

Board of Selectmen Meeting Minutes
1/22/2018, Rhodes Building, 8am

Present: Select Board members Bill Martell, Alisa Pearson, and Karen Ribeiro, John Trickey, Kathy Martell, Edna Holloway, Joe Larson, and Susannah Carey.

Open: Selectman Martell opened the meeting at 8:04am.

Questions organized and adopted by each committee member to ask.

Candidate #1 – June Massee

Roles and Responsibilities of Collector and Treasurer

Collects taxes, turns over money to the bank, responsible for tax title, loans, reconciliation either monthly/quarterly depending, makes sure BOS are satisfied with work requests, collection and payroll.

Payroll in Blandford was done in-house and outsourced.

Experience as interim treasurer in Blandford for 6 months.

Are you familiar with UMAS accounting system?

No. Blandford uses Softright and understands accounting part as Collector. Treasurer's work completed in Softright, also Accountant, Water, and Assessors work.

Next step after demanding real estate taxes?

If you don't hear back, send letter to advertise in paper then wait for response. If still no response, advertise again. Used Berenson and Bloom for tax attorney.

What fees can be forgiven on motor vehicle excise taxed and when?

June has not forgiven any fees. If legitimate reason, up to \$15 of interest can be and not charge demand fees. There is discretion here. Are these abated in full? Yes.

What do you do with abatements after you receive them from the Assessor?

Process and those with a refund give to accountant who issues the checks.

Do you know how to reconcile accounts?

Yes.

Questions for us?

1 person office, collector/treasurer combined. Hours are 8-4 or 8-4:30 with lunch, 4 days per week. Residents and departments used to this schedule. Has town ever considered evening hours? June has worked evening hours in Blandford and is used to them. Former tax collector in Blandford being indicted due to receipt and cash issue. June would work evening hours so that residents could have receipts for their payments and also issued receipts with SASE. Pelham has no issue with marking receipts for residents.

Organizational skills?

June currently runs her own tax business and uses filing, folders, and locked cabinets to stay organized.

Skills to make you successful in this position in Pelham?

June attends school at UMASS-Collector/Treasurer Association. She is on the Legislative Committee for Collector/Treasurer. June is also an enrolled agent, who is licensed through the IRS, for tax preparation and to represent clients and her skills are currently up to date.

If unfamiliar with task at hand, how do you go about getting the help you need?

When June began in Blandford, there was a network of people to call and used them a lot. Now she gets many questions from that same network she relied on initially. She will pick up the phone if necessary.

Strengths or weaknesses?

Experience with accounting, and payroll. Her education is up to date and continues to refresh her skills annually. Knows both Point and Softright software-all strengths.

Weakness-When June was on her own in Blandford, there was no one to guide her so it is hard for her to delegate to other co-workers as she is used to doing it on her own. June follows the law in the Treasurer/Collector handbook. Example of tax payer who didn't believe he should have to pay excise tax on car that was sold. Registry marked him so he couldn't renew his license. June had to straighten out with the resident who was upset and the Blandford Town Administrator. He later produced the plate return receipt to clear the issue.

Anything on Resume want to address?

June mentioned her work experience being a close match to Pelham's position and she has broad knowledge. She is also the Treasurer for the Association of Timeshares.

Why would you like the job here?

June said she is ready for a change. Since ongoing trauma with previous tax collector, residents in town are wary same issue could occur again. She would like to continue with job without the disturbance in another town.

Do you have to give notice to your employer?

No she does not. She can go anytime as town is outsourcing now.

Share what you know/learned about Pelham?

June wondered if Pelham is similar to regional schools like Gateway Regional? Pelham has about 75 Pelham kids and 52 School Choice. Regional School has about 1400 with 89 from Pelham. Amherst does payroll bi-weekly but our tax collector prepares the town employees side and sends down to Amherst. Pelham receives the checks and produces a warrant. In Blandford, it is mandated for all to have direct deposit or use a debit card system as their check except for potential 1099 candidates who still have checks issued. The Town of Blandford worked with United Bank to set that up. At first there were complaints and resistance.

In closing, June stated she is selling her house and the distance is not an issue as Blandford is a 45-1 hour drive to Pelham.

Thoughts on June Massee

- Knowledgeable about both Tax Collector and Treasurer position
- Has new and innovative ideas
- Impressive roles on several Committees
- Seems confident & familiar with software programs, training needed in Pelham with warrants, payroll

Candidate #2 - Gene Ferrari

Roles and Responsibilities of Collector and Treasurer

As role as Town Accountant he joined with Collector/Treasurer and Assessors posting receipts, balanced receivables, balanced cash monthly-preferred to do, check writing, accountant side of warrant. In Charlton, Gene worked with the part-time treasurer. Collector/Treasurer position affects accounting. He is against cutting checks early.

Are you familiar with UMAS accounting system?

Gene installed it in 2 other towns but has not used it. Familiar with Vadar, and Admins.

Next step after demanding real estate taxes?

