



June 17th, 2021

## Transitioning to New Opportunities at DLS

Sean Cronin – Senior Deputy Commissioner of Local Services



### In this edition:

- **Transitioning to New Opportunities at DLS**
- **DLS Offers New Growth Template and Mass Appraisal Online Trainings**
- **A Collaborative Effort**

### Important Dates & Information

### DLS Seeks Paralegal

As you're well aware, we're in a transitional phase in Massachusetts with the recent [order rescinding COVID-19 restrictions on May 29 and terminating the State of Emergency effective June 15](#). Yesterday, the Governor signed into law Ch. 20 of the Acts of 2021, extending certain pandemic-related policy measures including authorizations for remote public meetings, to-go alcohol sales, eviction protections and more. ([Click here to view the law.](#))

At the Division of Local Services, we remain committed to keeping you informed and remind you to encourage your colleagues to [sign up for DLS Alerts](#) and bookmark our [DLS COVID-19 Resources and Guidance for Municipal Officials page](#). To that end, we're continually issuing guidance to local officials to help them navigate through the provisions of Coronavirus State and Local Fiscal Recovery Funds (American Rescue Plan Act) funds. There will be more guidance to come from DLS and from the office of the Secretary of Administration and Finance as the U.S. Treasury Department details further instructions. We remind municipalities to maximize all the federal (ARPA, CARES, FEMA, etc.) revenues allotted to your community. Also, we want to remind you that the special legislative provisions available during the last fiscal year, such as the use of free cash after June 30 and the use of stabilization funds without town meeting vote by

## Specialist

The Division of Local Services is seeking a paralegal specialist to join its dedicated municipal finance legal team. The person who fills this position serves as a resource for the Municipal Finance Law Bureau on the legal and policy issues that arise in the course of the local tax and finance oversight responsibilities of the Division.

The paralegal specialist will be tasked with researching and analyzing law sources; preparing legal documents; analyzing proposed legislation; responding to inquiries concerning formal interpretation of agency laws, rules, and regulations, and perform related work as required. The basic purpose of this role is to provide legal and other assistance to DLS attorneys.

To view the job posting, please [click here](#).

### **OSD: Latest Issue of *Buy the Way* Now Available**

Don't miss Issue #10 of [Buy the Way](#), the monthly newsletter of the Operational

the board of selectmen, are not available for FY2022.

As you move forward in the days ahead, here are some other items to keep in mind as you close out the fiscal year:

- Drawdown any state or federal reimbursable grants. Certain grant deficits as of June 30th reduce free cash. If you have questions about such a deficit, contact your [BOA field representative](#) for additional guidance.
- Review capital project funds and make sure any internal borrowings have been taken care of via the issuance of either short- or long-term debt by June 30. Similar to above, any deficits (cash basis) in capital project funds reduce free cash.
- Determine if any year-end budget transfers are required and utilize the expanded transfer authority that was approved as part of the Municipal Modernization Act.
- Prepare the FY22 preliminary property tax commitment.
- Submit requests for current fiscal year reimbursements of exemptions granted under the various clauses of [MGL ch. 59, sec. 5](#).
- Prepare your financial system for FY22 based on appropriation votes of the legislative body.
- Notify our Municipal Databank at [databank@dor.state.ma.us](mailto:databank@dor.state.ma.us) regarding all votes (wins and losses) on Proposition 2½ overrides, underrides, debt exclusions, and capital exclusions.

While not a financial matter, it's important to make sure that information in the Local Officials Directory (LOD) is verified

Services Division (OSD).

Click [here](#) to get news and updates from OSD delivered to your inbox.

### **OIG: MCPPO 2021 Summer Classes and Trainings Schedule**

The Office of the Inspector General has posted information related to its Massachusetts Certified Public Purchasing Officials Summer 2021 Classes and Trainings Schedule. To view, please [click here](#).

### **FY2022 Telephone Company Central Valuations**

Local boards of assessors will find the fiscal year 2022 telephone company central valuations pursuant to M.G.L. Chapter 59, Section 39 on the our [website](#) effective Tuesday, June 15, 2021. Also included is a memorandum to assessors about the FY2022 valuation as well as the valuation table used, the new growth figures and a list of company billing addresses. The *Additional Landline Telephone Personality by FCC Code* for each of the centrally valued telephone companies

and updated as the LOD determines the officials who have access to the DLS Gateway. In particular, verification of email addresses is critical since Gateway notifications are automatically generated and sent via distribution lists derived from the LOD. Additionally, all municipal clerks and assessors must certify the staff listing of assessors within the LOD by July 1st. This is required for DLS approval of value certification and tax rate setting. For assistance in updating assessor information with the LOD, please contact Linda Bradley at [bradleyl@dor.state.ma.us](mailto:bradleyl@dor.state.ma.us).

