Minutes of the Enfield BAA
Special Meeting
July 2, 2022
Draft

Chairman Tyler called the meeting to order at 10:00 am

1. **Roll Call**: Tom Tyler, Donna Dubanoski and Lori Longhi were present.

Additionally, two members of the public were present.
One introduced himself as James Tallberg, Town Attorney

2. **Minutes.** No minutes were discussed or approved.

3. **Correspondence**:

   a. **Alaimo Family LLC Appeal**. The Chairman Thomas Tyler brought up correspondence dated June 10, 2022, addressed: "Chairman, Board of Assessment Appeals" mailed to "820 Enfield Street, Enfield, CT 06082" from Charles Alaimo on behalf of Alaimo Family LLC regarding a PA 490 Appeal for forest land on Weymouth Road. Someone in the Tax Assessor's office apparently intercepted and opened that mail, reviewed an enclosed Appeal, then sent appellants a denial letter, all without the knowledge or consent of the BAA or its Chairman, either before or after, the above-described actions by the Tax Assessor's office. The chairman only discovered this action because he received a copy of the denial letter. It appears that the Tax Assessor continues to usurp BAA's statutory authority without consequences from his superiors. The Chairman briefly described this appeal and distinguished it from the Romano Appeal in that it was filed well beyond the time for the BAA to hear, deliberate and decide appeals, which ended on May 31, 2022. This appeal is clearly different from the Romano appeal which involved an exception to the doctrine of equitable estoppel. This appeal clearly appears to be outside our time frame to conduct a hearing, etc..

Donna Dubanoski made a motion, seconded by Lori Longhi to authorize the chairman to contact the family, investigate further to see if there was any additional evidence supplied or introduced that was not in our packet. Motion Passed Unanimously.

   b. Donna presented what appeared to be the **Resume of Tax Assessor**, consisting of 4 pages given to her to her by a resident who requested anonymity. Chairman Tyler asked her to validate that this document is what it purports to be and was obtained properly. Donna said she will do that and, if confirmed, then it will be added in as correspondence.

c. **Certified Connecticut Municipal Assessors Special Meeting** document which Donna said was given to her to her by a resident who requested anonymity. It appears to concern information regarding failing exams for certification status.

d. **Town's limited list of attorneys or law firms specializing in tax appeals.** Lori Longhi stated it was mentioned at the last council meeting there was a limited number of attorneys - she thought they mentioned three specializing in tax appeals. Lori went to the judicial site to look at random towns that had tax appeal cases. She produced a list consisting of firms such as:

Murtha Cullina LLP
Fitzpatrick, Mariano
Santos, Sousa PC
Rome McGuigan, PC
Attorney Thomas A Kaelin
Wiggin and Dana LLP
Ciulla & Donofrio, LLP
Greene Law, PC
Pullman & Comley
StangerLaw, LLC
Locke Lord, LLP
Suisman Shapiro
Berchem Moses PC (which is whom the town manager and town attorney picked)
Cohen & Wolf PC
Updike Kelly & Spellacy PC
Halloran & Sage LLP
JA Morgan Law, LLC
Attorney Gergory Sachs

All were quickly found searching tax appeal cases or internet inquiry. Lori's opinion was if this is what could be found in a few minutes we should have it in our correspondence section so it could be out there for other people to be aware. It seems that there are more qualified lawyers than the three attorneys that were on this short list.

Chairman Tyler made a motion that Lori Longhi be authorized as a BAA member to give the list to the council members as an additional pool of what appears to be qualified attorney or law firms. Seconded by Donna; Passed Unanimously.

4. **Discussion and Possible Vote on BAA's role regarding Post-Report/Supplemental Report regarding attorney selection process** for either

(a) Town Council-led investigation into town administration as per the Town Charter: or

(b) Town Administration – led investigation into the town administration; and,

(c) BAA's role going forward to best maintain the integrity of its statutorily assigned duties while participating in a fair, impartial, transparent inquiry to be conducted with the best interest of the taxpayers, property-owners, and Town of Enfield in mind.

The chairman wanted to bring the BAA up to date since our last couple of meetings on the issue of retaining an outside attorney to represent BAA interests since there were obvious conflicts of interest the town attorney has in representing the tax assessor and the BAA. Also, among other reasons why an independent counsel became necessary for BAA, town attorney is intimately involved with the town manager insofar as defining or trying to define the scope of review or investigation of assessment process or whatever they want to call it. In checking to find an attorney to meet the qualifications that we are looking for in terms of providing the BAA with an independent advisor to protect BAA's interest Tom found Attorney Rachel Baird, conversed with her and related that she is very experienced in this area. She has represented clients in board of assessment appeals matters, tax assessor and Vision litigation matters. She is exceptionally experienced in this area. Tom retained her subject to our approval so she is ready, willing and able to assist the board immediately. The fee she has agreed to charge is a reduced municipality rate of $300.00 per hour which is very reasonable for such a high quality lawyer experienced in this type of work. Hearing no further discussion, Donna made a motion to ratify hiring Attorney Rachel Baird for BAA counsel/advice; Tom seconded, Motion to Ratify Passed unanimously.

