First Report of
Wellesley Town Government Committee ("WTG Committee")
as presented to 1994 Annual Town Meeting

I. The Charge of Wellesley Town Government Committee

The Wellesley Town Government Committee was established, by vote of the 1993 Annual Town Meeting, to evaluate Wellesley town management. A copy of Article 26 which sets forth the charge to this Committee is attached to this report and marked Appendix A. Among other things, the Committee was directed to evaluate (1) what, if any, defects exist in the present form of town government, (2) reasonable alternatives to the present form of decentralized government, (3) the relative merits of an Executive Director, Town Administrator and Town Manager, and (4) how communication and cooperation among elected and appointed boards may be improved.

The objective of the Committee has not been to engage in long-term research or to prepare another study of the workings and structure of our town government. The essential purpose of the Committee has been to build on the existing studies and, as set forth in the direction given the Committee by the Town Moderator, "to recommend how Wellesley should provide capable and effective town government for itself as we approach the next century."

To assist in weighing the value of the comments, observations and recommendations contained in this report, it is relevant to point out that three members of WTG Committee have served at various times on the Board of Selectmen; six members have served at various times on the Advisory Committee and seven members are presently Town Meeting members, with periods of service ranging from 8 years to 43 years.

As called for by its charge, the WTG Committee has consulted with appointed and elected boards, committees and officers of the Town. Wellesley town government as it now exists under its Bylaws consists of ten elected and eighteen appointed boards and committees. Attached as Appendix B is a chart showing the existing Wellesley Town boards and committees. These boards and committees accepted the invitation of the WTG Committee to appear before it to express views as to matters covered by the charge given the WTG Committee and to inform this Committee of any suggestions as to how they felt the structure of Wellesley town government could be improved. In addition, representatives (including in each case the Town Administrator) from three towns, namely Natick, Needham and Concord, accepted the WTG Committee's invitation to appear before it to discuss their own town government structure. This Committee also held three public hearings, one on September 22, 1993, one on December 16, 1993 and the third on February 14, 1994.

II. Previous Wellesley Town Government Studies

In recent years many towns in Massachusetts have undertaken an evaluation of their existing town structure. At one extreme is a decentralized structure with many separate, self-standing boards and committees, many of which are elected. At the other extreme is a centralized structure with executive power concentrated in one board or committee and with a powerful administrator in charge of town-wide operations. The Town of Wellesley has been no exception to this self analysis movement. In 1985, the Town established a committee to study

the organizational structure of Wellesley town government. In 1986, this committee recommended that the Town make the following changes:

(1) The function of the present Board of Public Works and Selectmen be combined under an expanded Board of Selectmen.

(2) A highly qualified professional manager called the Executive Director of General Government Services be hired to work with the Board of Selectmen.

(3) The number of elected boards and committees be reduced.

(4) Some boards and committees formerly elected be appointed.

(5) A Nominating Committee and a Long Range Planning Committee be established.

The motion to adopt these recommendations was defeated at 1986 Town Meeting by the vote of 89 For and 96 Nos.

The 1986 Town Meeting went on to establish a Town Government Study Committee, Phase II, whose charge was to work with the several boards and committees to improve communication and coordination among the various boards and committees, to improve the budget process and to consider a long range planning committee.

This Town Government Study Committee II reported to the 1987 Annual Town Meeting with the following recommendations: namely, that the membership of the Board of Selectmen be increased from three to five, that the Board of Selectmen be charged with the responsibility of coordinating the budgets of six specified elected Boards and of recommending and presenting to the Advisory Committee and to the Town Meeting the budgets of all these Boards; that the Board of Selectmen be responsible for coordinating and maintaining a Long-Range Master Plan; and finally that the position of Executive Director of General Government Services be created. The motion relating to the Executive Director was passed by a standing vote of Yes 95, No 88. The other three recommendations were adopted by voice vote but at the 1991 Annual Meeting it was voted to remove from the Board of Selectmen responsibility for coordinating and presenting the budgets of the six Boards which were not appointed by the Board of Selectmen.

