

REPORT OF THE WELLESLEY TOWN GOVERNMENT STUDY COMMITTEE TO THE 2003 ANNUAL TOWN MEETING

I. INTRODUCTION

The Wellesley Town Government Study Committee is pleased to submit a report of its findings and recommendations to the 2003 Annual Town Meeting. The Committee consists of Joe Avellone, a former Selectman; Bob Cultice, also a former Selectman and former Advisory Committee chair; Lise Woodard, a Town Meeting Member and former chair of the Recreation Commission; Betsy Snyder, former President of the League of Women Voters; Sheila Morse, a Town Meeting Member; Dick tenEyck, a former member of the Board of Public Works; and David Dinwoodey, a former Library Trustee and a member of the 1995 Town Government Study Committee.

Our Committee was formed pursuant to the vote of the 2002 Annual Town Meeting, in order "to study whether the organization and structure of Town government could be improved." As described by the Advisory Committee, the catalyst for the Warrant article under which our Committee was established was the approaching retirement of the incumbent Executive Director of General Government Services, Arnold Wakelin. The Committee would thus have the opportunity to consider the structure and functioning of Town government, and in particular, the Executive Director position, before Mr. Wakelin's retirement occurred.

Following the appointment of its seven members, the Committee was charged by the Moderator to specifically review and make recommendations on:

- A. the duties and responsibilities of the position of Executive Director, who also serves as the Chief Financial Officer of the Town, and whether this position should be redefined upon Mr. Wakelin's retirement;
- B. the current structure and functioning of Town government, focusing on areas of shared or overlapping jurisdictions among different Town boards; and
- C. the role and function of the Advisory Committee, and whether to recommend any changes in members' terms of appointment.

A copy of the full text of the Moderator's Charge to the Committee is attached as Appendix A to this Report.

In carrying out its tasks, the Committee decided to do its work in separate stages. The first stage, running roughly from September through December of 2002, was primarily devoted to amassing as much information, and from as many perspectives, as possible. This stage included many meetings or interviews with key Town administrators; meetings with members of each Town elected board and several appointed boards; studying Wellesley's by-laws and the by-laws of five other towns – Needham, Concord, Winchester, Belmont and Lexington – to compare governmental structures, including meetings with the chief town administrator for each of those other communities; meetings with the chairs of the two prior town government study committees in 1985-87 and 1993-95; and telephone interviews with municipal management

consultants or recruiters. We also conducted an introductory public hearing during this stage to elicit ideas about how to proceed.

The second stage of our work, which the Committee essentially conducted during January, February and early March, has focused on analyzing and evaluating all of the information gathered, drawing up some preliminary recommendations, and soliciting further comments from Town boards and officials and from the public through two additional public hearings. In the third and final stage, we have deliberated and reached conclusions on a series of findings, observations and recommendations, all of which are embodied in this Report.

Throughout this process, we have been enormously grateful for the cooperation which we have received from all those from whom we sought information, and particularly the Town boards and department heads. The thoughtfulness of their comments and ideas has been particularly important in formulating the direction of our proposals. A detailed listing of all of the boards, officials and others with whom we met or whom we interviewed is attached as Appendix B to this Report.

II. SOME OBSERVATIONS

A. Comparing Wellesley with Other Communities.

In evaluating Wellesley's Town government and determining whether improvements might be made, it is instructive to compare and contrast specific attributes of our governmental model with the governmental structures in place in the five neighboring communities which we examined – Concord, Winchester, Needham, Lexington and Belmont.

In Wellesley, we manage most governmental services through a decentralized framework of numerous independent and autonomous boards which are separately elected. Our various appointed boards, such as the Permanent Building Committee, the Human Resources Board and the Advisory Committee, generally handle more technical, specialized or support tasks. Department heads are appointed by each of the respective boards, rather than by a central authority. A town administrator (our Executive Director of General Government Services) has direct administrative responsibility only for General Government, but does deliver certain Town-wide centralized services in areas such as management information systems, financial administration and centralized purchasing guidelines; the Executive Director has no formal authority, however, over the hiring of department heads or supervision of personnel outside of General Government or any by-law responsibility for initiating and carrying forward any non-General Government budgets. Finally, our Advisory Committee has significant responsibilities, due in part to our relatively decentralized board structure and due also to the fact that Advisory analyzes and comments upon all articles in the Warrant, not merely those having financial content.

