



Town of *Wellesley*
FY2022 Budget Request
Office of the Town Clerk: Mission, Services & Priorities

Mission

The office of the Town Clerk serves as the repository of vital records for the town; conducts all activities related to census, elections and voter registration; issues a variety of licenses and permits; and serves as the office of record for a variety of public filings. A staff of three and the Town Clerk carry out the various functions of the office.

Services

Census and Elections

- The Town Clerk's Office conducted 2 elections in FY 2020, the Presidential Primary March 3, 2020 and the Annual Town Election. The Presidential Primary 2020 election participation rate was 54%.
- The Annual Town Election was originally scheduled for March 17th. Due to the sudden emergency crisis of the coronavirus pandemic (COVID-19), Wellesley requested a court order to postpone the election on March 16, 2020. The Election was rescheduled to June 13, 2020.
- To mitigate risk at elections, the Secretary of the Commonwealth issued regulations that permitted Vote By Mail Early Voting, reduced staffing at polling places, and allowed changes in polling locations.
- The Annual Town Election participation rate was 27%. 91% of all ballots cast were either Early Voting by Mail or Absentee by Mail. All eight precincts were consolidated at the Babson Recreation and Athletic Center.
- In the Local Election, there were contested races for the offices of Moderator, Board of Selectmen, Board of Public Works, and School Committee which contributed to the turnout. In addition, the aggressive Vote By Mail campaign contributed to the turnout. There was one non-binding question on the ballot. It asked:

Do you believe the Town of Wellesley should keep our current 7 neighborhood elementary school model by rebuilding and/or renovating the Hardy, Hunnewell and Upham Elementary Schools, instead of closing one school and redistricting all of our elementary students into 6 schools?

- The administration of elections requires the assistance of over 100 poll workers and the cooperation of the Department of Public Works, the Wellesley Public Schools, the Police Department, and IT department. The June 13th Election also



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included support from the Health Department and Babson College. Without the support of these departments and citizens we would not be able to fulfill our mandate.

- The Board of Registrars of Voters is charged with the responsibility of certifying the validity of voter signatures on registrations, absentee ballots, nomination papers and petitions. As of the June 2020 Election, the Town of Wellesley had 16,194 Active registered voters. The members of the Board of Registrars for FY 2020 were: Jane Kettendorf, and George P. D. Porter, Republicans, and Mary (Toby) Sullivan, Democrat, and KC Kato, Town Clerk, Unenrolled.

Town Meeting

The Town Clerk is responsible for keeping and publishing the minutes of Town Meeting.

- In FY20, there was a Special Town Meeting on December 9, 2019 to fund designs, construction documents and other associated costs related to the reconstruction or replacement of the Hunnewell School.
- The 140th Annual Town Meeting was originally scheduled for March 30th. Due to the COVID-19 pandemic, the Annual Town Meeting was postponed three times and finally scheduled to begin on June 22nd, 2020. Due to the pandemic, legislation was enacted to allow Virtual Town Meetings. Wellesley Town Meeting members met for 2 sessions, beginning June 22, 2020 and ending June 23, 2020. The meeting was held virtually via Zoom Videoconferencing. The actions of Town Meeting reflected primarily financial articles. Many articles on the Town Meeting Warrant were deferred to a Special Town Meeting fall FY21.
- The Town Clerk is also responsible for shepherding the approval process through the Attorney General's office for all Town and Zoning bylaw changes that result from Town Meeting.

Vital Records and Miscellaneous

- During the period July 1, 2019 to June 30, 2020 the office processed:
 - 183 Birth records
 - 96 Marriage Intentions
 - 253 Death Records
 - 114 Business Certificates
 - 3,150 Dog Licenses
- The office maintained a variety of other public records and conducted other miscellaneous activities:



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- ZBA decisions
- Ethics and open meeting law training and compliance
- Public records requests in partnership with the Schools, the Selectmen's office and the Police Department.

FY22 Budget Priorities

FY22 Capital Budget has been adjusted by the following:

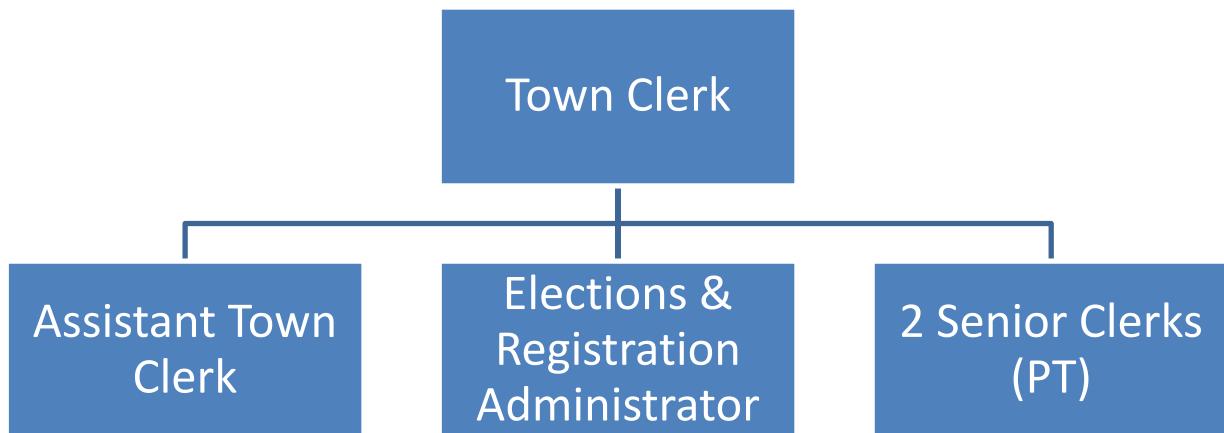
- \$16,000 for Electronic Poll Pad devices is included in the FY22 capital budget. The State Elections office allowed the piloting of the use of Poll Pads during the FY21 Elections. Due to a State Grant, Wellesley piloted the Poll Pads and plans to launch the use of poll pads across the precincts in FY22 and FY23.
- At ATM 2019, Town Meeting voted to pilot Electronic Voting. The FY19 budget included \$15,000 to support the purchase or lease and the operations of electronic voting devices for Special and Annual Town Meetings in FY19. Due to the COVID Pandemic, Town Meeting was virtual via Zoom in FY20 and FY21 and used a polling system in the Zoom Platform. The expense in FY22 is an operating expense in the event Town Meeting resumes in-person meetings. It will continue to be in the pilot phase in FY22. If successful, there will likely be a capital expenditure of \$15,000 to purchase the devices in FY23 and an operating expenditure of personnel to support the devices.

