



**STATE OF MAINE CHAPTER
INTERNATIONAL ASSOCIATION OF ASSESSING OFFICERS**

**Executive Board Meeting
September 25 - 10:00 a.m.
Falmouth Memorial Library, 5 Lunt Rd, Falmouth**

MINUTES

Members Present: President Darryl McKenney; Vice-President Joe St. Peter; Secretary Barbara Brewer; Treasurer Clint Swett; Past President Karen Scammon; Executive Board Members Natalie Andrews, Lauren Asselin (remote), Terri Duff (remote), and Kerry Leichtman (remote). Bonnie Baker (remote) was also in attendance.

Members Absent: Brent Martin and Amber Poulin.

President Darryl McKenney called the meeting to order at 10:11 a.m.

Secretary's Report: Clint moved to accept the minutes of the August 21, 2025, meeting as written. Barbara seconded the motion. Eight members were in favor and the motion passed. Barbara abstained from voting on the meeting minutes because she was absent from the August meeting.

Treasurer's Report: Clint provided his Treasurer's Report. We currently have a balance of \$8,188.88. Clint issued a check for \$200 to Kerry for reimbursement towards last month's boat excursion that was part of the August meeting, and he deposited a check for dues and \$20 for mugs. Karen moved to accept the Treasurer's Report. Natalie seconded the motion. All were in favor and the motion passed.

Standing Committee Reports

- **Education:** Karen has drafted an agenda for the annual meeting that has been planned for Thursday, November 20th. She requested that Board members give her their input on what they would like for the speakers (Dan Stevenson, Chris Bell, and Valerie Moon) to include in their presentations. Chris Bell and Valerie Moon will be discussing AI. Terri and Kerry asked for examples of how to use AI with some real-world examples. Karen will make a strong outline for the speakers to use in their preparation of their presentations. She asked if members of the Education Committee could help her in sending the outlines to the speakers. Natalie will contact Dan Stevenson, Terri and/or Lauren will reach out to Chris Bell and Valerie Moon.

Karen would like to have the annual meeting registration form completed by next week. She hopes to send out as many meeting reminders to the membership as possible so that we can get a good turn-out. Terri is happy to help with this.

The Hilton Garden Inn will need us to confirm our food service choices by October 21st. There was some discussion on whether an afternoon snack was necessary. If we choose a heavier lunch, then the snack is not needed during the afternoon break. If a lighter lunch is offered, then perhaps a snack would be appreciated. There was also some discussion about eliminating breakfast and only providing tea and

coffee at the beginning of the day and having a snack available at the mid-morning break (9:45). Joe mentioned that some past surveys have indicated that attendees would like soda at these events. Karen will send out a survey of food service options, and the Board can weigh in on their preferences.

The Hilton Garden Inn will need an estimated head count by November 6th, and a final head count by November 14th. The total cost is expected to be around \$5,000. This includes food service, room rental, projector, and other AV services. Doing the math, Natalie pointed out that the cost per person would be \$71.42 if seventy people paid to attend. Karen recognized that when the Hilton Garden Inn was selected, the Education Committee realized that there would be some loss. Karen pointed out that previous registration costs were \$50 per member and higher for non-members. Joe stated that we would have to go higher than \$50 per member for this event. Karen agreed.

There was some discussion about how many people attended past Chapter meetings. Joe thought around seventy people registered for the 2024 annual meeting held this past February. Karen believed that almost one hundred people attended the 2023 annual meeting. Barbara chimed in that both those numbers were too high. The highest we have had, in terms of paying members, for past events was at most eighty, if that (since Board members did not pay for past events). Karen said we should plan for seventy attendees at this annual meeting. Natalie suggested if we charge \$60 per person, that it would arrive at \$4,200, which would be just around an \$800 loss. Karen then suggested charging \$60 for members and \$65 for non-members. Kerry did not agree.

Karen then suggested \$60 for members and \$70 for non-members. Joe agreed that seemed reasonable, but Kerry asked if members had ever been charged as much as \$60 to attend. Karen answered that we've never charged over \$60 for members and that \$70 would be too much per person. Natalie then suggested that members should pay \$50 so that the cost wouldn't be prohibitive for members to attend. Clint added that losing some money on events was fine if we realized that we may need to up the membership fees to compensate for our losses. He further stated that when he became treasurer, there was \$19,000 in the account, and we are now down to \$8,100. If we aren't careful, we could be out of money. Joe interjected that this conversation segways into the cost topic under "New Business." Barbara added, as a point of information, that the \$8,100 does not include the stipends to be paid out at the end of the year. Stipends will further deduct \$2,500 from the \$8,100 currently in our account. If we then subtract any losses from this annual meeting, our account will be further depleted at year end. We will begin 2026 with only the dues we bring in plus a tiny buffer. Barbara added that she would be ok with \$55 per member and \$70 for non-members for the annual meeting. She then asked if Board members would also be required to pay to attend the meeting. Barbara just wanted to point out that Board members work extremely hard to put these meetings together and that it seems almost unfair to ask Board members to work the event and pay to attend the event.

