

Board of Selectmen
Special Meeting

February 13, 2019
1:00 P.M. Town Hall

Present: Bruce Adams, Chris Garrity and Jeff Parkin.

Also present: Patty Braislin, Darlene Brady, Lesly Ferris, Lynn Harrington, Barbara Herbst and Rick Osborne.

Mr. Adams called the meeting to order at 1:05 p.m.

The pledge was recited.

Park and Rec:

Mr. Adams stated that the Board of Selectmen had met with Lesly Ferris, Park and Rec Director, on February 7, 2019 and reviewed the operating section of the proposed 2019/2020 Park and Rec budget. He added that the Board of Selectmen has no issue with that part. Mr. Adams stated that the Park and Rec Commission had removed the Monday/Wednesday Lunch Program at the Senior Center from the Park and Rec Director's job description. The Board of Selectmen asked that the Park and Rec Director retain the responsibilities until the Board of Selectmen and the Park and Rec Commission could meet to discuss the Park and Rec Director's job description. Mr. Adams stated that his concern is "what would the Park and Rec Director do with the approximately three hours a week allotted for the program if the she was relieved of those duties?" Park and Rec Chairman Lynn Harrington stated that the Park and Rec Commission had discussed and would like to see the Park and Rec Director focusing on youth sports, conducting meeting with coaches and parents prior to the sport beginning, getting more involved with the website and posting information on social media. The overall concern is that there is a decline in children, what direction is Park and Rec going? Mrs. Harrington stated that Park and Rec offers piano and guitar lessons, martial arts, teaming with other towns for youth sports, concert series, and senior bus trips. She added that the Park and Rec Commission feels that the Monday/Friday lunch does not fit under Park and Rec. Mrs. Harrington added that she sees the position as a 40 hour per week position and feels that it would be difficult to reduce the position, with the added responsibilities, to 35 hours per week. Mr. Garrity compared the Monday/Wednesday lunch program with the after school program. He stated that the two programs are similar, just for different age groups. Mrs. Harrington agreed to bring the information back to the Park and Rec Commission. Ms. Ferris added that there are four new members have joined the Commission since the job description was updated. The Board of Selectmen thanked Mrs. Harrington and Ms. Ferris.

Town Clerk:

Mrs. Brady noted that the proposed budget worksheet line 211 (022-402), Record Maintenance, needs to be corrected. It should be \$12,000 not \$11,000. The Board of Selectmen agrees that they have no issue with the operational portion of the Town Clerk's proposed budget. Mr. Adams stated that Mrs. Brady

RECEIVED FOR RECORD
KENT TOWN CLERK

2019 FEB 19 A 11:11

BY [Signature] TOWN CLERK

had submitted the proposed Town Clerk's budget with the salary information left blank. He added that the treasurer entered the salaries with a 3% increase. Mr. Adams stated that the Board of Selectmen have not made any decisions nor have not adopted any scales relative to salaries. Mr. Garrity agreed the Board of Selectman has not adopted the Management Report or any other data. He added that not everyone is the same with respect to "bosses" i.e.: First Selectman, board or commission. The Board of Selectmen, Town Clerk and Tax Collector, all elected, do not have a board or commission to speak on their behalf. Who should advocate for them? Mr. Garrity stated that while an employee asked the Board of Selectmen to be fair, he stated that is not always possible because not all situations are the same. He stated that Mrs. Brady has held her budget and, in fact, lowered it and she is a good person and the kind of person "we" want to retain. Mr. Garrity added that he is grappling with how to get to a fair point. Mr. Parkin asked Mrs. Brady if she had put together some numbers. Mrs. Brady clarified that she is not advocating for an increase. She stated that she is unclear as to what parameters, what the foundation, what to compare to, if the Board of Selectman is moving toward a 35-hour workweek? Mrs. Brady noted that Mr. Parkin has product per capita information in a discussion regarding the Administrative Assistant and stated that the per capita would be relevant for the Town Clerk's office, as well. She added that Mr. Parkin has not provided the result of his study for the Town Clerk and requested the results. Mr. Parkin stated that he had been working on that document but recalled that the Town Clerk's position was slightly under statistical average by approximately 7%. He added that the Town Clerk's office is run efficiently. He stated that he feels Mrs. Brady would qualify for merit or above the across-the-board increase, but he is not sure how to facilitate. Mr. Parkin stated that he feels that the Town Hall should be a 35-hour week, regardless of posted hours of 30 or 40 per week, and salary should not be based on an hourly rate as the management review focused on. After a few moments of silence, Mr. Adams stated that breaking down salaries hourly was the only way he could compare apples to apples. Mr. Parkin disagreed and stated that was the way Mr. Adams chose to compare the salaries. Mr. Garrity asked Mrs. Brady if she feels that she is compensated within the range. Mrs. Brady stated that she feels that she is compensated within the range but feels there is room within the range, based upon the Management review, surrounding towns, per capita. The Board of Selectmen took another pause before Mr. Garrity moved on to say that they have addressed the assistant line and the overall budget looks okay. Mr. Parkin concluded the only item left to discuss is the potential for a merit increase.

