



# TOWN GOVERNMENT STUDY COMMITTEE MEETING WITH TOWN BOARDS AND DEPARTMENT HEADS

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ROLL-OUT OF DRAFT RECOMMENDATIONS

MAY 11, 2015

BABSON COLLEGE OLIN HALL

# ATTENDEES ON MAY 11

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## Advisory Committee

### Board of Selectmen

- Hans Larsen, Executive Director
- Meghan Jop, Deputy Director
- Sheryl Strother, Finance Director
- Jack Pilecki, Deputy Police Chief
- Rick DeLorie, Fire Chief
- Joe McDonough, Director of Facilities
- Tom D'Orazio, IT Director
- Brian Dupont, GIS Manager
- Michael Grant, Building Inspector

### Council on Aging

- Gayle Thieme, Director Senior Services

### Board of Assessors

### Community Preservation Committee

## Human Resources Board

- Scott Szczebak, Human Resources Director

## Library Trustees

- Jamie Jurgensen, Library Director

## Natural Resources Commission

- Brandon Schmitt, NRC Director
- Pam Helenik, Wetlands Administrator

## Permanent Building Committee

- Kathy Mullaney, Administrator to PBC

## Board of Public Works

- Dave Cohen, DPW Assistant Director
- Dave Hickey, Town Engineer

## Municipal Light Plant Board

- Dick Joyce, MLP Director

# ATTENDEES ON MAY 11

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## Board of Health

- Lenny Izzo, Director of Health

## Historical Commission

## Wellesley Housing Development Corporation

## Recreation Commission

- Jan Kasetta, Director of Recreation

## School Committee

- David Lussier, School Superintendent

## Planning Board

- Michael Zehner, Planning Director

## Sustainable Energy Committee

## Town Government Study Committee Youth Commission

- Maura Renzella, Youth Director

## Zoning Board of Appeals

- Lenore Mahoney, Executive Secretary to ZBA

- Town Treasurer, Marc Waldman

- Town Clerk, Kathy Nagle

- Town Counsel, Tom Harrington

- Town Counsel, Ray Miyares

- Retirement Administrator, Lynn Whynot

# AGENDA

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- Introduction
- Overview of the State of Local Government in MA
- Strengths, Weaknesses, Opportunities
- Draft Recommendations
- Timeline
- Conclusion

# CHARGE

## TO TOWN GOVERNMENT STUDY COMMITTEE

### 2014 Town Meeting

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- Suitability of existing structure of Town government for now and for future
- Role and authority of Executive Director and alternative management models
- Number, composition and role of the elected and appointed boards
- Potential consolidation and other changes to department functions and responsibilities
- Optimal number of Town Meeting Members
- Number and scope of Town Meetings
- Timing of Annual Town Meetings and municipal elections
- Other related topics in discretion of TGSC

# MEMBERS OF TOWN GOVERNMENT STUDY COMMITTEE

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Katherine L. Babson, Jr. *Chair*

Stanley Brooks

Rose Mary Donahue, *Vice Chair*

Arthur J. Goldberg

Ann Marie Gross, *Secretary*

Richard Page

Linda Perlmutter

Anna Sereiko

Thomas Ulfelder

Staffed by Kathy Nagle, *Town Clerk*

We have served as Town Moderator(1); School Committee(1); Board of Selectmen (1); Board of Health (1); Planning Board (2); Community Preservation Committee (2); Advisory Committee (5); Numerous Study and Ad Hoc Committees ( 19); and current/former Town Meeting Members (all).

