

CHARLEMONT BOARD OF ASSESSORS
JULY 7, 2025 MEETING MINUTES
CHARLEMONT ASSESSOR'S OFFICE

Members Present/ Participating:

Karen Rau: Chair, Anthony Ostroski, Andrea Santos

Call to Order

Rau called the meeting to order at 6:30 p.m. The Board welcomed Andrea Santos to the Board of Assessors; Andrea has successfully completed the Course 101, *Introduction to Assessment Administration: Law, Procedures, Valuation* required for all Assessors to value property. Santos brings experience as a previous Charlemont Assessor to the Board.

Approval of Minutes

The minutes from the 6/9/2025 Assessor's meeting were reviewed. On a motion by Rau and seconded by Ostroski (Santos abstained), the minutes were approved, as written.

#1: Board Approval/Signatures

After review, on a motion by Rau and seconded by Ostroski, the Board voted unanimously to approve/sign the following:

1. Warrant to Collector and Notice of Commitment for Fiscal Year 2026 preliminary property tax commitment,
2. Massachusetts Association of Assessing Officers dues invoices (2 members),
3. CAI Technologies WebGIS support and quarterly tax maintenance invoices,
4. Omitted and Revised Assessment Report,
5. Amended Tax Base Levy Growth (LA-13A) Report,
6. Monthly list of property & excise tax abatements for June, 2025,
7. Fiscal Year 2024 records of abatement and exemption,
8. Fiscal Year 2025 records of abatement and exemption.

#2: Board Discussion

1. 7:00 Appointment; Jonathan Mirin. Mirin attended to discuss his appeal of a Chapter 61 conveyance tax assessed to him and his wife, Godelieve Richard. The applicants cited a lack of response from their Forester, Mary Wigmore and family illness as a reason for their appeal. Hayden gave a brief history, beginning with the 2023 purchase by the applicants of a 17+ acre portion of a parcel enrolled in Chapter 61. Emails and letters were sent to the applicants regarding the Chapter 61 status of the property, and they subsequently filed an affidavit with the Assessors, acknowledging the property's Chapter 61 status and their intent to continue it, as well as an application for Chapter 61. However, after several conversations between Hayden and the Forester to check the status of the forest management plan, Wigmore informed her that Mirin was traveling out of the country and not returning her calls, so she was unable to complete the plan and they therefore could not be enrolled for Fiscal Year 2025. Mirin later mentioned looking into switching to Chapter 61B, but no application was submitted. The parcel is currently being used for a theatre operating out of a barn on the property and outdoor education programs for children. The conveyance tax was assessed per G.L. Chapter 61, Section 6, which states that if a purchaser of land that was enrolled in Chapter 61 forest use signs an affidavit that they will continue that use but it is not in fact continued, they are liable for the conveyance tax that would have been due at the time of sale. Mirin explained that after purchasing the old farmhouse at 224 Avery Brook Road, as they were forming their nonprofit, they negotiated buying the barn across the road for use

by their theatre company. In the process of learning about the Chapter 61 program, he applied for and received a grant to assist with the cost of the Forester's services. He said he then kept trying to get in touch with Mary, the Forester. He admitted to having travelled with the theatre; however Mary had also taken some time off. Mirin said he then decided that nature study would be a more appropriate use for the property, since he wasn't interested in forest management, so he no longer had a need for the forest plan. He explained the program they are currently running Bee and Blossom is a nature program for young children, so he had discussed the possibility of going into Chapter 61B with Hayden. The Board agreed that Chapter 61B would be a better fit for his use of the property and explained that he will need to determine how many acres are dedicated to the nature study, and that buildings will be excluded. They informed him that if he applied by December 1st, he would be eligible for Fiscal Year 2027. Mirin acknowledged these and the Board told him they will take his appeal into consideration and will let him know of their decision. Mirin thanked the Board for their time. After discussion and consideration of the facts, it was noted that the applicants were guided by several forms of communication from our office and the forester, that they had signed an affidavit to continue the use, and that it is ultimately the landowner's responsibility to timely submit all required documentation and take the necessary steps to enroll and maintain the land in the Chapter 61 program, which is why the State institutes these penalties. The Board was in consensus that the applicants hadn't exercised their due diligence in ensuring the continued forest management use of the land nor in subsequently applying for Chapter 61B. Therefore on a motion by Rau and seconded by Ostroski, the Board unanimously voted to deny the application for abatement of the \$4,491.00 conveyance tax. The Board will sign a letter to the applicants explaining this, at the next meeting.