Mr. Garrity stated that he has come to the conclusion that the Board of Selectmen needs to be fair but that does not mean that all decisions will be equal.

Treasurer:

Mr. Adams opened the discussion by stating the Board of Selectmen has not made any decision and has not come to any conclusion with salaries. Mrs. Herbst asked if she was supposed to update the budget document, specifically salaries, based on prior Board of Selectmen meetings. Mr. Adams stated that no decisions have been made, so, therefore, there is nothing to update.

Mr. Adams stated that he has no issue with the proposed operating budget. He asked Mrs. Herbst if her job has become more involved. Mrs. Herbst has requested 2 additional hours for the assistant and has requested a \$5,000 increase for herself. She stated that her workweek is supposed to be 16 hours and she works an average of 5-6 additional hours every month, which at her current salary equals \$2,600 and the additional increase is reflective of the high range hourly rate in the Management Review. Mr. Garrity asked what would happen if she did not work the additional hours. She stated that the work would not get done.

Highway:

Mr. Adams stated that the Town Garage remained flat. He added that no changes have been made to the Highway operating budget either. Mr. Osborne stated that he could no longer get the cards for the current the card reader for the fuel system. He estimates the cost to replace the system would be approximately \$12,000. He added that he could not wait five years to put it in the Capital Budget. He recommends to either increase next year's budget by the \$12,000 or perhaps there would be surplus this year to make the purchase. Mr. Garrity expressed his concern with not budgeting lines correctly. He would like to budget the lines based on historical data to make each line reflect the true expenses and not have to transfer money from line to line. Mr. Garrity would like to add anticipated repairs. Mr. Osborne stated that every year the Board of Selectmen issue a letter to all department heads that requests all lines stay flat. Mr. Garrity stated that if the lines need to be increased, then the lines should be increased. It makes for cleaner budgeting. He is willing to provide the resources and take the heat. Mr. Adams believes that the Board of Selectmen is making mountains out of molehills, and it should be left alone.

Mr. Adams moved onto the salary portion of the Highway budget. He noted that a 3% increase was entered for Mr. Osborne and 2.24% for the union employees. Mr. Osborne asked if he was getting the 3% or something else, based on the "extra hours" he works. Mr. Adams stated that nothing has been decided on salaries.

Mr. Garrity noted that Mr. Osborne is doing additional office work. He asked what would happen if Mr. Osborne did not work the additional hours. If it means that the Highway Department needs another employee, the Board of Selectmen needs to know. Mr. Osborne explained that if he gets a call at night for a tree

down, currently he goes out and handles it if he can; if he has the call in the crew, he has to call-in two union workers for a three-hour call back for each of them. Mr. Parkin stated that the nature of salaried is that the employee is expected to work more than but not without limits. Mr. Adams stated that it has been documented that Mr. Osborne works an average of 300 hours more than he is compensated for. He has budgeted a ½ man for seasonal work. Mr. Adams stated that he does not think that Mr. Osborne does not use the position properly. He would like to see that position used to mow the fields as well as plow. Mr. Garrity reminded the Board of Selectmen that they need to look at the position and not the current employee, because that employee may not be in that position forever. Mr. Garrity asked if Mr. Osborne is happy with the performance of the current crew. Mr. Osborne stated that he is happy with the current crew, 99% of the time.

Assessor:

Mrs. Braislin provided the Board of Selectmen with a budget worksheet that reflects an increase in the data processing, primarily due to increase user licenses from one to two. She added that the budget also shows a reduction in tax mapping. Mrs. Braislin stated that the proposed software upgrade from the 6.5 version to the 8 version would be paid out of the money in reval from the Capital Budget. The treasurer provided confirmation that there is money left in the capital plan for the proposed upgrade. Mrs. Braislin stated that the new version of the software does have the capability to input building permits. She added that she does not know how it works but wanted to mention it.

Tax Collector:

Mr. Adams noted that the operational portion of the budget is almost flat. Ms. Devaux stated that there was a slight increase of \$14.00 from Vision. She added that she anticipated a larger increase due to the increase in postage. Mr. Adams requested clarification. Ms. Devaux stated that Vision prepares and mails the July invoices, which are property and vehicle taxes. She added that the January billing, which is vehicle only, is done in-house. Mrs. Devaux stated that some towns charge a \$5.00 fee for removing vehicles from the DMV delinquent list. She stated that she has not proposed that at this time because she does not believe that the Town needs that money that badly. Mrs. Devaux thanked the Board of Selectmen for publishing the COG salary survey as it reflects that her salary is within the range, based on an 18-hour workweek. Mrs. Devaux stated that at \$41.11 per hour for 18-hours, she is not overpaid. She conformed that she is only requesting the 3% across-the-board increase.

Mr. Parkin made a motion to adjourn the meeting at 3:40 p.m. Mr. Garrity seconded the motion and the motion carried.


