

The Collector Treasurer

A publication of the Massachusetts Collectors and Treasurers Association

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No. 3

Start Planning Now For 2008 June Conference and Annual School

The winter holidays are barely past and the cold weather is now upon us, but spring and summer are just around the corner and it is not too early to be making plans to attend the 59th Annual MCTA Conference on Local Taxation and Finance at the Sea Crest Hotel and Conference Center on Old Silver Beach in North Falmouth, June 8th to June 11th. Hotel reservation forms are included in this mailing. Sea Crest rooms sell out fast.

Information as to the agenda and registration forms for the conference will be forthcoming early in the Spring. Your Education Committee and Association staff is working to provide you with top quality subject matter and presenters. We will have lots of interesting educational sessions all three days, and some terrific entertainment after dinner both nights. We look forward to another great June Conference. **Look forward to seeing you!**

MCTA 38th Annual School At University of Mass. Amherst, August 12 - 15

Orientation, General Assembly and the Legislative Program will be on Tuesday. Review (201) of New Legislation will be on Wednesday, with the Certified Track on Tuesday and Wednesday. **Examinations will be held on Friday.**

Re-Certification Credit can be Earned at Sea Crest

Are you finding it difficult to schedule time and travel in August to get to Amherst for the required three years out of five of course credit towards re-certification?

Are you having trouble scheduling both yourself and your assistant(s) to be at Amherst at the same time, so that you can be re-Certified and they can achieve their own Certification?

An enhancement initiated two years ago to the MCTA Certification and re-Certification program allows members who are already Certified to meet their re-Certification requirements by attending Course #201 and five additional hours of approved classes at the June Annual Conference on Municipal Taxation and Finance at the Sea Crest in Falmouth. Or they may attend some courses at Sea Crest and some at MCTA Annual School in August.

Course #201 (Review of New Legislation) is scheduled for the first class on Wednesday Morning, June 11 at Sea Crest, and will be presented by a staff attorney from the Massachusetts Department of Revenue. A selection of additional classes designated as earning credit toward re-Certification will be offered on Monday and on Tuesday.

(Cont.) pg. 2

A Great Time Was Had By All Who Attended The 2007 Holiday Meeting

The Hogan Center at the College of the Holy Cross in Worcester was decked out for the holidays with poinsettia plants galore for MCTA's Annual Holiday Meeting donated by Associate Member First Southwest Company.

At a Joint Session of the Membership the morning program opened with Mark Jacobsen, President and CCO of Promontory Interfinancial Network. He spoke of the Economic Viewpoint of the Global Economy and How it Relates to Massachusetts. Lt. Governor Tim Murray, former Mayor of Worcester welcomed the Membership and addressed the Partnership and Collaboration between State Government and Municipalities. The Joint Session concluded with Barbara Auger, Treasurer of Milford who presented an in-depth report on security of your Town Hall.

After lunch, MCTA President Nancy Holt and DOR Property Tax Bureau Chief Kathleen Colleary awarded Certificates to Newly Certified and Re-Certified Collectors and Treasurers, and to Newly Certified Assistants. Our newly certified members were listed in the Autumn edition of the MCTA Newsletter.

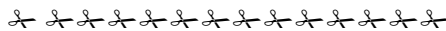
To close the meeting, President Nancy Holt and Ex. Director Mike Hanlon awarded the door prizes that had been so generously donated by a number of our Associate Members.

The President's Page

By
Nancy Holt

**- President's Report –
Winter 2007**

A new year brings new opportunities to get to all of those "when I have more time" projects done. The GASBs have kept us busy for several years between GASB 34, 40 & 45 but it has also brought about a new level of reporting and transparency in public entity financials. Many of the wait-listed projects relevant to fixed asset inventories, investment policies and insurance roll audits have been accomplished out of necessity but many more still remain to be accomplished. So, the best way to tackle the seemingly never ending workload is to create a plan. A plan can be as simple as a list on a sticky note on your blotter. Keep it short and manageable and update it weekly. And yes, you can write things on just to cross them off – that is half the fun.