A robust discussion followed about agenda item # 4:
(a) **Town Council led investigation into town administration as per the Town Charter**. Such an investigation into the tax assessor, or any town officials, including the town manager, was discussed in some depth. A town council-led investigation would have subpoena power and, unless people want to invoke their 5th amendment rights which he or she may legally choose to do, this form of investigation is more likely to get to the truth AND through transparency, real independence, fairness and impartiality, earn the public's trust and confidence in its final outcome. Also, town council has ability to subpoena documents that may not otherwise be forthcoming. Or,

(b) **Town Administration – led investigation into the town administration.** Observations were made that the Town Manager's lobbying to have the town administration investigate itself, coupled with her suppression of BAA's fact-filled, documented and well sourced reports and minutes, is very troubling. The public has a right to know the BAA decisions and findings made after we heard about 400 appeals this spring. We have each heard "aspersions" that have been cast upon us, individually and as a board, purportedly by the town manager and/or others connected with the town administration. It is disgusting. The BAA is merely a messenger with a message the public has a right to know but the town administration is doing its best to censor and/or suppress messages it doesn't want people to hear. The administration not wanting the public (and the Town Council) hear what we had to say was one thing, but to be joined at the June 20th Town Council Meeting by the Mayor and Deputy Mayor's admonitions directed at Chairman Tyler had a "chilling effect" on people's right to exercise their first amendment right. Since that Council Meeting (6-20-2022) many people have expressed their views to us that they are afraid of the town administration investigating itself. The Chairman expressed unanimity with people fearing a "whitewash" and/or, even worse, a "shadow investigation" attacking the victims (taxpayers, property owners) or messengers (like BAA, agricultural groups, etc.) if the town investigates itself.

Chairman Tyler continued by bringing us to a discussion of **agenda item # 4. (c)** explaining that, in his opinion, BAA has a duty to maintain the integrity of what we are doing here today, which is way beyond what normally is expected of us as a BAA. We don't normally write opinions; however, because the grievances were so deep and wide spread we wanted people to understand the abuses that occurred and we wanted the town administration to see that those abuses, errors, etc., are rectified so as to not be repeated going forward. Accordingly, Chairman summarized by saying that we want to participate in a fair, impartial and transparent inquiry conducted in the best interests of the tax payer, property owner and Town of Enfield. Donna and Lori wholeheartedly agreed. Chairman Tyler concluded as follows: All that being said, would anyone else like to speak?

Lori Longhi stressed that she wanted it to be fair to everyone; fair to the public, fair to the town administration and fair to the Tax Assessor. But what she is upset about is the perception of public trust. When people see something then say something it should not be twisted around to mean something else. Lori is all for the Council-led investigation that follows the Town Charter. We heard this sentiment over and over from citizens themselves.

Donna Dubanoski mentioned it wasn't just one person saying things.

Tom Tyler expressed the need to look not just at the assessor but someone needs to look at Vision, too. When Vision and the Assessor artificially inflate the grand list they do so at the expense or on the backs of unsuspecting tax payers who don't even know it until they get their bills. There is a need to correct all the issues presented by Vision and the Assessor. Tom asked: What about those taxpayers who don't know what happened but now try to find out? They go back and look but are deprived information since it's been deleted or removed. Example given of a house where the condition was raised from "Average" to "Good" (without any improvements having been made) or the age manipulated to increase the gross assessment. That's artificially increasing the grand list. It's accomplished by a manipulation of the numbers. So now if a taxpayer goes back and gets a copy of their street card - it has vanished. Now it's deleted and in every single case one may query: Is that altering a public record? Is it a civil violation? Is it a crime? If one alters public documents for those purposes, perhaps it is both a civil and a criminal violation of law. Only time and a truly independent, fair, impartial and transparent investigation can answer those questions.

Donna Dubanoski agreed and Donna stressed multiple problems with the street cards. All were in agreement that the town administration should have already done an internal investigation to find out what exactly did the assessor do or fail to do in the assessment process then correct it so it wouldn't happen again; also, the town administration and officials who have heard these complaints for many months now should concentrate on trying to fix the numerous inequities for those taxpayers who did not file appeals for a myriad of reasons.