The FY22 Operating Budget includes the following variances from FY21.

- Due to COVID-19 and special legislation, the State allowed the use of Early Voting by Mail. This new method of voting resulted in a significant increase in voter turn-out, postage and personnel. Wellesley saw an increase in Vote by Mail from 1300 ballots mailed in 2016 (Absentee) to 13,000 ballots mailed in 2020 (Early Voting by Mail). Voting by Mail is expected to extend through FY22. The budget reflects additional postage and personnel expenses to support Voting by Mail.
- We expect to have 2 elections in FY22 versus 5 in FY21.
- Due to increased compliance requirements and changes in elections, the Town Clerk's office is requesting an additional 0.5 FTE, non-benefits election.
- The FY21 budget received supplemental revenue from both the CARES Act fund and a grant from the Center for Technology and Civic Life to offset the increased costs due to the elections changes required by COVID legislation.



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PERMANENT STAFFING (FTEs)	FY18 Actual	FY19 Actual	FY20 Actual	FY21 Budget	FY22 Request
Position Titles:					
Town Clerk	1	1	1	1	1
Assistant Town Clerk	1	1	1	1	1
Elections & Reg. Administrator	1	1	1	1	1
Clerk/Voter Registration	0	0	0	0	0.5
Clerk	0.6	0.45	0.5	0.5	0.5
Total Number of Positions	3.6	3.5	3.5	3.5	4.0



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Town Clerk FY22 Operating Budget Request									
Org	Object	Account # 01-161 Account Title	FY18 Actual	FY19 Actual	FY20 Actual	FY21 Budget	FY22 Request	\$ Variance FY21-22	% Variance FY21-22
PERSONAL SERVICES									
01161100	511010	Senior Administrator	\$ 92,142	\$ 91,423	\$ 93,968	\$ 95,950	\$ 102,392	\$ 6,442	6.71%
01161100	511220	Other Professionals	34,037	49,508	55,155	62,562	58,464	\$ (4,098)	-6.55%
01161100	511225	Board of Registrars	2,000	2,600	2,300	3,200	2,300	\$ (900)	-28.13%
01161100	511370	Clerical	70,845	71,950	74,922	81,370	106,722	\$ 25,353	31.16%
01161100	512010	Pages/Poll Workers	10,980	37,168	21,524	90,833	35,100	\$ (55,733)	-61.36%
01161100	512050	Custodians/Laborers	880	1,337	7,164	3,750	5,000	\$ 1,250	33.33%
01161100	513160	Other Overtime	106	1,237	1,371	1,500	3,000	\$ 1,500	100.00%
01161100	515050	Longevity	600	600	600	600	600	\$ -	0.00%
PERSONAL SERVICES SUBTOTAL			211,591	255,822	257,004	339,765	313,579	(26,186)	-7.71%
EXPENSES									
01161200	517020	Medical Checkup	-	-	-	65	65	\$ -	0.00%
01161200	517030	Meal Allowances	662	1,329	756	2,250	2,250	\$ -	0.00%
01161200	524030	Equipment Maintenance	8,160	9,982	8,032	10,000	12,400	\$ 2,400	24.00%
01161200	534010	Postage	5,429	8,859	11,706	8,000	17,750	\$ 9,750	121.88%
01161200	534030	Advertising-General	17	68	58	150	150	\$ -	0.00%
01161200	534040	Printing & Mailing Expense	5,082	9,410	15,239	11,000	20,700	\$ 9,700	88.18%
01161200	538020	Book Binding Services-see Obj	2,735	-	1,269	2,750	2,750	\$ -	0.00%
01161200	538050	Deliveries	-	-	-	150	150	\$ -	0.00%
01161200	538090	Other Purchased Services	1,100	850	2,252	1,550	1,550	\$ -	0.00%
01161200	542010	Office Supplies	1,942	3,267	643	3,300	3,300	\$ -	0.00%
01161200	542040	Paper & Stationary	260	330	419	500	500	\$ -	0.00%
01161200	542090	Other Supplies - Dog Tags	1,011	1,922	1,203	1,000	1,200	\$ 200	20.00%
01161200	571010	Travel-Mileage	156	232	80	250	250	\$ -	0.00%
01161200	571110	Conf/Meetings-Administrators	90	482	413	750	750	\$ -	0.00%
01161200	573010	Dues-Administrators	150	175	150	175	175	\$ -	0.00%
01161200	574120	Public Employee Bond	100	100	100	100	100	\$ -	0.00%
01161200	583053	Equipment Replacement	-	1,577	-	-	-	\$ -	0.00%
01161200	527090	Other Rentals/Leases		-	-	1,400	15,000	\$ 13,600	971.43%
		EXPENSE SUBTOTAL	26,894	38,583	42,320	43,390	79,040	35,650	82.16%
	570000	Other Charges & Expenses		-	2,219			\$ -	0.00%
		DEPARTMENT TOTAL	\$ 238,486	\$ 294,405	\$ 299,325	\$ 383,155	\$ 392,619	9,464	2.47%



**Town of *Wellesley*
FY2022 Budget Request
Board of Assessors Operating Request: Mission, Services & Priorities**

DEPARTMENT MISSION:

The mission of the assessors' office is to value real and personal property efficiently, fairly and accurately, in accordance with the laws of the Commonwealth of Massachusetts and comply with regulations established by the Department of Revenue; to administer motor vehicle excise; exemption and abatement programs; and to address concerns of the public by exhibiting the highest level of competence and professionalism.

