



APPOINTMENTS

Town of Franklin
Treasurer/Collector

Kerri Anne Bertone
85 Hillside Road

The Treasurer/Collector interview committee has recommended the appointment of Kerri Anne Bertone to serve as Treasurer/Collector.

MOTION to ratify the appointment by the Town Administrator of Kerri Anne Bertone to serve as Treasurer/Collector of the Town of Franklin effective November 6, 2017.

DATED: _____, 2017

VOTED:

UNANIMOUS _____

YES _____ **NO** _____

ABSTAIN _____

ABSENT _____

A True Record Attest:

Teresa M. Burr
Town Clerk

Judith Pond Pfeffer, Clerk
Franklin Town Council

Town of Franklin

Town Administrator
Tel: (508) 520-4949



Fax: (508) 520-4903

355 East Central Street
Franklin, Massachusetts 02038-1352

TO: Town Council
FROM: Jeffrey D. Nutting, Jamie Hellen
DATE: September 22, 2017
RE: Ratification of Treasurer/Collector Appointment

Application Process

The Town has gone through a long, extensive process to fill the shoes of the current Treasurer/Collector Jim Dacey. The search began on May 10, 2017 when the position was posted on the Town of Franklin website. We kept the position open through mid-August, three full months. The Town posted the position on our website, the Municipal Building Bulletin Board and paid for an online/print ad on the Massachusetts Municipal Association (MMA) website and in the June issue of the Beacon magazine, which lists all of the vacant job postings for municipal officials. In addition, Mr. Dacey personally announced to the Massachusetts Treasurer-Collectors Association annual meeting he would be retiring and the job posting was open. Outreach for the position is the most we have ever done for any job in Town during our tenure.

We received six applications that met the required finance experience qualifications in the posting. We invited the top four candidates to come in for in-person interviews. One candidate withdrew his application prior to their interview and we interviewed the remaining three candidates.

Per the Town Charter, the interview committee, including a of Town Council Representative, Tom Mercer, a Finance Committee Representative, Susan Dewsnap, as well as key town staff Town Administrator Jeff Nutting, Deputy Town Administrator Jamie Hellen, Human Resources Manager Karen Bratt, Comptroller Susan Gagner, and School Business Manager Miriam Goodman conducted all of the interviews.

Recommendation

The interview committee unanimously recommends current Assistant Treasurer/Collector Ms. Kerri Bertone to be the next Treasurer/Collector for the Town of Franklin. Current Treasurer/Collector Jim Dacey fully supports this recommendation.

Candidate Profile

Ms. Bertone has been a resident of Franklin for the past 31 years and has been very involved in Franklin civic groups and activities. Ms. Bertone is active in her parish, coached Franklin Youth Soccer, and volunteered with the Pop Warner Football program. She also was involved in Town government, serving on the Finance Committee between 2013 to 2016.

Ms. Bertone has well over two decades of private and public finance industry and supervisory experience. She started her career as an Administrative Assistant with EMC Corporation before joining Putnam Investments in 1996. In her twenty years at Putnam, she worked her way up from a Client Service Specialist to a Senior Operations Supervisor, and most recently, the Operations Manager. Ms. Bertone has served as Franklin's Assistant Treasurer/Collector for the past 13 months and has helped the Treasurer's Office reach new levels of efficiency and productivity. Her resume with professional history is attached.

Ms. Bertone has worked very hard to further her education. She expects to complete her Associate's Degree in Business from Dean College in Spring 2018 and will then enroll in further classes to earn her Bachelor's Degree. Ms. Bertone is a member of the Norfolk County Municipal Finance Officers Association and the Massachusetts Collectors and Treasurers Association (MCTA). In the past year, Ms. Bertone has taken advantage of professional development opportunities that have been offered through the Town and various municipal professional organizations, including:

- The "New Finance Official's Forum" with the Department of Revenue;
- "Staff School" through The Massachusetts Collector and Treasurer's Association (MCTA);
- Completed her first year of "Treasurer's School" and will continue to attend school in August 2018 and August 2019 before taking the exam to become certified as a Municipal Treasurer; and
- After becoming certified as a Treasurer, she will attend three more years of "Collectors School" and become certified as a Municipal Collector.

Ms. Bertone is a very bright, hard-working, reliable employee who has proven herself over the past year. She embodies everything the Administration and our Department Heads have worked to build: an organization based on a responsive town government with excellent customer service, strong ethical values and a true passion for public service. I am confident that Ms. Bertone is well prepared to be Franklin's next Treasurer/Collector.