In addition to the policy transitions taking place across local government, DLS is undergoing some exciting organizational changes. As [previously highlighted](#), three of our bureau chiefs, Joanne Graziano from our Bureau of Local Assessment, MJ Handy from our Bureau of Accounts and Patricia Hunt from our Bureau of Municipal Finance Law, have retired. In addition to their departure, I'd also like to congratulate Jodi Beaton, Paul Corbett and Jack Lyons who are also leaving DLS after many years of dedicated public service. These individuals have played an integral part in sustaining and supporting the DLS mission to promote sound municipal finance management practices and supports local officials by providing guidance, training and oversight. On behalf of all of us at DLS and our colleagues in local government, thank you.

While we wish our colleagues all the best, we're also celebrating the arrival of our next generation of DLS leaders. To that end, I'm pleased to welcome Chris Wilcock as Chief of the Bureau of Local Assessment, Deb Wagner as our new Bureau of Accounts Director, and Ken Woodland as our Municipal Finance Law Bureau Chief. I have the utmost faith that all three are prepared and ready to not only hit the ground running, but utilize their experience and perspectives to positively shape DLS going forward. Each of our new leaders will be outlining their own visions for their respective bureaus in the next edition of *City & Town*, so please stay tuned. In the meantime, please join me in welcoming them aboard. As always, if you have any suggestions for ways DLS

by community is also available.

### **FY2022 Pipeline Company Central Valuations**

Local boards of assessors will find the fiscal year 2022 pipeline company central valuations pursuant to M.G.L. Chapter 59, Section 38A on our [website](#) effective June 15, 2021.

Also included is a memorandum to assessors about the FY2022 valuation as well as the new growth figures and a list of company billing addresses.

### **Final FY2022 State-Owned Land Valuation under MGL C. 58 § 13-17**

The Division of Local Services has posted on its website the FY2022 state owned land values based on the fair cash value of certain state owned lands (SOL) pursuant to [MGL Ch. 58, §§ 13-17](#). These lands are reimbursed for loss of local tax revenue on the Cherry Sheet's State-Owned Land line.

Click [here](#) to display the final municipal state owned land

can support your city or town, feel free to contact me at [croninse@dor.state.ma.us](mailto:croninse@dor.state.ma.us).

### **DLS Offers New Growth Template and Mass Appraisal Online Trainings Frank Gervasio - DLS Director of Special Initiatives**

Our Bureau of Local Assessment has released a [walkthrough](#) of the New Growth Excel Template, an instruction resource providing guidance on how to fill out the template use for annual review. The video covers the different methods assessors can use to enter data into the template, format needs and edit the template. It also answers common user questions users.

In addition, modules covering [mass appraisal](#) are now available on our [YouTube channel](#). These include overviews [on collecting and analyzing sales data](#), [tax maps](#), and [property and inventory data](#). In addition, you can learn more about [market analysis and details](#), [valuation methodologies](#), and [reassessment programs](#). Note that new assessors are still required to complete Course 101 in Gateway, and these modules will still be available in their current form on our website. For other assessing related resources, please visit the [property taxes and Proposition 2 ½ section](#) of our training page.

Be sure to bookmark the [Municipal Finance Training and Resource Center](#) page and subscribe to our [YouTube channel](#) to stay updated on new items added. Is there something you'd like to see added? We'd love to hear from you! Please email us at [DARB@dor.state.ma.us](mailto:DARB@dor.state.ma.us).

### **A Collaborative Effort Paul Corbett – Bureau of Local Assessment**

The Community Software Consortium Computer Assisted

values and their share of the total state owned land. In addition, this [link](#) features *Frequently Asked Questions* about this program.

The Bureau of Local Assessment (BLA)

was notified of acquisitions, deletions, and agency transfers by the Department of Capital Asset Management (DCAM) during the past year and have adjusted the values pursuant to [MGL Ch.58, §15](#).