Joyce Kearns
Administrative Assistant

These are draft minutes and the Board of Selectmen at the subsequent meeting may make corrections. Please refer to subsequent meeting minutes for possible corrections and approval of these minutes.

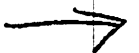
Tax Collector

Budget Worksheet

FY 2019 - 2020

	YTD				Proposed Budget
	Jul '17 - Jun 18	Budget	Jul '18 - Jun 19	Budget	
Income					
130-310 • Property Taxes	11,218,500.84	11,021,099.00	6,710,106.06	11,082,455.00	
130-320 • Tax Refunds	-52,433.37		-8,713.32		
130-330 • Interest	58,406.14	40,000.00	18,337.09	40,000.00	
130-340 • - Liens	716.96	500.00	419.96	500.00	
130-350 • Property tax relief	845.78		0.00		
Total Income	11,226,036.45	11,061,599.00	6,720,149.79	11,122,955.00	
Expense					
017-000 • TAX COLLECTOR					
Compensation					
017-101 • Salary	37,356.80	37,357.00	19,238.96	38,478.00	39632.
017-102 • Assistant	10,962.49	12,876.00	5,737.52	13,261.00	13659.
017-998 • Social Security	3,708.76	3,843.00	1,644.63	3,958.00	4077
Total Compensation	52,028.05	54,076.00	26,621.11	55,697.00	
Department Operations					
017-201 • Supplies	1,739.68	1,800.00	0.00	1,800.00	1800
017-202 • Postage	3,868.80	3,500.00	2,507.65	3,500.00	3500
017-203 • Notices	472.91	400.00	128.70	400.00	400
017-204 • Mileage	95.16	200.00	0.00	200.00	200.
017-302 • Data Processing	10,980.09	10,762.00	7,529.28	10,918.00	10932
017-453 • Fees for Delinquent	250.00	250.00	331.62	250.00	250
017-501 • Telephone	479.41	675.00	299.23	675.00	675
Total Department Operations	17,886.15	17,587.00	10,796.48	17,743.00	
Professional Development					
017-450 • Dues	175.00	250.00	0.00	250.00	250.
017-451 • Conferences	1,082.00	1,000.00	50.00	1,000.00	1000.
Total Professional Development	1,257.00	1,250.00	50.00	1,250.00	1250.
Total 017-000 • TAX COLLECTOR	71,171.20	72,913.00	37,467.59	74,690.00	

Tax Collector Assistant Rate Budgeted hours
25.5 520



Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury, CT 06705

Budget Letter 2019-20

Date	Letter #
2/6/2019	2018E853r

Name / Address

Kent Tax Collector
PO Box 678
Kent, CT 06757

Contact	Leo DiNicola
Phone #	203-755-9031 x103
Fax #	203-574-4360
e-mail	leo@qds.biz
Cellphone #	203-910-2316

Description of Services	Est Qty	Total
June 2019 - CASI certify File	1	75.00
June 2019 - Fold, Meter, Insert, Tray, Strap and Deliver Mail to Post Office for mailing Bills (RE, PP, MV)	3,650	419.75
June 2019 - QNest Processing Fee - QDS patented service that allows Nesting of 1 Real Estate and 1 Motor Vehicle Bills into 1 envelope - Potential 30%-40% reduction in RE bills mailed	1	300.00
June 2019 - #10 Mailing Envelopes 24# WW - 1 sided	3,650	118.63
June 2019 - 1st Class Postage - CASS Certified Rates (est)	3,650	1,478.25
June 2019 - 8 1/2 x 11 Insert, 4 Color, White Paper, 24lb, single sided - includes folding and inserting with tax bills - Min Qty 5,000	2,400	339.48
Subtotal JUNE 2019		2,731.11
Dec 2019 - CASI certify File	1	75.00
Dec 2019 - Fold, Meter, Insert, Tray, Strap and Deliver Mail to Post Office for mailing Bills	400	90.00
Dec 2019 - #10 Envelopes 24# WW - 1 sided	500	45.00
Dec 2019 - 1st Class Postage* - Regular Rates	400	190.00
Subtotal DEC 2019		400.00

Mailing services available for ALL Town Mailings - Delinquent Notices, Mayors Letters, other Departments - Please call for Pricing

WE WILL BEAT YOUR CURRENT VENDOR PRICING FOR MAILING SERVICES BY 5% (GUARANTEED) excluding Postage as that is a pass-through charge

www.qds.biz

Review this letter carefully - call if items need to be removed or added - Sign and return promptly

Enter Total based on options chosen

Customer Acceptance Signature: _____
Print Name and Title: _____
Customer Acceptance Date: _____
Purchase Order # (if applicable): _____

Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury, CT 06705

Budget Letter 2019-20

Date	Letter #
2/6/2019	2018E852

Name / Address

Kent Tax Collector
PO Box 678
Kent, CT 06757

Contact	Leo DiNicola
Phone #	203-755-9031 x103
Fax #	203-574-4360
e-mail	leo@gds.biz
Cellphone #	203-910-2316

