



City of Malden

Malden City Hall
215 Pleasant Street
Malden, MA 02148

Meeting Minutes - Final Finance Committee

Councillor-at-Large McDonald, Chair
Councillor Condon, Vice-Chair
Councillor O'Malley
Councillor-at-Large Colon-Hayes
Councillor Simonelli
Councillor Linehan

Tuesday, February 28, 2023

5:30 PM

CityHall, Room #105

215 Pleasant Street

Roll Call

Present: 4 - Councillor at Large Carey McDonald, Ryan O'Malley, Karen Colon Hayes and Amanda Linehan

Absent: 2 - Councillor Paul Condon and Chris Simonelli

Also Present:

Alicia McNeil-Legal Department

Councillor McDonald called the meeting to order at 5:40 PM.

Minutes to be Approved

[59-23](#)

Minutes of February 21, 2023 to be approved.

A motion was made by Councillor O'Malley, seconded by Councillor at Large Colon Hayes, that the Committee Minutes of February 21, 2023 be approved. The motion carried by a unanimous vote.

Business

[56-23](#)

The committee will meet for the Annual updates and discussion with Dan Grover, Treasurer and Nate Cramer, Assessor.

Attachments: [Assessors Annual Office Update 2023](#)

[Treasurers Annual Office Update 2023](#)

Dan Grover started with the Treasurer's Office Annual Update. He had prepared a power point presentation.(see attached). The organization chart names all his employees in the office and their titles. He also lists the Treasurer and Collector Duties. The office consists of 10 FT employees and 1 PT employee. They mail four bill types making up 245,000 bills sent out per annum. They also handle Municipal Lien Certificates and process 1500 parking appeals per annum. There are four languages spoken in the office to assist constituents, English, Portuguese, Spanish and French. Constituent services for paying bills include in-person, mail, telephone and email. Some goals of the office are to continue to learn and develop, bring more bills online and to build bench strength, succession planning and continuity planning. He said we do make mistakes not to many but we are always learning. He encourages his team if they make a mistake it's fine and

encouraged because they are trying things and learning. As a team they reinforce cross-training in the office and maintain continuing online training. They have added credit card acceptance for cash and carry items such as trash tags, stickers and bags. They also assisted the City Clerk's office to accept credit cards for Vital Records requests. They have added parking appeal PDF's online. Goals for 23/24 include working with the School business office to provide student activity offerings on City Hall Systems. Continue with in-house training. He would like to attend the two year Treasurer Collector School. They will continue to build bench strength, upward development for in house staff and strengthen interdepartmental collaboration.

He speaks about ensuring that the implementation of the Neptune water meter upgrade is seamless for water billing. Dan explained the Neptune water meter which is an initiative driven by engineering. They are looking to put up antennas to get a more efficient read in a real time manner for the read collection. Presently, the water meter reader drives around every street in the city and gets the radio transmission and its low frequency in the City. These are the constituents water meters that will generate the water bills. It is a large project to work with the Neptune group and he will continue to work with them to make this process be seamless to constituents. For the Treasurers office the change is in the reporting piece. Transitioning from the driver to the antenna base with that comes different billing software that will have to be implemented on the Treasurer/Collector side. A lot of this is outside of his control but the long term plan is to make it more accessible and more information available which is much further down the road.

Councillor McDonald said talking about the prudent man mandate and how that works do we have to be approved for investing before we go for the RFP or does it happen at the same time

Dan said the prudent man is just what assets you are allowed to invest in prudently. The RFP was to determine an investment management group that could not only manage our assets as they are currently through the state approved list but also has the capability to manage our assets appropriately when we should move forward with a group plan. The RFP was a conversation for changing investment managers is a conversation that has been happening for some time with the transition from the prior investment manager group to the new investment manager group where we are saving a little over 50% of the annual fees. We are using a more prolific investment management group with more qualified asset managers that have significant assets on management for municipalities and state agencies across the state.

Councillor McDonald said assuming we get approved for this they would basically manage our assets like they would manage any private endowment, diversified portfolio and mutual funds. Do you know if they offer any kinds of ESG's metrics or screens, are we investing in private prisons, tobacco industries or weapons companies what do you know about that

Dan said we could absolutely integrate ESG with any aspect of our investments, desires or options

Councillor McDonald said all these investment firms have some version of this at this point

Dan said right now cemetery assets are only invested in the state approved list. There may be only one company that is not housed or domestic.