2. Quotes for Valuation Services. The Board discussed three quotes for valuation services; Catalis Tax & CAMA, CIDARE and MAK Valuation Consultants, Inc. The Board reviewed the pros and cons for each Vendor. Catalis Tax & CAMA (current vendor). Pros: They provide all the valuation services we need and their quote came in much lower this year. Cons: Their valuation consultant has a limited work schedule and we have struggled to meet the State's requirements for property inspections. He is also not able to set up inspection appointments with property owners. CIDARE. Pros: They have high-tech property collection methods and will sketch all data collected, giving us an audit trail of everything they did. They offer a scheduler for property owners to set up appointments directly with them. Come highly recommended by the Cities of Needham and Quincy. Cons: They only do property inspection/collection, no personal property or cost table adjustments, so we will need to use another vendor for those. They can do a 3-year quote but can only provide a price for the first year, due to economic fluctuations. MAK Valuation Consultants, Inc. Pros: They will inspect personal property and do the value adjustments to our cost tables and depreciation schedules. They will also assist with Gateway reports. Cons: They don't inspect real estate, so we will need to use another vendor for that. Their quote is somewhat high in comparison with the others, considering they don't do the real property. General notes: Catalis came in with the lowest price for all services; maybe we can negotiate to ensure we get the required inspections or ask them to quote us without real property inspections and we use CIDARE for that? Using CIDARE and Mak would cover all our services and still be below last year's price. MAK's quote is for 3 years; we may want to go with a 1-year quote to see how it goes, would this affect the cost? There are 2 other RFP's out with vendors that provide all services, but they have not responded yet. Hayden explained that by statute we can't enter into an agreement until the funds are secured for the relevant FY, but she wanted the Board to have time to consider the options and make an informed decision. Hayden will check on the questions and the Board will table this for now to see if any other quotes come in and will revisit this at a later time.

3. Krusz Forest Cutting. Rau noted that there was a large area of trees clear-cut on the Krusz property on East Hawley Road and wondered if there was any kind of approval or process for such a large land clearing. The Krusz forest cutting plan was reviewed and the Board noted it was approved and signed by the Service Forester Allison Wright. Oftentimes landowners will clear large sections of mature trees to make room for new growth and promote the health of existing trees.
4. The Board reviewed the deeds for May and June, 2025.

Adjournment

At 8:02 p.m. on a motion by Rau and seconded by Ostroski, the Board voted unanimously to adjourn their meeting and enter into Executive Session for purpose #7 (to comply with, or act under the authority of, any general or special law or federal grant-in-aid requirements); to deliberate on pending abatement and/or exemption applications, which pursuant to G.L. Chapter 59, Section 60 are not open to public inspection, to sign the minutes from their last executive session meeting, and to not reconvene in open session afterwards. Roll Call vote: Rau-Yes, Ostroski-Yes, Santos-Yes.

The next meeting is Monday, August 4, 2025.

Respectfully Submitted,

Carlene Hayden,
Assessor's Clerk

Documents Viewed in Meeting of 7/7/2025*

1. Agenda for meeting of 7/7/2025
2. Minutes for meetings of 6/9/2025
3. Warrant to Collector and Notice of Commitment for Fiscal Year 2026 preliminary property tax commitment
4. Fiscal Year 2026 Massachusetts Association of Assessing Officers dues invoices, 7/1/2025
5. Fiscal Year 2026 CAI Technologies WebGIS support and quarterly tax maintenance invoices, 7/1/2025
6. Fiscal Year 2026 Omitted and Revised Assessment Report
7. Fiscal Year Amended Tax Base Levy Growth (LA-13A) Report
8. Monthly list of property & excise tax abatements for June, 2025
9. Fiscal Year 2024 records of abatement and exemption
10. Fiscal Year 2025 records of abatement and exemption
11. Application for abatement of a conveyance tax, by Jonathan Mirin and Godelieve Richard; 6/12/2025
12. Quote for property valuation services from Catalis Tax & CAMA, 6/17/2025
13. Quote for property inspection services from CIDARE; 6/19/2025
14. Quote for property valuation services from MAK Valuation Consultants, Inc.; 6/9/2025
15. Krusz Forest Cutting Plan, 2/13/2025
16. Deeds for May and June, 2025.

***Documents are stored in their respective files in the Assessor's office.**