Description of Services	Est Qty	Total
Software Services		
Annual Software Support Fee - Revenue Collection Software	1	3,200.00
Annual Subscription Fee - QSearch - Tax Records Web Hosting Service	1	1,200.00
Annual Hardware Maintenance Plan - Epson TMU675 validator	1	225.00
Disaster recovery as a service (DRaaS) is a cloud backup and restoration service model that uses cloud resources to protect and data from disruption caused by disaster. It gives an organization a total system backup that allows for business continuity in the event of system failure. (DRaaS) is MANDATORY unless the Town can show that they written proof of a current Cloud backup service** for your office. (see enclosed flyer for more information) -	24	192.00
Split Billing for 1 Database (Tax/Assessor) Tax Office - 24GB @ \$8.00/gb Assessor - 24GB @ \$8.00/gb		
Printing Services		
Setup Charge	1	100.00
June 2019 - Printing and Processing RE Bills Including Banks	1,550	883.50
June 2019 - Printing and Processing MV Bills	1,750	997.50
June 2019 - Printing and Processing PP Bills	350	199.50
Dec 2019 - Printing and Processing MVS Bills	400	228.00
Final Posted Ratebook per CT State Statutes	1	500.00

www.gds.biz

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Customer Acceptance Date: _____
Purchase Order # (if applicable): _____

Compensation		18/19 budget	19/20 Proposed Budget	Difference	% change	Notes
016-101	Assessor	37,424	38,547	1,123	3.00%	
016-102	Asst JD	15,820	18,870	3,050	19.28%	720 hrs.-3% \$26.19 per hr
016-104	Asst JH	9,591	9,879	288	3.00%	377 hrs.-3% \$26.19 per hr
016-998	SS	4,807	5,148	341	7.09%	
Total		67,642	72,444	4,802	7.10%	
				0	#DIV/0!	
Dept-Oper				0	#DIV/0!	
016-201	Supplies	1,000	1,000	0	0.00%	
016-202	Postage	900	900	0	0.00%	
016-203	Notices	100	100	0	0.00%	
016-204	Mileage	700	700	0	0.00%	
						Vision software upgrades- Vision (2) users 6,015- Vision web site 1,597 & 150 Static file - Quality 5,400 estimated, figs from QDS not yet received-Qpublic 1,500 (increase vision to 2 users)
016-302	Data Processing	12,335	14,662	2,327	18.87%	
016-423	Tax Mapping	2,500	1,500	-1,000	-40.00%	
013-501	Telephone	600	600	0	0.00%	
Total		18,135	19,462	1,327	7.32%	
				0	0.00%	
Pro-Dev				0	#DIV/0!	
016-450	Dues	60	60	0	0.00%	
016-451	Conferences	550	550	0	0.00%	
total		610	610	0	0.00%	
			610	610	#DIV/0!	
				0	#DIV/0!	
GRAND TOTAL		86,387	92,516	6,129	7.09%	
1. attached are notes re Vision Software upgrade (funds should be in Capitol Reval) also Joyce is aware of possible IT needs						
2. Potential for added legal fees in reval years						
3. Included is general information regarding the assessment process from prior yrs for info purposes						
4. 19.28% increase reflected in line 016-102 is not a fair/accurate reflection of what is in place .						

509.



QUALITY VISION SOFTWARE SOLUTIONS

November 26, 2018

Dear Vision Client:

In the spirit of providing unparalleled levels of service in the CAMA industry, we wanted to respond to the request from many of our clients for updates to our maintenance pricing for those who are developing their budgets for the coming year. The following are our annual maintenance prices starting in July 2019.

CAMA Software Maintenance:

Single User	\$4,053
2-5 Users	\$6,015
6-10 Users	\$7,622
11-20 Users	\$8,755
Over 20 Users	depends on environment

*All jurisdictions that have GIS will be billed an additional \$556 annually for GIS support.
We will continue to provide the first Static Database within the annual software maintenance.*

Web Hosting for Public Access:

Number of Parcels:	Standard Database <u>AND GIS Map</u>	PDF of PRC
Less than 2,500	\$1,597	\$309
2,501 - 5,000	\$2,318	\$309
5,001 - 10,000	\$2,833	\$309
10,001 - 20,000	\$3,348	\$309
20,001 - 35,000	\$3,914	individually priced
Over 35,000	individually priced	individually priced

Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury, CT 06705

Budget Letter 2019-20

Date	Letter #
2/6/2019	2018E855

Name / Address

Kent Assessor
PO Box 678
Kent, CT 06757

Contact	Leo DiNicola
Phone #	203-755-9031 x103
Fax #	203-574-4360
e-mail	leo@qds.biz
Cellphone #	203-910-2316

