



**STATE OF MAINE CHAPTER  
INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS**

**Executive Board Meeting  
April 18, 2024 - 10:00 a.m.  
Council Chambers Gray Town Hall, 24 Main St, Gray**

## **MINUTES**

**Members Present:** President Darryl McKenney; Vice President Joe St. Peter; Secretary Barbara Brewer; Treasurer Clinton Swett (remote); Past President Karen Scammon; Executive Board Members Natalie Andrews, Lauren Asselin, Terry Duff (remote), Kerry Leichtman, Brent Martin, and Amber Poulin. Bonnie Baker and Bill Brunelle were also in attendance.

**Members Absent:** None

Darryl called the meeting to order at 10:06 a.m.

**Secretary's Report:** Joe moved to accept the minutes of the February 1, 2024, meeting as written. Natalie seconded the motion. All were in favor and the motion passed.

**Treasurer's Report:** Clint reported a current balance of \$14,361.33 in an earlier email to the Board. Kerry moved to accept the Treasurer's Report. Amber seconded the motion. All were in favor and the motion passed.

### **Standing Committee Reports**

- **Education:** Natalie provided a summary of the survey responses to our March 7<sup>th</sup> Chapter meeting. There were 37 responses; comments included positive reviews for venue, food, and educational sessions with a couple of those who weren't fond of the food and one who wasn't satisfied with the location. The feedback from the Board was very positive, both Karen and Joe remarked that the topics were timely and well presented. Natalie asked the Board to look at the suggested topics from the surveys and think of anyone who might be knowledgeable and willing to speak at a future Chapter meeting. Joe did suggest that Gary McCabe (from Massachusetts) might be willing to present a session on Marshall and Swift as he taught two sessions (commercial and residential) on Marshall and Swift at Property Tax Institute a few years back. Natalie also suggested that upcoming legislative changes be incorporated into future educational sessions. There was some discussion regarding changes to veteran's property tax exemptions and the valuation of land in tree growth programs.

Amber asked about the Chapter meeting's final cost compared to the revenue received. Barbara replied that she took the cost of the venue from Clint's Treasurer's report, added in the cost of gift cards, and subtracted the fees received, and figured the loss to be around \$1,012. This is an improvement over last year; Natalie did a good job of keeping costs down.

- **Legislative:** Karen asked about the status of proposed changes to the open space program. Bill stated the proposed bill was before the appropriations committee. Kerry mentioned that there are aspects of this proposed legislation that don't make sense, such as shifting the approval for open space applications to the State's Department of Agriculture and away from the assessor. Joe mentioned that

this would be problematic as open space applications often contain errors that must be resolved by the assessor prior to approval. The State may not have the ability to distinguish and resolve those errors. Karen wondered whether current beneficiaries of the open space program would be able to meet new qualifications, if passed, and whether they would be subject to a withdrawal penalty if they no longer qualified for open space.

Bill further mentioned that there was a proposed bill to allow municipalities to create their own senior tax relief program (since property tax stabilization was withdrawn last year). Some municipalities already have these programs for seniors who are 65 and older.

- **Membership:** Barbara reported that there are currently 151 members of the Maine Chapter, some recent renewals occurred due to attendance at the March Chapter meeting. Darryl inquired about how many of those members are also IAAO members and Barbara estimated about 35 at last count but cautioned that many members leave that question blank on the application.

Kerry asked about the past practice of offering free one-year memberships to new CMAs and whether we receive a list of those who had recently passed the exam. Barbara has not mailed letters with that offer since she took over as Secretary. She has not yet been able to obtain a list of new CMAs and their addresses. She will, however, provide a free one-year membership to any new CMA who asks about this benefit. Bonnie stated that she does provide a list of new CMAs to Joe as the Communications Chair. Barbara asked Joe if the Communications Committee could take on the task of offering new CMAs a one-year membership and he agreed.

- **Audit:** Nothing to report
- **Nominating:** Nothing to report
- **Communications:** Joe circled back to the discussion of offering a free one-year membership for new CMAs and whether we should make that offer to individuals who were members before passing their CMA exam. The consensus on the Board was that the free one-year membership should be offered to anyone who passes the exam, regardless of whether they have previously been a member of the Maine Chapter.

Joe plans to issue the next newsletter at the end of May. He had too many items for the last newsletter, so he has unprinted articles for this upcoming newsletter. Joe is also working on the membership directory for the website. He plans to reach out to members who have indicated that they are willing to be on the membership list and ensure they are still interested in participating. He would like to add a short bio and headshot, if desired, for each participating member. Karen asked if there would be a place to advertise open positions, and Joe thought he could perhaps find a way to work that in. Karen suggested, since we are now capable of remote participation in our meetings, to invite Kyle, our webmaster, to attend Board meetings since some of our discussions pertain to keeping the website current.