In contrast, the structures of government in the five towns which we examined all exhibit, to a greater or lesser degree, considerably greater centralization of power. These towns typically have fewer elected boards, and more boards which are appointed and/or advisory. The Board of Selectmen is stronger, with greater responsibility for initiating and carrying forward a town-wide budget and for appointing various department heads and members of boards. Similar budget

control powers and appointment powers, to the extent not granted to the Board of Selectmen, are in the alternative granted to the Town Administrator or Town Manager, who also tends to have significant powers to hire and supervise personnel across town departments. Decision-making regarding budget/program priorities, sharing of staff resources and matters which cross departmental lines tends to be more tightly controlled in these communities, with clearer lines of authority and accountability.

B. Wellesley's Success.

Notwithstanding some of the apparent administrative advantages of a more streamlined Town Manager model which we observed in other towns, it is important to remind ourselves that, under Wellesley's long-established model of decentralized government, our community exhibits many important attributes of long-term success, including:

- the preeminent standing of our public school system;
- a comparatively low property tax burden, compared with other communities;
- the Town's high bond rating, evidencing its financial stability;
- extraordinary property values, and a healthy mix of residential and commercial uses; and
- an enviable reputation as a well-managed, attractive and desirable place to live and work.

What appears to account for this success? Through our many meetings and interviews, a number of factors have come to our attention:

- (i) The strong attachment to, and pride in, our "citizen government" model, which is exhibited by the majority of the Town's volunteers who participate in Town government. While critical of certain aspects of Wellesley's government, these volunteers appear to be committed to making it work.
- (ii) A stable and experienced cadre of highly skilled and professional department heads (including Town Counsel) and key staff across Town departments – a major asset.
- (iii) A strong tradition of qualified volunteers as board members. This is not unique to Wellesley, but is particularly important in a government with many elected boards.
- (iv) The closeness of elected boards to Town residents through the ballot box, and the focus of each board on discreet service tasks.
- (v) The importance of Arnold Wakelin, the incumbent Executive Director, at the center of the system.

In any evaluation of Wellesley's form of government, Mr. Wakelin's role deserves particular attention. Since his designation as the first Executive Director in 1993, following his many years of service as the head of the Town's Financial Services Department, Mr. Wakelin has influenced the performance of our government in many ways. He is highly skilled in both the administrative and financial aspects of the Executive Director's position. By virtue of his many years of experience and knowledge of Wellesley and state government, he has been able to serve as an important resource and advisor to department heads and boards. The depth of his knowledge and experience has also permitted him to undertake informal planning through the budget process in order to facilitate major capital projects and to pursue strategic objectives, such as consistent funding of the Town's retirement system and its long-term capital maintenance needs. Finally, the trust reposed in him by Town officials and departments has permitted him to act as an intermediary across Town departments to help make difficult budget and programmatic decisions.

C. Areas of Risk.

The past achievements of Wellesley's Town government do not, however, assure its success as a model for the future. A number of Town officials and board members, speaking from differing perspectives, made comments and observations to us which highlighted several areas of potential concern:

- (i) The need to implement better long-range or strategic planning and to develop practices which foster more consistent coordination among boards and departments. This encompasses the integration of efforts of boards across multiple jurisdictions, more effective sharing of existing knowledge and expertise among departments, and assuring that opportunities to cooperate are seized whenever possible.
- (ii) The increasing strains of coordinating the adoption of both operating and capital budgets across Town departments. In our decentralized government, each independent board is accountable for its own budget, but no operating board "owns" the entire Town budget. As a result, pressures increase on the Advisory Committee, as a non-elected board, to make programmatic decisions late in the process, a trend which appears unwelcome both to Advisory and to the independent boards.
- (iii) The need for various departments to gain the benefits of additional or enhanced central administrative services, in areas such as more consistent access to financial information, training or mentoring of department heads or board members, creating more consistent lines of communication and shared information across departments, and similar measures.

