

Finalist Interviews for the Treasurer/Collector Position

Present: Chairman William J. Plasko, Selectmen Helen Abdallah Donohue, Paul A. Bishop , Allan D. Howard, Thomas F. Maloney, Assistant Christina K. Mulvehill, HR Director Michelle Pizzi.

Chairman Plasko explained the purpose of tonight's meeting to appoint a new Town Treasurer and Tax Collector. Three candidates were put forth by the screening committee and last week candidate Gary Carreiro withdrew from the process. This evening the remaining two candidates will be interviewed. The Chairman thanked the screening committee for all its hard work.

Appointments

6:10 P.M.                      Mark Good

Mr. Good is currently the Treasurer/Collector in the City of Malden. Chairman Plasko asked Mr. Good to start with telling a little about himself, his job and history, etc. and to talk about why he is interested in this position. Mr. Good began by saying he has been a Treasurer his entire career and twenty seven of those years have been as a municipal treasurer. He started out in the Town of Weston as a Clerk to post payments and prepare deposits and learned the business from there. He was appointed Treasurer of Weston after a year. While there, he increased the Town's bond rating from AA to AAA. He also assisted in migrating from one computer system to another system and that was a big job. After leaving Weston he went to private sector and he learned to manage cash flow. From there he went to Walpole and helped put together some very good policies for debt management as well as investment policies for both the general fund and the trust funds. He was in Walpole for about ten years before he moved to Malden, and he has been in Malden for four years. Mr. Good explained that he is a hands on Treasurer and gets involved with the day to day activities. One reason he is interested in moving on from Malden is he feels like Town Government is better managed than City Government and he wants to get back to that. That is the number one reason he is here today.

Selectman Maloney mentioned the City of Malden approved the Community Preservation Act in November of 2015 and asked Mr. Good about his role and involvement in the implementation of CPA. Mr. Good said Malden initiated in July 1, 2016 and the biggest challenge he faced was making sure the math was correct on the tax bills. Malden uses an outside agency for billing which pulls information from the city's system. The other challenge was putting together the commission that oversees the funds that are collected and deciding who will do what, etc.

Selectman Howard asked Mr. Good to share what he knows about Norwood, such as annual budget, funding sources, work force and population. Mr. Good stated Norwood is unique in many ways. He looked at the proposed 2018 budget of approximately \$186,000,000 and what is striking about that is \$99,000,000 is raised from Town business such as light and cable receipts and the water receipts, etc. he spoke about the debt service and other specifics in the Norwood budget. Selectman Howard then asked

Mark Good (cont'd)

for Mr. Good's comparison of town government to city government. Mr. Good said in Malden the Treasurer is appointed by an eleven-member council, which meets every Tuesday night. The Mayor is elected and oversees the day-to-day operations including putting together the budget.

Selectman Bishop asked whether Mr. Good had ever had supervisory issues with staff in a negative way. Mr. Good said the staff he has now is marvelous and he cannot say that he has ever had an issue with his staff including staff in Walpole. He feels he has always had a good relationship with his staff. Selectman Bishop asked Mr. Good how he would handle a negative employee who was causing trouble. Mr. Good said the union contract would have progressive disciplinary steps so the main thing would be to work with the union and gain their respect. He believes he gains the respect of his staff by showing he knows a little about the work and actually doing the work and hopes that would help initially. If an adversarial relationship were to develop, a conversation would hopefully work, and if not they would follow the disciplinary steps outlined by the contract. Selectman Bishop asked Mr. Good if he had an issue in his department he would do everything he could to square it away and make it better. Mr. Good concurred.

Chairman Plasko asked Mr. Good to speak about the difference between BANs and bonds and what his approach to debt issuance is. Mr. Good said the biggest learning experience was in Walpole when they built the library over there. When the architect came back with the budget, it was a very tight budget. He learned to ban this type of thing before jumping into bonding so they are bonding with the proper amount. When he got to Walpole they were just finishing up the high school project. Bans are the temporary borrowing that allows the project to move forward and at the end of the project, you borrow only what you need. Mr. Good said for a big project, bans are the way to go, and then when you have enough of a principal amount, you bond. Chairman Plasko inquired about the period of time you can borrow for and when that period of time starts. Mr. Good said the clock starts with the first ban issue. Municipal modernization and some of the laws that came with that have changed up the borrowing options.

