



Town of *Wellesley*

FY2024 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

Due to the 2020 Federal Census, the Congressional, House, Senate, Governor's Council district lines and Wellesley Municipal precinct lines were revised in the fall of 2021.

The State legislature reconfigured the Congressional, House, Senate and Governor's Council district lines. There were two significant changes in the State Legislature redistricting lines. Wellesley is now split between the 4th and 5th Congressional Districts. In addition, Wellesley is consolidated into one Senate District, the Norfolk and Middlesex District.

Precincts	Governor's Council	Congressional District	Senate	House
E & F	3	04	Norfolk and Middlesex	Fourteenth Norfolk
A-D, G, H	3	05	Norfolk and Middlesex	Fourteenth Norfolk

The 2020 Federal Census indicated that Wellesley had grown from 27,982 to 29,550 residents. Precincts B and D exceeded the acceptable range of +/- 5% of the mean.

The combination of the State redistricting and the Wellesley reprecincting resulted in changes to all districts and seven out of eight precincts.

The Town Clerk's Office conducted 2 elections in FY 2022.

Election	Date	% Turn-out of Active Voters
Hardy & Hunnewell Schools Town Special	12/7/2021	21%
Annual Town Election	3/1/2022	27%

In 2021, to mitigate COVID risk at elections, the legislature extended regulations that permitted Vote By Mail Early Voting, a reduction of staffing at polling places, and allowed changes in polling locations through December 15, 2021.

Due to decreasing incidents of COVID, polling locations were moved to what is hoped to be their long term locations. Precincts A and C were located at the Bates Elementary School. Precinct B returned to the Sprague Elementary School. Precincts D and E were located at the Warren Recreation and Health Building. Precincts F and G were located at the Dana Hall School Shipley Center and Precinct H was located at the Tolles Parsons Center.

The December 7, 2021 Special Election included two questions.

Question 1:

Shall the Town of Wellesley be allowed to exempt from the provisions of Proposition two-and-one-half, so called, the amounts required to pay for the bonds issued in order to design, construct, equip, and furnish a new replacement



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facility for the existing Hunnewell Elementary School Project located at 28 Cameron Street, including all costs incidental or related thereto?

Question 2:

Shall the Town of Wellesley be allowed to exempt from the provisions of Proposition two-and-one-half, so called, the amounts required to pay for the bonds issued in order to design, construct, equip, and furnish a new replacement facility for the existing John D. Hardy Elementary School Project located at 293 Weston Road, including all costs incidental or related thereto?

The Annual Town Election was held on March 1, 2022. Vote by Mail was no longer in effect.

There were contested races for the offices of Select Board, Library Trustees, Natural Resources Commission, Planning Board, and School Committee. As a result of the 2020 census redistricting, all precincts except Precinct B, required all 30 seats to be up for election.

The administration of elections requires the assistance of over 100 poll workers and the cooperation of the Department of Public Works, the Municipal Light Plant, the Police Department, and IT department. The elections also included support from the Health and Recreation Departments. 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 2022, the Town of Wellesley had 16,764 Active and 2,291 In-Active registered voters, for a total of 19,055 registered voters.

In FY2022, the Board of Registrars experienced some transitions. Long time members of the Board of Registrars, Jane Kettendor retired and George P.D. Porter passed away. Both contributed much to the Town in overseeing elections and will be missed.

The members of the Board of Registrars as of June 30, 2022 were John Duffy, Republican, and Mary (Tobey) Sullivan and John Schuler, Democrats, and KC Kato, Town Clerk, Unenrolled.

Town Meetings

The Town Clerk is responsible for keeping and publishing the minutes of Town Meeting. There was a Special Town Meeting on October 25, 2021 through October 27, 2021 to address school buildings warrant articles and a few other warrant articles. Wellesley Town Meeting members met for 3 sessions. Due to the continuing pandemic, legislation was extended to allow Virtual Town Meetings.

Special Town Meeting 1 and Special Town Meeting 2 were held virtually via Zoom Videoconferencing.