III. Two Recent Significant Developments

The first is the recent decision of the Board of Selectmen to fill the position of Executive Director of Town Government Services by naming Arnold Wakelin to that position and by expressly recognizing that under the guidance of the Board of Selectmen, which is the chief executive board of the Town and charged with overseeing the interests and welfare of the Town, the Executive Director is to be responsible for the proper administration of the functions, officials, and departments under the direct jurisdiction of the Board of Selectmen and for assuring that all activities of town government are functioning properly. The appointment of this experienced, competent and highly regarded individual with his many years of effective service to the Town augers well for developing the vitally needed closer cooperation between the Board of Selectmen and the other independent town agencies not directly under the purview of the Selectmen. The current practice of having town-wide interagency meetings evidences this developing trend.

The second of these developments involves the Town Light Plant. At its 1992 Annual Town Meeting the Town voted unanimously to create the Light Plant Review Committee and charged that committee with the task of evaluating the missions, policies, management,

operations, governance and oversight of the town-owned Light Plant. Later that year the Light Plant Review Committee presented to a special Town Meeting held on December 14, 1992 the recommendation that the Light Plant be separated from the Department of Public Works and that it be governed by a new Municipal Light Board of five members to be appointed by the Selectmen. At this December 14 meeting the Town voted by a one vote margin (Yes 98, No 97) that a new Municipal Light Board be established as so recommended. At its 1993 Annual Meeting, however, -- the same meeting that created the Wellesley Town Government Committee -- the Town, by a narrow margin voted to change the membership of the Municipal Light Board so that three of the five members would be members of the Board of Public Works and the remaining two would be appointed by the Board of Selectmen. Early in 1993, the Massachusetts Legislature enacted the special legislation enabling Wellesley to provide for such a municipal light board. Shortly thereafter the Selectmen appointed its two members and the duties, responsibilities and obligations of the Board of Public Works relevant to the management of the Municipal Light Board have recently been transferred from the Board of Public Works to the new Board.

IV. Observations of the WTG Committee and a Recommended Schedule of Improvements

Early in its deliberations the WTG Committee concluded that the basic question before it was to determine what improvements in town government structure make sense to aim for and how to proceed to realize them.

There is no doubt that within the Town there is an articulate and concerned group of citizens who feel that the existing form of decentralized government with its emphasis on citizen participation through essentially autonomous elected committees should be maintained and changed only if there are demonstrated specific reasons for doing so. At the same time, there is an equally articulate and concerned group of citizens who believe that in the interests of coordination, cooperation, efficiency and economy, Wellesley should have a strong town manager system with a streamlined committee structure at the top of which is a single elected committee. Among the various points of views that fall between these two extremes, there is a widespread recognition of the need for greater cooperation and coordination among town agencies and, on a town-wide basis, for a more centralized support system and a stronger staff administrative structure.

This wide divergence of views has been reflected in the reaction of the 1986 and 1987 Town Meetings to the recommendations of the 1986 and 1987 Town Government Study Committees and in the actions taken at the 1991, 1992 and 1993 Town Meetings. This divergence continued to be evidenced to our Committee throughout the various presentations made before us (including the views expressed during our public hearings).

On the other hand, even with this divergence, in the presentations to our Committee, there was a high degree of support for the importance of continued significant citizen participation in Wellesley town government. Most presentations recognized the value of decentralized policy-making, although there was not unanimity on the form this decentralized activity should take.

Another view which received a high level of agreement from those who appeared before us was regarding the existence of the following defects which exist in Wellesley's current system of government:

inadequate coordination, communication

- inadequate long-range planning
- inadequate centralized services in support of boards and departments
- inability to speak with one voice
- difficult and cumbersome budget process

It is interesting to note that the 1986 Town Government Study Committee in its report to the Town found these same defects to be among the major concerns and issues confronting that Committee.

The process of meeting with virtually all boards and committees was extremely time consuming and the WTG Committee has not yet been able to grapple with many of the issues presented by the two divergent viewpoints mentioned earlier. However, the Committee has been able to reach agreement upon three recommendations which, if carried out, would in the judgment of the Committee make Wellesley Town Government work more effectively while preserving significant citizen participation.

1. Provision for Centralized Staff Services. The Board of Selectmen should be given the authority and obligation to support the activities of boards and departments by the provision of centralized services in the following areas:

- Management Information Systems
- Financial Administration
- Purchasing
- Personnel Administration
- Long-range building maintenance

The need for such services was a consistent theme in many of the Board presentations to our Committee. The details of how best to provide these services should be determined by the Executive Director in collaboration with the departments.