MAJOR AREAS OF RESPONSIBILITY:

The assessors' office functions as part of the town governmental system but most activities are governed by Massachusetts's general laws and regulated by the Massachusetts Department of Revenue (DOR). We have direct responsibility for insuring that property taxes and motor vehicle excise taxes, the source of over 85% of the town's budget, occurs efficiently. The increased dependence on property taxes and the vital New Growth component of the tax levy reinforces the importance of the assessors' office and the need for accurately administrating Massachusetts' property tax laws. The major areas of responsibilities are illustrated through the following activities (annual number in parentheses):

- Annual valuation of all real property using the Town's mass appraisal system and analysis of market conditions. (8,510 parcels)
- Annual discovery and valuation of all business personal property accounts. Inform all business owners on their requirement to complete the state Form of List. (1,000 business accounts)
- Motor vehicle excise billing and adjustments due to changes in ownership. (24,200 bills)
- Collection of objective and subjective property data as a result of building permits, sales transfers and cyclical inspections. (1,500 field inspections)
- Measure and sketch to scale the footprint of all buildings in town. Calculate total square footage of buildings. (1,500 properties annually)
- Process deed transfers for real estate market analysis and accurate mailing of tax bills. (1,000 deeds)
- Review building permits and subdivision plans to measure the impact on property values and make all necessary changes to the valuation database.



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Board of Assessors Operating Request: Mission, Services & Priorities

- Perform annual statistical testing as required by the Massachusetts Department of Revenue to ensure horizontal and vertical equity amongst all taxpayers.
- Promote statutory personal tax exemptions, assist seniors in completing forms, and verification of taxpayer's income and assets for decision on application. (175 annual applications)
- Assist seniors in understanding and completing the application for the tax deferral program. Process applications by verification of income restrictions, assist in gaining approval from banks when a mortgage is held on the property, and record liens to protect the town's interest in repayment of the deferred taxes. (40 applicants)
- Process all local appeals of property assessments, review applicant's issues, gather market evidence and documentation supporting assessments, review with board of assessors and process their decisions on appeals. (200 applications)
- Prepare and testify on appeals before the State Appellate Tax Board, verify jurisdictional compliance. (20 cases)
- Responsible for the preparation of the town's recapitulation sheet (recap sheet) and providing documentation for setting of the town's annual tax rate and compliance with the provisions of Proposition 2 ½.
- Maintain the comprehensive property database containing legal ownership data, detailed building information, sketches, and photographs on all properties. This database is an asset used as the platform for several other departments.
- Annual compliance review and valuation of chapter land discounts and filing of liens on the properties. (14 properties)
- Collection of data on new taxable property for both real estate and personal property and the calculation of annual New Growth added to Town's tax levy limit. (1,500 properties)
- Calculation and billing of Payment in Lieu of Taxes (PILOT) for exempt properties. (beginning in fiscal 2012 only Babson College - about \$1,500 annual payment)
- Meet with taxpayers and motor vehicle owners to explain and instill confidence in the consistent application of Massachusetts tax laws.
- Produce and distribute documentation on property tax valuation models and tax levy.



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Board of Assessors Operating Request: Mission, Services & Priorities**

- Produce customized reports from our extensive database as requested by other departments and the general public.
- Assist with the assigning of house numbers.
- Taxpayer assistance. Taxes are never popular and assessment procedures are technical and difficult to understand.
- Prepare Tax Classification report and present to the board of selectmen for annual public hearing on dual tax rate option.
- Compliance reporting to the Department of Revenue on their on-line Gateway system; end-of-year Tax Rate Recapitulation Sheet reports and supporting documentation prior to approval of tax rate.

PROGRAM OBJECTIVES:

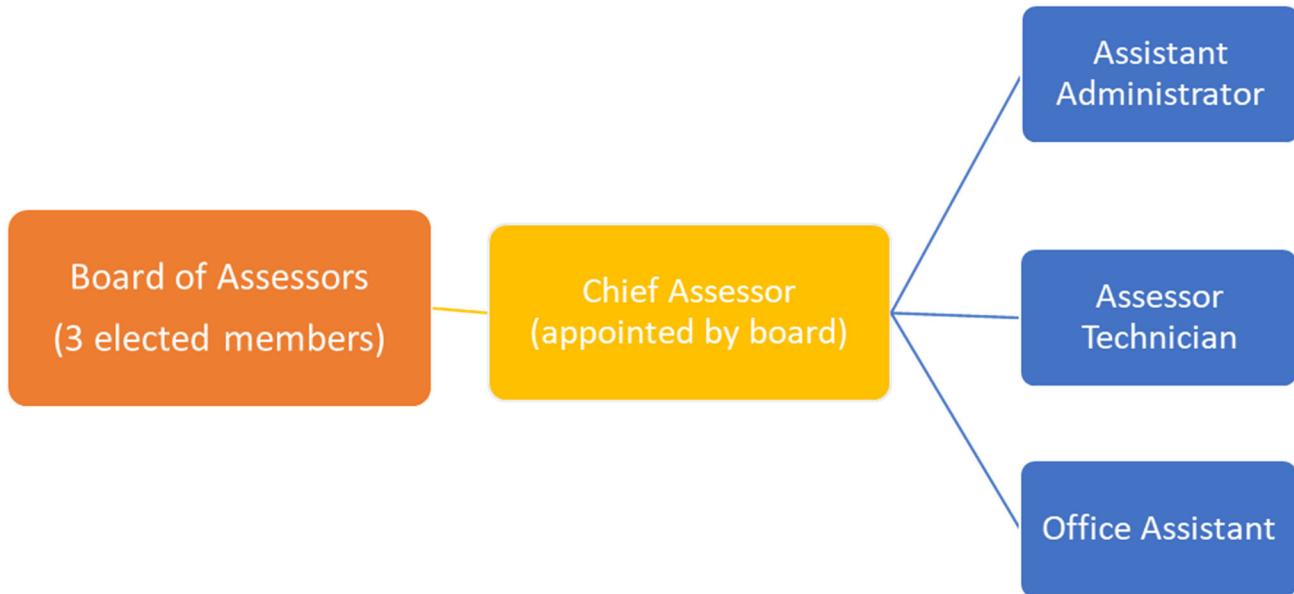
In Massachusetts “full and fair cash value” is the standard by which property is taxed. In order to meet these standards, we must collect, record and analyze a great deal of information about each property, including the price similar properties would bring on the open market. Valuation for commercial properties includes an analysis from an investment point of view since the purchase price depends, in large part, on the return a buyer expects to receive. The Department of Revenue requires assessors to annually adjust assessments to current market value. Every fifth year the DOR performs a comprehensive audit and certification of the values.