Kerri Anne Bertone

Professional Profile

- Dedicated professional with a strong desire to succeed and play an integral role in daily and long-term operational success
- Proven track record of success and contribution to a major organization with over twenty years of experience
- Strategic thinker with innovative skills to achieve organizational and team goals
- Effective communicator with the ability to communicate both efficiently and effectively at all levels internally and externally
- Team oriented with a desire for both individual and team success through initiatives and process improvements
- Strong track record in providing excellence and the ability to create and foster mutually effective relationships

Professional Experience

Town of Franklin

August 2016 - Present

Assistant Treasurer/Collector

Supervises cashiering duties including the collection and reconciliation of payments, cash-up on a daily basis, accept tax bill payment for Real Estate, Motor Vehicle, Excise Tax, Water and Sewer, Personal Property, trash bills and permits, posts daily payments to accounts, abatements, exemption and refunds
Prepared tax title procedures for advertising, taking and recording outstanding taxes
Assisted in long-term borrowers projection
Partner with School department's receipts
Supervise and train office clerks
Reports all receipts to the Comptroller and Treasurer and reconciles monthly with the Comptroller
Provides information regarding tax and assessment collection to the public, attorneys, banks and realtors
Responsible for handling of all the payroll related functions and duties of the Treasurer's office including paying and reporting federal and state withholding taxes, W-2, 1099 and 1095 reporting.
Documented procedures for various clerk duties as well as the Treasurer/Collector's responsibilities
Reconcile financial accounts including the cash book
Perform a variety of administrative support functions
Worked with bond counsel during the bonding process
Understanding of Land of Low Value process
Tactfully and courteously deal with and maintain good relationships with others

Putnam Investments, Boston, MA

Operations Manager

2007-2016

Establish and maintain mutual fund operating characteristics on record keeping system
Ensure that mutual funds were balanced to prevent pricing errors
Reconciled commission payments
Executed and reconciled mutual fund corporate actions on shareholder system
Responsible for the effective management of closed end mutual funds between client, firm, and the NYSE
Manage relationships internally including sales force, product management team, investment management, risk & compliance, legal counsel, fund accounting, and internal audit
Manage relationships externally that included broker dealers, mutual fund audit firms, systems vendors, print distribution, and fund accounting & custodial bank
Project manager for several initiatives that improved the quality of the mutual fund product lineup for the firm
Manage the annual SAS70 audit process as it pertains to mutual fund system setup
Manage the process of reviewing and approving of Federal Reserve wires, ACH payments and money movements initiated by the Control Department.

2005-2007

Senior Operations Supervisor

Partner with Code of Ethics, Putnam Securities Services and Preferred Client Service areas to monitor employee trading violations and communicate trading guidelines to all employees
Coach and develop staff through aggressive performance management process and continuous support
Act as a resource to new supervisors, providing leadership, guidance, and coaching

Critically analyze all current processes, identify improvement areas and execute action plans for implementation
Work closely with staff to ensure client satisfaction while considering operational, regulatory, and fiduciary risks and obligations
Demonstrate strong leadership skills, taking initiative to make positive change and participating in projects with senior management
Supervised daily production by prioritizing current needs and allocating resources effectively
Assessed staffing model, and hired as appropriately to meet business needs
Coached and developed staff by implementing training plans and encouraging participation in activities throughout Putnam
Worked closely with adjustment departments to ensure consistency in actions and elimination of redundancies
Successfully trained peers and staff on Siebel
Member of the working team for the conversion to DST

1996-2005

Career Path with Putnam Investments

- Client Service Specialist - Client Services Division
- Quality Administrator - Financial Institutions Division
- Sr. Processor – Shareholder Services
- Technical coordinator
- Senior Agility Representative

Education and Professional Training

- Dean College - Business
- Katharine Gibbs School – Graduate of Information Processing Program
- Massachusetts Bay Community College – Liberal Arts
- Executive Development Courses – The Working Program, Business Writing, How to Influence People, Financial Services Industry, Benchmarks of Team Excellence, and other domains

Professional and Community Involvement

- Member of the Massachusetts Treasurer Collectors Association
- Member of the Norfolk County Municipal Finance Officers Association
- Bonded
- Former member of the Town of Franklin Finance Committee
- Former member of the Wellness Committee, Putnam Investments
- Former member of the DAC/WLF Mentoring Program, Putnam Investments

Town of Franklin

James P. Dacey, CMMT, CMMC
Treasurer • Collector
E-Mail: treasurer@franklin.ma.us

Office of the Treasurer • Collector
355 East Central Street • Franklin, MA 02038-1352

(508) 520-4950
FAX (508) 520-4923



September 19, 2017

Jeff Nutting, Town Administrator
355 East Central Street
Franklin, MA 02038

Dear Jeff,

It is my pleasure to recommend Kerri Bertone for the position of Treasurer-Collector for the Town of Franklin.

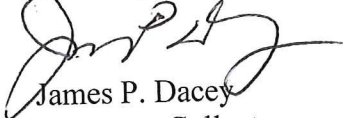
Since her hiring as Assistant Treasurer-Collector over a year ago, she has been learning everything that there is to know about the Treasurer-Collector's responsibilities. She has experienced everything that happens in this office including selling bonds, tax takings, foreclosures, an auction, investing funds, reconciling bank accounts and reconciling receivables.

Kerri has demonstrated very strong leadership skills gained from her many years as a manager at Putnam Investments. She has also shown a compassionate side with taxpayers who are having a difficult time paying their bills.

Kerri has been attending every MCTA (Massachusetts Collectors and Treasurers Association) class and school since her hiring. She is less than two years from taking the Treasurer's test for certification as a Massachusetts Municipal Treasurer.

It has been a pleasure to have her work in this office and I highly recommend her for my replacement as Treasurer-Collector.

Sincerely,


James P. Dacey
Treasurer-Collector