# BOARD INTERVIEWS

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- Council on Aging
- Audit Committee
- Board of Assessors
- Board of Selectmen
- Community Preservation Committee
- Design Review Board
- Board of Health
- Historical Commission
- Historic District Commission
- Wellesley Housing Authority
- Wellesley Housing Development Corp.
- Human Resources Board
- Library Trustees
- Municipal Light Plant Board
- Natural Resources Commission
- Permanent Building Committee
- Planning Board
- Playing Fields Task Force
- Board of Public Works
- Recreation Commission
- Retirement Board
- School Committee
- Sustainable Energy Committee
- Trails Committee
- Wetlands Protection Committee
- Youth Commission
- Zoning Board of Appeals

# DEPARTMENT/STAFF INTERVIEWS

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- Town Assessor
- Town Clerk
- Facilities Maintenance Department
- Director of Finance
- Chief of the Fire Department
- Human Resources Director
- Director, GIS
- Director of Information Technology
- Library Interim Director
- MLP Director and Director of Finance
- Permanent Building Staff
- ZBA Executive Secretary
- Inspector of Buildings
- Planning Department Director
- COA Director
- Chief of Police
- Youth Commission Director
- DPW Director, Finance Manager and Town Engineer
- School Superintendent and Assistant Superintendent
- Selectmen, Deputy Director
- Town Treasurer/ Tax Collector
- Veterans' Affairs Director
- Wetlands Administrator
- NRC Director
- Department Heads as a Group

# OTHER INTERVIEWS

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- Marilyn Contreas, Mass. DHCD
- Kate Fitzpatrick, Town Manager, Needham
- Hans Larsen, Executive Director of General Government Services
- Representative Alice Peisch
- Former Advisory Committee chairs, 2000-2014
- Former Selectmen
- Current and former Town Moderators
- Town Residents (2 sessions)
- Town Meeting Members (2 sessions)
- Former Town Counsel, Al Robinson
- Lawyers, residential builders, commercial developers and property owners who interact with our land use departments

# EXTERNAL REVIEW

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TGSC members visited selected benchmark communities to conduct structured interviews with town administrators/ town managers:

- Acton
- Andover
- Belmont
- Concord
- Dover\*
- Lexington
- Marshfield\*
- Needham
- Reading
- Sudbury
- Wayland
- Weston
- Westwood
- Winchester

\*Not benchmark town

# PETER HECHENBLEIKNER

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- Retired after 26 years as Town Manager of Reading
- Created Department of Community and Economic Development in Westwood; served as its interim department head while a search took place
- Chaired MMMA Form of Government Committee
- Currently Interim Town Administrator in Norwell

# MARILYN CONTREAS

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- Employed by the Commonwealth for 39 years, 36 years at Department of Housing and Community Development
- Worked state-wide with charter commissions and local government study committees
- State's representative to the Receiver's working group created to prepare a new charter for the City of Chelsea in 1994
- Assisted Wellesley's Town Government Study Committee prior to her retirement



# STRENGTHS

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- Strong and robust group of dedicated volunteers
- Committed and engaged professional employees
- Strong leadership has provided direction in absence of much authority to do so - ability to get some big things done in spite of the organization structure
- Expectation of high quality Town services
- Town is financially healthy
- Collaborative culture among Town boards and departments emerges when needed

# WEAKNESSES

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- Nobody is in charge - there's a lack of accountability and internal coordination in the budget, management, and planning processes
- Over-reliance on the ability of long-time employees to collaborate and get things done despite structural impediments
- Bylaws and actual practices are frequently inconsistent

# WEAKNESSES

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- Lack of ongoing coordinated Town-wide planning for the future
- Weak communications internally and externally
- Lack of understanding and agreement about difference between board policy and staff operational responsibilities
- Risk of failure to get skilled volunteers on elected boards that have technical responsibilities

# OPPORTUNITIES – OPERATIONS

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- Create a uniformly consistent high quality of customer service throughout
- Consistent responsiveness, efficiency and professionalism in interactions with the Town
- Establish more consistent office hours across Town departments
- Provide easier access to information for Town residents

# OPPORTUNITIES – OPERATIONS

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- Establish employee and user friendly processes in all areas
- Use technology platforms to create seamless operation for customers and employees
- Improve records and data management
- Improve office layouts and space utilization throughout town government

# OPPORTUNITIES – HUMAN RESOURCES

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- Establish consistency in personnel administration including performance evaluation, job classification, training, and professional development
- Create flexibility and efficiencies of staffing and identify opportunities for professional growth
- Develop a strong, integrated management team
- Institutionalize a culture of collaboration and improved internal communication

