



**LANCASTER SELECT BOARD
Special Meeting Minutes
Of Thursday, August 26, 2021**

I. CALL TO ORDER

Chairman Jason Allison called the meeting to Order at 6:00 P.M. via Zoom. He noted that the meeting was being recorded.

Zoom Meeting <https://us02web.zoom.us/j/87498755681>
Meeting ID: 874 9875 5681

Roll call was taken, Alex Turner, present, Jay Moody, present, Jason Allison present. Also present were Town Administrator Orlando Pacheco and Human Resources Director Sandi Charton.

II. PUBLIC COMMENT PERIOD - NONE

III. APPROVAL OF MEETING MINUTES - NONE

IV. SCHEDULED APPEARANCES & PUBLIC HEARINGS - NONE

V. BOARDS, COMMITTEES AND DEPARTMENTS REPORTS - NONE

VI. TOWN ADMINISTRATOR REPORT - NONE

VII. ADMINISTRATION, BUDGET, AND POLICY - NONE

VIII. APPOINTMENTS AND RESIGNATIONS

Mr. Allison reviewed the format for tonight's meeting. The purpose of the meeting was to interview two candidates for the position of permanent Principal Assessor. An interview was scheduled with Bobbi-Jo Williams at 6:05 pm, and with Rena Gagne at 6:20 pm. It was explained that the process would mimic the process previously used for Town Clerk interviews. Each candidate would be welcome to make an opening statement, during which time both candidates were in the room. Following this, each member of the Select Board would have three prepared questions for each candidate, with the same questions asked of each candidate. During

the Question and Answer period, candidate not being addressed would be asked to leave the room. After the question period, the Select Board would deliberate and then decide which candidate was selected for the position.

Mr. Moody had questions on the recommended minimum requirements, specifically regarding certification from the Massachusetts Association of Assessing Officers (MAAO). Ms. Turner stated that she hoped this would come up during the interviews and that Mr. Pacheco could be asked to gather more information on certification after the interviews if needed.

Mr. Allison recognized Bobbi Jo Williams and asked her to make an introductory statement.

Ms. Williams thanked the Select Board for the opportunity to speak. She has worked for the Town of Lancaster for almost six years. She stated that she has taken continuing education for the length of time she has worked for the Town. She now lives in Berlin, but was a former Lancaster resident, raising her family in Lancaster.

Mr. Allison invited Ms. Turner to ask the first questions, encouraging the Board to ask the same questions of each candidate. Ms. Turner deferred to Mr. Moody.

Mr. Moody asked Ms. Williams if she were willing to be certified and what the timeframe would be. Ms. Williams replied that she has completed six of the eight required courses, finishing most recent with a 90. She hopes to complete certification before winter, but the scheduling of courses will be up to the MAAO. She explained that this would mean she would be certified in calendar year 2022; once she completes the last two courses she would then complete her application and send it to the Association with all her completed certificates and then wait for their action.

Mr. Moody asked Ms. Williams to explain the process for setting the tax rate and the process for getting a tax abatement. Ms. Williams stated that as the Assistant Assessor she has not been fully exposed to the process of setting the tax rate but that she has participated in parts of this and has been part of the classification hearing. She went on to state that she is very much involved in creating procedures and wants to create procedures so that if she were absent, another individual could follow the process without any questions. She stated that although setting the tax rate would be new for her this year, she felt comfortable that there is enough support in the office and at the DOR (Department of Revenue) to make the process happen without problems. She stated that she has a close working relationship with other individuals in the Town Hall. Regarding abatements, Ms. Williams stated that she currently processes abatements so she is confident that she could handle those.

Mr. Moody asked a further question about abatements; Ms. Williams clarified that the Board of Assessors approves abatements after she has prepared the paperwork.

Mr. Moody asked Ms. Williams if she believed in and supported the CPA (Community Preservation Act). Ms. Williams stated that as an employee of the Town of Lancaster,

processing the paperwork for the CPA is part of her job, that it will take a little bit of education but that she has no problem doing the work.