**Association Calendar
2008**

| | |
|----------------|---|
| April 2008 | Spring Meeting TBA |
| May 14, 2008 | New Coll/Treas Day Forbes Municipal Bld Westborough |
| Jun 8-11, '08 | 59 th Annual Cape Cod Conference Sea Crest Hotel North Falmouth |
| Aug 12 15, '08 | 38 th Annual School University of Mass. Amherst |
| Sep x & x, '08 | Annual Staff School Littleton Adm. Building |
| Oct 21, 2008 | Fall Conference The Log Cabin Holyoke |
| Dec 10, 2008 | Holiday Meeting Holy Cross College |

I want to extend my congratulations to all of the newly certified collectors, treasurers, assistant collectors and assistant treasurers on their accomplishment. It was wonderful to be able to present you with your certificates at Holy Cross on December 12th. I also want to applaud all of our re-certified members for their commitment to continuing their professional development.

It was wonderful to see in excess of 275 people at the winter conference. The updates from the Lieutenant Governor on the municipal partnership program, topical information on the sub prime mortgage market and SIVs in addition to timely security recommendations made the day educational and informative. A special thanks to our associate members for all of their generous door prizes, which made the occasion more festive.

As the snow pack grows, it seems the perfect time to plan for those warm summer days on the cape. The June conference will be held at the Seacrest Hotel and Conference Center in North Falmouth from June 8-11, 2008. Please mark the dates on your calendar and make your reservations early.

I hope everyone had a wonderful holiday season.

Nancy

Cont – from pg 1 Re-certification

As with the Certification and re-Certification program at Annual School, members seeking to earn credit for a class must be in attendance for the full duration of the class and MUST SIGN IN for each class section.

Please note that this alternative educational opportunity is only for members who are already Certified and are seeking re-Certification.

Members and Assistants who are seeking initial Certification are required to attend classes at UMass Amherst in August.

We hope that this program change will increase the number of Certified members who renew their Certification and that some of the overcrowding of classrooms at UMass will be alleviated. It is a tribute to the eagerness of the MCTA membership to learn and become better professionals that over-crowding has become a problem.

**Nominating Committee
Named for 2007-2008 Officers
and Executive Board.**

President Nancy Holt has announced the appointment of: Past President Tony Logalbo, Treasurer/Collector, Concord, as Chairman; John Nunes, Treasurer and Finance Director, Fairhaven; Jean Berg, Treasurer/Collector, Holden; Marilyn Sheehan, Collector, Pittsfield; and Thomas Florence, Treasurer/Collector, East Longmeadow, to the Committee.

The Nominating Committee is charged with drawing up a slate of candidates for all offices in contention, including soliciting nominations from the membership.

If you, or someone you know, would like to serve as an officer or board member of the Association, please do not hesitate to contact any one of the Nominating Committee members. →

The Collector-Treasurer

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|---------------------------|--|
| President | Nancy Holt |
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| 2 nd Vice Pres | Paul Nowicki |
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Education Committee Report

By First V-P Joanne Savignac

Did you enjoy and learn from the recent programs offered at the annual Holiday Meeting? Those topic suggestions were gleaned from your evaluation sheets and messages to the MCTA office. Your Education Committee thanks you for all the ideas, so please keep them coming. There was such a positive response to Barbara Auger's presentation showing us that action before a loss is always better than a reaction, that we will probably offer that or an expanded presentation either at Sea Crest in June or the Annual School in August.

Even though there are many current issues to discuss and build a meeting around (403(b) plan documents and the Commonwealth's new Smart Plan administrator, to name a couple), the committee has decided not to hold a February meeting in 2008. Attendance has historically been light for those meetings; not due to subject matter, but to the huge potential for snow or icy conditions - though this past December's weather certainly may outdo anything February can toss at us! That means there will be much to look forward to in April. This will also give local county associations an opportunity to hold meetings of their own and increase attendance (no "too many meetings" excuse).