Selectman Donohue spoke about the town budget and the small items like the chapel at the cemetery. She spoke about the money that was put into an account seventy years ago. She also mentioned the Morse House, which has a separate fund and they take in donations. Mr. Good said the Town Accountant mentioned that there are various bank accounts for some of these funds and he said he does not understand why we don't close out some of the bank accounts and account for it at the general ledger. You would have to look at the specifics such as trust documents, etc. as there might be restrictions.

Selectman Maloney asked Mr. Good about his experience in system conversions. Mr. Good said the biggest conversion he was involved with was in Weston when they migrated to the Munis platform. In migrating, it takes a great amount of planning and work and he built the payroll system in his basement. The process begins with the General Ledger and then you bring in receivables, payables, etc.

Selectman Bishop asked for the definition of BAN. It is a Bond Anticipation Note or a short-term borrowing. Selectman Howard asked when he would be available to start if chosen. Mr. Good said he believes he would be available to start June 1<sup>st</sup>.

6:40 P.M.

Zoe Pierce

Ms. Pierce is currently the Treasurer/Collector in the Town of Wayland. Chairman Plasko asked Ms. Pierce to start by telling a little about herself, her job history and education, including why this position interests her. Ms. Pierce began by stating she graduated from Furman University in Greenville South Carolina. Upon graduation, she moved to the Boston area and worked in public accounting for Deloitte for two years. She was hired away by a insurance agency client and eventually became the Assistant Treasurer of that organization. She fell into a municipal finance job at a low level in Concord and was there for six and a half years. She took a position in Randolph during which time the town was close to receivership and they reorganized to a City Council. After she was in Randolph for two years, a position opened in Wayland, where the Treasurer had been let go six months prior, and she took it on for the opportunities it could offer. Ms. Pierce went on to say that when she got to Wayland there was a lot going on. They had gone without a treasurer for six months. It has been a whirlwind and she was in the right place at the right time. Ms. Pierce pointed out that she is now at a point in her career where she is a very solid Treasurer/Collector and is pulling from many different experiences. She said had a great training in Concord and was thrown onto the fire in Wayland and she does not particularly see Wayland as where she wants to end up. Wayland recently had to defend their Triple A rating with Moody's and did a lot of work with the Finance Director and the Town Administrator but Town Meeting drew down the reserves.

Chairman Plasko asked Ms. Pierce what in particular interested her in Norwood. Ms. Pierce said that in doing research with Wayland and looking at what went wrong there, she has looked at and done comparative analysis. Norwood seems to be a solid town and if she makes a move, she wants to go to a solid town. It seems to be a very well run town. There does not seem to be a lot of drama. In addition, she lives in Bedford and is only willing to travel a certain radius for work. Her husband worked in Norwood for over ten years. If there had been a position for her in Randolph she would have stayed but she was the same age as the incumbent and therefore did not see potential for promotion.

Selectman Maloney said she had listed five financial areas in the Town of Wayland that she thought need to be addressed right away. He asked what actions, if any, she took there to improve the weaknesses she perceived in their system. Ms. Pierce said she did stellar. When she first went in they did not have a daily cash out process so nobody had any idea, from the different sources of revenue, how much money was running through just the Treasurer's Office. She implemented a system with a spreadsheet coming in and showing what monies came in and from where each day. In addition, for seventeen years, nothing was done with their tax titles. She is currently at \$1.2 million in tax collection, out of \$2 million that was outstanding. Ms. Pierce went on to say that the Wayland Building Department is the biggest source of revenue outside her office, taking in \$1.0 million. That is the one area of the five she identified that she is still working on.