DEPARTMENT PRIORITIES:

Our priority has always been to produce fair and equitably assessed values for timely tax bills and to instill taxpayer confidence. Failure to comply with Massachusetts's property tax laws or to issue tax bills by the statutory deadlines may jeopardize the town's cash flow and possible bond rating.



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Board of Assessors Operating Request: Mission, Services & Priorities



PERMANENT STAFFING (FTEs)	FY18	FY19	FY20	FY21	FY22
	Actual	Actual	Actual	Budget	Request
Position Titles:					
Chief Assessor	1.0	1.0	1.0	1.0	1.0
Assistant Administrator	1.0	1.0	1.0	1.0	1.0
Principal Assessor	1.0	1.0	1.0	1.0	1.0
Secretary/Technical Assistant	1.0	1.0	1.0	1.0	1.0
Part-time (Temporary & clerk)	0.3	0.3	0.3	0.3	0.3
Total Number of Positions	4.3	4.3	4.3	4.3	4.3



Town of *Wellesley*

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Board of Assessors Operating Request: Mission, Services & Priorities

Assessor Department FY22 Operating Budget Request									
Org	Object	Account # 01-141 Account Title	FY18 Actual	FY19 Actual	FY20 Actual	FY21 Budget	FY22 Request	\$ Variance FY21-22	% Variance FY21-22
<u>PERSONAL SERVICES</u>									
01141100	511010	Senior Administrator	\$104,741	\$106,836	\$109,811	\$111,580	\$111,580	\$ 0	0.00%
01141100	511220	Other Professionals	56,237	57,362	58,959	62,817	130,922	\$ 68,106	108.42%
01141100	511370	Support Staff	103,881	108,110	114,778	118,054	60,230	\$ (57,824)	-48.98%
01141100	512290	Part-time / Temporary / Seasonal Help	3,532	3,788	2,075	5,667	5,725	\$ 57	1.01%
01141100	513120	Scheduled Overtime	-	-	-	5,000	-	\$ (5,000)	-100.00%
			268,392	276,097	285,623	303,118	308,457	\$ 5,339	1.76%
<u>EXPENSES</u>									
01141200	524030	Equipment Maint.	-	-	198	-	200	\$ 200	0.00%
01141200	530500	Training & Development	500	1,075	410	1,500	1,500	\$ -	0.00%
01141200	530600	Appraisals and Surveys	43,500	53,000	75,300	52,500	55,125	\$ 2,625	5.00%
01141200	530600	Appraisals and Surveys	-	-	-	10,000	6,500	\$ (3,500)	-35.00%
01141200	530800	Computer Software Services	6,000	7,000	6,000	7,000	7,000	\$ -	0.00%
01141200	534010	Postage	1,100	1,304	1,042	2,200	2,200	\$ -	0.00%
01141200	534030	Advertising	42	-	-	-	-	\$ -	0.00%
01141200	534040	Printing & Mailing Expense	109	82	92	2,000	2,000	\$ -	0.00%
01141200	534060	Photocopying	-	-	1,211	-	-	\$ -	0.00%
01141200	538010	Deed/Abstract Copies	732	304	228	500	700	\$ 200	40.00%
01141200	542010	Office Supplies	1,062	1,310	1,619	1,500	1,500	\$ -	0.00%
01141200	553060	Computer Supplies	1,370	1,387	443	2,000	2,000	\$ -	0.00%
01141200	571010	Travel-Mileage	1,660	2,444	1,594	3,000	3,000	\$ -	0.00%
01141200	571110	Conf/Meetings-Administrators	490	559	1,339	1,500	1,500	\$ -	0.00%
01141200	573010	Dues-Administrators	1,675	1,675	1,790	1,800	1,800	\$ -	0.00%
			58,240	70,140	91,265	85,500	85,025	(675)	-0.79%
	570000	Other Charges & Expenses	-	-	154	-	-	-	0.00%
			\$326,632	\$346,237	\$376,888	\$388,618	\$393,482	\$ 4,864	1.25%



Town of *Wellesley*
FY2022 Budget Request
Planning Board Operating Narrative: Mission, Services & Priorities

MISSION AND DUTIES

The Planning Board consists of five elected members and one appointed associate member. The Board guides the Town of Wellesley in preserving and enhancing Wellesley's quality of life by fostering a diverse housing stock, multi-modal transportation options, valuable natural resources, resilient infrastructure, and a thriving local economy. Particular Town land use goals are identified in the Town's Unified Plan 2018-2028. The Planning Board achieves these goals through the creation and implementation of Zoning Bylaws, policies, long-term planning, and by promoting citizen participation in the planning process.

The role of the Planning Board is to make short and long term decisions related to land use in the Town of Wellesley. The Planning Board seeks to realize the vision of Wellesley residents for their community through the judicious use of municipal planning and project review with many responsibilities and objectives as set forth in the Town's Unified Plan. The Planning Board is responsible for the maintenance and update of the Town's Zoning Bylaws and Zoning Map, divisions of land. At the October 2020 Special Town Meeting the Planning Board submitted and Town Meeting approved 9 articles amending the Zoning Bylaw, including revisions to Large House Review, Tree Protection, Natural Resource Protection, and Drainage Bylaws. Numerous additional articles for the Zoning Bylaw and revisions to Planning Board regulations are being prepared for consideration in calendar year 2021.

The Planning Board is also involved with the review of many projects of all sizes throughout the Town as further discussed below.

CLIMATE ACTION

Land stewardship, protection of the environment and promotion of sustainable development are key responsibilities of the Planning Board and the Planning Department. As mentioned above, in October 2020 Planning proposed and Town Meeting approved significant amendments to the Zoning Bylaw regarding Tree Protection, Natural Resource Protection, and Drainage. Planning is working on further efforts to incorporate sustainable construction and reductions in energy use into the Zoning Bylaw for consideration in FY22. Preservation of structures and landscapes and preventing adverse impacts such as increased runoff are major factors in its permitting activities, including Large House Review and its support of the Historical Commission and the Historic District Commission. Planning works extensively with all Town departments, boards, and commissions in developing and pursuing these actions.