These concerns, and the need to address them, are not new. They were similarly identified by the two most recent town government study committees, which carried out studies in 1985-87 and 1993-95, respectively. Certainly the filling of the Executive Director position in 1993, and the informal budget and long-range planning carried out by Mr. Wakelin in that position, have helped in this regard. But with Mr. Wakelin's anticipated departure, and given

Wellesley's broadly decentralized form of government, coupled with the very difficult fiscal pressures which the Town is now beginning to face, we believe that all Town boards, led by the Selectmen, will need to be more proactively engaged with one another in order to maintain and build on our Town's previous success.

III. OUR FINDINGS AND RECOMMENDATIONS

In light of what we have learned and discussed, we believe that the areas of risk for our Town government can be addressed by strengthening the **processes** of Town government relating to long-range planning, the formulation of operating and capital budgets, coordination/collaboration among boards, and similar issues, rather than looking for help in the form of any major changes in the **structure** of Town government. Our thinking can best be understood, first, by giving our specific response to each element of the Charge given to our Committee by the Moderator, and, second, by spelling out a number of specific recommendations for improvements to the processes of Town government.

A. OUR RESPONSES TO THE CHARGE

1. The Executive Director Position.

- (i) *Regarding the Executive Director, should one person oversee both the administration of General Government Services and Town-wide fiscal management?*

We strongly believe that the Executive Director position should continue to combine the tasks of administration of General Government Services, as well as the responsibility of supervising the delivery of financial services throughout Town government.

* Keeping the tasks combined creates the needed stature and organizational prominence for the Executive Director position, as a key central resource for all departments. Indeed, the "planning through the budget" done by the Executive Director may be the most consistent and important central planning taking place, and it is most effectively done by someone who has administrative and programmatic responsibilities as well. Having at least a modest amount of powers in the Executive Director position acts as a counterweight to our decentralized and otherwise "evenly-balanced" government; we believe it would be a mistake to weaken the potential of the position as a place from which further Town-wide efficiencies can emerge.

Furthermore, because Town Administrators or Town Managers from other communities typically have significant responsibilities for initiating and managing town budgets, a number of candidates for the position are likely to present, and will expect to utilize, both significant administrative skills and financial oversight skills. To divide the responsibilities of the position back into two separate positions, as existed prior to 1993, would clearly widen the gap between the expectations of those candidates and the reality of the position's formal responsibilities.

- (ii) *Can we attract the right skill set for the position? What will the best people expect?*

We heard consistently from municipal executive recruiters and from other town administrators that many candidates who might be available to fill the position of Executive Director are likely to expect to have more power than is currently provided under our by-laws. As previously discussed, a number of functions typically associated with a stronger Town Manager/Town Administrator position, such as initiation of town-wide budgets, appointment powers regarding department heads and control over personnel, are not exercised by our Executive Director. We therefore believe that Wellesley's ability to attract highly qualified candidates for consideration as the new Executive Director will instead depend upon Wellesley's reputation and the strength of its existing departmental managers, coupled with the ability to demonstrate that the Executive Director's relatively modest by-law powers can be augmented by acting as a central resource to departments, much in the same way that Arnold Wakelin has managed to augment his authority over time.

As mentioned earlier, we expect that many candidates for the Executive Director position will at least have financial oversight skills. However, it will not necessarily be the case that such candidates will typically have the depth of detailed financial expertise which Arnold Wakelin has possessed. Fortunately, Wellesley appears to have a highly skilled group of senior managers in the Financial Services Department, and this fact should permit the Selectmen to select a new Executive Director based on the more fundamental attributes of overall leadership and general management skills which we believe are most important. The new Executive Director will need to rely heavily on the expertise of the Financial Services Department, and the responsibilities of that department would grow under several of our recommendations. Accordingly, the Selectmen and the new Executive Director should expect to carefully evaluate the department at the time of the new Executive Director's appointment, including the possibility of designating a formal "Assistant Director for Finance" position in support of the new Executive Director.

Beyond the organizational chart aspects of the Executive Director position, it is important to note that we repeatedly heard from many sources how important Mr. Wakelin's personal skills and qualities – engendering trust, contributing to stability, displaying reliability and sound judgment – have been to his performance. The Executive Director job will thus need to be filled by the person who has the best array of skills in consensus-building, collaboration and communication with many different groups and power centers in Wellesley's decentralized government. Put another way, the management style of the new Executive Director will need to fit Wellesley's style of government, in order for that person to be successful.