Collection process is next step. Edna stated next step is to start demand process and there are only 7 parcels affected in Pelham.

What fees can be forgiven on motor vehicle excise taxed and when?

Not sure.

What do you do with abatements after you receive them from the Assessor?

Not sure.

Do you know how to reconcile accounts?

Yes, would do monthly and go over with Collector and Treasurer. Outstanding receivables done monthly.

Questions for us?

Is there water and sewer in Pelham?-No.

Community Preservation Act is not Gene's favorite thing to do. Royalston got 100%. Edna verified that Pelham also gets full 100% grant.

Organizational skills?

Analytical to a fault, extremely organized, and able to juggle many things, knows spreadsheets, less paper and more computer docs/files. Gene was once on the Athol Retirement Board. Vadar would be able to link to excel to run same docs.

Skills to make you successful in this position in Pelham?

Analytical, likes exact figures to the penny, extremely organized, and knows a lot about a little. Worked late evenings and from home from Log Me In he installed. He is a self starter.

If unfamiliar with task at hand, how do you go about getting the help you need?

Can call someone if unfamiliar, like Collector/Treasurers in the area that he has met. Gene has developed rapport with others at Vadar.

Strengths or Weaknesses?

Strengths-Open doors and discuss issues with others right away and willing to try new things.

Weaknesses-Re-organization and hierarchy of Board of Selectmen frustrates him.

Anything on Resume want to address?

Unfortunately he had to leave his position in the City of Gardner because of family passing. When he worked in Charlton another relative needed care so he had to leave too.

Why would you like the job here?

Nice, easy drive from Athol and would like to locate out of town. Larger towns have so much going on and many redundancies.

Do you have to give notice to your employer?

No.

Share what you know/learned about Pelham?

There was no budget information on the town website. Pelham is not a thriving metropolis. About 1300 for population.

When could you start?

Next week could be here.

Did you bring references?

No, but can email to town.

Are you certified as Tax Collector/Treasurer?

No. Could take classes at UMass in August.

Thoughts on Gene Ferrari

- Several breaks in resume, no longevity with work history
- Used word 'hate' several times when speaking

Candidate #3-Cassandra Burgess

Roles and Responsibilities of Collector and Treasurer

Keep balanced and financial records to outside accounting firm, day to day payments and questions.

Are you familiar with UMAS accounting system?

No.

Next step after demanding real estate taxes?

Go to outside collection agency.

What fees can be forgiven on motor vehicle excise taxes and when?

Interest and demand fees can be forgiven.

What do you do with abatements after you receive them from the Assessor?

No knowledge.

Do you know how to reconcile accounts?

She knows a lot.

Questions for us?

Why is the position open? Edna retiring 3/1/18.

Organizational skills?

Basic filing system with paper documents. Sets timer to file on computer, reserve the day.

Skills to make you successful in this position in Pelham?

Accountant for over 30 years. Started in family business, worked with small businesses so she is used to wearing multiple hats. Has set up insurance systems; health & benefits and liability insurance.

If unfamiliar with task at hand, how do you go about getting the help you need?

Insurance companies offer trainings. Able to make phone calls and ask questions. She is not hesitant about her skills.

Strengths or Weaknesses?

Strengths-purchase orders, supply orders, friendliness with vendors, billing vendors, calling persons in collection and using humor.

Weaknesses-filing paper documents and doesn't like dealing with sales tax. Sets calendar reminders to file.

Anything on Resume want to address?

Longevity with past employers.

Why would you like the job here?

Logistically, lives close to her home in Amherst. Would like to change out from manufacturing and work in different industry with small town feel.

Do you have to give notice to your employer? When could you start?

Couple of days. Not working currently.

Share what you know/learned about Pelham?

Cassandra just moved here in August. Pelham has small town feel.

Did you bring references?

Yes.

Are you certified as Tax Collector/Treasurer?

No, but willing to be certified at School.

Thoughts about Cassandra

- Not qualified for position and not prepared
- Strengths and weaknesses
- Honest, friendly, straightforward, sense of humor

Reference Checks

Need to check references in a coherent way and look at entire situation. Board of Selectmen make overall decision of who to hire. Susannah will make reference calls for June.

Interview Committee recommends June Massee with a 2nd interview on February 1, 2018.

Edna checked Legislative Committee listing.

Questions to ask references:

- If this position was available, would you hire this person back again?
If yes, please elaborate, if no, why?
- How did this person work with others in the office?
- Were their reports timely?
- Strengths or Weaknesses?
- Give recommendation to Town for hiring person?
- For Selectman Martell's recommendation from friend, keep questions social.

Next meeting on 1/29/18 at 8am to discuss offer, salary, references, and recommend candidate to Board of Selectmen.

Prepare for 2nd interview on 2/1/18.

Approve PVPC as MVP Vendor

Motion to approve PVPC as MVP vendor, seconded by Selectman Martell, unanimously approved.

Adjournment

Motion to adjourn at 10:51am, seconded by Selectman Ribeiro, unanimously approved.

Respectfully submitted, Susannah Carey