Mr. Allison next recognized Ms. Turner. Ms. Turner stated that she herself wears two hats, so she asks this question both as an employee and as a Selectman, and asked Ms. Williams to describe a time that she had to work with an angry resident and how she provided quality customer service. Ms. Williams stated that the entire time she has worked in Lancaster she has not had to deal with an angry resident. She has dealt with residents who needed something explained, such as a procedure based on Massachusetts General Law (MGL). Ms. Williams stated that this is an area in which she excels, and that she has had several years of compliance experience and that she is very familiar with interpretation of MGL. Additionally, based on her prior experience as Vice President of a bank, she stated that when dealing with an angry customer listening is the most important thing, they want to be heard, and they want someone to sympathize with them.

Next, Ms. Turner asked Ms. Williams to describe her work style and an ideal work environment. She asked Ms. Williams what types of tasks motivate her, and what situations cause her stress in the work environment and how she manages her stress.

Ms. Williams said that what motivates her is that there is so much work in the office that there is never not something to do. She stated that she is very much about attention to detail and likes to be in compliance. She likes to go above and beyond and to give more than is required. She stated that she does not take out her stress on anyone else and prides herself on being an extremely professional person at work. She talked about her enjoyment of professional improvement.

Ms. Turner asked a follow-up question about Ms. Williams' work style and ideal work environment. Ms. Williams stated that she is very efficient and pays attention to detail.

Ms. Turner asked for additional details on Ms. Williams certification, stating that the MAAO offers courses 100 to 600 and asked specifically which courses Ms. Williams has completed. Ms. Williams explained that she has taken them in the prescribed order and has completed the required first course, then Principles of Assessing Procedures, then Comparable Sales Approach to Value. Then the International Assessing Organization came into play, and she completed Fundamentals of Real Property Appraisal, Appraisal of Land, and the Income Approach Evaluation which she has just completed. She still needs to complete courses five and six; these are usually offered Spring, Summer, and Winter.

Mr. Allison's turn for questions was next. He asked Ms. Williams what three qualities were most important for a Principal Assessor. Ms. Williams responded that those would be knowledge of the laws, attention to detail, and willingness to attack a lot of information.

Mr. Allison asked Ms. Williams if she had ever worked with a Board of Assessors, and what did she understand her relationship with this Board to be? Ms. Williams replied that the most important part of her role is to be responsible for communication, providing the Board with

documentation and information that they need to be able to go through the process of approving abatements and exemption applications. She stated that in the 5-1/2 years that she has been doing this there has been no need for the Board to come back for additional information.

Mr. Allison asked again if Ms. Williams had worked with a Board of Assessors. She explained that she works with them now, and that she has worked with Board member Deb Sanders for 5-1/2 years.

Mr. Allison asked Ms. Williams to describe how she organizes, plans, and prioritizes her work, especially in an environment that offers walk-up service, and asked her to give some examples of work she has done that required attention to detail and meeting deadlines. Ms. Williams explained that everything in the Assessors' Office requires attention to detail; for example, because currently she is in the office by herself, she has had to prioritize items that are date or time sensitive. She stated that interruptions are a normal part of the day and that she likes to take care of these items right there and then. If it's something requiring more attention, she takes the information and gets back to the person. She explained that her day includes emails and phone calls, and thinks it is important to get back to someone immediately to let them know that their message has been received and that she is working on their need.

Mr. Allison asked, if a resident of Lancaster asked her to describe what a reevaluation is and why it's needed, how would Ms. Williams explain the process. Ms. Williams answered that it's important to communicate that these values are set per MGL as of January 1. There is then a 30 day window for residents to file an abatement. During the 30 days, the Principal Assessor researches the situation and then puts the application before the Board of Assessors. Generally, the Assessor then goes out to the property to re-assess and make sure that they have all the information needed. She stated that there is now a statement on the tax bills that mentions this.