**Final FY2022 Department of Conservation and Recreation (DCR) Lands under MGL C. 59 §5G**

Parcels under DCR are not reimbursed on the cherry sheet, but DLS does determine the value of those lands, the final values can be found below:

DCR Water Supply Protection Land: Click [here](#) to display by municipality.

DCR Water Supply Protection Annexed Land: Click [here](#).

Any community with questions regarding their final state-owned land valuation should contact the DLS Bureau of Local

Mass Appraisal (CSC CAMA) software, formerly known as the state CAMA system, was used by as many as 80 communities for almost 30 years to maintain property descriptions and generate assessed values for property taxes. However, by 2016 the end was in sight. Budget constraints, staff reductions and software compatibility issues all contributed to a predictable end for the CSC CAMA system.

In early 2016, the Division of Local Services (DLS), the entity that had provided training and technical support for the CSC software since its inception, approached the Massachusetts Office of Information Technology (MassIT) to collaborate with the CSC to assist the more than 60 member communities in finding an affordable alternative to the CSC CAMA system. Mike Hamel, the prior Director of MassIT's Office of Municipal and School Technology, agreed to partner with DLS and the CSC on this project. In August 2016, MassIT secured the funding for the project and issued a Request for Quotation (RFQ). They also hired Cathy Marques as the project manager. Three vendors answered the RFQ but only two were accepted as meeting the necessary requirements. An evaluation committee was formed consisting of the CSC Executive Board, CSC Assessors, DLS and MassIT. The committee chose the Tyler Technologies proposal. MassIT handled the contract negotiations and CSC communities that chose to opt in signed a Memorandum of Understanding committing to the conversion from the CSC system to Tyler Tech's "iasWorld solution" system. By August of 2017, all contracts had been signed and 40 CSC communities moved forward with the conversion. At this time, MassIT took on the new moniker of the Executive Office of Technology Services and Security (EOTSS). In the fall of 2017, Tyler Tech, the CSC, DLS and EOTSS started the evaluation phase of the project.

Project Manager Cathy Marques spent the next few months traveling to the municipalities that were converting to the iasWorld system. She gathered data on the assessors current system, the speed of their internet and answering the assessors questions. Kirsten Shirer, the Chief of our Data Analytics and Resources Bureau (DARB), worked with the

Assessment at  
[bladata@dor.state.ma.us](mailto:bladata@dor.state.ma.us).

### **Important Notice Regarding State House Notes Program Submission Process**

The Division of Local Services has posted a letter from Senior Deputy Commissioner Sean Cronin regarding the State House Notes Program. This letter provides important guidance to city, town and district officials regarding the timeframe to submit notes to DLS for approval. To view this letter, please click [here](#).

For additional information about the State House Notes program, please visit the State House Notes page on our [website](#).

### **Special Injury Leave Indemnity Fund IGR**

The Division of Local Services (DLS) has issued and posted Informational Guideline Release (IGR) 2021-16 informing local officials about a local option provision allowing the establishment of a Special Injury Leave Indemnity Fund for the payment of injury leave

lead conversion tech from Tyler Tech on data conversion specs. A copy of each community's current system data was retrieved and given to Tyler Tech for analysis. Three "pilot communities" were chosen for the initial conversion scripts, Holliston, Needham and Charlemont. (Charlemont would later withdraw from the program.)

A CAMA Conversion Committee was established. The members of the committee were:

- Cathy Marques - Project Manager, Office of Municipal and School Technology (OMST)
- Michael Hamel - Director of the Office of Municipal and School Technology (OMST), Executive Office of Technology Services and Security (EOTTS)
- Kirsten Shirer Taylor - IT Director for the Division of Local Services
- Rebecca Krause-Hardie – CSC Executive Director
- David Manzello - Regional Assessor, Regional Resource Group
- Chip Davis – Assessor, Town of Needham, CSC Board Member
- Kathryn Peirce - Assessor, Town of Holliston
- Carlene Hayden – Assessors' Clerk, Town of Charlemont

This group met for several months with the Project Manager from Tyler Technologies and the conversion lead for Tyler. The software was configured to accept the data from the CSC system. The data for the three pilot communities was converted and the software went through many iterations until the software was ready to go live. Cathy Marques said that during this time, "each municipality was given several spreadsheets of cleanup that needed to occur before conversion." This took approximately one year from first pass to final pass. Training, data conversion and implementation occurred over ten months in 2019. Municipalities were grouped by BLA certification date and

compensation and medical bills of police officers and firefighters injured on duty.”

