

Memorandum

To: Falmouth Town Council

From: Nathan Poore, Town Manager

Re: Assessing

November 9, 2015

The status of the Cumberland County Assessing services has been in transition during the past 6 weeks. As most are aware, the former regional director of assessing took another position out of state. Since then, the County Manager has appointed Renee LaChapelle to take the director position. Renee has been the lead assessor for services provided to Falmouth since we joined the regional program in 2014. Renee has performed very well and we are excited to see her succeed in her new position.

Status of Cumberland County Participants and Overall Program

The most immediate needs of the communities being served by the County have been a backlog of customer inquiries and requests. Fortunately there were very few in Falmouth. The County Manager assigned a very experienced municipal leader, Nadeen Daniels, to take over with customer contacts and she reported today that all customer related concerns have been resolved with no outstanding issues known at this time. The other priority for Renee was to develop a new plan to address the Yarmouth revaluation project. She reported today that the project will not be delayed based on the support provided by Cumberland County to build a larger team that will succeed with this project. This team includes Bruce Kerns, retired assessor from Kittery and a consultant.

A new assessor who will work with Renee has been hired. Christian Kuhn, from Kittery, has informally accepted an offer to serve in the position left vacated by Renee which will mean the program will be back to full staff by November 23.

Status of Falmouth Services and Short and Long Term Needs

Falmouth has not had immediate or triage type needs based on the excellent condition of the department, lead by Renee during the past year. This allowed her to redirect her attention to other more immediate concerns in the other communities. She did find time to start software training for assessing support staff at Falmouth Town Hall. We have convened a Falmouth staff team to meet with Renee. That team included staff from management, assessing, community

development and IT departments and our GIS mapping consultant. They are working with Renee to refine some operational logistics. Most matters include “back office” operations with minimal customer impact. These logistics include mapping related tasks (building points, sewer connections, and building outlines); website update (removing prior year commitments); property card updates; sales data coordination; and training Town Office staff to run software reports. All of these matters did not need to be addressed while the services were in transition and short on staff. Renee has committed to addressing these items with our team later in the year.

I have received very few comments or complaints about the program during the past year. My recollection is that approximately three concerns were brought to my attention and all of them were related to response time to inquiries. In two situations, the former director resolved the matter. Another complaint was received in October related to a property tax bill that erroneously omitted a homestead exemption. Renee resolved this matter directly with the resident who replied to me via email that he was satisfied with how Renee took care of his concern.

Abatements were the lowest in five years while under the County program. Only 13 abatements were approved with an abated value of \$247,900 and abated taxes equaling \$3,495. The average for the four years prior was more than 40/yr with an average abated value of more than \$3,000,000.

Status of Assessing in the Greater Portland (and beyond) Metro Region

*** Note – the FTE and parcel data identified below is a very rough approximation that should be confirmed and adjusted where necessary. The point in identifying rough estimates is to demonstrate the similarity in FTE/parcels.*

County Program – Cumberland may be leaving the program to join with the Town of Gray. The Yarmouth revaluation project is back on track. Casco is not making any changes. The combined FTE for this group is approximately 5 (includes 4 people employed by the County and one equivalent FTE from all town offices). The combined number of parcels is 15,500.

Cape Elizabeth and Scarborough – they share an Assessor with other supporting staff with 4.5 FTE for a parcel count of around 14,000

Westbrook and South Portland – The assessor announced her retirement last week. They have a staff of around 5 who manage approximately 16,000 parcels.

Gray – they are considering a joint program with Cumberland that will result in approximately 2 FTE for a parcel count of around 8,000.

Windham – the assessor recently announced his retirement. They have approximately 9,000 parcels and have approximately 2.5 FTE.

Others – There are two assessors in other communities not represented above but within the region that are retirement age.

The managers from Cape Elizabeth, Scarborough, Cumberland (Assistant Manager), Gray, Westbrook, South Portland, Falmouth, and Windham and the Assessor from Cumberland County Program and the combined Cape Elizabeth and Scarborough program met this morning to discuss the state of assessing in our region. They identified some findings and conclusions:

1. Assessing is regionalized in rural communities outside the metro region through larger consulting agencies that are specialized in smaller communities but most likely do not offer the services that would be needed in a larger town/city.
2. Fewer people are entering the field of assessing.
3. There are many assessors who have recently retired or will be retiring soon.
4. Technological access to all assessing information via web sites have dramatically reduced the number of customer contacts. (In Falmouth, Renee has reported that she receives approximately one call per week and has probably met with 20 people since starting in July 2014.)
5. There is no longer a sustainable model for each community to have its own stand alone assessing office.
6. The current emerging models of two or more communities working with each other are working but will not be sustainable in the long term. (There is a need to have specialization, cross training, succession planning, and other organizational enhancements that only a larger entity can provide).
7. The future of assessing is most likely through a model that includes more participants at the county level or sub-county level.