2. Improved System for Citizen Inquiries. An improved centralized customer information/referral activity should be established, under the Selectmen, to provide improved support for citizens who need to deal with Town Departments. This recommendation is not intended to suggest that all questions regarding all activities would be answered in one location; while much routine information can be centralized in one location, efficient referral will be the more likely way to respond to many customer requirements. Again, the details of how best to accomplish this purpose should be determined by the Executive Director in collaboration with affected departments.

3. Improved Budget Process. Greater support should be provided to the Advisory Committee and Town Meeting by modifying the budget process to operate as follows:

a. Budget parameters will be developed by the Advisory Committee with the assistance of the Executive Director.

b. All boards/departments will prepare their budgets in accordance with the parameters established by the Advisory Committee.

c. The Executive Director will prepare a proposed balanced town budget in consultation with boards/departments. The Executive Director will submit the depart-

ment budgets, as initially proposed, as well as the proposed balanced budget to the Selectmen.

d. The Selectmen, in their role of Chief Executive Board, will submit to the Advisory Committee the budgets submitted by each board/department and the balanced budget with such proposed changes and observations as they deem appropriate.

e. The Advisory Committee will evaluate the information submitted to them with whatever focus and level of detail they deem appropriate. The Advisory Committee shall provide its recommendations to Town Meeting.

This proposed modification to the budget process will remove a substantial burden of budget preparation work from the Advisory Committee. The current process requires substantial time and effort by the Advisory Committee to develop a balanced budget from the separately submitted departmental budgets. The proposed process, by shifting this responsibility, will allow the Advisory Committee to have more time for its intended role of review and evaluation of the proposed budget.

V. One Year Extension of Life of WTG Committee

The WTG Committee needs additional time to enable it to complete its recommendations with respect to the issues set forth in the charge from Town Meeting. Accordingly, it is recommended that the life of WTG Committee be extended to the 1995 Annual Town Meeting and the charge set forth in Article 26 of the Warrant for the 1993 Town Meeting be continued.

VI. Conclusion

This report is the unanimous report of the Wellesley Town Government Committee except that one member of the Committee dissents with respect to the third recommendation set forth in Part IV relating to the Budget Process on the ground that such member believes that this recommendation does not recognize the existing independence of the Wellesley Town boards and committees that have the responsibility for developing their own budgets.

Respectfully submitted,

Wellesley Town Government Committee

Ernest J. Sargeant, Chairman
Constantine Simonides, Vice Chairman
Ronald R. Cloutier
Stephen A. Cook
Ruth Humphries
Judith S. Inker
Sara Johnson
William C. Nutting
Patricia Palmer

February 15, 1994

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Appendix A

ARTICLE 26: SUBSTITUTE MOTION TO APPOINT COMMITTEE TO EVALUATE TOWN MANAGEMENT

1. That there be appointed a Committee to Evaluate Town Management, to consist of nine residents of the Town of Wellesley appointed by the Moderator; that the Committee shall make findings and recommendations in accordance with the charge outlined below; and that the Committee shall present its findings, recommendations and any proposed bylaw changes to the 1994 Annual Town Meeting; and

2. That the Committee be charged to do the following:

   a .Evaluate (1) what if any defects exist in the present form of town government and what if any harm they cause, (2) whether there are reasonable alternatives to the present form of decentralized government, (3) the relative merits of an Executive Director, Town Administrator and Town Manager, and (4) how communication and cooperation among elected and appointed boards may be improved;

   b. Analyze the cost and benefit differences between the current form of government and any proposed alternatives, and separately analyze, without respect to cost, the trade-offs between efficiency and citizen participation;

   c. Consider and make recommendations on the consolidation of similar town government functions in order to provide better taxpayer/customer services;