Lori Longhi mentioned that she tried to point out to the town that when the town gave us the cards for the appeals, any person/business is still able to appeal whether they came to us or not that we are still in an appeal period to the Superior Court. Thereafter, the street cards got changed and we saw the change on 6/7/2022 after we talked about the "fountain of youth" methodology was pointed out in our 5/28/2022 Report. Lori was concerned the town put itself in jeopardy for all these appeals once it had all of these field cards suppressed. Lori saw something, she said something and "Poof" the manipulated fields disappeared or were deleted or otherwise removed from the street cards. "It just looks so bad, it's a document they are changing and all this during the appeal period too. Altering public records or documents could be a major problem for the town and it was so unnecessary," Lori opined.

Donna Dubanoski expressed that she was upset and angry about these card changes.

Tom Tyler mentioned our reports and minutes were and still are being suppressed; the public's right to know has been infringed; the town manager is keeping people in the dark. If town manager is allowed to hire an attorney with "No Connection" to her or anyone else that makes a good public appearance. Shortly thereafter however, one might say: ah ha we have attorney client privilege so need to shut up, then selectively leak what they want and that is wrong! In the event an attorney is hired to assist with any investigation, the attorney client privilege should be waived so everything (other than exempt documents) is out there for the public to see. The public has a right to know what's going on. The public can handle the truth. But to not be fair, impartial and transparent in conducting an investigation that way raises cover-up suspicions and lowers public confidence in any investigation's outcome.

Lori Longhi I don't feel I know what is going on. Tom interjected: Perhaps the town manager doesn't know that we had a half a dozen appellants come in who said they met with the town manager or spoke with her; some gave her documents which she retained and were to transmit to BAA for complainants. According to them, the Town Manager told them: not to worry … the BAA will straighten it out … and, I have my eye on him (or words to that effect). When these appellants showed up for hearings none had any documents. Where did these documents go? For instance, the Moose club had approximately 400 pages which we had difficulty obtaining. We kept the Moose Club appeal hearing open in order to have the Tax Assessor produce their records. Finally, we were allowed access but only to read but not to make or keep a copy of the entire file as per the orders of the Assistant Tax Assessor. Lori finally insisted on couple copies of items to document our file. I'm not saying the Town Manager suppressed those records because they may have been intercepted by the assessor since he was our contact for records. Not her. She could be an innocent bystander.

Donna Dubanoski Yes. I have gotten calls and heard about the Veteran complaints.

Tom Tyler I have been referring them to the council members.

Lori Longhi Motor vehicles and VA exemptions this is an issue that have to say I am not proficient in. Can you appeal a Veteran Exemption on a car or house? Switch them etc and I honestly don't know the answer. I know in the past people have gotten veterans exemptions and I think fireman used to get a credit too? You can put it on your house or car. Houses many pay monthly but motor vehicles get charged in June. People that budget or are on a fixed income I have been told use it on the car so they have an easier time with that large onetime payment. Chairman Tyler got the BAA handbook and read from page 16 and 17 number 6 it appears as though we have jurisdiction to hear any veteran denied a property exemption and since we are a board of equity they would need to appeal this in September.

Lori Longhi pondered that we were told nothing came in by mail to the Assessor's Office addressed to us. How do we know this is true? Tom Tyler suggested that Rachel may help us with that.

Donna Dubanoski there should be forms in the lobby for all people to just take one; no one should have to explain why they are appealing. If they don't have internet then they can't get an appeal form without going in.

Tom Tyler added I don't like it when letters are sent out in our (BAA's) name. Pretending to be us. What is the liability of that civilly for the Town of Enfield and if there is a criminal aspect. Another thing is that MV inquiry letter based on a false DMV Notice predicate? Assessor never did give us all those letters, just the ones that appealed. That must be part of the investigation too and is another reason the town administration can't investigate itself and expect credibility. They need to retain someone experienced in tax assessing duties (like Rachel but since we already have engaged her it would be a conflict for the Town Council to retain her now). Let's get to votes on 4. A, B and C

Tom makes a **motion in support of (a) to support a Town Council-led investigation**, Donna seconded, **passed unanimously.**
For the purpose of the record Tom makes a **motion to support (b) town to investigate itself,** Donna seconded, Motion **failed by 0-3 unanimous** vote.
Lastly **(c) BAA's role going forward to best maintain the integrity of its statutorily assigned duties while participating in a fair, impartial, transparent inquiry to be conducted with the best interest of the taxpayers, property-owners, and Town of Enfield in mind.**
Tom makes a **motion in support of (c) Donna seconded, passed unanimously.**

Motion to adjourn made by Tom Tyler, Donna seconded, passed unanimously.