Description of Services	Est Qty	Total
Annual Software Support Fee - Assessor Software	1	3,550.00
Disaster recovery as a service (DRaaS) is a cloud backup and restoration service model that uses cloud resources to protect and data from disruption caused by disaster. It gives an organization a total system backup that allows for business continuity in the event of system failure. (DRaaS) is MANDATORY unless the Town can show that they written proof of a current Cloud backup service** for your office. (see enclosed flyer for more information)	24	192.00
Split Billing for 1 Database (Tax/Assessor) Tax Office - 24GB @ \$8.00/gb Assessor - 24GB @ \$8.00/gb		
Double Sided laser Printing & Indexing of Grand List - Regular	1	350.00
Permanently Binding Grand List Book(s) - Regular List	1	75.00
Double Sided laser Printing & Indexing of Grand List - MVS	1	300.00
Permanently Binding Grand List Book(s) - MVS	1	75.00
Assessor Annual Cost of Services; Maintenance of Town FTP (File Transfer Protocol) Folder which provides for storage (uploads and downloads) of Town databases, installation .exe's, IT tools and DMV CIVLS access maintenance	1	450.00
PP Declarations - Printng and Mailing Setup Charge	1	75.00

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Review this letter carefully - call
if items need to be removed or
added - Sign and return
promptly

Enter Total based on options chosen

Customer Acceptance Signature: _____

Print Name and Title: _____

Customer Acceptance Date: _____

Purchase Order # (if applicable): _____

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121 Mattatuck Heights Rd
Waterbury, CT 06705

Budget Letter 2019-20

Date	Letter #
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Name / Address

Kent Assessor
PO Box 678
Kent, CT 06757

Contact	Leo DiNicola
Phone #	203-755-9031 x103
Fax #	203-574-4360
e-mail	leo@qds.biz
Cellphone #	203-910-2316

Description of Services	Est Qty	Total
Printing Personal Property Declaration Forms - Personalized	380	152.00
Printing and Processing Personal Property Declarations - Blanks	40	8.00
Fold, Meter, Insert, Tray, Strap and Deliver Mail to Post Office for mailing Bills	380	63.33
Meter PP Decl on Postage Meter	380	19.00
1st Class Postage - Regular Rate	380	190.00
Optional		
Annual Subscription Fee - Personal Property CAMA	1	900.00
Annual Subscription Fee - QDS Hosted Personal Property Declaration Form	1	100.00
Printing and Processing Increase Assessor Notices	375	100.00
Folding, Suffing and Mailing services with Standard #10 envelope	375	75.00
Meter Notices on Postage Meter	375	18.75
1st Class Postage - Regular Rate	375	183.75
Setup Charge 4 page Pre-printed I&E < 550 pieces	1	75.00
Print 4 page Pre-printed I&E with Taxpayer Information, including Printing, mailing services and Standard #10 envelope - No Cass certification < 550 pieces	50	50.00
Meter I&E's on Postage Meter	50	2.50
1st Class Postage - Regular Rate (est)	50	24.50

www.qds.biz

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Customer Acceptance Signature: _____
Print Name and Title: _____
Customer Acceptance Date: _____
Purchase Order # (if applicable): _____

Budget 2019/20

Keep

Patrícia Braislin

From: Sales-DG
Sent: Tuesday, June 20, 2017 10:30 AM
Cc: Sales-DG
Subject: Introducing Appraisal Vision v8 CAMA!
Attachments: V8 Product overview 6-17.pdf

Dear Connecticut clients,

I am pleased to introduce Vision's newest CAMA product, Vision v8. This product is for Assessors, built by Assessors. We are harnessing Vision's hundreds of years of internal experience and actively engaging with some of our loyal clients to ensure that Vision v8 is the best CAMA solution on the market.

Though we are just now officially launching Vision v8, we know that some questions have arisen and we hope that this email will help everyone learn more about the product, timing and process for your future upgrade.

Vision v6 has been a tremendously valuable and dependable CAMA product for the past ten years. We continue to be very proud of it. However, the underlying Microsoft and Oracle technology is anticipated to reach end of life no later than 2020. To give our client partners the maximum amount of planning and budgeting notice, Vision will begin implementing v8 this fall.

Vision v8 will include all current v6 features, numerous new-to-market features such as square foot pricing and significant performance enhancements. We are leveraging our years of experience and building an entirely new platform using technology and engineering best practices (please see the attached information sheet for additional details on Vision v8 features and technology).

We are actively seeking input and feedback from our clients during the development of Vision v8. We have asked a small group of early adopters to participate in the Vision v8 Client Advisory Team, which will include helping to shape the product roadmap, conducting product testing this summer and being early adopters this fall. The team met for the first time last week and we had an outstanding session trading CAMA product ideas.

I would like to personally thank Paul Friia from Westport and Jason Lawrence from Tolland, as well as the Assessors who participated from the other states, for their invaluable contributions.

Lastly, we will be conducting Vision v8 webinars, demos and user groups throughout 2017, including the Vision User Group in October. Please be on the lookout for additional information about how you can learn more about the product roadmap, the implementation process, commercial terms and payment options.

Our internal Appraisal team and you, our client partners, have been requesting CAMA "wish list" items for years. I am very happy to say that Vision 8 will deliver many of those features and enhancements and greatly help the Assessors in Connecticut.