Selectman Donohue asked Ms. Pierce if she ever attended the air shows in Bedford. Ms. Pierce said she did go and her house is right around the block from the airfield. Selectman Donohue then asked Ms. Pierce how being on the Wayland Board of Assessors would be beneficial in Norwood. Ms. Pierce said

Zoe Pierce (cont'd):

even though state law says the two positions should have nothing to do with each other, but to understand what the departments need to do together is a dance. Mostly the work flows from the Assessors Office to the Treasurer's Office. Having knowledge of what the processes are is very important.

Chairman Plasko asked Ms. Pierce if she had state certification, and she does and she is continuing to take courses in assessing. Ms. Pierce said she is planning to sit for the Treasurer certification this summer. Chairman Plasko followed up by informing her that the Board likes department heads to attend Town Meeting and to occasionally come before this Board.

Selectman Howard asked Ms. Pierce what she knows about Norwood's budget, funding sources, etc. Zoe knows we have airport, light plant, and water, and that the budget is roughly \$170 million. She was surprised that the tax levy was \$70 million and the other receipts that were coming in was largely for the light plant. She said she was surprised that Norwood has no deferrals. A deferral is asset based that at a certain age you can defer your taxes as long as it doesn't go over 50% of the value of your home. This allows seniors to stay in their homes. There are many caveats involved. The taxes are at a reduced rate and then when the last surviving spouse passes, the town collects the taxes before the property is conveyed.

Selectman Bishop addressed supervisory skills. He asked Ms. Pierce if she has had any difficult supervisory issues with perhaps one or two employees, and if so, how she dealt with it. Ms. Pierce said in Randolph she had four people that had been there for 20 – 30 years that had a ton of time accumulated and it was hard to deal with people who would say they don't feel like working today and not come in. When she got to Wayland the situation was that the gentleman she replaced was very likeable and well thought of and it was unfortunate what happened; there was an internet breach. In some senses in her department it is fine and works well. She said she set the Assistant Treasurer up to run the outer office but it has not been a perfect thing and she is not a perfect manager. For instance she is responsible for balancing and funding payroll, but the payroll clerk does not work for her so whenever there is an issue it is not a smooth problem. She feels Wayland is very disjointed. Selectman Bishop said if she were to start in Norwood tomorrow she would be responsible for a staff of seven and if she found one to be difficult, how would she deal with it. Ms. Pierce said you have to understand exactly what each person does and how they do it. She would try to get a clear understanding of what they do and does it need to be done that way. She would go in and see what the structure is and then if there were issues she would try to work with them. People don't like change and they don't like someone new coming in but she thinks there is a way to work with them. If it got to the point where the situation was not workable, she would be talking to Michelle Pizzi.

Selectman Maloney said Norwood is contemplating installation of a new financial and accounting system and asked Ms. Pierce what her experience in that area is. She does not know what Norwood uses CJ for but in Concord they used him for the collection process but for accounting they used Vadar. If something happened to CJ or his system fails there is a huge problem. In Wayland they have Munis for accounting and Vadar for collections.

Selectmen's Appointments (cont'd):

April 24, 2017

Zoe Pierce-(cont'd):

Ms. Pierce said she is excited about being considered for this position and it would be a step up for her. Chairman Plasko asked when she could start if she were to be offered the position. Ms. Pierce said she would prefer giving three to four weeks' notice. Chairman Plasko told her the decision would be made this week and she would hear from Ms. Pizzi as to whether there will be second interviews.

Chairman Plasko asked the Board for suggestions as to how to proceed. Selectman Bishop said he would like to wait until tomorrow to make a decision. On motion of Selectman Howard, seconded by Selectman Maloney, voted to table the matter for one day.

Adjournment

No other business being presented for consideration, on motion of Selectman Howard, seconded by Selectman Maloney, voted to adjourn and the meeting was adjourned accordingly at 7:20 p.m.

A True Record.

ATTEST: \_\_\_\_\_  
Assistant