Mr. Moody asked Ms. Williams to describe a time that she made a mistake at work and how she handled it. Ms. Williams stated that she could not think of a specific example, but perhaps she might have provided a resident with incorrect information, in which case she would have contacted them immediately and then created a procedure and a "cheat sheet" to ensure that the error did not happen again. She stated that she also thinks that it is important to be able to tell people that she will get back to them if research is needed, rather than give incorrect information.

Ms. Turner asked Ms. Williams what types of software she has been using for assessing, what types of GIS software she is familiar with, and in what way she uses GIS software. Ms. Williams answered that the Assessors' Office recently went through a conversion that was very successful. She spoke about several different software packages and explained that the GIS system is used for mapping, is updated annually, and that she uses it frequently to compile abutters lists. She additionally spoke about another software package used to create excise tax bills, and that the many systems all have to talk and coordinate with each other.

Mr. Allison asked Ms. Williams how her coworkers would describe her. Ms. Williams said that they would describe her as bubbly, cooperative, reliable, independent, knowledgeable, and a team player.

Mr. Allison asked Ms. Williams if she were offered the position, when would she be able to start. Ms. Williams stated that since she is already doing the job, it would be immediately.

At this point, Ms. Williams was asked to leave the room and candidate Rena Gagne was admitted. Mr. Allison explained the process to Ms. Gagne and invited her to make an opening statement.

Ms. Gagne currently works in Chelmsford in the Assessors' Office and has been there for six years. Prior to that she worked for Vision doing sales work. She is looking to advance her career, be closer to home, and advance in the field of assessing.

Mr. Moody asked Ms. Gagne to explain the tax rate setting process and the process for getting a tax abatement. Ms. Gagne answered that the abatement season, if you disagree with your value, is January 1 to February 1. She explained that this is the "maintenance season." Regarding setting the tax rate, the DOR certifies values and then it goes to the Select Board for approval and then the rate is basically set.

Mr. Moody asked if Ms. Gagne had experience with the CPA (Community Preservation Act). Ms. Gagne replied that yes, she hands out the forms for the applications that are then reviewed and decided upon by the Board of Assessors. She explained that her current role is to check the returned packets for completion and to make sure they qualify.

Mr. Moody asked Ms. Gagne if she was in the process of trying to get her certification. Ms. Gagne explained that some of the qualifications have changed and that due to COVID some of the courses have not been available although prior to two years ago she had taken some courses. She would estimate that it would take about two years to complete assuming that courses are available.

Ms. Turner asked Ms. Gagne to describe a time that she had to deal with an angry resident, and to explain how she provided quality customer service. Ms. Gagne stated that she has always had good rapport with customers and taxpayers, and basically she keeps calm, reassuring the person that she will look at their issues and try to come to an agreement. She relayed an incident during which she was in the field doing an inspection and encountered a very angry person who had just lost his job. She politely apologized for disturbing him, thanked him for his time, and left.

Next Ms. Turner asked Ms. Gagne to describe her work style, her ideal work environment, and secondly, what tasks motivate her, what situations cause her stress in the work environment, and how she handles stress.

Ms. Gagne stated that she has a tendency to stay calm. She explained that she is very organized, very diligent, and likes her work done on time. She likes to keep up with daily tasks. She said that upcoming deadlines might cause stress, but since these are known in advance, staying organized and calm avoids stress. She likes to use file folders and other tools to avoid chaos and to stay focused.

Ms. Turner asked specifically which of the six courses Ms. Gagne had passed toward certification, and if hired would she continue working toward certification.

Ms. Gagne stated that she would absolutely finish her certification if hired. She had done the first and second DOR courses and passed, but failed the International Association of Assessing Officers (IAAO) course that she took during COVID. She has been to a number of conferences that offered education on topics such as cell towers, solar fields, and personal property.

Ms. Turner asked when Ms. Gagne believed she could finish her certification. Ms. Gagne said that she would like to complete it within a year, but that it depended on the availability of courses.