The Annual Town Meeting was conducted on March 28th and 29th, and April 4th, 5th, 11th, 12th, and 25th. The meeting was held virtually via Zoom Videoconferencing.

Vital Records and Miscellaneous

During the period July 1, 2021 to June 30, 2022 the office processed:

Birth records - 187

Marriage Intentions - 84

Death Records - 217

Business Certificates - 133

Dog Licenses - 3,628



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Staffing

Office staff of Donna Whitham, Assistant Town Clerk, Diane Innes, Elections and Voter Registration Administrator, and Jill Dube, Christine Kehoe and Alissa Keene, part time Senior Clerks ably support all the functions of the office.

FY24 Budget Priorities

The FY24 Operating Budget includes the following:

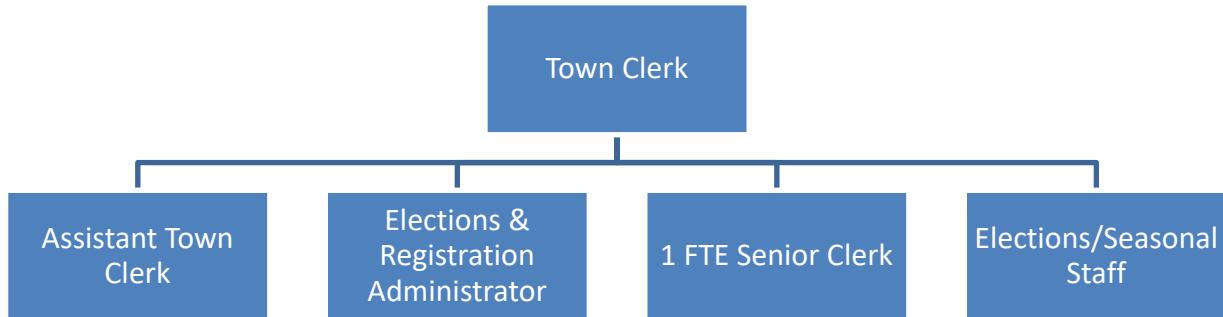
- In June 2022, the Massachusetts Legislature passed the VOTES Act which makes permanent Vote by Mail for all Elections. While it is not definitive the impact on Vote by Mail on voter turn-out, it has increased the costs of postage and personnel. At least 50% of Wellesley Voters voted early by mail or in-person in elections where either were offered. It is expected to stay at that level. The budget has been adjusted to reflect the costs to support Vote by Mail.
- To support the counting of Vote by Mail ballots, the State has certified high speed tabulators. The FY24 operating budget includes a lease for a high speed tabulator. If successful, the high speed tabulator will be purchased in FY25.
- We expect to have 2 elections in FY24 versus 3 in FY23 (4 budgeted in FY23). Due to fewer elections, expenses and personal services have been adjusted.
- Included in the budget is the cost to lease Electronic Voting Devices for Town Meeting. Electronic Voting Devices were approved for use at Town Meeting in 2019. The devices were piloted in October 2019. Due to COVID and the ability to conduct Town Meetings remotely, the devices have not been used since the initial pilot. The original plan was to eventually purchase the Electronic Voting Devices and staff it internally. The Town currently lacks the expertise to support Electronic Voting Devices and will continue to lease.
- The FY24 Budget includes a one time, benefits adjustment to fund the consolidation of 2 part time positions into 1 benefits eligible position. This change was done to enhance our ability to retain and recruit personnel and to meet the high work standards of the office.

The FY24 Capital Budget includes the following:

- 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, FY21, FY22 and fall of 2023 and used a polling system in the Zoom Platform. It is expected to have Town Meeting in person in FY24. Therefore, the capital expenditure of \$16,000 to purchase the devices will be rolled over into FY24 and an operating expenditure of personnel has been added to support the devices.
- If the FY24 leased High Speed Ballot Tabulator is successful, then one will be purchased in FY25.