Clint offered that membership dues haven't been increased in a "long time" and that we can justify charging more because of the cost of holding these events. Joe mentioned that the rising costs have affected all organizations in a similar way and that is why we need to discuss them later in the meeting. The membership costs of other groups were mentioned as a good comparison.

As Karen wants to get the registration forms out by next week, Darryl suggested that we firm up the member and non-member costs for the annual meeting. Natalie suggested \$50 for members and \$75 for

non-members. Kerry concurred. Joe wondered if any non-members ever choose to attend these events. Barbara answered that we usually do get a couple of non-members to attend. For instance, some O'Donnell's employees will come to the meetings, but they do not pay membership fees as it would be expensive for O'Donnell & Associates to pay membership fees for each employee.

Darryl asked for a vote from the Board on the suggested fees of \$50 for members and \$75 for non-members to attend the annual meeting. Barbara asked that a consensus be requested, rather than a vote. Darryl asked what the difference was between the two, and Barbara answered that if the Board formally votes on the fees to be charged, then we cannot adjust them if needed without rescinding the vote and voting again. Also, a formal vote is not required to decide fees for Chapter meetings. Barbara asked for clarification on whether Board members would be required to pay the full amount to attend the annual meeting. Barbara reminded the Board that Board members were only required to pay half the cost at the last Chapter meeting. Joe stated he had no trouble paying the full amount to attend. Natalie added that the fee comes from the Town's budget. Barbara added that not every Town budget has the funds to pay for these events, she stated that she did receive a couple of personal checks for the last Chapter meeting from Board members who did not have Town funds. Karen asked Board members to weigh in on this issue. Kerry stated he could go over his budget, so he was fine with paying the fee. Terri added that she will go along with whatever the Board decides but was concerned about the rising costs of training and the fact that our ME Chapter account is getting low on funds. She can pay to attend the meeting, but she understands the concerns regarding Board members working and paying to attend these events. Karen added that we do these events "out of the goodness of our hearts." Darryl added that he doesn't think we need \$19,000 or \$8,000 sitting in the bank. Barbara assured him not to worry since we won't have either by year end. The Board decided that we would each pay \$50 (member rate) for our attendance.

Karen agreed that she would state the fees on the registration form as \$50 for members and \$75 for nonmembers.

Karen will also include the address of the Hilton Garden Inn on the registration form and then suggested that a QR code be included to link attendees to the location of the Inn and the parking lot. The Board agreed that this would be a good idea. The registration deadline for attendees will be set for November 10th.

- **Legislative:** Darryl handed out a list of eighteen taxation changes of municipal interest that were provided in the July issue of Maine Town and City with a brief description of each. Terri suggested that this list be uploaded to our website. Karen agreed that this would be a good idea. Kerry stated that the agenda for the second legislative task force was just released. On September 30th there will be a live Zoom with presentations by Amanda Campbell and Lewis Cousins as well as others.
- **Membership:** Barbara reported that there are currently 153 members for 2025. Six of those members are new CMAs that Joe reached out to for a free annual membership. These newer members will be granted membership through the end of 2026 as 2025 has only a few months left to the year. Joe added that Bonnie has recently provided seven more names of new CMAs, and he will reach out to them as well.

- **Audit:** Clint will need to balance the bank statements before the audit can commence. Barbara will confirm the names of the Audit Committee once she reviews the list and she will provide the names to Clint so that he can arrange for the annual audit.
- **Nominating:** Barbara asked if the Nominating Committee was ready with their report since it is due on October 1st in accordance with the by-laws. Karen asked who was on the Committee, and Barbara answered that Kerry, Judy (Mathiau) and Donald (Ferrara) are the current members. Joe asked Kerry if the Nominating Committee report could be ready by the next meeting (October 16th) and Kerry replied that it would. Consequently, this item will be included on next month's agenda.
- **Communications:** Joe hopes to have the next newsletter out before the annual meeting in November. He expects that this will be a shorter newsletter, but he wants to promote the annual meeting as much as possible. He really appreciates articles written by Board members, so if you have an article you would like to submit, please do. Joe is also looking for another recipe to include, so please submit one, especially if you have a family favorite you would like to share. The deadline for submitting content for the newsletter is November 1st.