(iii) *What are the alternative administrative structures to the present Executive Director position, and their relative strengths and weaknesses?*

We have already expressed our view that splitting the job of Executive Director back into separate administrative and financial management positions would not be appropriate. The other obvious alternative, of course, would be to go in the other direction and significantly enhance the by-law powers of the Executive Director, making the position more like that of a true Town Manager, with authority to formulate/initiate budgets, appoint department heads and control decisions regarding personnel.

Although in our examination of neighboring communities we saw several examples of what appeared to be very well-administered town governments headed by a strong Town

Manager, we are not recommending that Wellesley undertake such an approach to restructuring its government, for a variety of reasons. As we have noted previously, there continues to be a strong allegiance among the many volunteers in Town government to its current basic structure of autonomous independently elected boards, with administrative, policy and budget oversight for their respective departments. Because municipal power is essentially a “zero sum” exercise, these powers which presently reside with elected boards would need to flow toward the Town Manager in a more centralized model; this would constitute a fundamental change in Town government and not merely an administrative adjustment. At present, we detect no significant appetite among the Selectmen or the other major boards for such a transfer of power to a strong Town Manager. Moreover, we are mindful that over the course of several study committees, the Town Meeting has not given majority support to a Town Manager concept or the centralizing of powers which would accompany it, and in this respect Wellesley has very consciously maintained the essentials of its form of government.

The suggestion made by certain boards or interested citizens in favor of a Town Manager concept seems to be prompted largely by a desire for greater central direction and coordination within Wellesley’s government. We believe that these concerns can be addressed in substantial part by the recommendations which we will make later in the Report. Those recommendations are intended to gain some of the benefits of the Town Manager concept, but are to be carried out within Wellesley’s existing governmental model.

2. Review of Current Structure and Functioning of Town Government.

(i) *Shared/Overlapping Jurisdictions of Town Boards.*

Under our Charge, we were asked to focus on areas of shared or overlapping jurisdictions among different Town boards and whether there were any recommendations to make regarding these overlaps.

Nothing we have heard during our meetings and interviews has led us to conclude that any particular responsibilities which are presently divided among two or more boards should be unified under a particular board. We found that some differences between boards which shared jurisdiction over a particular matter reflect substantive and legitimate differences arising from the differing by-law or statutory functions of those boards, rather than any inadvertent overlap. This seems to be a systemic part of the “messiness” of a broadly decentralized government, and not necessarily a weakness. Other problems in this area appear to relate to misunderstandings as to the precise boundaries of a given board’s jurisdiction on a particular matter, which can be ameliorated by better communication both among the boards and with the public.

In fact, boards appear to be doing a better job of cooperating and working together in areas of shared jurisdiction. We heard of a number of examples of informal staff coordination across departments on issues which crossed jurisdictional lines, the formation of ad hoc committees or task forces with representatives of several departments working to share information, and the like. It appears as if boards are moving away from a “turf” mentality, which may have been more prevalent in earlier years.

Perhaps the biggest difficulty associated with jurisdictional overlaps is that Town residents appear to sometimes have difficulty navigating through Town government where issues touch upon the responsibilities of several departments. We have some ideas to help address that problem, which we have included in our recommendations.

(ii) *Other Matters Relating to Structure/Function of Town Government.*

Other possible ideas for restructuring Town government which were mentioned to us include making certain smaller boards appointed, rather than elected, on the theory that these boards involve more administrative duties or technical expertise and have relatively few policymaking functions of the kind which need to be accountable through the elective process.

We heard comments across the spectrum on this idea, with no single message. Some felt that the process of running for office, rather than being appointed, required prospective board members to develop and defend their ideas regarding a board's objectives, and might offer outsiders an increased chance to become involved, compared to an appointive process, which might favor already well-known candidates. Also, no one pointed out any glaring failure of performance which might prompt a suggestion that a certain board needs to be appointed to assure more qualified candidates. Moreover, while having smaller elected boards in control of their own budgets can certainly complicate the budget process, we note that the idea of centralizing small board budgets under the Board of Selectmen was tried in 1987, but formally abandoned in 1991.