Meeting adjourned at 10:48 a.m.

Tom Tyler

From: Tom Tyler
Sent: Friday, July 1, 2022 11:30 AM
To: 'Rose, Victoria'
Subject: RE: ALAIMO

Got it, Vicki. Thank you.

Tom

From: Rose, Victoria [mailto:vrose@enfield.org]
Sent: Friday, July 1, 2022 10:36 AM
To: Tom Tyler
Subject: ALAIMO

Victoria Rose, CCMA II
Assistant Assessor
Town of Enfield
(860)253-6337

Tom Tyler

From: Rose, Victoria <vrose@enfield.org>
Sent: Friday, July 1, 2022 10:36 AM
To: Tom Tyler
Subject: ALAIMO
Attachments: 20220701101651766.pdf

Victoria Rose, CCMA II
Assistant Assessor
Town of Enfield
(860)253-6337

Department of Assessment and Revenue Collection
Town of Enfield
820 Enfield Street
Enfield, CT 06082
Tel. 860.253.6339 Fax 860.741.4028
www.enfield-ct.gov

FILE COPY

June 20, 2022

Esther Alaimo + Charles Alaimo
121 Oldefield Farms
Enfield, CT 06082

Dear Esther Alaimo + Charles Alaimo,

The Assessor's Office is in receipt of your assessment appeal form for 35 Weymouth Rd. Our office received the form on June 13, 2022. Pursuant to Connecticut State Statute Section 12-111 and Section 12-117 the appeal must be filed, in writing, on or before March 20, 2022.

As the Board has already met and completed their duties, the next time you may file an appeal for your real estate will be next year on or before February 20, 2023.

Sincerely yours,

Victoria Rose

Victoria Rose, CCMA II
Assistant Assessor

CC: Thomas Tyler, Chairman, Board of Assessment Appeals

RECEIVED
JUN [illegible]
ASSESSOR'S OFFICE
TOWN OF ENFIELD

TOWN OF ENFIELD

ASSESSMENT APPEAL FORM

Appeal No. ________

THIS APPEAL FORM TO THE BOARD OF ASSESSMENT APPEALS MUST BE RECEIVED ON OR BEFORE MARCH 18, 2022, AND MUST BE COMPLETED IN ITS ENTIRETY. PROPERTY OWNERS OWNING MORE THAN ONE PROPERTY MUST FILE A SEPARATE FORM FOR EACH ACCOUNT APPEALED. PLEASE TYPE OR PRINT LEGIBLY.

Property owner(s) ALAIMO FAMILY LLC
Name of agent (if different from owner) ________
Position of agent (if different from owner) ________
Property owner will be represented by (check one): Self ✓ Agent: ________
(If by agent, must attach evidence of authorization)

Name of Person and Address to which all notices and correspondence should be sent (list ONE address only):
Name ESTHER ALAIMO + CHARLES ALAIMO
Street 121 OLDEFIELD FARMS
City, State, Zip Code ENFIELD, CT 06082 Telephone (Daytime) 860-749-6302
860-875-4439

For the Grand List of October 1, 2022 :
Description of the property being appealed (location if real estate, year/make/model/marker number if motor vehicle)
NOTE: Regular Grand List Motor Vehicle hearing conducted in September.

Property Type: FOREST LAND
(Real Estate, Supplemental Motor Vehicle, Personal Property)
Property Location: 35 WEYMOUTH RD PID 6358
(Number and Street) (Assessor Map/Lot if Real Estate)
Property Description: ________
(Business Name if Personal Property; Year, Make, Model, VIN if Motor Vehicle)
Reason for the Appeal: REQUEST FOR UPDATED FOREST CERTIFICATE CONFORMING TO CT STATUE
SEE ATTACHED INFORMATION.
Appellant's estimate of FAIR MARKET VALUE of the property being appealed: ________

[signature] 6/10/2022
Signature of owner and/or agent (Attach proof of authorization) DATE

(Position of signer: MEMBER OF ALAIMO FAMILY LLC

FOR BOARD OF ASSESSMENT APPEALS USE ONLY:

Property Description: ________
Street Address: ________ Assessor Map ____ Lot ____ ID Lock ________
Other: ________

NOTICE OF APPEAL HEARING TIME AT THE TOWN HALL:
An appeal hearing is to be held (DATE) ________ (TIME) ________

________ Your application was denied on ________ (Action Date)
________ Your application was granted on ________ (Action Date)

	Old Assessment	New Assessment	Difference
LAND			
BUILDINGS			
OUTBUILDINGS			
PERSONAL PROPERTY			
TOTAL			

________ ________
CHAIRMAN, BOARD OF ASSESSMENT APPEALS DATED

This action may be appealed to Superior Court within two months of the mailing of the decision.