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Office of the Town Clerk: Mission, Services & Priorities



PERMANENT STAFFING (FTEs)	FY20	FY21	FY22	FY23	FY24
	Actual	Actual	Budget	Request	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	0.5	0.5	0.2
Clerk	0.5	0.5	0.5	0.5	0.8
Total Number of Positions	3.5	3.5	4.0	4.0	4.0



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Office of the Town Clerk: Mission, Services & Priorities

Town Clerk FY24 Operating Budget Request									
Org	Object	Account # 01-161 Account Title	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	\$ Variance FY23-24	% Variance FY23-24
PERSONAL SERVICES									
01161100	511010	Senior Administrator	\$ 93,968	\$ 95,950	\$ 102,392	\$ 104,952	\$ 108,732	\$ 3,780	3.60%
01161100	511220	Other Professionals	55,155	59,732	44,439	58,965	77,520	\$ 18,555	31.47%
01161100	511225	Board of Registrars	2,300	2,600	2,200	2,900	2,300	\$ (600)	-20.69%
01161100	511370	Clerical	74,922	71,566	90,654	122,628	111,288	\$ (11,341)	-9.25%
01161100	512010	Pages/Poll Workers	21,524	34,872	16,237	77,103	36,600	\$ (40,503)	-52.53%
01161100	512050	Custodians/Laborers	7,164	9,340	3,961	10,000	6,000	\$ (4,000)	-40.00%
01161100	513160	Other Overtime	1,371	12,516	574	6,000	3,000	\$ (3,000)	-50.00%
01161100	515050	Longevity	600	600	600	600	700	\$ 100	16.67%
		Benefits Adjustment					20,000		
		PERSONAL SERVICES SUBTOTAL	257,004	287,176	261,057	383,148	366,139	(17,009)	-4.44%
EXPENSES									
01161200	517020	Medical Checkup	-	-	-	65	65	\$ -	0.00%
01161200	517030	Meal Allowances	756	847	72	2,250	1,250	\$ (1,000)	-44.44%
01161200	524030	Equipment Maintenance	8,032	13,141	12,909	18,700	21,200	\$ 2,500	13.37%
01161200	534010	Postage	11,706	6,365	9,603	26,500	21,000	\$ (5,500)	-20.75%
01161200	534030	Advertising-General	58	136	78	150	100	\$ (50)	-33.33%
01161200	534040	Printing & Mailing Expense	15,239	15,303	25,721	26,000	15,000	\$ (11,000)	-42.31%
01161200	538020	Book Binding Services	1,269	-	2,852	2,750	2,750	\$ -	0.00%
01161200	538050	Deliveries	-	-	-	150	150	\$ -	0.00%
01161200	538090	Other Purchased Services	2,252	590	-	1,550	1,550	\$ -	0.00%
01161200	542010	Office Supplies	643	3,578	4,811	3,500	3,500	\$ -	0.00%
01161200	542040	Paper & Stationary	419	503	171	500	500	\$ -	0.00%
01161200	542090	Other Supplies - Dog Tags	1,203	1,175	3,173	1,200	1,200	\$ -	0.00%
01161200	571010	Travel-Mileage	80	-	146	250	250	\$ -	0.00%
01161200	571110	Conf/Meetings-Administrators	413	40	443	750	750	\$ -	0.00%
01161200	573010	Dues-Administrators	150	150	235	175	175	\$ -	0.00%
01161200	574120	Public Employee Bond	100	100	100	100	100	\$ -	0.00%
01161200	583053	Equipment Replacement	-	953	-	-	-	\$ -	0.00%
01161200	527090	Other Rentals/Leases	-	-	847	-	23,000	\$ 23,000	0.00%
		EXPENSE SUBTOTAL	42,320	42,880	61,162	84,590	92,540	7,950	9.40%
	570000	Other Charges & Expenses	2,219		4,833			\$ -	0.00%
		DEPARTMENT TOTAL	\$ 299,325	\$ 330,057	\$ 322,219	\$ 467,738	\$ 458,679	(9,059)	-1.94%



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Assessor's Department: 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. (8,563 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. (23,200 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.
- Perform annual statistical testing as required by the Massachusetts Department of Revenue to ensure horizontal and vertical equity amongst all taxpayers.