**Town of *Wellesley*
FY2022 Budget Request
Planning Board Operating Narrative: Mission, Services & Priorities**

PLANNING DEPARTMENT

The Planning Department is overseen by and supports the Planning Board to assist in the development and maintenance of a functional and attractive residential community by implementing the Zoning Bylaws and by initiating and reviewing projects.

The Planning Department has five staff members: Planning Director, Senior Planner, one full-time Planner, one part-time Planner, and the Department Administrator. Total staffing is 4.1 FTE, though the Planning Department is not yet at full staffing as it continues to rebuild following the departure of the Director and Planners in 2019.

In addition to the Planning Board, the Planning Department serves as professional staff to the Historical Commission, Historic District Commission, Design Review Board, and the Denton Road Neighborhood Conservation District Commission. It provides supplemental assistance to the Zoning Board of Appeals as needed, particularly for projects in the Residential Overlay District (RIO) and Comprehensive Permits under MGL c. 40B. The Department Administrator also supports the Housing Development Corporation by establishing and maintaining project files and waiting lists for individuals wishing to be entered into the HDC's lotteries. The Planning Director is the Town's Fair Housing Officer. The Department has frequent interaction with the Building Department and the Zoning Enforcement Officer on questions about the Zoning Bylaws.

The Planning is also involved with the review of many projects of all sizes throughout the Town. Such extensive efforts by Planning is a requirement of many of the new homes, renovations, and commercial developments in the Town which contribute to the annual new growth in the Town's tax base. During FY20, the Planning Department staff prepared for and attended a total of seventy-four (74) meetings of the Planning Board, Design Review Board, Historical Commission, Historic District Commission, and Denton Road Neighborhood Conservation District Commission. Additionally, staff attended sessions of Town Meeting, Special Town Meeting, meetings of the Board of Selectmen and Zoning Board of Appeals, and meetings associated with special projects, such as the Mobility Committee and the Housing Committee, Design Review Board Guidelines and Historic Preservation Design Guidelines.

During the same period, the Planning Department staff processed eighty-seven (87) new applications for the Planning Board, Design Review Board, and Historic District Commission, Denton Road Neighborhood Conservation District and applications for fifty (50) properties under the Historical Commission's Demolition Review Bylaw, for a total of 137 applications. In addition, the Planning Board reviewed and made recommendations to the Zoning Board of Appeals for Planning Board for forty-eight (48) applications made to the Zoning Board of Appeals.



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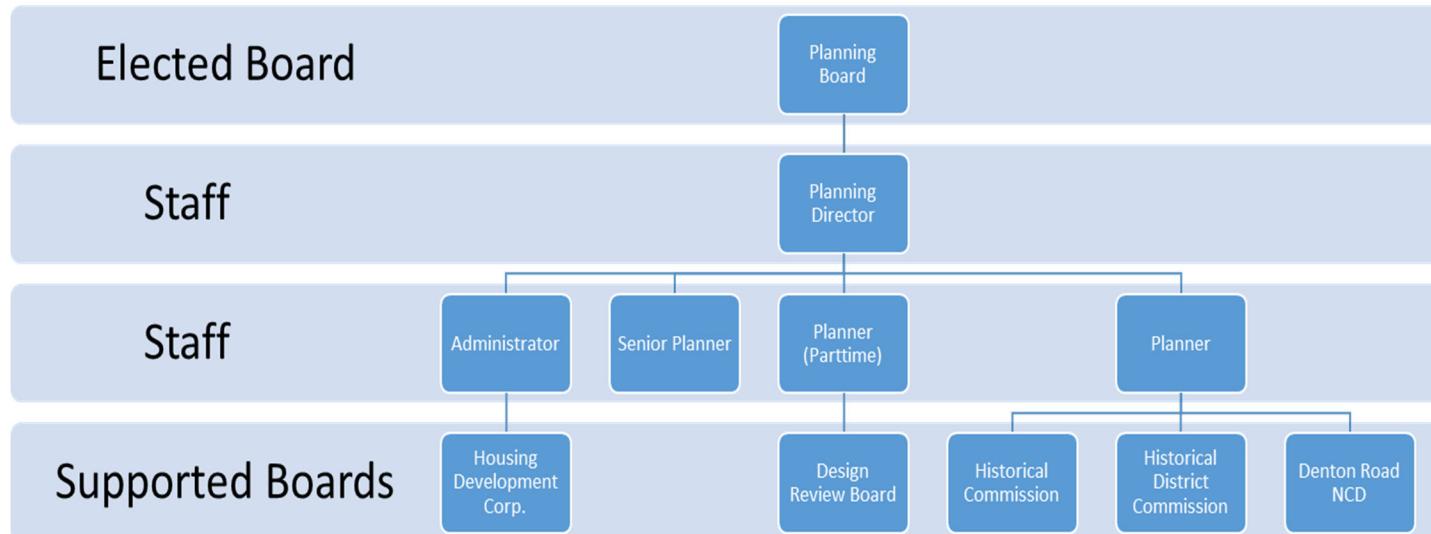
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Planning Board Operating Narrative: Mission, Services & Priorities

During FY21 the Planning Board and the Planning Department have continued to work at these levels including decisions in 4 Projects of Significant Impact. They expect to continue at the same or increased levels during FY22.

Planning's Budget also contains \$25,000 for hiring outside consultants to assist in key initiatives and projects. These funds are essential to Planning's ability to perform studies, assist in Town wide initiatives, and respond to unexpected situations. In FY22 such funds may also be used to assist in the digitization of some of Planning's files prior to leaving Town Hall for the Town Hall renovation project.

Planning also collects fees of varying sizes for numerous applications for Town reviews and approvals. In FY20, Planning collected over \$67,000 in such fees. Planning also receives and monitors escrow funds received as security for various projects, including Reviews of Adequacy and issuance of Temporary Certificates of Occupancy. At the end of FY20, Planning was supervising over \$470,000 in escrows.





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Planning Board Operating Narrative: Mission, Services & Priorities

PLANNING DIRECTOR

Reporting to the Board Chair, the Director's primary responsibility is to direct and administer the Town's planning programs and the permitting activities of the Planning Board and other supported Boards. The Director oversees the day-to-day operations of the Planning Department, directly supervises Department personnel, reviews all special permit applications presented to the Board, and prepares Town Meeting articles affecting the Zoning Bylaw.