Councillor McDonald said this could be the retirement board. Does the retirement board have an investment advisor group they work with or are they on the state approved list Dan said they work with the DeBurlio Group

Councillor McDonald would like to follow up with this and know what kind ESG offerings our advisors have and screens they have available and what we look into in terms of integrating long term

Nate Cramer, Assessor handed out a power point presentation for the annual update of his office. There are five employees in the Assessors office. Some of the functions he

mentioned are updating permits and deeds, determining annually fair and equitable valuation of all real and personal property in the City. They also grant or deny MV/Real Estate and Personal Statutory abatements. The office receives correspondence by phone, emails and mail. This year they sent out 1,500 Forms of List which is a small commercial exemption in Malden if you have a personal property for your business is worth under \$5,000 you do not get a bill. The database has over 1500 only about 397 usually go out. There is a lot of clutter in there and he hopes this will clean it up. He also mentioned his office has averaged 4 sick days per employee in 2022.

Councillor McDonald asked how do the pieces of motor vehicle and excise tax get held is it from the registry?

Dan said it gets sent to Kelly & Ryan they are our deputy collectors. They get the file from the registry, Kelly & Ryan work with the Assessors with the formula to determine the excise tax which is based on your MSRP.

Councillor McDonald asked if they have historic records of MV registrations or excise tax or he would like to know how many cars are registered in the City within the last fifteen years?

Dan said Kelly & Ryan might have that

Councillor McDonald is interested in how has the number of cars registered in Malden gone up

Dan said he could get that information for him

Nate explained the number of residential abatements have gone down considerably since he started. They were averaging about 150 and have gone down to 42 for FY23. For 13,500 parcels he feels 42 is a good number. He speaks about his 2022

accomplishments. They reduced the number of appellate tax court cases from 57 to 2 which is when a property owner applies for an abatement because you feel your value is too high and the Assessors office denies you, you can file an appeal with the Appellate Tax Court. He continues to cross-train staff. The office has also engaged with the youth/senior employment program with special projects such as archives and mailing. Some of the 2023 goals would be to upgrade the Patriot Properties Software, continue to cross-train staff. He would like to get NearMap in the City which is a software program which could be used city-wide. This software flies over the City three times a year. All of the cities around us have it. He also has been discussing with the City Clerk's office about charging for abutters list. We currently do not charge for this and we should be. Every city around us charges around \$35. It is a lot of work and it can get expensive. They are working to scan all archives and make them available to the public. You could go on GIS and click on a parcel and get the information. The office procedures manual is an ongoing process.

Councillor McDonald asked if there is anything they would like support from the Council within the upcoming year. Nate said he will continue to speak with the City Clerk about charging for abutters lists and also NearMap. For the most expensive version \$30,000/year. The whole city could use it. They could put it in every police car. It has change detection where he could move a bar across from previous years.

Dan said he doesn't have any asks but he did support charging for the abutters lists.

Other Business

Tabled Papers

[246-22](#)

Minutes of April 19, 2022 to be approved.

A motion was made by Councillor Linehan, seconded by Councillor at Large Colon Hayes, that the Committee Minutes of April 19, 2022 be approved. The motion carried by a unanimous vote.

[381-22](#)

Minutes of June 14, 2022 to be approved.

A motion was made by Councillor O'Malley, seconded by Councillor at Large Colon Hayes, that the Committee Minutes be tabled to the Finance Committee. The motion carried by a unanimous vote.

[38-23](#)

Minutes of December 20, 2022 to be approved.

A motion was made by Councillor at Large Colon Hayes, seconded by Councillor Linehan, that the Committee Minutes of December 20, 2022 be approved. The motion carried by a unanimous vote.

[39-23](#)

Minutes of January 10, 2023 to be approved.

A motion was made by Councillor O'Malley, seconded by Councillor at Large Colon Hayes, that the Committee Minutes of January 10, 2023 be approved. The motion carried by a unanimous vote.

Adjournment

A motion was made by Councillor O'Malley, seconded by Councillor Linehan, that this meeting be adjourned at 7:00 PM. The motion carried unanimously.