[IGR-2021-16: Special Injury Leave Indemnity Fund](#)

To access additional IGRs and Bulletins, please visit this [webpage](#).

### **Owners Unknown IGR**

The Division of Local Services (DLS) has issued and posted Informational Guideline Release (IGR) 2021-15 informing local officials about assessing property to an owner unknown.

[IGR-2021-15 – Owners Unknown Assessments](#)

To access additional IGRs and Bulletins, please visit this [webpage](#).

### **Bulletin 2021-2: FY2022 Budget Issues and Other Related Matters**

This [Bulletin](#) addresses several issues that cities, towns, regional school and other districts should consider for FY2022 budget issues and other related matters. To

then by location. CSC purchased a rolling classroom with laptops, projector, coffee maker and supplies so training could be held close to the municipalities. Kirsten Shirer’s IT team retrieved the data from each community and provided a vast list of supporting documents from each municipality so that the data could be validated. Tyler Tech brought in trainers and each group was scheduled for four weeks of training, conversion, data validation and implementation.

The conversions were completed in December 2019. Each municipality spent the next year or so validating converted data and correcting errors. Cathy Marques and her team continued defining and correcting issues with Tyler Technologies. As this process continued, the assessors were dual-entering all data into both the CSC system and the new iasWorld system. This was necessary as our Bureau of Local Assessment (BLA) had to conduct “Data Quality Reviews” of the converted data in the iasWorld system before it could be used for valuation and tax billing.

The Bureau of Local Assessment (BLA) traditionally required assessors to conduct a “full field review” of all property descriptions following a data conversion to a new mass appraisal system. However, early in 2019, BLA Bureau Chief Joanne Graziano, recognizing the advances in imaging technology, updated the BLA Certification Standards ([Informational Guideline Release 19-08](#)) to include the option to conduct an office review of property descriptions. Before exercising this desktop review option, the community had to submit a plan to the BLA. The plan had to detail how the community was going to conduct the review, who was going to perform which tasks and what imaging technology, if any, would be used. BLA had to approve the plan before the community could conduct the desktop review.

The desktop review option proved to be a pivotal change to the BLA standards when the pandemic caused almost everyone to switch to remote work. North Reading chose to conduct a full field review, but the other 39 communities that initially decided to convert from the CSC system to the Tyler Tech system submitted plans and eventually conducted

review other Bulletins and Publications recently issued by DLS, please see this [webpage](#).

### **Cybersecurity and IT Health Check Programs**

The Office of Municipal and School Technology has announced the following programs available to Massachusetts municipalities and schools. If you have any questions, please contact [Catherine.Marques@mass.gov](mailto:Catherine.Marques@mass.gov)

#### [Cybersecurity Health Check](#)

The Cybersecurity Health Check Program provides opportunities for local government to access basic cyber security services at no cost.

These services can be a good first step in discovering, assessing and identifying cybersecurity gaps that could impact IT systems that support essential business functions. This is a rolling application.

#### [IT Health Check](#)

An IT Health Check is a high-level assessment of current IT

desktop reviews (four communities would later decide to convert their data to different mass appraisal systems).

Needham was one of the pilot communities for the project. Chip Davis, the principal assessor, opted to conduct a desktop review of his converted data. "Considering we could not have imagined a more challenging time to switch CAMA systems and get through a desktop review in time to produce tax bills on the Tyler system, it went very well." Chip suggested the desktop review process "gave assessors the chance to get immersed in the iasWorld system (Tyler Tech) in an accelerated fashion." He also found "the flexibility and patience" of everyone involved in the review "made what seemed like an impossibility a year ago, a reality in nine short, sometimes frantic, months."

Holliston was the other pilot community for the project. Kathy Peirce, the town's principal assessor, felt the desktop review process had many advantages. "It allowed us to develop a more in-depth knowledge of the software functions and a better understanding of the data and how it worked to generate values in the new system. It also shortened the learning curve and helped us learn query techniques sooner."

The Holliston assessor said, "At the end of this process, I had a better knowledge of the new software and its use. I understood how to access and adjust tables and how to run queries and look for issues. I was able to review data issues and inconsistencies quicker, determine what properties needed to be reviewed in the field, and correct any errors in data. I have a more in-depth knowledge of the data, and how it fits in the new valuation model. I am more confident with the end product and the ability to move forward with the new software." She added, "I can't say enough about the dedication and level of service provided by Cathy Marques and her team. Tyler also has been incredible throughout the process."