Mr. Allison asked Ms. Gagne to list the three most important qualities for a Principal Assessor. Ms. Gagne answered that the first one would be honesty, especially in municipal government, and then diligence and patience.

Next, Mr. Allison asked Ms. Gagne if she has ever worked with a Board of Assessors, and how she viewed her role in relationship to that Board. Ms. Gagne asked if the Lancaster Board of Assessors was elected or appointed. Ms. Gagne said that assuming that the Principal Assessor was not a Board member, the role is just to facilitate and make sure that the Board has the information they need to do their job. She explained that in her current position she prepares all the exemption information at abatement time, she has done field work for abatements. She has delivered packets to Board members' homes during COVID and has processed documents that come in over the counter.

Mr. Allison asked Ms. Gagne to describe how she organizes, plans, and prioritizes her work, especially in an environment that offers walk-up service, and asked her to give some examples of work she has done that required attention to detail and meeting deadlines.

Ms. Gagne explained that she does all the new growth and building permits for residential property and that she has done some commercial items. Because Chelmsford, where she currently works, is a 653 community, she has six months to manage the new growth. She enters the building permits in their software system and then goes out in the field and does the inspections. All new growth has to be entered by June 30, so she is always mindful of dates.

Mr. Allison asked, if a resident of Lancaster asked what a property assessment reevaluation is and why it's needed, how would Ms. Gagne explain this?

Ms. Gagne said she would explain that the Town is valuing their property and that they are trying to be fair and equitable. She would review values with the taxpayer and explain how the value is determined. She explained that the value is determined based on the property, the size of the land, the acreage, and that this is all included in their software system. The system then calculate the value.

Mr. Moody asked Ms. Gagne to talk about a time she made a mistake at work, to describe the situation, how she handled it, and what she learned from it. Ms. Gagne recalled that she had made an error in the body of a newspaper article, and that the taxpayer involved called. She explained that this was early in her job, and that she had apologized, looked at everything, and made the needed changes. Additionally, she talked about as late as last year, that she had done an inspection but had not been allowed inside the building, and had made some incorrect assumptions. Once they were allowed inside, they had to adjust the value.

Ms. Turner asked about the type of software that Ms. Gagne has used for assessing, and about her familiarity with GIS software. Ms. Gagne discussed a variety of software packages including Vision, and talked about the use of Patriot field cards. She is familiar with Eagle View, a GIS package. She talked about doing entry and downloads daily to stay current with work.

Mr. Allison asked Ms. Gagne how her coworkers would describe her. She spoke about the great team that she currently works with, and that she loves her current work environment but would like to advance in her career. She stated that coworkers would say that she is considerate, conscientious, polite and fun.

Mr. Allison asked Ms. Gagne, if offered the job, when would she be able to start. Ms. Gagne stated three weeks.

With conclusion of the interviews, Ms. Williams was invited back into the meeting room.

The Select Board held lengthy discussion about the requirements for the Principal Assessor position, and if completion of certification was a requirement, or if a candidate could be offered the position if they had not completed certification. Mr. Allison asked Sandi Charton, Human Resources Director, to address the issue. Ms. Charton discussed discrepancies in the job description for the position. Mr. Allison asked Mr. Pacheco if this needed to be a requirement. Discussion continued as to whether or not the job description was accurate, when it was written, and if certification was a preferred or mandatory requirement.

Mr. Pacheco stated that certification appears to be a preferred requirement but not a mandatory requirement and that it appears that the confusion was from an old compensation and classification study. Mr. Allison stated that he would like the following on record, "Okay, so Orlando, I want this on record here, because the reason I'm a little frustrated, this Board needs to make an important decision and we need to understand if this whole section, education, special requirements knowledge, ability and skill, physical requirements is recommended or are those required?"

Mr. Pacheco stated that he does not believe, for the purposes of appointment, that it is a requirement. Mr. Allison stated that he wants a definitive answer, not a belief. Mr. Pacheco stated it is not a requirement. It was also stated that the prior Principal Assessor was not certified. Mr. Allison stated that he will follow up on the job description.