I'd like to welcome a new member to our committee. Victor Garofalo, Treasurer/Collector, Town of Bedford, expressed an interest in joining and the Executive Board successfully appointed him. We look forward to his participation and ideas. If you are a certified treasurer or collector, you are eligible to serve on any committee. I urge you to contact the MCTA office if you are interested in supporting the work of your Association.

As we enter 2008 we look forward to the launch of the new MCTA web site. There are just a few minor details to be neatened up before its debut - soon - perhaps even before you receive this newsletter.

The new calendar year also brings the inevitable budget season. I hope that all of you are able to maintain your budgets for education. The MCTA makes every attempt to keep the costs of meetings reasonable for all. We understand that attending all meetings is difficult, monetarily and time-wise, but your education and the education of your staff is important to the continued success of your office. It's much easier to support your point with a disgruntled taxpayer or employee who thinks his or her deductions are being mishandled when you are armed with up-to-date and accurate information.

Best wishes to all for a safe and healthy winter season.

Joanne

REMINDER: PACT Applications have been mailed. If you are eligible to take the exam in August, please fill out the application and return it to the MCTA office as soon as possible. Remember, applications must be received by May 31st in order to be considered for the exam in August.

Comings - - - - - And Goings - - - - -

(This feature in *The Collector-Treasurer* is intended to help our members keep abreast of changes taking place within our professional community. With your help in sending us late-breaking changes by fax or e-mail, we will be able to keep current on the whereabouts of our members and friends.)

Sheila Sprague is the new Treasurer for the Mohawk Trail Regional School District, replacing Gina Sieber.

Julie Dell'Anna is the new Treasurer/Collector in the Town of Lunenburg, replacing Kathryn Herrick.

William Fowler is now the Treasurer/Collector in the Town of Sharon, replacing Todd Hassett.

Elizabeth Craveiro is now the Treasurer/Collector in the City of Somerville, replacing William Fowler.

Maryann MacKay has been appointed Acting Treasurer/Collector in the Town of North Reading, replacing Elizabeth Craveiro.

Daniel M. Keyes is the new Treasurer in the Town of Easthampton, replacing Adrienne Booth.

Debra Blanchette is the new Treasurer in the Town of Barnstable, replacing Jeff Cannon.

Gary Carreiro is the new Treasurer/Collector in the Town of Marion, replacing Debra Blanchette

Maureen Niemi is the new Collector in the Town of Barnstable, replacing Maureen McPhee, who has retired. .

Look For Job Postings on The Internet at MCTA's Website

CERTIFIED TREASURER RENEWALS:

Jean T. Berg, Treasurer/Collector, Holden,
David F. Desgroseilliers, Treasurer,
Tyngsborough Water District, **Ellen S.
Guerin**, Treasure/Collector, Boxford,
Karen F. Jelloe, Treasurer/Collector,
Dover, **Michael James Joyce**, Treasurer,
Braintree, **Anthony T. Logalbo**,
Treasurer/Collector, Concord, **Carolyn J.
Marcotte**, Treasurer/Collector,
Shrewsbury, **Carol A. McLeod**,
Treasurer/Finance Director, Merrimac,
Virginia H. Peck, Treasurer, Shelburne,
Janet A. Pierce, Treasurer/Collector,
Leicester & New Braintree, **Vivian Pitts**,
Treasurer/Collector, Foxborough, **Joan M.
Plante**, Treasurer/Collector, Eastham,
Dawn E. Rickman, Treasurer/Clerk,
Wellfleet, **Herbert L. Sanderson, Jr.**,
Treasurer/Collector, Sunderland, (con't.)