The Vision team looks forward to talking with everyone more about Vision v8 this summer. Please let either myself, Pat Donovan, Michelle DeVecchio, Mike Tarello, Steve Ferreira, June Perry or Neal Dupuis know if you have any questions in the meantime.

Best,

Dave

VISION v8 Product Overview

v8 TIMING

- Vision is planning on launching v8 in the fall of 2017
- Vision anticipates the end of life for Vision v6.5 in 2020, possibly sooner (driven by Microsoft and Oracle)
- Each client should plan for the v8 upgrade implementation to take up to two weeks
- Vision recommends implementing v8 in Q3 or Q4 during a non-revaluation cycle
- Vision will begin conducting revaluations using v8 in Q2 of 2018
- Due to the expected demand, we recommend that you notify Vision of your intentions as soon as possible so that your upgrade timing needs will be accommodated



v8 FEATURES

All existing Vision v6.5 functionality will be included in Vision v8, plus the following new features:

- My Screen—Dashboard
- Non-Effective area (Square foot pricing)
- Land Property Factors (now value options-user defined model)
- Sales Analysis Enhancements
- GIS Enhancements
- Comparable Sales Enhancements
- Enhanced Sketch Tools
- New Security and Admin Module
- Subdivision, Parcel Split, Copy & Merger Tools
- Enhanced Report Wizard
- Ownership Table
- Multi Owner Transactions

The user interface and navigation will be very similar to Vision 6.5 minimizing end user training requirements

v8 ADD-ON FEATURES

- Mobile Capability
- Building Permit Import Module

Software site license includes:

- Data conversion from Vision 6.5
- v8 training

Additional Services and Options:

- Interfaces, custom reports and values may be an incremental charge
- Historical database conversions
- Most clients should already have the needed hardware in house

We will provide a pre commitment quote to clients to use for internal budgeting purposes

v8 Support/Maintenance Pricing

Support costs will remain consistent to historical pricing for v6.5 users for the first year post upgrade to v8

Vision's mission:

To enable local governments to serve their constituents and accurately assess taxable values. We build lasting client relationships by delivering the best service and products in the appraisal industry.

Our values:

- Exceed client expectations by being responsive and respectful
- Meet our commitments in build confidence and trust
- Be the most knowledgeable people in the appraisal industry
- Work as a team and treat each other like family

v8 TECHNOLOGY

- Vision v8 is a new platform and is being built using technology and engineering best practices
- Rich client application that uses a N-tier web service-based application architecture
- Supports Microsoft SQL 2016, Windows 10 and .NET 4.6.1
- Supports Microsoft SQL Report Server and RDL Reports
- Easy and seamless deployment using MSI technology. Can be extended using SCCM deploy Tool

v8 PERFORMANCE IMPROVEMENTS

- Recalculation time by 25%
- Screen refresh time by 10%
- Start-up time by 30%

For information please contact:

Patrick Donovan 800-628-1013 x3644

pdonovan@vgsi.com

Neal Dupuis 800-628-1013 x4046

NDupuis@vgsi.com

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Many part time assessors who work in small towns also work full time in a larger town. They have evening hrs. or week end hrs. In many small towns a qualified Certified Asst. is in the Office during posted hrs. In most cases posted hours in part-time offices do not come close to reflecting real hours worked to compile a Grand List annually. There are many variations around the state.

Assessment work also requires on site property visits to view status of building permits on or around the Oct 1, annual assessment date. All deeds filed that change ownership requires updating assessment records, exemptions, etc., surveys and zoning changes impact assessment records and tax mapping. Information from many sources impacts assessments.

The annual assessment cycle is very detailed, regulated, and complex only fully understood by those who are responsible for the total process from beginning to end annually. The individuals who work in assessment offices in most all cases have very specific training relating to assessment procedures. Courses for assessor certification are required by statute. It takes years to obtain certification and there are two levels. The annual Grand List is based on information processed from many sources to maintain a solid tax base and to create the tax bills that fund the Town.

Part time offices with part time assistants have challenges that full time Depts. don't have just by being part-time. Many of annual required filings are subject to penalties if filings dates are not met.

Some Specifics of Annual Assessment Function

Reports to State: 23: 13 yearly- 10 monthly -Three of these reports result in funds back to the Town.

Annual Filings with Assessor's Office: Approx 100 - covering different functions Elderly Home owners, Income veterans, disabled, blind, newly exempt properties must file for exempt status. These filings require processing and tracking from year to year. There are differing statutory filing dates and criteria for each. In addition every 4th year certain tax exempt properties have to refile to continue their exempt status.

Personal Property Annual filings: 400 see attached required form, the statutes that cover personal property are complex.

Prepare Annual Tax Bills: Provide and maintain the proper data to create approx. 5500 tax bills annually. This is ownership, title, acct allocation when property is split, and mailing addresses.

Building permits: Approx 500 need to be reviewed and processed for tracking in our system this is a different process than annual field inspections on site.