6/10/2022

Alaimo Family LLC
121 Oldefield Farms
Enfield, CT 06082

Chairman, Board of Assessment Appeals
Town of Enfield
820 Enfield Street
Enfield, CT 06082

RE: 35 Weymouth Road
PID: 6358

Dear Chairman,

This is a formal appeal regarding the Enfield Assessor's unexplainable determination for an updated Forester Certificate regarding the above subject property. Our position is outlined in the enclosed 4/20/2022 and 5/9/2022 letters to the Assessor. To date we have not received a response or been provided a regulatory basis for his determination.

The Assessor's lack of response suggests his determination for an updated Forester Certificate is entirely arbitrary and not consistent or based on the relevant CT Department of Agriculture Public Act 490 statues. The Assessor's determination is contrary and in violation to 2005 CT Statue Code Sec.12-504h which unquestionably supports our position that a new application is not required.

Thank you for your anticipated review and look forward to your determination. If, however, additional information is needed please do not hesitate to contact me.

Sincerely,

Charles Alaimo
Member, Alaimo Family LLC

SENT BY CERTIFIED MAIL

5/09/2022

Alaimo Family LLC
121 Oldefield Farms
Enfield, CT 06082

Office of The Assessor
Town of Enfield
820 Enfield Street
Enfield, CT 06082

RE: 35 Weymouth Road
PID: 6358

Assessor,

This is a follow up to my 4/28/2022 letter, a copy of which is enclosed. I received a voice mail message on 5/4/2022 from Andrea Urbano of the Connecticut Forestry Department who assumingly was asked to provide support regarding the basis of the Enfield Assessor's determination for an updated Forester Certificate.

Andrea's message stated that forest land is "technically due" to be updated by a qualified Forester's Report every 10 years and suggested I retain one of the qualified 490 Foresters listed on their website to complete the work. I called Andrea back later that day and left a message requesting to be advised the relevant Connecticut Statue as well as its effective date regarding this 10 year updated Forester's Report. However, as of this date I have not heard back from Andrea.

Being curious as to the reason Andrea selectively said "technically due" rather than "is required", I searched numerous CT forestry related statues but was unable to locate any pertaining to this 10 year forestry update. If there is a specific CT State Statue stipulating a requirement for this 10 year updated Forester's Report which was effective prior to our ownership, we certainly would comply

Notwithstanding, as previously mentioned, it seems to us that according to 2005 CT Statue Code Sec. 12-504h (copy enclosed) a new application is not required once the land has been classified as PA 490 forest land as there has been no change in use or ownership since this 2005 public act went into effect.

Our intention is merely to be provided the relevant CT State Statue and effective date that requires an updated Forester Certificate and are hopeful you will take the above noted CT Statue into consideration.

If there is no change in your position, we would again appreciate your written response as to the statutory basis for your determination at the above The Alaimo Family LLC address so that we may act appropriately.

Sincerely,

Charles Alaimo
Member, Alaimo Family LLC

CC: Board of Assessment Appeals

2005 Connecticut Code - Sec. 12-504h. Termination of classification as farm, forest or open space land.

Sec. 12-504h. Termination of classification as farm, forest or open space land. Any land which has been classified by the record owner as farm land pursuant to section 12-107c, as forest land pursuant to section 12-107d, or as open space land pursuant to section 12-107e shall remain so classified without the filing of any new application subsequent to such classification, notwithstanding the provisions of said sections 12-107c, 12-107d and 12-107e, until either of the following shall occur: (1) The use of such land is changed to a use other than that described in the application for the existing classification by said record owner, or (2) such land is sold by said record owner.

(P.A. 74-343, S. 6, 7.)

Cited. 173 C. 328, 333. Cited. 178 C. 100, 101, 103, 104, 113-115. Cited. 226 C. 407, 410, 411, 413, 416-418.

Subdiv. (2):

Cited. 226 C. 407, 414.

SENT BY CERTIFIED MAIL

4/28/2022

Alaimo Family LLC
121 Oldefield Farms
Enfield, CT 06082

Office of The Assessor
Town of Enfield
820 Enfield Street
Enfield, CT 06082

RE: 35 Weymouth Road
PID: 6358

Assessor,

This is in reply to your December 30, 2021 letter sent to my sister Esther Alaimo's address, a copy of which is enclosed. We are sorry for not responding earlier as Esther was diagnosed with a serious medical condition late last year which accumulated in the need for major surgery and to this date continues with her rehabilitation. I called your office in early April to discuss this matter but was directed to your voice mail where I left a message. However, as of this date I have not received a reply.