CERTIFIED TREASURER RENEWALS:
(continued)

Joanne L. Savignac, Treasurer/Collector, Westborough, **William F. Schlosstein**, Treasurer, Warren, **Karen M. Sepeck**, Treasurer, Rockland, **G. Louise Slysz**, Treasurer, Hatfield

CERTIFIED COLLECTOR RENEWALS

Mary C. Barrell, Collector, Spencer, **Mary A. Bousquet**, Treasurer/Collector, Holliston, **Carol A. Brandolini**, Collector, Fairhaven, **Susan J. Carpenter**, Collector, Oakham, **Thomas J. Connolly**, Treasurer/Collector, Hull, **Holly M. Denault**, Treasurer/Collector, Adams, **Grace L. Devitt**, Treasurer/Collector, Bellingham, **Cheryl A. Gouveia**, Treasurer/Collector, Rehoboth, **Wendy A. Hatch**, Treasurer/Collector, Saugus, **Brenda A. Herbeck**, Treasurer/Collector, Mattapoisett, **Nancy E. Hess**, Collector, Sherborn, **Caroline T. Johnson**, Treasurer/Collector, Manchester-by-the-Sea, **Robert Kane, Jr.**, Collector, Holyoke, **Melissa T. Lampron**, Collector, Northampton, **David E. Leary**, Treasurer/Collector, Weymouth, **F. Ellen McKay**, Treasurer/Collector, Boylston, Collector, Shutesbury, **Marianne L. Nickerson**, Collector, Wellfleet, **Fred Pereira**, Collector, Ludlow, **Maureen Pike**, Collector, Shelburne, **Joan M. Plante**, Treasurer/Collector, Eastham, **Janice G. Smith**, Collector, Lee, **Shirley A. Sprague**, Collector, Yarmouth, **Thomas P. Sullivan**, Treasurer/Collector, Wilbraham, **Jacqueline R. Vigeant**, Treasurer/Collector, Rowley, **Bonnie L. Yasick**, Treasurer/Collector, West Boylston.

CERTIFIED ASSISTANT TREASURER RENEWALS

Patricia Conley, Assistant Treasurer, Westwood\

CERTIFIED ASSISTANT COLLECTOR RENEWALS

Maryanne Bilodeau, Assistant Treasurer/Collector, Westborough

Legislative Committee Report

By Second V-P Paul Nowicki

The Legislative Committee held its regional meeting at the City Hall in Quincy on November 16th.

The meeting was well attended by legislators from the greater Quincy and South Shore area, our legislative agent, Steve Roche as well as various town treasurers and collectors.

I would like to thank our host, Quincy Collector & Treasurer, Gloria Williams for her hospitality.

All eleven (11) legislative proposals were discussed individually. As suggested by the legislators present at the meeting, the legislative committee suggests putting more effort into four (4) proposals most likely to pass. Those proposals, namely S.1205 (Municipal Borrowing), H.2549 (Optional Life Insurance), S.1813 (Collection of Personal Property Taxes) and H.1372 (un-cashed and abandoned checks), will be pursued more strongly by our legislative agent. Our legislative agent will still watch the remaining seven (7) legislative proposals closely.

What can you do to help? Your legislators may have offices within your community, or they may schedule office hours at your municipal facility. Introduce yourself, that way when you make a telephone call or send an e-mail, he or she can put a face to the name.

If you're not sure about approaching your legislator, there is a list of our legislative committee members available at www.MassCTA.com. Also on our website is a link to look up your state representative and senator from your district.

The Legislative Committee will be scheduling its next regional meeting

soon. Committee members are always open to your suggestions and your participation. You can also help by offering your municipal facility as a meeting place for the MCTA's Legislative Committee or a future regional meeting by contacting our Executive Director, Mike Hanlon or myself.

Remember that you can find the MCTA 2007-2008-2009 legislative package and the text to our legislative proposals by visiting the MCTA website www.MassCTA.com.

Paul

MCTA's Legislative Update for 2007-2008

It was nice to see so many of you at the holiday meeting at Holy Cross on December 12th. I think that the Lt. Governor's comments were insightful, especially his discussion of the Governor's proposals for three casinos in Massachusetts. It's all about the revenue these days on Beacon Hill as we look ahead to the release of House 1 – the Governor's budget proposal for FY2009.

With the release of his budget plan, the budget process will swing into full motion as the House and Senate push a spending plan through before wrapping up formal sessions on 7/31/2008.