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Assessor's Department: Mission, Services & Priorities

- 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. (15 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.
- 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.
- Produce customized reports from our extensive database as requested by other departments and the general public.
- Assist with the assigning of house numbers.



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Assessor's Department: Mission, Services & Priorities

- 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.

Assessor Department FY24 Operating Budget Request

Org	Object	Account # 01-141 Account Title	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	\$ Variance FY23-24	% Variance FY23-24
PERSONAL SERVICES									
01141100	511010	Senior Administrator	\$ 109,811	\$ 111,580	\$ 108,421	115,113	102,484	\$ (12,629)	-10.97%
01141100	511220	Other Professionals	58,959	60,202	107,867	135,138	133,377	\$ (1,761)	-1.30%
01141100	511370	Support Staff	114,778	125,834	95,335	61,893	63,511	\$ 1,618	2.61%
01141100	512290	Part-time / Temporary / Seasonal Help	2,075	3,728	612	5,725	24,000	\$ 18,275	319.21%
01141100	513120	Scheduled Overtime	-	-	-		1,500	\$ 1,500	0.00%
			285,623	301,344	312,235	317,869	324,873	\$ 7,004	2.20%
EXPENSES									
01141200	524030	Equipment Maint.	198	152	\$ -	200	200	\$ -	0.00%
01141200	530130	Legal Services-Special Counsel	-	-	\$ -	-		\$ -	0.00%
01141200	530500	Training & Development	410	1,285	\$ 680	1,500	1,500	\$ -	0.00%
01141200	530600	Appraisals and Surveys	75,300	69,500	\$ 71,000	67,500	74,000	\$ 6,500	9.63%
01141200	530800	Computer Software Services	6,000	7,500	\$ 6,000	7,000	7,000	\$ -	0.00%
01141200	534010	Postage	1,042	1,042	\$ 1,182	2,200	2,000	\$ (200)	-9.09%
01141200	534030	Advertising	-	51	\$ -	-		\$ -	0.00%
01141200	534040	Printing & Mailing Expense	92	301	\$ 311	2,000	1,750	\$ (250)	-12.50%
01141200	534060	Photocopying	1,211	-	\$ -	-		\$ -	0.00%
01141200	538010	Deed/Abstract Copies	228	640	\$ 107	700	500	\$ (200)	-28.57%
01141200	542010	Office Supplies	1,619	1,326	\$ 893	1,500	1,400	\$ (100)	-6.67%
01141200	553060	Computer Supplies	443	204	\$ 482	2,000	2,000	\$ -	0.00%
01141200	571010	Travel-Mileage	1,594	1,549	\$ 1,139	3,000	2,500	\$ (500)	-16.67%
01141200	571110	Conf/Meetings-Administrators	1,339	210	\$ 1,846	1,500	1,500	\$ -	0.00%
01141200	573010	Dues-Administrators	1,790	1,555	\$ 1,158	1,800	1,800	\$ -	0.00%
			91,265	85,314	84,798	90,900	96,150	5,250	5.78%
	570000	Other Charges & Expenses	154	-	-	-		-	0.00%
			\$ 376,888	\$ 386,658	\$ 397,032	\$ 408,769	\$ 421,023	\$ 12,254	3.00%