Your letter does not state any reason why the Assessor determined this property will need an updated Forester Certificate. The property has not changed ownership or use since The Alaimo Family LLC acquired it by inheritance from our late father Matthew C. Alaimo in 2002.

There has been no logging or any other similar activity on the property since it has been owned by the Alaimo Family LLC. We have just kept it as forest land to conserve the natural resources of the land and paid our taxes. The property does not produce any income and we do not see the need to incur the costly expense at this time of having a Forester Report prepared as we have no plans to do any type of logging in the near future. It seems to us that Connecticut Statute Sec.12-504h means we do not need to do so.

Please inform us the basis for your determination at the above The Alaimo Family LLC address so that we may act appropriately.

Sincerely,

Charles Alaimo
Member, Alaimo Family LLC

CC: Board of Assessment Appeals

Department of Assessment and Revenue Collection
Town of Enfield
820 Enfield Street
Enfield, CT 06082
Tel. 860.253.6339 Fax 860.741.4028
www.enfield-ct.gov

December 30, 2021

Alaimo Family LLC
121 Oldefield Farms
Enfield, CT 06082

Location: 35 Weymouth Rd
PID: 6358

To Whom It May Concern:

It has been determined by the Assessor for the Town of Enfield that the above subject property under Forest Classification will need an updated Forester Certificate No. 4041B. The above subject property Forest assessment will be removed until proof is provided that an updated certificate is pending.

In addition to the updated Forester Certificate, I have attached an Application to the Assessor for Classification of Land as Forest Land to also be updated.

You may appeal this decision with the Board of Assessment Appeals by February 18, 2022. Forms are available online at www.enfield-ct.gov.

Sincerely,

Office of the Assessor
Attachment

TODD HELEMS

EMPLOYMENT HISTORY

MASS APPRAISAL/ASSESSOR EXPERIENCE

11/16-
Present

TOWN of BLOOMFIELD, BLOOMFIELD, CT

Assessor

Directs and administers the valuation of real estate, motor vehicle and personal property. Work involves analysis and calculations; answering customer inquiries and directing the office staff. Responsible for the planning, organization, implementation and supervision of the Assessment division within the Finance Department and is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control.

Job Description / Duties

- Plans, directs, supervises and participates in the valuing/assessment of all taxable and non-taxable real estate, motor vehicle and personal property to establish the Grand List. Conducts physical inspection and re-inspection of existing properties, improved properties, and properties under construction to determine their value.
- Formulates and prescribes policies, work methods, and procedures for subordinates in the listing and appraisal of real and personal property. Evaluates current assessment practices and data processing applications and proposes changes as warranted.
- Compiles, maintains and analyzes complex statistical data to ensure equity in assessments. Analyzes property trends.
- Investigates property and businesses to discover, list and value property not previously recorded.
- Projects estimated values of proposed buildings for commercial developments for planning purposes and for Town officials. Works with Planning and Community Development department to maintain records of new developments and Town Clerk's office for change in ownership.
- Updates CAMA data base as part of assessment process.
- Resolves complaints relating to assessments and makes adjustments as warranted.

- Supervise and maintains accurate property title records and records related to ownership, sale and value of land and improvements through automated system; assists with maintenance and updates to GIS program.
- Manages the preparation, installation and maintenance of property tax maps.
- Supervises the elderly, veterans, and disabled tax exemption programs based on eligibility requirements and state statutes.
- Meets and provides information to the public, other Town departments, and attorneys to explain assessment procedures and conclusions.
- Manages and conducts the periodic revaluation with in-house staff of all properties within the town according to State Statutes. Responsible for review and acceptance of completed work and works with vendors to implement automation of revaluation.
- Responds to Board of Assessment Appeals inquiries, defends the Town's findings during assessment appeals by property owners.
- Develops division policies and procedures and assigns, trains and supervises staff. Consults with Department Head on such personnel actions as hiring, termination, and discipline and obtain final approval from Town Manager for such personnel actions.
- Prepares and administers operating budget for division; presents budget to the Department Head.
- Submits oral and written reports to Town officials and State agencies as required.

12/12-
11/16

TOWN of WALLINGFORD, WALLINGFORD, CT
Property Appraiser
Provide technical and administrative assistance to the Assessor in the valuation of real and personal property; perform increasingly responsible field investigations and inspections required to properly value property; collect and process information to establish the Town Grand List and related taxable property information.

Job Description / Duties:
- Receive oral or written instructions from the Assessor.
- Organize work according to standard office procedures, for self and other staff.
- Establish priorities within work assignment.
- Perform lead work in the preparation of data and maintenance of assessment cards, files and other documents.
- Oversee the revision of records relating to taxpayers' addresses and property ownership.
- Enter and retrieve assessment information in an electronic filing system by computer terminal.
- Lead person in the development and design of GIS improvements.