Making various boards appointive would certainly make sense as part of a major restructuring toward a Town Manager/strong Selectmen model, where many smaller boards typically become appointed and have diminished budget or policymaking powers. However, since we are not proposing any such major restructuring, we feel that any change regarding election of boards is of marginal benefit. We believe that the Town should instead focus its collective energies toward changes in process, where we believe more can be achieved.

We do, however, believe that it might be valuable to examine in more detail one idea for combining the functions of several smaller elected/appointed boards into a single elected board. This idea is discussed at the end of our report.

3. Review of the Role and Function of the Advisory Committee.

Our analysis of Advisory's functioning is more specifically addressed in our recommendations. Briefly:

- Advisory member terms should commence on July 1, rather than June 1, as at present. This change will presumably be effected through Article 27 of the 2003 Annual Town Meeting Warrant.
- Advisory members should be affirmatively permitted to serve a second consecutive three-year term of service.

- Advisory members should have consistent access to the services of the Financial Services Department in order to adequately perform and make more manageable their very considerable responsibilities.

We have also included in our recommendations specific suggestions regarding processes for Town-wide operating and capital budgeting and long-range planning. Once implemented, these concepts should help lessen the burden on Advisory to become involved as a policymaker in lieu of Town boards, and permit Advisory to concentrate on its primary task of evaluating and analyzing budgets as an advisor to Town Meeting.

B. OUR RECOMMENDATIONS

To address the “areas of risk” described earlier in Part II.C. of this Report, we propose a series of recommendations which are intended to accomplish the following:

- strengthen the Town’s long-range planning process;
- develop a Town-wide process for formulating both operating and capital budgets;
- enhance central administrative services;
- improve the process of handling citizen inquiries; and
- change the duration and effective date of the terms of appointment for Advisory Committee members.

Each recommendation is set forth below, together with an accompanying explanatory statement.

Recommendation 1.

The process of preparing, maintaining and presenting annually to the Town Meeting a long-range Strategic Plan for the Town, which is the responsibility of the Selectmen pursuant to the Town’s by-laws, should be reinvigorated and strengthened. This planning process should involve the participation of all Town boards and departments, and should be structured so as to (i) identify community-wide goals and objectives, (ii) integrate on an ongoing basis the respective plans, policies and service objectives of Town boards and departments, (iii) reflect the projected fiscal environment and any anticipated limitations on the Town’s financial resources, (iv) foster improved coordination and sharing of information and resources across all Town departments, and (v) annually assess the Town’s progress regarding the various objectives expressed in the Strategic Plan. The Selectmen should make an oral presentation on the Strategic Plan to the Annual Town Meeting.

Rationale:

Under Section 19.16 of the Town's by-laws, the Selectmen are charged with the task of managing an ongoing "Master Plan" process for the Town. At present, such strategic planning does not take place on a regular or coordinated basis. While our Executive Director has carried out informal planning through his financial strategies and timing of major capital improvements, we believe that future Town-wide planning will need to occur in a much more organized way, with the Selectmen taking a more active role in convening board chairs, collecting and sharing information, and soliciting public input where appropriate. Strengthened planning efforts should help the Town make better, more informed choices about competing needs in a difficult fiscal environment.

Within this strategic planning process, we anticipate that most ongoing work would be handled by departmental staff. The Executive Director should be delegated the task of coordinating and facilitating the Selectmen's responsibilities regarding Town-wide strategic planning. Each board would continue to carry out its own jurisdictional responsibilities with respect to planning (for example, the Planning Board with respect to its Comprehensive Plan).

Recommendation 2.

Each independent board, in the course of preparing its operating and capital budget requests for the Annual Town Meeting, should also participate in a Town-wide budget process initiated and coordinated by the Selectmen, as the chief executive board of the Town. This budget process is intended to (i) foster a Town-wide perspective regarding financial resources, including any anticipated constraints on spending, and create a forum for all boards having budget responsibilities to engage in cooperative setting of priorities in the context of preparing their respective budgets, (ii) commence early in the annual budget cycle, so as to encourage timely decision-making, (iii) provide all boards and departments with adequate access to financial information and expertise from the Department of Financial Services within General Government, and (iv) promote organizational practices which emphasize more integrated, open and participatory budget planning among the boards, under the leadership of the Board of Selectmen. Such a Town-wide budget process should be coordinated with the Town's development of its Strategic Plan, and should also provide the basis for the Selectmen's preparation and report to Town Meeting of the long-range capital budget program, as required by the Town's by-laws.

