuss whether the upcoming retirement of Principal Assessor Jean Berthold offers any opportunities to change how we currently operate.

At this time, our Board plans to keep the status quo. Bear in mind that – under Massachusetts General Laws and Department of Revenue (DOR) regulations – the Board of Assessors is legally responsible for all mandated Assessing responsibilities in the Town, no matter who performs them.

In essence, our position is, “Why fix something that isn’t broken?” with the department charged with bringing in the largest portion of the Town’s annual revenues. We don’t think it’s right to short-change the town’s long-term financial health for a short-term budget fix. We also know that, once you lower budget line items, Proposition 2 ½’s limits make it almost impossible to restore them.

Please understand that we have been preparing for Ms. Berthold’s eventual retirement for the past several years – giving us time to explore and consider a variety of potential options in great detail.

Here are our comments on various options:

- **Outsourcing:** At this time, there is only one company in Massachusetts (Regional Resource Group of Leominster) that takes over the day-to-day operations of Assessing departments. RRG’s “pitch” to municipalities is that outsourcing will save them money on employee insurance and retirement costs.

However, in practice, RRG lacks sufficient trained staff and rarely provides personnel on site to serve the public. Instead, it offers a video kiosk for taxpayers to communicate with a remotely located person serving multiple communities. Its client municipalities also need to have a local employee who must be trained enough to provide limited services.

Assessing involves a great deal of personal contact with taxpayers. To outsource the majority of the department's operations would short-change the public.

- **Partial Outsourcing:** Mendon already does this to the extent that it can. Most municipalities of Mendon's size outsource their annual mapping and GIS requirements. Mendon does so through the Central Massachusetts Regional Planning Commission. Several years ago, Board of Assessors' members transferred the majority of our individual stipends to fund the outsourcing of the property inspections we used to do to Paul Kapinos & Associates, our CAMA (Computer-Aided Mass Appraisal) software vendor. Beyond these functions, there is nothing else that can be outsourced.
- **Part-Time Principal Assessor/Party-Time Clerk:** The DOR's recent analysis of Mendon's financial departments suggested looking at a part-time Principal Assessor supported by a general financial clerk as a possibility once the current Principal Assessor retires.

This recommendation was based on the supposition that the Town would not be able to hire a trained, competent Principal Assessor. We find this to be the case only in municipalities that are not offering competitive salaries. Based on the initial interest in replacing Ms. Berthold – now that word of her pending retirement is circulating – we are not finding this to be the case. It seems premature to look at this idea unless we lack people applying for the position.

In addition, the idea of having a general financial clerk handle the day-to-day public inquiries – while being assigned other daily duties – raises the possibility of not having a trained person who could only offer limited services.

It's important to note that prior to Ms. Berthold, Mendon's Assessing department was supported by a part-time clerk. Surrounding municipalities have at least a full-time clerk supporting their Assessing departments. Many have several employees.

- **Regionalization**: Part of Governor Maura Healey's proposed Municipal Empowerment Act would allow regional Boards of Assessors.

A recent presentation by the DOR to members of the Massachusetts Association of Assessing Officers (MAAO) explained that this bill primarily was designed for the western Massachusetts towns that have part-time assessors who serve more than one town – with the aim of having these assessors report to only one board, not to multiple boards. (There are two municipalities in eastern Massachusetts that are regionalized, but together, they have one Principal Assessor, each town has an Assistant Assessor and each town has several staff members.)

We are not aware of any towns near Mendon that would be interested in regionalizing their Assessing functions. Neighboring Blackstone's Principal Assessor is retiring at the end of March, but that town is not interested in regionalizing. Most towns surrounding Mendon (and Mendon) have enough numbers of parcels to assess that warrant having their own full-time assessor.

Also, the DOR's presentation to the MAAO included the DOR's expectations that regional board members would be trained o the same level as Principal Assessors.

- **Elected vs. Appointed Board of Assessors:** The DOR's recent analysis of Mendon's financial departments suggested changing the Board of Assessors from elected to appointed. Again, the DOR's rationale was that towns would not have anyone running for the position.

We do not see that happening in Mendon. People have always run for the elected position and then completed the DOR-required education. In addition, having an elected board provides a check-and-balance with the remainder of Mendon's financial officials – all of whom are appointed by the Select Board.

Going forward, we plan to advertise the Principal Assessor vacancy in April, conduct interviews in May and appoint someone in early June. This schedule will give the person chosen enough time to give notice to their existing municipality, negotiate a contract with our board and start in Mendon with a three-week overlap with Ms. Berthold.

Principal Assessor

The Town of Mendon seeks qualified and motivated applicants for the position of Principal Assessor. Responsibilities include professional, administrative, supervisory and technical work related to the enforcement and interpretation of Massachusetts Department of Revenue regulations pertaining to property tax assessment; abatements and exemptions, Chapter 61, 61 A and 61B properties; valuation of real and personal property; and, analysis of deeds, plans, ownership information and other data. Conducts field inspections, measures buildings, inspects interiors of structures and reviews market data to determine value. Applicants should have a strong understanding of mass appraisal standards and procedures, and Appellate Tax Board hearings. Candidates must have a working knowledge of GIS and the ability to manage contracted resources. Must have superior technical, analytical, and written/verbal communication skills, with the ability to communicate complex matters in a tactful and courteous manner to residents, both in person and using all available media sources. The Principal Assessor must be able to work alone, without clerical support. This position is hired by, and reports directly to the elected Board of Assessors for implementing and maintaining policies/procedures. Must be able to work cooperatively with the Town Administrator and Finance Director as a key member of the Town's financial team.

Qualifications: A minimum of 10 years of experience in real estate and personal property assessment and/or the appraisal of real and personal property. Must be a Massachusetts Accredited Assessor (MAA) and possess a valid motor vehicle operator's license. Must be able to use the Microsoft Office suite of applications. Ability to post information on the Town's website and familiarity with the PK Systems CAMA software is desired.

Salary Range: \$60,000 to \$80,000, based on experience.

To Apply: Submit a cover letter and resume in .PDF format to: Jennifer O'Neill
(insert e-mail) or mail/drop off to Human Resources, 20 Main Street, Mendon, MA
07156. Deadline for submissions is May 9, 2024. EOE/AA/ADA