- ♦ Perform field investigations, inspections, and valuations, as assigned.
- ♦ Prepare dimensional sketches.
- ♦ Collect, review, and update data relating to property values.
- ♦ Tabulate information gathered with accuracy.
- ♦ Perform sales verifications.
- ♦ Oversee the preparation of special reports and summaries such as sales ratios, etc.
- ♦ Perform technical review of personal property tax forms.
- ♦ Price motor vehicles for assessment valuation reasons, to include VinDecode program.
- ♦ Audit property appraisal for accuracy and conformance to standards.
- ♦ Lead commercial appraiser
- ♦ Administer all income exemption programs.
- ♦ Assist with the elderly tax relief programs.
- ♦ Assist elderly and other persons in completing tax emption forms.
- ♦ Prepare statistical and narrative reports for submission to State and Federal governments and town government bodies.
- ♦ Provide technical information to lawyers, land-searchers, bank officials and the general public.
- ♦ Assist in the preparation of court cases and/or in discussions with taxpayers or their representative in the settlement before going to trial.
- ♦ Assist in the formulation of office procedures and policies.
- ♦ Point/Lead person in 2015 Revaluation
- ♦ Key person to institute a program in the preservation of Assessor's documents to include a new storage facility within the town, the conversion of paper documents to electronic and the storage of older documents with the State Library.
- ♦ Instrumental in the upgrade of technology within the office to include barcodes and scanners for yearly declarations and statements.

12/05–
12/12

VISION GOVERNMENT SOLUTIONS, NORTHBORO, MA

Staff Appraiser

Assist Project Manager and Senior Appraisers with implementation of valuation parameters toward completion of full field reviews of property data to ensure accurate data and consistency amongst similar properties.

Job Description / Duties:

♦ Interact professionally and tactfully with taxpayers while in the field and during informal hearing process; completion of hearing forms; investigation of discrepancies/inaccuracies reported by taxpayers.

♦ Build rapport and maintain positive relationships with the clients, the general public, and company personnel.

♦ Participation in training and monitoring of data collection staff.

- Responsible for hands-on final valuation and review process of both residential and commercial properties, completing a full field review on-site of appraisal related data to insure that the property record cards are accurate and the critical data, which is used in the valuation process, is consistently applied among similar properties within the projects.

Projects include but not limited to: New Haven, Enfield, Stamford, Wallingford, Bridgeport, Cromwell, Windsor, Windsor Locks, East Granby, Glastonbury, West Haven, Coventry, Suffield, Bristol, Berlin, New Britain, Manchester, Andover, Columbia, Ellington, Wethersfield, Suffield, Westport CT, Pawtucket, RI, Foxboro, Ma, Derby, NH and Rye, NY

06/05-
12/05

Crew Chief

Responsible for overseeing the data collection effort and completing complex data collection assignments which may be beyond the scope of normal data collection personnel. Maintaining a high level of operating competence and efficiency, monitoring and evaluation of the data collection personnel.

11/04-
06/05

Residential/Commercial Data Collection

Responsibilities include accurately locating, identifying, and measuring the exterior dimensions of assigned properties as well as making a thorough inspection of the interior of the property and accurately recording all pertinent data used in the valuation of the property. Recent projects worked on include Easthampton, MA and Westport, Windsor, West Haven, Windsor Locks, East Granby, and Coventry, CT.

1986-
Present
(seasonal)

Cedar Ridge Landscaping – Southampton Ma.

Owner/Manager

Responsibilities include marketing company services throughout regional area via all available outlets. Handle all projection of costs for residential and commercial project landscaping contracts and preparing and proofreading all bid documents and submitting documents prior to the applicable deadline. Negotiate cost and procure all required materials for projects. Design custom landscaping projects with property owner and oversee completion of all work. Manage all payroll and employee benefits programs for over twenty employees.

1986-
1988

New England Drywall

Assisted in all aspects of residential/commercial construction with a concentration on framing and roofing.

PROFESSIONAL EDUCATION/TRAINING

APPRAISAL EDUCATION

The Appraisal Institute: USPAP
The Appraisal Institute: Basic Appraisal Principles – 100GR
The Appraisal Institute: Basic Appraisal Practices – 101GR
The Appraisal Institute: Residential Market Analysis and Highest & Best Use – 200R
The Appraisal Institute: Income Approach to Valuation
The Appraisal Institute: Residential Market Analysis and Highest and Best Use – 200R
IAAO: Fundamentals of Real Property Appraisal – Course 101
IAAO: Fundamentals of Assessment Ratio Studies - Course 452
IAAO: Real Property Modeling Concepts - Course 311
IAAO: Assessment Administration - Course 400
IAAO: Standards of Professional Practice and Ethics – Course 171
IAAO: Sales Comparison Approach – 803
MAAO: Reconciling Marshall & Swift Tables
Microsoft Excel – Beyond the Basics
Completed courses 1A – 3 at Assessors School, Uconn
Multiple varied continuing education seminars/conferences (Dale Carnegie, Fred Pryor, etc.)