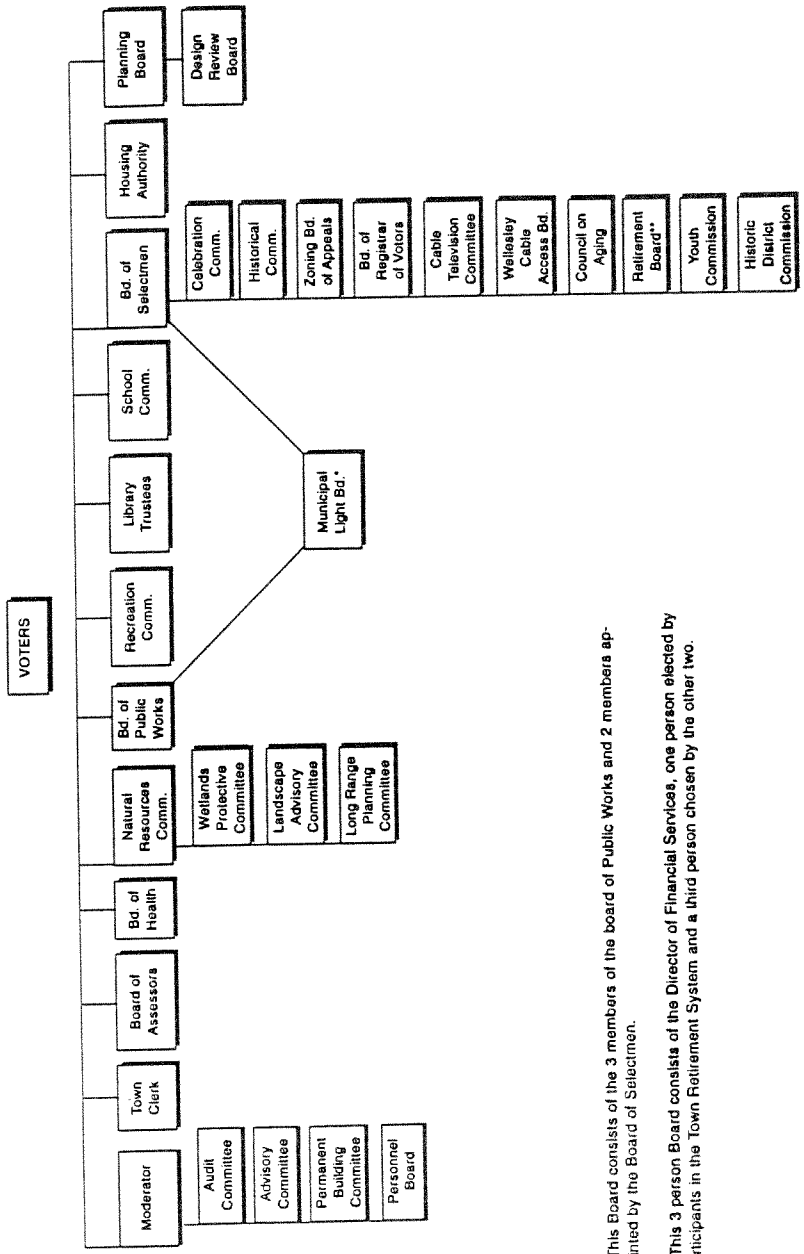
   d. Make other findings and recommendations related to the above; and

3. That the Committee shall consult with appointed and elected boards, committees and officers in the Town, and shall hold at least three public hearings prior to preparing its findings and recommendations; and

4. That subsequent to the Town Meeting which takes action on the Committee's findings and recommendations, and if Town Meeting decides to vote for any changes in Wellesley town government as a result of the recommendations, such changes shall be submitted to the voters of Wellesley for approval at the 1994 general election.

Appendix B

TOWN OF WELLESLEY, MA
ORGANIZATION CHART OF TOWN BOARDS AND COMMITTEES
AS SET FORTH IN EXISTING TOWN BYLAWS
PREPARED BY TOWN GOVERNMENT COMMITTEE - 1994



* This Board consists of the 3 members of the board of Public Works and 2 members appointed by the Board of Selectmen.

** This 3 person Board consists of the Director of Financial Services, one person elected by participants in the Town Retirement System and a third person chosen by the other two.

INDEX OF APPENDICES

APPENDIX A - Schedules Prepared by deparmtent of Financial Services

APPENDIX B - Glossary of Municipal Finance Terms

APPENDIX C - Guidelines for Conduct of Wellesley Representative Town Meeting