Rationale:

A Town-wide budget process should encourage the making of hard budget decisions by the elected boards at an earlier stage of the budget process, and should reduce the likelihood that the Advisory Committee will be required to involve itself in substantive budget decisions or program priorities. Advisory would observe this budget process and provide financial information and other input, as appropriate, but would continue to separately evaluate and comment upon departmental budgets for the benefit of Town Meeting as is done currently.

In the area of capital budget planning, for which the Selectmen already have responsibility under Section 19.5 of the Town's by-laws, we believe that a budget process of the

This was covered in Grammar Lesson # 2. This should have been "discrete"

kind described above can yield a more integrated and reliable long-term capital budget, rather than simply a compilation of discreet budget requests from the various departments. Boards could collectively discuss their future capital projects and consider possible timetables, and take into account the need to manage the Town's long-term debt.

We emphasize that each elected board would still be ultimately responsible for formulating and presenting its own operating and capital budgets.

Recommendation 3.

The office of Executive Director of General Government Services should provide augmented or additional central administrative services to boards and department heads in areas such as, but not limited to, (i) training department heads and key department staff and providing orientation for board members with respect to Town-wide policies and procedures, state or federal regulations or mandates, budget-building skills and similar subjects, (ii) preparing a compilation of all department policies, procedures and regulations and a summary of the jurisdiction and services of each department for use throughout Town government, (iii) acting as a clearinghouse for information useful generally to Town departments, and (iv) where feasible, expanding the availability of facilities maintenance services as a resource to departments outside of General Government in their efforts to assess ongoing building maintenance needs, prepare departmental maintenance budgets, and evaluate long-term capital improvement needs.

Rationale:

Several department heads and boards expressed to our Committee the desire to receive additional administrative assistance in several areas, which can effectively come only from a centralized staff source rather than from volunteer boards. The additional tasks described above are, we believe, consistent with the existing responsibilities of the Executive Director in such areas as centralized purchasing guidelines and supervision of Town-wide information networks needs, and do not represent a substantive extension of power or encroachment upon the prerogatives of independent boards. The provision of these additional services would also complement and support the Town-wide planning and budgeting processes described in earlier recommendations.

Recommendation 4.

The Selectmen, in cooperation with other boards and departments, should develop policies and procedures to improve the Town's systems for receiving and acting upon inquiries, requests or suggestions from residents regarding Town services or programs, which improvements may include, without limitation, (i) making additional information available on the Town's website and in printed materials, (ii) instituting procedures to log in and track citizen inquiries requiring some response, and (iii) providing a single contact point for residents to initiate all inquiries.

Rationale:

In a decentralized government like Wellesley's, with no single center of administrative power, residents sometimes need additional information in order to make effective contact with

their Town government and to know that their complaints and comments are being heard. We believe that the use of technology could help overcome barriers to communication by residents, and enable Town departments to better identify service trends and improve the quality of delivered services. Enhanced communication with Town residents will also help to maintain respect for our Town government and will help sustain our strong tradition of volunteerism.

Recommendation 5.

The term of Advisory Committee members should commence on July 1, rather than June 1 as is presently the case, in order to coincide with the conclusion of the fiscal year. Advisory members should also be eligible for appointment by the Moderator to a second three-year term, in order to permit service for up to six consecutive years.

The Advisory Committee should have consistent access to financial information from the Department of Financial Services, in order that Advisory can effectively carry out its responsibilities to evaluate annual appropriation requests of Town boards and other matters relating to Town budgeting and fiscal planning.

Rationale:

Our Committee endorses the passage of Article 27 under the 2003 Annual Town Meeting Warrant, which would change the beginning of an Advisory Committee member's term from June 1 to July 1.