CAAO Education Committee, Member (currently)
CAAO Revaluation Committee, Co-Chair (currently)
CAAO Information Tech Committee, Member (currently)
CAAO PA 490 Committee, Member (currently)

2 Courses from being able to obtain the CAE designation from IAAO

Graduate Easthampton High School

Stockbridge of U-Mass. - Continuing Education - Landscaping and Architectural Design

CERTIFICATION:

State of Connecticut:	Residential/Land Certification, 2004 Commercial Certification, 2008 CCMA II #1640
State of New Hampshire:	Certified Mass Appraiser

CERTIFIED CONNECTICUT MUNICIPAL ASSESSORS COMMITTEE SPECIAL MEETING

Thursday – April 25, 2019
South Windsor Town Hall
Madden Room – Lower Level
1540 Sullivan Ave., South Windsor, CT

The meeting was called to order by Ann Marie Heering, Chair at 10:02 a.m.
Members present: Ann Marie Heering, Dave Dietsch, Lucy Hussman, Shawna Baron, Mary Huda and Jennifer Gauthier, OPM Rep.
Member absent: Tom DeNoto
Guests: Chandler Rose & Bill Gaffney– CCMA Course IIA Instructors, Todd Helems

<u>CCMA Exam Review</u>
Todd Helems was asked to leave the meeting during the executive session.

At 10:03 a.m. Shawna Baron made a motion to go into executive session. The motion was seconded by Mary Huda. The motion passed. This session was to review with the course instructors, Chandler Rose and Bill Gaffney, the CCMA Exam questions that pertain to CCMA Course IIA – Introduction to the Valuation Process. There also was a review of the 2018 UCONN Instructor Evaluations for Course IIA. At 11:08 a.m. Jennifer Gauthier made a motion to leave executive session. The motion was seconded by Mary Huda. The motion passed.

At this time Chandler Rose & Bill Gaffney left the meeting and Todd Helems was invited to join the meeting.

<u>Scholarships</u>
Dave Dietsch recused himself and left the room for the following discussions and votes.

It was brought to our attention that according to Roberts Rules of Order, the motion regarding 2019 UCONN Scholarships at the April 11, 2019 CCMA Meeting <u>did not pass</u> and this issue must be addressed. Mary Huda made a motion to not award any scholarships at this time. It was seconded by Shawna Baron. A discussion followed regarding the current treasury balance as well as upcoming income and expenses for the CCMA Committee. It was also emphasized the importance of promoting and supporting the assessor education process. Based on this discussion, Mary Huda amended the motion to offer one scholarship for UCONN this year. The motion was seconded by Shawna Baron. The motion passed.

The committee received scholarship applications from Kerilynn Lewis and Sharon Venditti. Shawna Baron made a motion to award the scholarship to Sharon Venditti as she has not previously received this scholarship. The motion was seconded by Jennifer Gauthier. The motion passed.

Dave Dietsch returned to the meeting.

Policy for multiple failures of CCMA Exams

As requested by guests at the April 11th meeting, the newly revised policy that was defined in the January 10, 2019 meeting minutes was discussed as well as the state regulations that support that policy. It was determined that the policy would not be revised at this time. The policy reads as follows: "As per the State Regulations, when a person fails a CCMA Exam for the second time, the CCMA Committee will determine which courses must be retaken before being approved for entrance to a subsequent exam. Following the second failure of the exam, the test results will be analyzed with each exam question being assigned to a CCMA course. If an individual scores 60% or below on the portion of the exam assigned to a course then they will be required to retake that course or an equivalent course that has been approved by the committee. After meeting those requirements, the individual may apply to retake the CCMA Exam. If an individual fails the CCMA Exam a third time or more, the CCMA Committee will not provide any requirements to retake the exam. An individual may contact the committee for an exam score breakdown."

Todd Helems questioned why our regulations are more rigorous than other professions with regard to certification exams. He also commented on whether the passing of an exam is a good indicator of having mastered the knowledge to be a good assessor. It was noted that the formal guidelines for training, examination and certification of assessors in Connecticut was established in 1974.

The meeting adjourned at 12:35 p.m.

Respectfully submitted,

Lucy Hussman