### **Sub-Committee Report**

- **IAAO Representative:** Kerry mentioned that he just missed the last remote IAAO representative meeting, but he will watch the recording of it and report back. Joe mentioned that he recently spoke with Bill Healey and he indicated that the IAAO Board intended to meet in Portland this August and that

general members will be encouraged to attend. Karen pointed out that IAAO designation informational meetings are offered through the IAAO. The next scheduled informational session is in June for those that are interested. Karen further mentioned that the IAAO has an online informational session for those planning to attend the National conference in Denver (scheduled for August 25-28). Karen suggested that promoting these opportunities, such as through listserv, might be helpful to members. Joe pointed out that the IAAO has an active presence on social media and Bill Healey has been prominent in their posts.

### **Ad Hoc Committee Report**

- **History:** Nothing to report

### **Old Business**

- **ME Chapter IAAO: Tax Exempt Status Certification**

Clint is currently working on filing for the tax-exempt status certification for the Chapter. He reached out to Linda Lucas at the State who referred him to an online application that appears to be well hidden on the State's website. Clint will reach out to Linda again for assistance in finding the application, and from there he should be able to file our request for a tax-exempt certificate.

- **Proposed By-Laws Amendments**

Joe wants to make it clearer in the by-laws that remote participation is allowed and submitted proposed edits to sections 2.3 and 3.4 for that purpose. Barbara suggested edits designed to clarify the by-laws with regard to the timing of stipends to Board members (this was actually a Board approved item from December 11, 2015, but was never incorporated into the by-laws) and a further edit to include the website administrator as stipend eligible in section 4.9 (this stipend has been established for many years, just not documented in the by-laws as other Board positions).

Darryl asked the Board whether the dollar amount of the stipends should be documented in the by-laws. Natalie stated "no" as the by-laws establish policy not procedure. Clint pointed out that the Treasurer's report presented at the annual meeting includes the amount of each stipend as agreed to by the Board so there is transparency for Chapter members. As a point of information, the stipend amount of \$500 for each eligible position (currently- education coordinator, newsletter editor, secretary, treasurer, and website administrator) was established in or before 2012.

Joe moved to accept provisional amendments to the by-laws as written, Kerry seconded. All were in favor and the motion passed. The proposed changes to the by-laws will be presented for Chapter approval at the annual meeting in November.

### **New Business**

- **MAAO List Serv Cost Increase**

Darryl received a request for contribution from the current President of the Maine Association of Assessing Officers, Lewis Cousins. The MMAO was recently informed of a substantial increase in charges for listserv services. The annual cost beginning this month will be \$1,800 for service maintenance and

tech support and Lewis was wondering whether other assessing groups would be willing to contribute to this new cost. Karen asked if there are other options for providing listserv services since this appears to be a dramatic increase of \$1,300 per year, and Kerry noted that there are other options available. Joe pondered whether the ME Chapter should consider contributing since the MAAO includes the benefit of listserv services when collecting membership fees and if we contribute using our membership fees, then would that be fair to our members (who are often members of the MAAO and CMAAO as well). Natalie asked about the cost of data migration and if this cost will be recurring. Joe asked if the cost for tech support is based on the actual cost of assistance or if it's only billed as it's used. Kerry put forth that the ME Chapter would need to receive some benefit from a financial contribution. All agreed that more information is needed before a financial commitment is made. Joe will discuss other possible listserv type services with Kyle. Kerry agreed to reach out to other State chapters to see what services they use. Darryl will ask Lewis about a group meeting with the other assessing associations to see if we can gain insight and get ideas. We will keep this item on the agenda.

While not "new business", Amber received an inquiry from Judy Mathiau's assistant on how we could recognize Judy's commitment to mentorship over the years. Joe mentioned he will be including Judy in his assessor "hall of fame" to celebrate her many accomplishments.

Bonnie mentioned that MRS is sponsoring a weeklong IAAO class (601, Cadastral Mapping-Methods and Applications) from October 21-25<sup>th</sup> in Brewer (Maine). She also reminded the Board that the Property Tax Institute will take place on June 4<sup>th</sup> and 5<sup>th</sup>.

Darryl circulated a Lincoln County property fraud alert flyer. Many counties are providing a service that alerts a property owner if a deed is filed at their registry of deeds transferring property in their name. Darryl also distributed a notice concerning intertidal rockweed ownership and prohibition of harvesting rockweed. Apparently, there is an ongoing dispute in Waldoboro between the owners of a property and sea weed harvesters.

The next meeting is the Chapter meeting will be May 16, at the Paris Town Office as Natalie is hosting.

Joe moved to adjourn the meeting, and Amber seconded. All were in favor. The motion passed and the Board adjourned at 11:13 a.m.

Respectfully submitted,

Barbara Brewer, Secretary