

**BOLTON BOARD OF SELECTMEN
FINANCE COMMITTEE
SPECIAL JOINT MEETING
7:00 PM, MONDAY, JULY 8, 2024
BOLTON TOWN HALL, 222 BOLTON CENTER ROAD
In-Person and Virtual (Hybrid Format)**

MINUTES

Board of Selectmen Members Present In-Person: First Selectman Rodney Fournier, Deputy First Selectman Robert Morra, Mather Clarke, Gwen Marrion, Amanda Gordon, Pamela Sawyer

Board of Selectmen Members Present Via Zoom: Tim Sadler

Finance Committee Members Present In-Person: Rhea Klein, Ashley Phelan

Finance Committee Members Present Via Zoom: Chairman Ross Lally, Christopher Connelly (7:12 p.m.)

Staff Present Via Zoom: Recording Secretary Linda H. McDonald, Tax Assessor Kara Fishman, Finance Director Jill Collins

Staff Present In-Person: Town Administrator James Rupert, Tax Collector Lori Bushnell

Others Present Via Zoom: Sandra Pierog, Holly MacDonald

1. Call to Order: R. Fournier called the meeting to order at 7:01 p.m.

2. Discussion on Assessment and Tax Collection for 2024 Tax Season:

R. Fournier explained there was an issue that happened with the transfer of data from the Assessor's office through a bridge into the Tax Collector's office, which are two different programs. He said 556 accounts were moved over wrong, resulting in the town collecting an additional one million dollars in tax assessment.

A. Gordon asked why there is additional revenue since the town has the grand list and is the grand list posted on the town website wrong, and, if so, why?

Assessor K. Fishman explained the reports she ran for the town and the state were based on what was in QDS, which was the terminal that did not bridge correctly. The last bridge took place in February and the reason there is more revenue for all those accounts is they were not increased to the revalued amounts.

Tax Collector L. Bushnell explained there are two QDS accounts, one for the Assessor and one for the town. She said the one K. Fishman referred to is the one going from the CAMA system Vision Government Solutions to the Assessor's system.

To clarify, A. Gordon said Vision, the company the town contracted with to do the revaluation, gave the town the wrong data. L. Bushnell said the data were right in Vision, in the CAMA system, but something happened in the bridge of the transfer to the QDS software in the Assessor's office.

R. Lally asked if the information that the town's assessing company did was correct. K. Fishman responded yes. She said, ultimately, she should have looked at the totals in the two systems and

compared them. She noted she never had a problem in the 12 years that she has used the system. She said the bridge is part of Vision's software. She explained what is being done in a bridge is you are exporting from CAMA and importing to the Vision system. K. Fishman said Vision has offered to go back and look through all their source coding to figure out if it is wrong there.

T. Sadler asked if residents received incorrect bills or correct bills. L. Bushnell responded there are about 500 accounts that went out with incorrect tax information.

R. Fournier said the important thing right now is to figure out how to redistribute this money.

R. Lally responded the members need to understand what happened so they know how much money is being talked about and what the committee needs to do to adjust the mil rate in order to properly give money back.

3. Consider and Possibly Act on Action to Resolve the Issue:

P. Sawyer read the following letter from K. Fishman dated July 8, 2024 labeled "numbers to work with" into the record:

"There are 556 accounts that had the wrong assessment. Of these, 161 are accounts paid through CoreLogic (the banks) and received the correct bill amount. An additional 38 accounts were adjusted through walk-ins and phone calls. An additional 357 accounts have not been rebilled.

The additional net assessment from the tax bills already corrected is \$13,894,230, with additional revenue of \$454,897.01.

The additional gross assessment from the accounts that have not been rebilled is \$19,545,260. The net assessment is estimated at 86% of the gross (based on the current ratio of net to gross real estate), or \$16,808,924. The additional tax revenue would be an estimated \$550,324.17.

In total, the additional assessment is \$30,703,164, producing additional revenue of approximately \$1,005,221.18."

A. Gordon noted, it is not just the tax bill that went out wrong, it is also the grand list the town uses to calculate the mil rate was wrong. That is why this would not normally be considered additional revenue if the grand list the town based the mil rate was correct. It would be revenue the town normally expected. But because those assessments were not in that grand list, it is additional revenue the town was not expecting.

To help the members better understand who and how this has affected the taxpayers, L. Bushnell provided an explanation how they have taken care of the problem so far. She has started changing the assessments to what they were supposed to be, setting priority to all the banks so they could go through their customers and pay the right amount. The office has also been addressing taxpayer calls and concerns.

Members discussed options, once the final amount of additional revenue overage is determined, of how to either refund or rebate the money to those affected, as well as the costs associated with this process.

With the consensus of the members, J. Collins said she will contact the auditor to explain the situation and see what he suggests.

P. Sawyer MOVED that the Board of Selectmen form a three-member panel consisting of Ross Lally, Amanda Gordon and Robert Morra to make discussion about the rebate/refund with the town attorney to be the priority versus the cause of the problem and to review and look at the contracts and that part of that issue and that they work with the Town Administrator and go forward and talk with the Town Attorney for clarification on state statute and town ordinances. This will be a subcommittee of the BOS and include members of the Finance Committee. R. Morra SECONDED. G. Marrison pointed out that the issue of getting the determination of rebate/refund is the priority question as opposed to the one of what the underlying problem was. MOTION CARRIED 7:0:0.

L. Bushnell said, as far as she knows, she will have the corrected bills at the currently adopted mil rate out to the 357 accounts that have not yet been rebilled by the end of the week. K. Fishman said, once those bills have been corrected and go out, she will have net assessment and then the final grand list number. She credited QDS staff for all their help.

The consensus was to direct the Town Administrator to create the first press release to the public as soon as possible saying where the town is of this meeting. P. Sawyer said, as elected leaders, they need to be upfront and open as possible. The Town Administrator will work with the First Selectman on this press release.

4. Adjournment: P. Sawyer MOVED to adjourn the joint special meeting at 8:13 p.m. R. Morra SECONDED. MOTION CARRIED 7:0:0.

Respectfully submitted by Linda H. McDonald

Linda H. McDonald

Please see the minutes of subsequent meetings for the approval of these minutes and any corrections hereto.