# OPPORTUNITIES – VOLUNTEERS

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- Develop a structure to create early and frequent collaboration from the top levels of Town government on a board and staff level
- Foster specific opportunities for collaboration
- Make the best use of talented volunteers; ensure appropriate staff support and relieve them of administrative burdens

# DRAFT RECOMMENDATIONS

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**CHARGE: Suitability of current structure for future and role and authority of Executive Director position/alternative models**

Recommendations:

- Town Manager
  - Budget Management
  - Personnel Management
  - Ability to Reorganize
- Strategic Planning

# DRAFT RECOMMENDATIONS

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**CHARGE: Potential consolidation and other changes to functions and responsibilities of Town departments**

- Recommendations
  - Creation of Land Use Division under Director of Land Use
  - Facilities Maintenance Department/Permanent Building Committee

# DRAFT RECOMMENDATIONS

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**CHARGE: Number, composition and role of various elected and appointed boards and committees**

- Recommendations:
  - Town Clerk position: appointment by Town Manager
  - Boards of Assessors, Health and Public Works:  
Appointment by Board of Selectmen

# DRAFT RECOMMENDATIONS

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## **CHARGE: Optimal Number of TMMs, number and scope of Town Meetings**

- Recommendations:
  - No change to number of TMMs
  - Institutionalize Fall Town Meeting on trial basis

# TOWN MANAGER – DRAFT RECOMMENDATIONS

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## **Create a new position of Town Manager**

- Responsibilities
  - Prepare and manage all budgets
  - Appoint and manage all dept heads
  - Ability to reorganize
  - Manage long-term planning
  - Oversee collective bargaining
- Appointment of Town Manager by Selectmen in transparent, open process
- Abolish position of Executive Director of General Government Services

# TOWN MANAGER - REASONS

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- Establishes centralized point of responsibility and accountability for day-to-day operations of the Town
- Ensures Town-wide approach to decision-making by eliminating silos and by mandating collaboration
- Promotes budget and operation efficiency and planning
- Establishes centralized point for long-term planning and setting of town wide priorities
- Relieves boards of personnel management responsibility
- Updates position of Town's CAO to better reflect needs of Town and provides title and responsibilities more consistent with current practice in municipal government

# TOWN MANAGER - BUDGET DRAFT RECOMMENDATIONS

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- Town Manager will be responsible for leading an annual operating and capital budget development process that ensures early and frequent collaboration among all boards and departments
- Preparation of the Schools' budget will remain the responsibility of the Superintendent and the School Committee
- Town Manager and the Superintendent of Schools will submit budget messages to accompany the budget
- The integrated, Town-wide budget to be voted on at Town Meeting will be the Town Manager's budget

# TOWN MANAGER – BUDGET REASONS

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- Evolution of current practice through assignment of actual responsibility to Town Manager
- Early, frequent, ongoing collaborative discussion fosters communication and transparency across boards and Departments
- Process respects autonomy of boards to develop and submit departmental operating and capital budgets for the coming year
- An integrated Town operating and capital budget comes together and evolves through the fall and winter

# TOWN MANAGER – BUDGET REASONS

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- Timeline for submission and review of budget materials and for hearings on budget remains essentially the same, and is tied to start date of Annual Town Meeting
- Process enables higher level review of budget by Advisory Committee, while preserving opportunities for boards to make individual presentations
- As staff with high level of professional expertise and detailed knowledge of budget, Town Manager and Superintendent will present budget at Annual Town Meeting

# PERSONNEL MANAGEMENT- DRAFT RECOMMENDATIONS

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- Town Manager is responsible for:
  - Consistent town-wide personnel management system, working with HR Board/Department
  - Appointment of department heads in consultation with affected board
  - Establishing process of appointment and personnel management of all other staff, working with HR Board/Department

# PERSONNEL MANAGEMENT - REASONS

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- Establish consistency among all employees in personnel administration including compensation, performance evaluation, training, and professional development
- Create flexibility and efficiencies of staffing
- Identify opportunities for professional growth
- Foster a culture of collaboration - improve internal communication
- Develop a strong, integrated cross-departmental management team