The Director manages, directs and administers municipal land use planning, zoning, and subdivision control programs within the Town as delineated by state statute and Town Bylaws and Zoning Bylaws. The Director is instrumental in implementing the Unified Plan and the Housing Production Plan. The Director recommends, prepares, and implements policies, programs, plans, and studies needed to guide short-range and long-range planning and land use challenges and opportunities.

SENIOR PLANNER

The Senior Planner supports the Planning Director in carrying out municipal planning, zoning, and subdivision programs under the provisions of state law and Town bylaws. She performs a variety of complex technical and professional work in the current and long range planning of the Town, including the development and implementation of land use policies and regulations. She also plays a critical role in Large House Review and other permitting functions. She provides staff support for the Planning Board and other serviced boards; assists the Director in staff and consultant supervision; and serves as Department Head in the Director's absence.

PLANNERS

Each Planner performs work at both the technical and professional level in the preparation of community planning studies and reports. They make recommendations on comprehensive planning, zoning analysis, site plan review, design review, and related matters. They represent the Planning Board, the Director, and/or the Town at interdepartmental meetings, meeting of Town Boards, community groups, and regional and state agencies.

The Planners provide staff support to the Historic District Commission (HDC), the Historical Commission, and the Design Review Board.



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Planning Board Operating Narrative: Mission, Services & Priorities

DEPARTMENT ADMINISTRATOR

The Department Administrator has extensive knowledge of all rules and procedures of the Department and is the initial contact for almost all inquiries from residents and others to the Department and is able to respond to a majority of all inquiries. The Administrator also maintains Department records, and has primary responsibility for all record requests. The Administrator interacts with all other Town staff in organizing meetings and department interaction with other Town departments. The Administrator also handles correspondence, expense tracking, and issuance of notices by the Planning Board and Department.

The Department Administrator also administers affordable housing project applications.

BUDGET OVERVIEW

The Planning Department's budget reflects an overall year on year increase of 5.88%.

Projected Personal Service costs increase by \$15,323 or 5.1%. Staffing levels remain the same. The salary level for the Senior Planner position has increased 7% over FY20 to reflect actual wage levels agreed with the newly hired Senior Planner. The Planning Director and other Planner positions have increased by approximately 1% reflecting Merit Pay Plan increases during FY21. There is also a projected 8% increase for the Department Administrator to reflect increased duties and responsibilities. Finally, there is \$7,500 for outside support services principally used for preparing minutes. This has been an expense of the Department for the last few years (actual costs of \$7,015 in FY20), but was inadvertently omitted from the FY21 budget request and so shows as a \$7,500 increase in the FY22 budget.

Expenses increase by \$4,800 or 11.1%. Most of the increase is the inclusion of a new line item of \$4,000 for technology expenses. Part of this expense is to allow purchase of software to facilitate electronic permitting and records. Part of this is for departmental cell phones for the Planners to facilitate working remotely and site visits which are necessary in the performance of the permitting and electronic meetings which are key part of the department's functions. Other expenses increase \$800 for increased costs for postage, legal notices, and office expenses.



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FY2022 Budget Request
Planning Board Operating Narrative: Mission, Services & Priorities

		Planning Department FY22 Operating Budget Request							
Org	Object	Account # 01-175 Account Title	FY18 Actual	FY19 Actual	FY20 Actual	FY21 Budget	FY22 Request	\$ Variance FY21-22	% Variance FY21-22
PERSONAL SERVICES									
01175100	511010	Senior Administrator	\$ 96,286	\$ 86,562	\$ 83,947	\$ 94,304	\$ 94,217	\$ (87)	-0.09%
01175100	511220	Other Professionals	100,829	117,087	55,637	141,669	146,969	\$ 5,300	3.74%
01175100	511420	Other Professionals	22,065	29,172	37,141	31,489	31,489	\$ -	0.00%
01175100	511370	Support Staff	26,535	23,217	26,611	31,320	33,930	\$ 2,610	8.33%
01175100	512290	Other Support Staff	-	1,127	7,015		7,500	\$ 7,500	0.00%
PERSONAL SERVICES SUBTOTAL			245,715	257,165	210,350	298,782	314,105	\$ 15,324	5.13%
EXPENSES									
01175200	530900	Other Professional Services ¹	8,679	3,731	1,859	25,000	25,000	\$ -	0.00%
01175200	534010	Postage	3,057	2,924	1,617	3,300	3,600	\$ 300	9.09%
01175200	534030	Advertising - General	2,632	1,283	1,037	2,250	2,500	\$ 250	11.11%
01175200	534060	Photocopying ²	-	-				\$ -	0.00%
01175200	542010	General Office Supplies + Furniture	2,397	1,799	2,705	2,250	2,500	\$ 250	11.11%
		Technology ⁵					4,000	\$ 4,000	
01175200	571010	Travel - Mileage	529	57	-	500	500	\$ -	0.00%
01175200	571110	Prof. Development ³	1,214	955	864	2,500	5,000	\$ 2,500	100.00%
01175200	573010	Dues and Publications ⁴	6,714	6,092	5,305	7,500	5,000	\$ (2,500)	-33.33%
01175200	578090	Unclassified Expenses	-	-				\$ -	0.00%
01175200	583120	Replacement	-	-	380	-	-	\$ -	0.00%
EXPENSE SUBTOTAL			25,222	16,841	13,766	43,300	48,100	\$ 4,800	11.09%
Other Charges & Expenses									
			8,082	700				\$ -	0.00%
DEPARTMENT TOTAL			\$279,019	\$274,705	\$224,116	\$342,082	\$362,205	\$ 20,124	5.88%

¹ This account is used for consultant services associated with special projects/studies, and to respond to needs beyond the expertise or time available of Staff.

² Photocopying has become centralized, and is no longer an individual department expense.