Most Wellesley board members and representatives of other towns expressed the view that the ability of Advisory members to serve an additional three-year term, if willing, would enhance the level of experience and expertise on the Committee. A significantly longer term limit, however, might result in entrenched viewpoints and undue deference to veteran members by newer members, which may detract from the "fresh look" which Advisory ideally should give to each year's budget and Warrant articles. We believe that a six-year maximum length of service would gain the positive result of additional expertise without seriously risking the negative results which might flow from excessively long service.

Under Wellesley's decentralized budget process with many independent participants, the role of Advisory is considerable, and involves a substantially greater workload than finance committees in towns where a strong Town Manager/Administrator is directly responsible for the formulation of budgets across many departments. The Advisory Committee appears to need more consistent "staff" assistance from the Department of Financial Services in order to effectively discharge its responsibilities under the by-laws.

IV. OTHER MATTERS WHICH WARRANT ATTENTION

During the course of our study, a series of matters were brought to our attention by various board members or Town officials, but the limitations of time did not allow us to pursue these ideas in the necessary depth. Each of these items, however, appears to merit further discussion by the affected boards, or by the Selectmen.

These matters are briefly described below:

A. Town Planner Position.

We think it would be useful for the Selectmen and the Planning Board to mutually discuss and evaluate whether it might be appropriate to expand the current Planning Director role (or, alternatively, institute a new position at some point) to manage some of the expanded planning functions contemplated by our recommendations, or possibly to help facilitate an expanded “community planning/development model” encompassing both Planning Board and Selectmen functions.

B. Human Services Board.

Several Town officials suggested the concept of a “Human Services Board,” which might combine several current elected or appointed boards, such as the Recreation Commission, the Youth Commission, the Council on Aging, and perhaps the Board of Health. Discussions among the affected boards or commissions might reveal whether there are any significant synergies and/or efficiencies to be gained by such a combination in the delivery of various human services within Town government.

C. Human Resources Board.

Several members of boards or Town officials expressed concern or confusion about the exact scope of jurisdiction and responsibility of the Town’s Human Resources Board. Some of these comments may derive, in part, from the fact that the Human Resources Board administers the Town’s personnel by-law and wage/salary classification plans, with an eye toward equitable treatment and consistency of decisions across all Town departments; this is an administrative task which may require the Board to render decisions which do not grant relief to every board’s request regarding its employees. In any event, we sense the need for improved communication between the Human Resources Board and the various Town boards and departments, in order to improve understanding as to how the Human Resources Board approaches its tasks and how it can act as an effective resource in assisting each board, within Town-wide personnel policies, to achieve a board’s particular personnel objectives.

D. Design Review Board.

We heard comments from several boards regarding the appropriate scope and timing of participation by the Design Review Board in the construction/approval process for municipal projects. We recommend that the Planning Board, as the board holding the power of appointment over the Design Review Board, communicate both with the Design Review Board and with the various Town boards which have undertaken significant capital projects over the past several years, in order to determine whether any adjustments in the Design Review Board’s role in the process of approving municipal projects might be warranted.

V. A FINAL OBSERVATION

Throughout our deliberations, we have heard variations of the rhetorical question, “How are we ever going to replace Arnold Wakelin?” Our study of the Executive Director’s position, as well as other matters relating to the structure of Town government, has reassured us that the task of finding a replacement who can be effective in the position of Executive Director can most

certainly be achieved. There are excellent municipal administrators with significant skills in the marketplace who would make excellent candidates for the position – indeed, several of the administrators whom we interviewed have the kinds of personal qualities which would merit serious attention were they to become candidates. Moreover, Arnold Wakelin himself believes that an effective replacement can take over the position as it is presently structured. We must remember, as well, that there exists a very strong Executive Director staff and a group of highly qualified department heads who are prepared to step forward in support of any new Executive Director and to help that person succeed.

Particularly in the transition period of a new Executive Director, however, all Town boards and staff will need to make additional efforts to focus not only on their own tasks, but on the needs of Town government as a whole in order to make that transition a success.