Building permit on-site inspections: Approx 250 annually then results must be processed for proper valuation for the annual Grand List filing.

PA 490: Farm Land comprises 1280.42 ac on 99 parcels, Forest Land 10,547.02 ac on 233 parcels., and Open Space 970.49ac on 76 parcels, 408 accts comprising 12797ac. There are changes and required filings on many of these parcels annually. Review of 490 parcels is ongoing as time allows.

PA 490 Penalties: The Assessor's Office has collected over \$620,200 in penalties since the 97-98fy. *Additional Note: More since 2/17*

Photo updates: Ongoing process as time allows saves on revaluation cost also.

Cert of Change: Approx 270 accounts impacted annually, generally motor vehicles

Report Requests: Estimate 30 for local orgs. Town, State departments, Regional orgs., and preservation types groups.

Real Estate Transactions: 150 to 200 estimate deeds filed with Town Clerk must be processed through our office for billing, exemptions, assessment classifications, etc.

Board of Assessment Appeals: Can range from one appeal to 120 The Assessor's office supplies the information to the Board.

Motor Vehicles: 3600 approx from DMV need processing. Pricing, list review for those that need to be sent to other towns, exempt ones, apply exemptions that qualify etc.

Pre Revaluation Year: 100 Mail I&E forms to commercial property owners two years prior.

120-150 Mail sales verification forms two years prior

Annual Change Notices: Est. 550 were mailed for current grand list

Annual Survey review for account and tax map changes: This is a process that can affect many parcels or accounts. One survey can impact five or just one account. Prepare for tax map updating needs to be done carefully also.

The above functions are not done by an outside company or by pushing a button on the computer. They are done by the personnel in the Assessor's Office. There is no one else to process the information that comes from many sources to an Assessor's Office. Much of our work is also determined on the accuracy of information provided by others. In addition these things do not even address Office coverage for public access or general questions. I have attached general info and back ground for education classes that give a good idea of specialized skills that are required for employment in an Assessor's Office. Most if not all ads for help in an assessor's office require courses specific to the assessment function.

Inspection process: The implementation of the revaluation inspection process has been ongoing for over two years and will result in a large savings for the 2018 revaluation. The public has been very pleased and clearly understands the benefits of doing this process locally. The extra work meshes with other assessment functions and requires knowledgeable personnel. This is a large undertaking for a part-time office and has been worked in with the annual assessment cycle work load. Jim, Jen and I have worked well together to make this work and the taxpayers will benefit.

So far there has been a 70% return rate. All but a small number have been reviewed and processed through our system. Of the 1500 improved parcels we started with we have approx. 400 to follow up on this year. Any questions regarding this process please contact me. Revaluations are very detailed and regulated doing this in-house has advantages beyond the cost savings.

Currently the Assessor's Office maintains a tax base that is worth close to a billion dollars and generates in excess of \$10,000,000 in tax revenue. There needs to be an understanding that the assessment function requires a level of training that is specific to the assessment function and has an impact on all taxpayers. I have included an overview of the background and course material that applies to the education of those who administer the assessment process in the State.

Patricia S. Braislin, Assessor.

CCMA Course 1A – Assessment Administration

A course is intended for newly-elected assessors, new staff members and others interested in earning the CCMA designation. Along with CCMA 1B, this is an appropriate course for first-time attendees.

Content: Introduction to state statutes, Transfer of title, Maintenance of assessment records, Exemptions and exempt properties, Assessment calendar, Common interest ownership.

Prerequisites: None

CCMA Course 1B – Assessment Valuation

This course is intended for newly-elected assessors, new staff members and others interested in earning the CCMA designation. Along with CCMA 1A, this is an appropriate course for first-time attendees.

Content: Concept of value, 490 valuation (farm, forest and open space), Revaluation, Sales ratio and grand list codes, Motor vehicle assessment administration, Personal property assessment administration, Miscellaneous valuation problems.

Prerequisites: None

CCMA Course 2A – Introduction to Appraisal Principles

Content: The appraisal process, Legal concepts and theory of value, Land valuation, cost approach to value, Measuring and listing.

Prerequisites: CCMA 1A and CCMA 1B

CCMA Course 2B – Application of Valuation Techniques

This course is open to attendees who have completed the prerequisites below, and to others on a space-available basis.

Content: Mathematics and statistics, Cost schedules, Revaluation concepts, Commercial valuation, Sales Comparison approach to value.

Prerequisites, CCMA 1A, 1B, and 2A

CCMA Course 3 – Income approach to Value

Content: Income capitalization, Capitalization and discount rate development, Mortgage equity and band of investment, Use of the HP-12C financial calculator, Residual techniques, Discounted cash flow analysis, Financial functions

Prerequisites: CCMA 1A, 1B, 2A, and 2B

CCMA Course 4 – Revaluation Course

Content: Requests for proposals and contracts, Public and media relations, Statutory framework, Preliminary valuation review, Ratio studies, Mass appraisal techniques.