³This account provides funds to allow Staff and Planning Board members to participate in conferences and training. It also covers dues for professional organizations, books, and publications. Professional Staff AICP certification requires a minimum of 32 CM credits every two years. The Southern New England APA Conference accounts for nearly 12 credits a year. With 3 staff members the cost to attend the two day conference is \$450. In addition Planning Board members are encouraged to attend the annual Citizen Planner Conference which costs approximately \$50 pp. This line was previously identified as Conf. and Meetings.

⁴This account includes funds allocated to pay the Town's membership fees in the Metrowest Regional Collaborative, and Staff dues for membership in professional organizations (APA, AICP, etc.).

⁵ This account includes funds to provide Town cell phones to staff and to cover costs of hardware for remote operation and software not covered by IT.



Town of Wellesley
FY2022 Budget Request
Advisory Committee: Mission, Services & Priorities

The Advisory Committee is appointed by the Moderator and consists of 15 members appointed to 3 year terms. The Committee has a part-time administrative assistant and the committee budget provides for the cost of printing and mailing Advisory reports to Town Meeting.

The **Advisory Committee Reserve Fund** of \$175,000 provides funding for expenses that are extraordinary or that were unforeseen when Annual Town Meeting appropriated the budget for that fiscal year. Use of the Reserve Fund reduces the need to defer critical expenses and/or to call Special Town Meetings to deal with events with limited expense impact. Transfers from the Reserve Fund are made under Motions passed by one of the Town Boards and approved by the Advisory Committee. Thus far in FY21 no funds have been withdrawn from the Advisory Reserve Fund.

<u>Advisory Committee Operating Request</u>										
DEPARTMENT										
EXPENDITURES			FY18	FY19	FY20	FY21	FY22	\$ Variance	% Variance	
Org	Obj	Description	Actual	Actual	Actual	Budget	Request	FY21-22	FY21-22	
01131100	511370	Clerical	3,370	9,131	6,092	11,000	10,000	(1,000)	-9.09%	
		Subtotal, Personal Services	\$ 3,370	\$ 9,131	\$ 6,092	\$ 11,000	\$ 10,000	\$ (1,000)	-9.09%	
01131200	534010	Postage	3,725	5,395	4,301	7,000	7,000	-	0.00%	
01131200	534030	Advertising - General	135	169	189	200	200	-	0.00%	
01131200	534040	Printing and Mailing	7,547	9,720	7,136	11,500	10,500	(1,000)	-8.70%	
01131200	542010	Office Supplies	280	1,223	395	2,450	1,450	(1,000)	-40.82%	
01131200	571140	Conf/Mtgs - Comm/Board Members	275	180	-	-	-	-	0.00%	
01131200	573040	Dues - Committee/Board Members	345	345	345	350	350	-	0.00%	
		Subtotal, Expenses	\$ 12,308	\$ 17,033	\$ 12,365	\$ 21,500	\$ 19,500	\$ (2,000)	-9.30%	
		Total	\$ 15,677	\$ 26,164	\$ 18,457	\$ 32,500	\$ 29,500	\$ (3,000)	-9.23%	
01132200	579000	Advisory Reserve Fund	\$175,000	\$145,000	\$175,000	\$175,000	\$175,000	\$ -	0.00%	



Town of *Wellesley*
FY2022 Budget Request
Human Resources: Mission, Services & Priorities

MISSION

Our mission is to attract and retain the staff necessary for the Town of Wellesley to function at optimal capacity. To this end, our major areas of responsibility and services are the administration of classification and salary plans for all Town employees, recruitment, maintenance of employee records, administration of employee group insurance programs, oversee the safety and workers' compensation programs, administration of performance evaluations, consultation with boards, committees and department heads on employment issues, professional development and compliance with state and federal employment laws.

HUMAN RESOURCES BOARD AND DEPARTMENT

The Human Resources Board is comprised of five members appointed by the Moderator to three-year terms. The Department of Human Resources is staffed by six professionals, led by the Director of Human Resources. The staff includes the Assistant Human Resources Director who is primarily responsible for providing recruitment, job classification support and working with the Director and Department Heads in all employment actions. The Benefits Coordinator helps to manage the Town's generous package of available insurance and health savings plans. The Workers Compensation and Leave Coordinator ensures compliance with O.S.H.A, promotes workplace safety and manages long-term leaves of absences. The Human Resource Department is also supported by an Administrative Assistant and Department Assistant.

The Human Resources Department's primary purpose is to act as a resource to departments Town-wide on all aspects of employment issues. These issues include recruitment, administration of benefits such as health, dental and life insurance plans, new employee orientation, professional development opportunities, maintenance of individual employee files, workers compensation, employee assistance program, communication and oversight of employment policies, compliance with the Town's by-laws, State and Federal employment laws and regulations, and other responsibilities as appropriate for school department employees and retirees.

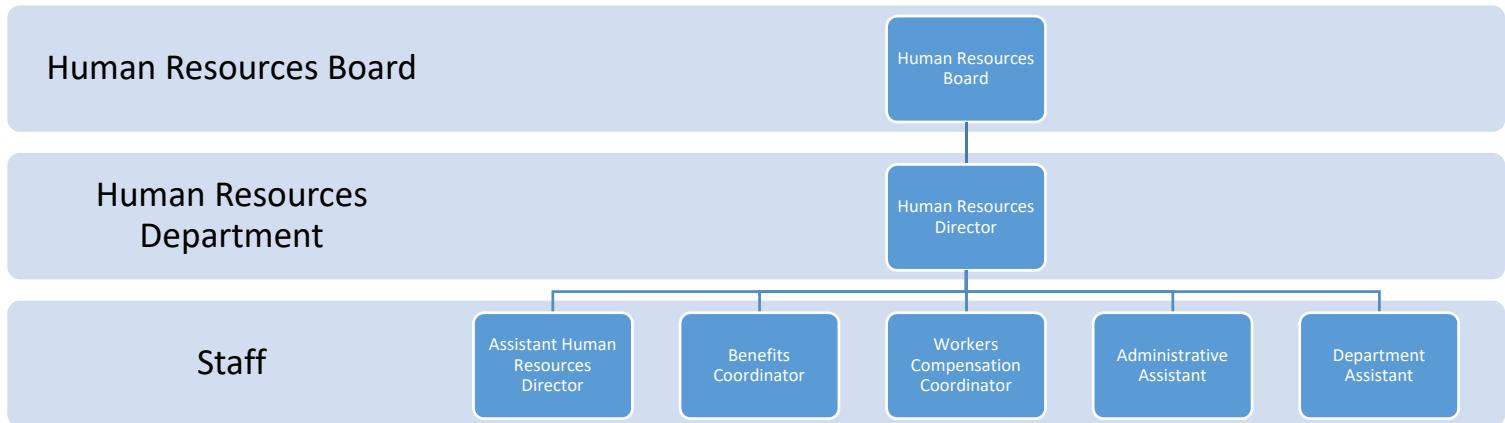
Historically, the Human Resources Department has been designated by the Select Board as the Town's collective bargaining representative with the Town's employee unions and associations. In addition to negotiating contract agreements, the Department is responsible for working with management on the day-to-day administration and interpretation of collective bargaining agreements, as well as grievance and arbitration administration and decision/impact bargaining matters.