# REORGANIZATION – DRAFT RECOMMENDATIONS

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- The Town Manager may, after hearing and approval of the Board of Selectmen, reorganize those departments under the Town Manager that have no boards
- Town Manager may propose a reorganization for Departments with an elected or appointed board upon:
  - Consultation with any affected elected or appointed Board
  - Approval of the BOS after a hearing
  - Approval of Town Meeting with an up or down vote without amendment

# REORGANIZATION - REASONS

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- Current Bylaws are silent on the subject of reorganization – this establishes a process
- Periodic reorganization is essential to enable the Town to evolve with changing circumstances:
  - Economic circumstances
  - Changes in regulation or mandates
  - Major changes in staff
- Provides check/balance for departments that have boards (BoS AND Town Meeting approval)
- Allows the Town to be somewhat nimble in addressing emergent circumstances

# STRATEGIC PLANNING – DRAFT RECOMMENDATIONS

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- **The Board of Selectmen will establish and lead a Town strategic planning initiative in an open, collaborative and iterative process**
  - Steering Committee appointed by Selectmen
  - Cross board representation to ensure collaboration
  - Public participation to identify core values
  - Implementation through goals and action plan
  - Accountability to Town Meeting
  - Evergreen plan that evolves with the Town

# STRATEGIC PLANNING - REASONS

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- Creates framework for consensus regarding vision, values and priorities
- Provides long range planning to anticipate and address critical issues
- Facilitates public participation to incorporate resident views
- Ensures integrated, collaborative and transparent government
- Provides guidelines to measure and evaluate budget and capital initiatives

# ELECTED STATUS OF BOARDS/OFFICIALS – DRAFT RECOMMENDATIONS

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- **To be appointed by Town Manager:**
  - Town Clerk
- **To be appointed by the Board of Selectmen:**
  - Board of Assessors
  - Board of Health
  - Board of Public Works
- All elected board members/officials will fill out their current elected terms of office, unless there is an earlier vacancy
- All elected board members/official are eligible for further appointment

# ELECTED STATUS OF BOARDS/OFFICIALS - REASONS

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- Many core and administrative responsibilities and tasks are guided by state statute or regulation
- Significant risk to the community from someone who has little training or expertise
- Little or no competition at the ballot box thereby requiring boards to recruit their own successors
- Opportunity for a larger pool of candidates
- Representation that better reflects demographics of the Town
- Best practices

# LAND USE - DRAFT RECOMMENDATIONS

Proposed Land Use Division	Board/Committee
Planning Department	Planning Board
ZBA Executive Secretary	Zoning Board of Appeals
Natural Resources Department	Natural Resources Commission
Building Department	Wetlands Protection Commission
	Historical Commission
	Design Review Board
	Historic District Commission
	Wellesley Housing Development Corp.
	Neighborhood Conservation District Commission

# LAND USE -DRAFT RECOMMENDATIONS

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- **To establish the position of Land Use Division Director, whose responsibilities will include:**
  - Strategic planning for the Division
  - Provision of appropriate administrative and staffing support for Division departments and boards
  - Administration of all personnel matters within the Division
  - Development and administration of a Division and departmental budgets
  - Coordination of the technology needs within the Division

# LAND USE DIVISION - REASONS

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- Structure connects the relevant departments and boards, maintains the autonomy of their functions
- Facilitate communication and collaboration between boards on important land use issues
- Centralize technology systems
  - permit application
  - permit tracking across departments
  - record management systems
- Improve customer service
- Provide an opportunity for cross-training and professional development across departments
- Provide a mechanism to address periodic fluctuations in staffing

# LAND USE – OTHER

## DRAFT RECOMMENDATIONS & REASONS

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- **To establish the position of local enforcement officer, reporting to the Director of the Land Use Division**
  - The position responsibilities will be defined so as not to conflict with the responsibilities of the Inspector of Buildings
- **Reasons:**
  - New zoning provisions impose new requirements, adding to the demands of the Building Department
  - Current provisions of the Zoning Bylaw, enacted to address specific resident concerns, are not being policed (e.g. Sign Bylaw, Tree Protection Bylaw)
  - Conditions imposed during permitting processes and site plan review are unevenly monitored for compliance