Karen had an additional thought regarding the annual meeting. She suggested that we project past photos of ME Chapter members at events in a slide show as a way of engaging the attendees. Joe has a collection of photos he can share for this purpose.

Joe has also been refreshing the website, so Board members may have seen recent updates. There are only a couple more things that need his review.

- **IAAO:** The annual convention in Orlando for the IAAO is going on now.

Ad Hoc Committee Report

- **History:** Joe sent a scan of a vintage "MAAO Guide for the Assessor" in an earlier email that he was given by the assessor in Wells who found it behind a file cabinet while cleaning out their office. As a coincidence, Darryl was given the same vintage pamphlet by Judy Mathiau. The author and date of the MAAO pamphlet is unknown.

Old Business

- None

New Business

- MAAO Costs

Joe wanted to discuss the increased membership cost for MAAO that was announced at their fall conference. The MAAO relies on assistance from the MMA. According to Darryl, the cost to the MAAO will increase from \$10,000 to \$40,000 to better reflect the actual cost of MMA services provided to the MAAO. Darryl added that the \$40,000 was then negotiated down to \$26,000 with fewer services provided. Since this is an increased cost to the MAAO, the MAAO will raise its membership fee. Joe expected to be approached to possibly combine assessing groups considering this increased cost, but

there may not be any interest in combining efforts due to the specific requirements that need to be met by each organization in relation to the IAAO.

Darryl also mentioned that the ME Chapter of the IAAO is under the umbrella of the MMA as an affiliate, the same as the MAAO. Natalie confirmed this affiliation by reviewing the MMA website. This is an affiliation that the ME Chapter of the IAAO does not appear to have received any benefit from. Joe questioned what does being an affiliate actually mean to the ME Chapter of the IAAO? It may mean that the support services provided by the MMA come at a cost. Bonnie suggested that as an affiliate, the ME Chapter should ask the MMA to include our trainings on their calendar.

Joe further discussed his concerns over the increased cost of MAAO membership and the ramifications to the ME Chapter of the IAAO. We may be competing for members with MAAO. Per Darryl, the MAAO discussed raising their cost to \$60 for next year and then revisiting the membership cost after next year. The advantage of MAAO membership over ME Chapter membership may be Listserv. Clint asked if we could provide the same type of service as Listserv. Joe has researched this in the past and does not know if we could provide a service without an associated substantial cost. Additionally, the MAAO has an established Listserv that would be difficult to compete with.

Joe also brought up the impact to other assessing groups, such as MidCoast assessors and CMAAO. Kerry chimed in that MidCoast doesn't charge a membership fee (but "you get what you pay for").

Barbara offered that perhaps the ME Chapter of the IAAO could just provide membership at no cost but charge enough at meetings to cover the actual costs and stipends. While Board members found this to be an interesting idea, Clint did point out that we also have scholarships, gift cards to speakers, etc., that need to be covered in addition to stipends and that might not be cost effective. Clint will look at the numbers and see what the numbers look like in terms of actual costs. Natalie offered that we discuss the aspects of training and membership costs at the annual meeting in lieu of a game or icebreaker. Joe agreed that the topic is timely and a discussion from the members might be helpful so that we can be more responsive to what the members need and would like to see from our group. Kerry affirmed that the strength of ME Chapter training is that the topics are contemporary. Joe agreed.

Terri asked Bonnie how many attendees were at Property Tax School. Bonnie stated that there were 199 in attendance. Bonnie added that the change of date may have deterred some people from coming as there were fewer people in attendance than the year before. Bonnie stated that she hopes to keep prices for her trainings in 2026 the same as this year. Terri added that she has enjoyed her past in-person trainings, and that keeping control over the costs is important to make certain that assessors stay involved in education. Terri also believes that the ME Chapter of the IAAO has provided quality training without the costs that seem to be burdensome to the MAAO.

Natalie moved to adjourn the meeting, and Joe seconded. All were in favor. The motion passed and the Board adjourned at 11:25 a.m.

The next meeting is scheduled for October 16th at the Lithgow Library in Augusta.

Respectfully submitted,

Barbara Brewer, Secretary