The Human Resources Department assists Town departments in the assignment of work tasks by formulating job descriptions and ranking these descriptions based on several factors, including level of responsibility, education and know-how, thereby establishing and maintaining a job classification system for the Town. The Department also coordinates the various annual performance evaluations for individual employees. The Department also collects and reviews



Town of *Wellesley*
FY2022 Budget Request
Human Resources: Mission, Services & Priorities

outside employment and market data to recommend wage and benefit package changes to the Town's compensation plans.



FY22 Goals

The goals for FY22 are expected to continue to focus on improving the employee experience, updating policies and procedures, continue to promote professional development and ensure that the Town's salary structure remains competitive:

Improve Hiring Process

- Evaluate the hiring process to find ways to improve efficiency, reduce recruitment time and make it easier for departments to participate in.

COVID-19

- Continue to provide leadership and act as a primary resource for all Department Heads and employees during the ongoing COVID-19 pandemic. Adjust department functions to accommodate physical restrictions. Provide guidance on new state and federal regulations, health and safety measures and employment issues related to COVID-19.

Update Department Responsibilities

- Update all job descriptions and reorganize responsibilities to modernize the department and increase efficiency.

Update Policies and Procedures

- Continue to recommend updates, additions and deletions to the Town's personnel policies and procedures.



Town of *Wellesley*
FY2022 Budget Request
Human Resources: Mission, Services & Priorities

Operating Budget Summary

The Human Resource Department's budget is considered to be at a base level and is below the recommended guideline with an **overall year-to-year increase of 0.91%**. There are no additional positions or new line items included this year. The increase includes an assumed salary increase of 2.0% for all staff. Included in the budget is a reclassification of the Senior Human Resources Generalist to the Assistant Human Resources Director after an employee of twenty-five years retired and a reclassification of the Benefits Coordinator.

PERMANENT STAFFING (FTEs)	FY18 Actual	FY19 Actual	FY20 Actual	FY21 Budget	FY22 Request
Position Titles:					
Director	1.0	1.0	1.0	1.0	1.0
Assistant Human Resources	1.0	1.0	1.0	1.0	1.0
Benefits Coordinator	1.0	1.0	1.0	1.0	1.0
Administrative Assistant	1.0	1.0	1.0	1.0	1.0
Workers Comp Coordinator*	0.5	0.5	1.0	1.0	1.0
Department Assistant**	0.5	0.5	0.5	0.5	0.5
Total Number of Positions	5.0	5.0	5.5	5.5	5.5

* Benefit Eligible effective FY2020

** Shared with Retirement System. Benefits paid by Retirement



Town of *Wellesley*
FY2022 Budget Request
Human Resources: Mission, Services & Priorities

Human Resources Department FY22 Operating Budget Request									
Org	Object	Account # 01-152 Account Title	FY18 Actual	FY19 Actual	FY20 Actual	FY21 Budget	FY22 Request	\$ Variance FY21-22	% Variance FY21-22
PERSONAL SERVICES									
01152100	511010	Senior Administrator	\$ 119,709	\$ 122,103	\$ 125,503	\$ 127,337	\$ 127,337	\$ 0	0.00%
01152100	511220	Other Professionals	130,104	138,059	141,903	150,477	149,435	\$ (1,042)	-0.69%
01152100	511370	Clerical	52,964	54,021	55,534	56,705	57,826	\$ 1,121	1.98%
01152100	512590	Recognition Award Payment		1,253				\$ -	0.00%
01152100	513120	Scheduled Overtime						\$ -	0.00%
01152100	511420	Workers Comp	30,277	34,128	43,760	44,656	43,593	\$ (1,063)	-2.38%
01152100	511425	Health Insurance	14,085	14,803	16,900	16,300	16,628	\$ 328	2.01%
PERSONAL SERVICES SUBTOTAL			347,139	364,367	383,600	395,475	394,819	\$ (656)	-0.17%
EXPENSES									
01152200	517020	Medical Check-up	7,934	9,160	7,488	9,650	\$ 12,750	\$ 3,100	32.12%
01152200	530500	Training and Development	5,616	1,084	2,832	3,250	4,000	\$ 750	23.08%
01152200	534010	Postage	697	713	559	1,500	1,500	\$ -	0.00%
01152200	534035	Advertising-Employment	12,222	15,025	15,546	17,500	17,500	\$ -	0.00%
01152200	542010	Office Supplies	401	1,140	458	2,000	2,500	\$ 500	25.00%
01152200	542090	Other General Supplies	566	488	2,088	1,200	1,500	\$ 300	25.00%
01152200	543040	Equipment M&R Supplies	332	-	512	1,000	1,000	\$ -	0.00%
01152200	571010	Travel - Mileage	24	42	381	400	400	\$ -	0.00%
01152200	571510	Town Training & Development	3,676	4,837	5,639	6,500	6,500	\$ -	0.00%
01152200	573010	Dues-Administrators and Professional Staff	250	250	275	750	750	\$ -	0.00%
		EXPENSE SUBTOTAL	31,717	32,739	35,779	43,750	48,400	\$ 4,650	10.63%
	570000	Other Charges/Expenses	-	-	250			\$ -	0.00%
		DEPARTMENT TOTAL	\$ 378,855	\$ 397,106	\$ 419,379	\$ 439,225	\$ 443,219	\$ 3,994	0.91%