# LAND USE – OTHER

## DRAFT RECOMMENDATIONS & REASONS

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- **Establish a collaborative process for a comprehensive review of the Zoning Bylaw and regulations**
- Reasons:
  - Current zoning bylaw contains inconsistencies
  - Organizational structure could be improved
  - Other boards and departments charged with the interpretation and application of the zoning bylaws have valuable insights for changes

# TOWN MEETING- DRAFT RECOMMENDATIONS

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- Retain current model of elected Town Meeting of 240 members
- Add regularly scheduled Fall Town Meeting (subject to cancellation by Board of Selectmen) and to the extent possible limit subject matter to non-operating budget articles
- Election dates and timing of assumption of office should remain the same

# TOWN MEETING - REASONS

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- 240 member Wellesley Town Meeting has worked well for years and can be expected to continue to do so
- Town Meeting want to be able members to plan for fall sessions, but understand they may be cancelled
- There's a preference for a limited fall agenda focusing on issues that can be taken up apart from Annual Town Meeting
- Current timing of Town elections, effective dates of election to office pose no problems for effective Town governance
- Post-Town Meeting survey should yield additional recommendations on managing Town Meeting agenda, conduct and processes

# TIMELINE – MAY/JUNE

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- Roll-out of Draft Recommendations and obtain feedback
- Meetings with TMMs and residents
  - May 20 7:00 pm Great Hall
  - May 28 9:00 am Wakelin Room
- Meetings with Staff (3 sessions)
- Meetings with Boards
- *Townsmen* article
- Cable panel discussion

# TIMELINE – FALL 2015

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- Summer:
  - Process Feedback
  - Review and revise Draft Recommendations
  - Draft bylaws and special act
- September:
  - Roll-out package of Final Recommendations, job descriptions, and proposed bylaws and special act
- September/October:
  - Further meetings for TMMs, residents, boards and staff
- October 26 and 27 Special Town Meeting:
  - Presentation of recommendations for action by Town Meeting

# CONTACT US

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Feedback, questions, comments, suggestions:

Please contact us at

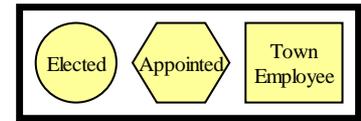
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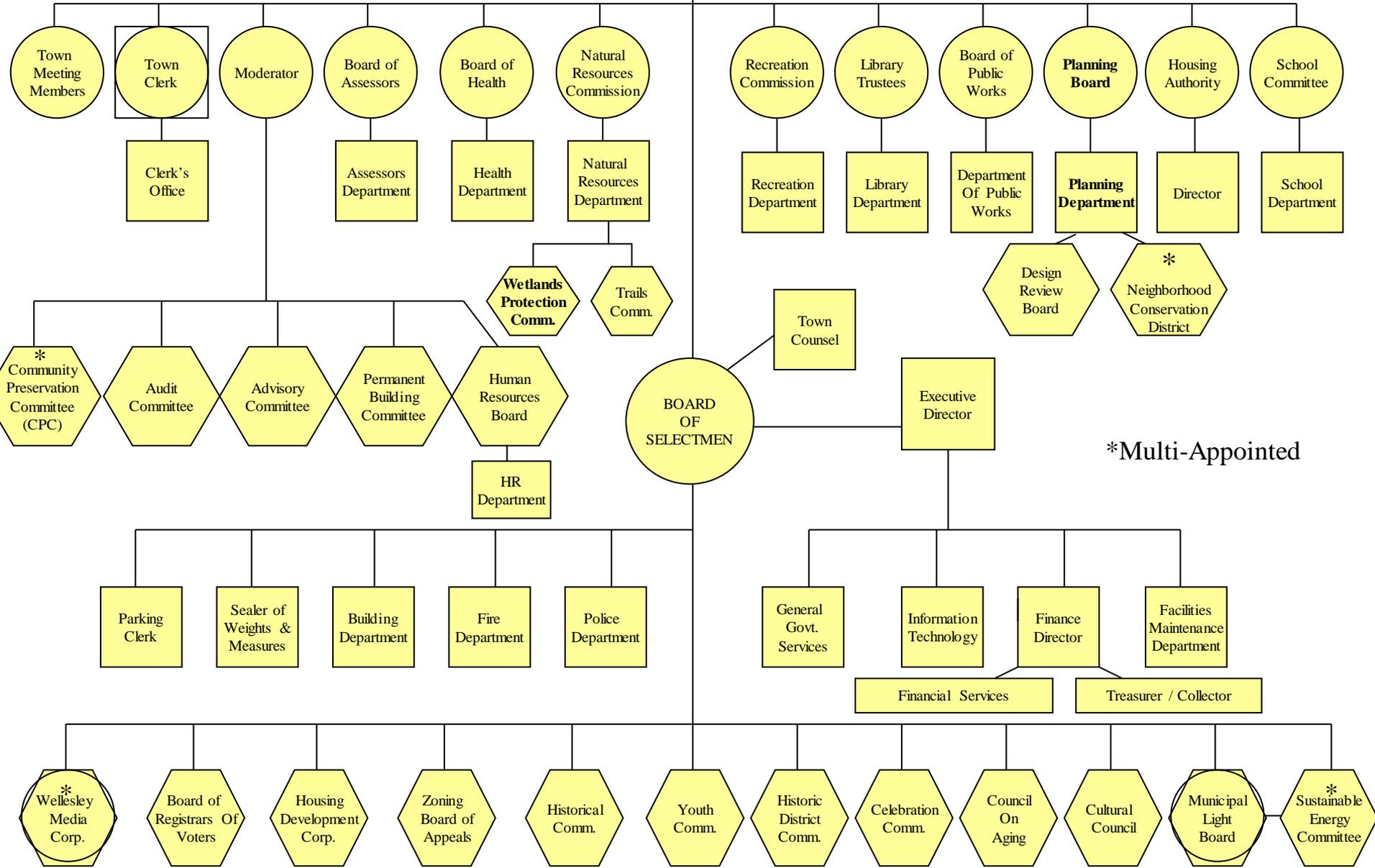
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# Wellesley Town Government Organization



## VOTERS



\*Multi-Appointed

# BUDGET TIMELINE

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- Post-ATM – summer: conversations with TM and individual departments regarding proposed budgets and expected revenue
- Fall
  - Ongoing conversations regarding budget development and projections
  - Collaborative inter-board meeting
  - BoS, School Committee and Advisory meet with TM as a group to discuss budget outline and approach
- 90 days before start of ATM:
  - All proposed departmental operating/ capital budgets submitted to TM
  - Superintendent submits proposed school operating/ capital budgets to School Committee, along with Superintendent's budget message
- 70 days before start of ATM:
  - School Committee, after public hearing and vote, submits budget to TM along with Superintendent's budget message

# BUDGET TIMELINE

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- 60 days before start of ATM:
  - TM submits integrated operating/ capital budgets, including TM's and Superintendent's budget messages, to BoS
  
- 45 days before start of ATM:
  - TM submits integrated operating/ capital budgets, including TM's and Superintendent's budget messages, to Advisory
  
- 7 days before start of ATM:
  - After public hearing, Advisory votes on integrated budget and publishes report

# BUDGET - TIMELINE

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## At Annual Town Meeting

- Budget contains budget messages, as well as format showing
  - Department submitted budget
  - TM recommended budget
  - Advisory voted budget
- BoS moves budget
- TM and Superintendent make budget presentation
- Advisory presents recommendation



# BENCHMARK TOWNS

Acton		x			
Andover		x			
Arlington			x		
Belmont		x	x	x	x
Brookline			x		x
Concord		x	x	x	x
Concord/Carlisle					x
Dedham			x		
Framingham			x		
Lexington		x	x	x	x
Lincoln					x
Milton		x			
Natick			x	x	x
Needham		x	x	x	x
Newton			x		x
Reading		x			
Sudbury		x	x	x	x
Lincoln/Sudbury					x
Wayland		x	x	x	x
Weston		x	x	x	x
Westwood		x	x		
Winchester		x	x	x	