By the spring of 2020, some of the converted communities had completed their desktop reviews, but for others the



assets. A Health Check can be a good first step in discovering, assessing and identifying gaps that could impact IT systems that support essential business functions.

The discovery will result in a completed score card that will identify the current state of critical IT systems, and platform and vendor agnostic suggestions. This is a rolling application.

**DLS Links:**

[COVID-19 Resources and Guidance for Municipal Officials](#)

[Events & Training Calendar](#)

[Municipal Finance Training and Resource Center](#)

[Local Officials Directory](#)

[Municipal Databank](#)

[Informational Guideline Releases \(IGRs\)](#)

[Bulletins](#)

[Tools and Financial Calculators](#)

work continued into the summer and fall.

The final phase of the project was the data quality reviews conducted by the Bureau of Local Assessment. Bureau Chief Joanne Graziano planned for the BLA reviewers to conduct field reviews of a representative sample of the converted data from each of the CSC conversion communities. Of the original 40 CSC communities committed to the data conversion to the iasWorld system, 36 remained. The first data quality field review took place in Hawley in early March 2020. Immediately following that review, the pandemic shutdown caused a change in the BLA review plans. From that point on, almost all data quality reviews would be conducted remotely. Instead of driving around the community and reviewing the accuracy of the converted property descriptions, the BLA reviewers conducted the data quality reviews remotely from their homes. Local assessors provided the BLA reviewers with copies of Property Record Cards (PRCs) from both the CSC and iasWorld systems for the chosen representative sample of properties. The reviewers also had cloud connection access to the iasWorld system. That allowed the reviewers to see each community's converted data and generate and review reports from the new system. The remote data quality reviews were conducted by comparing the data on the PRCs from each system and accessing the iasWorld database to investigate any data discrepancies. Cathy Marques, the Project Manager, played a key role in this process by promptly responding to requests for guidance on, and questions about, the iasWorld system. She also relayed any problems encountered during the review of the converted data, or the reports in the iasWorld system, to the Tyler Tech support staff. The BLA review team knew that conducting data quality reviews in so many data conversion communities in one year would be a challenge, but the pandemic shutdown and the required switch to remote data quality reviews increased the degree of difficulty. The BLA data quality reviews that began in March continued through the fall and were completed in December 2020.

In early 2016, DLS, MassIT and the CSC began their



collaboration on a project to offer the CSC's 60+ communities an affordable option for replacing their aging and expiring Computer Assisted Mass Appraisal (CAMA) system. By December 2020, the project was successfully completed. In the end, 36 CSC communities chose to convert their property assessment databases from the CSC system to the new iasWorld (Tyler Tech) system. The switch in mass appraisal systems, as well as the conversion and quality review of the converted property data, was accomplished without any significant delay in the participating communities' tax billing schedules.

This was a collaborative effort among multiple state and local government entities and a private mass appraisal company. It was a proactively planned strategy, effectively executed over five years, that resolved the issue of replacing the expiring CSC system and converting their assessing databases to a new CAMA system for dozens of communities. Staff from EOTSS (formerly MassIT), DLS, Tyler Technologies, and the assessors and their staffs from all the participating communities worked together and all contributed to the success of this project. Congratulations for a job well done goes to Mike Hamel (formerly of EOTSS) and Cathy Marques and her EOTSS team, Kirsten Shirer and her DARB team, Joanne Graziano and her BLA team, the staff at Tyler Technologies and, most importantly, the assessors and their staffs from all the participating communities. Your hard work and patience made this collaborative effort a success. Mission accomplished!

*(Editor's note: The City & Town Editorial Board would like to thank Paul Corbett for his service to our publication and wish him all the best in his retirement. Thank you, Paul. We tip our Red Sox hats to you in sincere appreciation.)*

**Editor:** Dan Bertrand

**Editorial Board:** Sean Cronin, Donnette Benvenuto, Linda Bradley, Paul Corbett, Emily Izzo, Theo Kalivas and Tony Rassias

Contact *City & Town* with questions, comments and feedback by emailing us at [cityandtown@dor.state.ma.us](mailto:cityandtown@dor.state.ma.us).

To unsubscribe to *City & Town* and all DLS alerts, email [dls\\_alerts@dor.state.ma.us](mailto:dls_alerts@dor.state.ma.us).