Education requirements were discussed; Ms. Charton offered an opinion that there was not a requirement per se for a Bachelor's degree since the documentation mentioned degree or equivalence.

Ms. Turner would like job descriptions and compensation to be reviewed for accuracy. Mr. Pacheco pointed out that some of the clarifications needed are union issues. It was determined that the job description should be sent to Ms. Charton for review. Mr. Moody would like to get a legal opinion. Mr. Allison suggested that this information could be clarified later, but that the Select Board needed to go ahead and appoint a Principal Assessor.

Ms. Turner suggested that a job offer could be made with a subject to a timeframe to achieve certification. Mr. Moody supported this idea but Mr. Allison stated that complications could arise if the person in the position does not become certified. Mr. Allison suggested modifying the salary range so that certification put the position in a higher pay range, or making certification part of the yearly performance review.

Ms. Charton noted that the job description is subject to change by the employer and in response to questions from Mr. Moody and Ms. Turner, offered the opinion that certification is not a legal requirement. She reminded the Select Board that changes to the terms of employment, including changes to salary structure, would be subject to union negotiation.

Mr. Allison returned to Mr. Pacheco, stating that, in his opinion, the Select Board wanted to update the job description to position it so that the Principal Assessor is certified. Mr. Pacheco noted that while MAA certification is desirable, experience may be more valuable.

Mr. Allison suggested that Mr. Pacheco be tasked with successful negotiation with the Union, discussing certification within a timeframe and/or monetary aspects as an incentive. An example would be that the person must acquire the MMA certification within 18 months, and if they do, they receive a certain percentage adjustment in salary.

Mr. Allison asked the Board members to offer their opinions on the candidates and to rank them as number one and number two.

Mr. Moody ranked Ms. Williams as #1 because of her experience in Lancaster and her further steps toward certification, and Ms. Gagne as #2, stating that it was close and that both candidates were worthy.

Ms. Turner ranked Ms. Williams as #1 because of her familiarity with the town and because she is closer to receiving certification. She noted that she especially liked Ms. Gagne's answer to the question about dealing with angry customers and her explanation of software.

Mr. Allison ranked Ms. Williams as #1, slightly ahead of Ms. Gagne. He noted that Ms. Williams has nothing but positive reviews from her current position in Lancaster and that her experience is excellent and that Ms. Gagne presented herself very well.

More discussion was held about certification and about consequences for the position if the person fails to meet the requirement in the requested timeframe. Mr. Pacheco noted a similar situation where the Massachusetts Treasurer Collectors' Association has a special law on the books where certification requires additional compensation, referring the Select Board to MGL Chapter 59, Additional Compensation of Assessors for courses of study.

The Select Board concurred that they would like Ms. Charton and Mr. Pacheco to work through the details and come back to the Board with proposals.

Mr. Allison requested a motion appointing Bobbi Jo Williams as Principal Assessor following the conclusion of successful union negotiations by Mr. Pacheco and Ms. Charton, as approved by the Select Board. Ms. Turner made the motion as requested. Mr. Moody seconded the motion. The Board agreed that this would be on the September 8 meeting, and that the board would need materials more than 48 hours prior to the meeting; Ms. Turner would like agenda items 4-5 days prior to the meeting.

Vote taken. Jason A. Allison, Aye, Jay A. Moody, Aye, Alexandra W. Turner, Aye. Motion passed [3-0-0].

IX. LICENSES AND PERMITS

X. OTHER/UNFINISHED BUSINESS

XI. NEW BUSINESS

XII. COMMUNICATIONS

XIII. ADJOURNMENT

Select Board member Alix Turner offered a motion to adjourn the meeting; seconded by Mr. Moody. Jason A. Allison, Aye, Jay A. Moody, Aye, Alexandra W. Turner, Aye. [3-0-0]

Respectfully submitted

Jay M. Moody Clerk
Approved and accepted: 9/20/2021