Respectfully submitted,

TOWN GOVERNMENT STUDY COMMITTEE

David T. Dinwoodey, Chairman
Joseph Avellone
Robert Cultice
Lise Woodard
Betsy Snyder
Sheila Morse
Dick tenEyck

March 24, 2003

APPENDIX A TO
WELLESLEY TOWN GOVERNMENT STUDY COMMITTEE REPORT

TOWN OF WELLESLEY



MASSACHUSETTS

2. A review of the current structure and functioning of Town government, with a focus on areas of shared or overlapping jurisdictions among different Town boards and departments, and a recommendation whether (a) a specific board or department should have exclusive or controlling jurisdiction over any such shared or overlapping areas and (b) any policy-making or implementation functions of the boards and departments should be consolidated and/or supported with additional resources.

TOWN MODERATOR

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3. A review of the role and function of the Advisory Committee and a recommendation regarding the length and effective dates of its terms of appointments, and whether Advisory Committee members should be able to be appointed for consecutive terms.

Charge of the Town Government Study Committee

4. Such other matters that the Committee believes should be incorporated into the study, after consultation with and concurrence of the Moderator.

August 2002

To conduct a study on whether the organization and structure of Town Government could be improved, and to make a report of its findings, including the need for any bylaw changes or Special Legislation to the 2003 Annual Town Meeting. As part of the study, the Committee shall confer with elected and appointed officials, and hold at least three public hearings prior to preparing its findings and recommendations. The findings and recommendations should include the following:

1. A review of the duties and responsibilities of the position of the Executive Director of General Government Services, who also serves as the chief financial officer of the Town, and a recommendation whether the Town should redefine this position, effective upon the retirement of the present Executive Director. Such recommendation should reflect an evaluation of:
 - (a) The effectiveness of charging one person with the oversight of both the daily operations and fiscal management of General Government Services;
 - (b) The likelihood of attracting a new director who will have the requisite skill set to assume duties and responsibilities of the current position;
 - (c) The scope of responsibility commonly sought by top performing administrators; and
 - (d) Alternative administrative structures, and their relative strengths and weaknesses.

**APPENDIX B TO
WELLESLEY TOWN GOVERNMENT STUDY COMMITTEE REPORT**

Listing of Meetings and Interviews Conducted with Town Officials and Others

Below is a listing of various Town boards, committees and officials and others whose views were solicited and received by the Committee. This input was obtained either directly at our regular meetings or by individual telephone or in-person interviews conducted by one or more Committee members.

I. Wellesley boards, committees and elected officials:

Board of Selectmen	Human Resources Board
School Committee	Board of Assessors
Board of Public Works	Planning Board
Trustees of the Wellesley Free Library	Town Clerk
Board of Health	Housing Authority
Recreation Commission	Natural Resources Commission
Municipal Light Board	Advisory Committee
Retirement Board	Permanent Building Committee

II. Wellesley department heads or key officials or administrators:

Albert S. Robinson, Town Counsel
R. Arnold Wakelin, Jr., Executive Director of General Government
Dr. Matthew King, Superintendent of Schools
Janice G. Coduri, Library Director
Susan Adler, Human Resources Director
Janet H. Bowser, Natural Resources Director
Janice Trainor-Tellier, Board of Health Director
Jan Kaseta, Recreation Director
Donna L. McCabe, Assessor
Christopher Clark, Assistant Director of General Government
Todd Hassett, Town Accountant
Marc V. Waldman, Town Treasurer
Terrence M. Cunningham, Police Chief
Kevin Rooney, Fire Chief
Bill Brooks, Deputy Police Chief
Judy Kirby, DPW Assistant Director
Tom D'Orazio, NIS Director

III. Other Wellesley Officials:

Richard Seegel, Chair of the 1985-1987 Town Government Study Committee
Ernest Sargeant, Chair of the 1993-1995 Town Government Study Committee

IV. Officials of other municipalities:

Michael Jaillet, Westwood Town Manager¹
William Keegan, Dedham Town Manager¹
Christopher Whelan, Concord Town Manager
Melvin Kleckner, Belmont Town Administrator
Kate Fitzpatrick, Needham Town Administrator²
Brian Sullivan, Winchester Town Manager²
Richard White, Lexington Town Manager

V. Municipal consultants or executive recruiters active in Massachusetts:

Dick Bennett, Bennett Associates
Mark Morse, MMA Consultant Group
Thomas Groux

¹ Representing the Massachusetts Municipal Managers Association

² Together with one or more Selectmen