Prerequisites: CCMA 1A, 1B, 2A and 2B

AAT COMMITTEE MODULE I – III

Module I – INTRODUCTION TO THE VALUATION PROCESS

Module II – VALUATION

Module III – INCOME APPROACH TO VALUE

Administrative Assessment Technician Designation, AAT

The Education Committee of the C.A.A.O., in 1996 established the designation of Administrative Assessment Technician (A.A.T.) to encourage and recognize educational accomplishment and to enhance professionalism among assessment staff and technicians.

A.A.T. Requirements

C.C.M.A. Class 1-A

C.C.M.A. Class 1-B

A.A.T. Module I or C.C.M.A. Class 2-A

A.A.T. Module II or C.C.M.A. Class 2-B

A.A.T. Module III or C.C.M.A. Class 3

Three (3) years of experience in an assessing office

Successful completion of a comprehensive examination

Continued membership in the C.A.A.O.

Each C.C.M.A. class is 30 hours. Each A.A.T. Module is 6 hours.

Since the Connecticut Association of Assessing Officers is the sponsor of this designation, the title is exclusively reserved for C.A.A.O. members. For qualifying former members of the C.A.A.O. the A.A.T. designation may be requested if membership is reestablished.

The benefits of an A.A.T. designation.

- The educational requirements of the A.A.T. enable you to gain knowledge and experience in the assessment field.
- Receiving the A.A.T. moves you ahead as a professional in the assessment field.
- The A.A.T. verifies that you have demonstrated your abilities in the complicated fields of Connecticut assessment law and general appraisal principles.
- The A.A.T. can give you increased confidence and professional credibility.
- The A.A.T. enhances your professional credentials.
- You receive recognition for the specialized knowledge that you have acquired.

With the advent of more complex laws and state-mandated programs, the need for skilled assessors who could perform their jobs with knowledge and integrity became more acute. The Meskill Commission's 1972 Report on Tax Reform recommended the establishment of a state certification program for assessors. This was the impetus for the 1974 legislation that created the Certified Connecticut Municipal Assessor (CCMA) Committee.

In accordance with §12-40a, the Secretary of the Office of Policy and Management (OPM) appoints the seven members of the Certified Connecticut Municipal Assessor Committee (CCMA Committee). This committee is charged with establishing programs and procedures for the training, examination, certification and recertification of assessors and making recommendations to the OPM Secretary concerning the certification of individuals.

The initial members of the CCMA Committee (Walter Birck, one of the earliest proponents of a state-sponsored certification program, Richard Prendergast, Robert Kemp, Joseph Cullen, John Killeen, and Edward Clifford) approved the first formal guidelines regarding the training, examination and certification of assessors. Based on the committee's recommendations, the 35 assessors who then held the CCA designation received their Certified Connecticut Municipal Assessor (CCMA) designations on October 23, 1974. By the end of that year, an additional 61 assessing officers had received the CCMA designation.

Awareness of the proficiency assessors must possess has increased since the first designations were awarded, as has the complexity of the assessment function. The certification program continues to be voluntary, however, a new State Statute makes it mandatory that the annual Grand List be signed by a certified assessor and many towns have made receipt of a state designation a condition of employment. And while the number of elected three-member boards of assessors has declined, many board members have become certified. There are currently approximately 350 persons who have received their designations and all but a handful of towns have state certified assessors on staff. This is a clear indication of the success of the certification process and the esteem with which assessor designations are viewed.

There have been several revisions to the certification program since its inception. Additional course requirements became part of the certification criteria in 1987. Two years later, these criteria were formally adopted as Regulations of Connecticut State Agencies. Recertification requirements were added in 1997, at which time the current two levels of certification were established. As of August 15, 2016, the Revaluation Course gained final approval and is now required as a prerequisite to obtain both a CCMA I or CCMA II designation starting with exams taken after January 1, 2018. There is no waiver for this course. During each of these revisions, there has been one constant: the underlying principles of education and experience as a prerequisite for certification have remained unchanged.

The two levels of state certification currently that currently exist for assessors are CCMA I and CCMA II, with the difference between the two hinging on their varying education and experience requirements. Comprehensive examinations for both levels of certification are conducted annually. Certifications are valid for a five-year period and persons wishing to maintain their certifications must successfully complete 50 hours of approved courses or workshops during that five-year period. The CCMA Committee determines which courses and workshops can be used to fulfill this requirement.

CAAO issues the Administrative Assessment Technician (AAT) designation to persons involved in the assessment field who either do not wish to become state certified, or have yet to achieve the necessary education and experience requirements. CAAO's Education Committee develops the guidelines for the AAT designation, which is issued following a person's successful completion of required courses and examinations. The designation remains valid while a recipient is a CAAO member. While not a state certification, the AAT designation evidences the professionalism of those who have satisfied the prerequisites for its achievement.

Given the accomplishments of the certification program and Connecticut's historical emphasis on the education of assessors, it can be assumed that the state's assessment officials will continue to meet future challenges with the same enthusiasm and competency they have exhibited in the past.

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