As he reaches the conclusion of his first year of his administration, Governor Patrick is still awaiting final action on a number of his proposals. One issue that we are tracking is House 3749 – the Governor's so-called "Municipal Partnership Act." The Joint Committee on Municipalities &

Regional Government recently released a portion of the bill that relates to borrowing powers for municipalities – see House 4329. Here's a summary for the new bill:

Submits recommendations to assist municipalities to address their operational needs, including, but not limited to modifying municipal borrowing procedures; establishes commissions to study the use of technology at the local level and increasing authority in areas currently requiring home rule petitions, including, but not limited to economic development, capital planning, retirement benefits and cash management.

MCTA 2007-2008 LEGISLATIVE PACKAGE

As we head to the close of the first year of the two-year session, it might be helpful to take a look at where our bills are at this time. All bills have been heard by the committees to which they were referred.

SENATE 1813 – PERSONAL PROPERTY TAX COLLECTION - pending before the Revenue Committee.

HOUSE BILL 2923 – INCREASE DEMAND FEE BY \$5 - pending before the Revenue Committee.

HOUSE BILL 1372 – TAILINGS BILL - pending before the Judiciary Committee.

HOUSE 3074 – MINIMUM TAX BILLING – pending before the Revenue Committee.

SENATE BILL 913 – REDUCE WAITING PERIOD FOR LAND COURT – pending before the Judiciary Committee.

SENATE BILL 914 – LAND COURT FEES– pending before the Judiciary Committee.

SENATE BILL 637 – PUBLIC DEPOSITS – pending before the Financial Services Committee.

HOUSE BILL 2549 – OPTIONAL LIFE INSURANCE BENEFITS – pending before Public Service Committee.

SENATE 1205 – MUNICIPAL BORROWING – pending before the Committee on Municipalities & Regional Government.¹

HOUSE 1928 – TRUST FUNDS – pending before the Committee on Municipalities & Regional Government.

As you can see, most of our bills remain in committee. While we had hoped for favorable action on them before the end of formal sessions on November 20th, we are in the same boat as most other bill filers – we're on hold. Here's a look at some statistics for the session as of the end of November:

- **212** - the number of bills not as yet assigned to a committee
- **6499** - the number still stuck in their initial committee
- **93** - the number ordered to a third reading
- **35** - the number engrossed for the first time
- **71** - the number languishing in a second committee
- **31** - the number ordered to third for a second time
- **12** - the number engrossed for a second time

¹ We are trying to amend House 4329 to include the language from Senate 1205.

- **208** - the number of bills signed into law so far in 2007
- Steve Roche, MCTA Legislative Agent – Email: sroche@thevictorygroup.org

Holiday Meeting Door Prizes

The following is a list of the Door Prizes generously donated by some of our Associate Members.

SoftRight – Gift Box, Standard & Poor's – Holiday Breakfast Gift Box, Kelley & Ryan – 2 Gift Baskets, Moody's – Gift Bag, MCC – Gift Basket, Eastern Bank – Gift Basket, TD Banknorth – Gift Basket, BNY Mellon – Gift Basket, Point Software – Gift Basket, First Trade Union Bank – Gift Card, UniBank – Poinsettia Gift Basket, Citizens Bank – Gift Basket, Webster Bank – Gift Certificate, ING Financial Advisers – Holiday Arrangement, Bartholomew & Company – Chocolate Basket, Arthur P. Jones & Associates – 2 Gift Certificates, Century Bank – Fruit Basket, Bank of America – 2 Gift Bags, Patriot Properties – 2 sGift Certificates, Cape Cod Five Cents Savings Bank – Gift Basket, Tarlow, Breed, Hart & Rogers, P.C. – Gift Box and Card, Berkshire Bank – Gift Bag, First Southwest Company – Gift Baskets, FIS Tax Services – Gift Card, The Bank of Western MA – Fruit Basket, Daniel J. Flynn & Company – Picture Book, Rockland Trust Company – Holiday Basket, MMDT – Gift Basket

Happy New Year and All the Best to our MCTA Members and Associate Members.

WINTER MEETING REMINDER

The Association has decided not to hold a Winter Meeting this February. Watch for information for the Spring Meeting to be held in April.