Planning Department FY24 Operating Budget Request

Org	Object	Account # 01-175 Account Title	Explanation	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	\$ Variance FY23-24	% Variance FY23-24		
PERSONAL SERVICES												
01175100	511010	Senior Administrator	Planning Director	\$ 83,947	\$ 94,422	\$ 96,337	\$ 98,601	\$ 100,188	\$ 1,587	1.61%		
01175100	511220	Other Professionals	Other Professionals	55,637	67,754	98,752	221,769	218,629	\$ (3,139)	-1.42%		
01175100	511370	Support Staff	Support Staff	26,611	41,572	30,547	35,235	35,100	\$ (135)	-0.38%		
01175100	512290	Other Support Staff	Other Support Staff	7,015	7,786	10,580	11,700	12,636	\$ 936	8.00%		
PERSONAL SERVICES SUBTOTAL		PERSONAL SERVICES SUBTOTAL		173,209	211,534	236,216	367,305	366,553	\$ (752)	-0.20%		
Benefits												
PERSONAL SERVICES SUBTOTAL + BENEFITS				173,209	211,534	236,216	367,305	366,553	\$ (752)	-0.20%		
EXPENSES												
01175200	517010	Medical Expenses		-					\$ -	0.00%		
01175200	517040	Tuition Reimbursement	For job related academic courses.	-	-	-			\$ -	0.00%		
01175200	530900	Other Professional Services ¹	For retaining professional and consultant services	1,859	-	-	50,000	50,000	\$ -	0.00%		
01175200	534010	Postage	For all mailing.	1,617	2,056	2,310	4,000	4,000	\$ -	0.00%		
01175200	534030	Advertising - General	For all newspaper public notice of meetings and public hearings.	1,037	4,293	2,847	5,000	5,000	\$ -	0.00%		
01175200	542010	General Office Supplies + Furniture	For all other office supplies needed by the Planning Department.	2,705	1,328	666	6,500	6,500	\$ -	0.00%		
		Technology	Unique Planning Software and staff cell phones	-				600	\$ 600	0.00%		
			For mileage reimbursement for use of private vehicles by Planning Department staff for subdivision, site inspections, regional meetings.	-	20	-	500	500	\$ -	0.00%		
01175200	571010	Travel - Mileage	For attendance at conferences and seminars.	864	403	9,500	5,000	5,000	\$ -	0.00%		
01175200	571110	Prof. Development										
01175200	573010	Dues and Publications	For professional assoc. membership and Town's dues to MetroWest Regional Collaborative.	5,305	5,427	6,100	5,000	5,000	\$ -	0.00%		
01175200	578090	Unclassified Expenses		-					\$ -	0.00%		
01175200	583120	Office Machines Replacement		380	-	-	-		\$ -	0.00%		
EXPENSE SUBTOTAL		EXPENSE SUBTOTAL		13,766	13,527	21,423	76,000	76,600	\$ 600	0.79%		
Other Charges & Expenses		year		-					\$ -	0.00%		
DEPARTMENT TOTAL		DEPARTMENT TOTAL		\$ 186,975	\$ 225,061	\$ 257,639	\$ 443,305	\$ 443,153	\$ (152)	-0.03%		

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.



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Advisory Committee Operating Request

DEPARTMENT EXPENDITURES			FY19	FY20	FY21	FY22	FY23	FY24	\$ Variance	% Variance
Org	Obj	Description	Actual	Actual	Actual	Actual	Budget	Request	FY23-24	FY23-24
01131100	511370	Administration	9,131	6,092	7,170	11,638	12,000	13,000	1,000	8.59%
		Subtotal, Personal Services	\$ 9,131	\$ 6,092	\$ 7,170	\$ 11,638	\$ 12,000	\$ 13,000	\$ 1,000	8.33%
01131200	534010	Postage	5,395	4,301	5,456	3,165	7,000	6,450	(550)	-7.86%
01131200	534030	Advertising - General	169	189	79	232	200	250	50	25.00%
01131200	534040	Printing	9,720	7,136	6,683	9,573	9,000	10,000	1,000	11.11%
01131200	542010	Office Supplies	1,223	395	30	150	1,000	200	(800)	-80.00%
01131200	571140	Conf/Mtgs - Comm/Board Members	180	-	-	-	-	-	-	0.00%
01131200	573040	Dues - Committee/Board Members	345	345	345	345	350	400	50	14.29%
		Subtotal, Expenses	\$ 17,033	\$ 12,365	\$ 12,593	\$ 13,465	\$ 17,550	\$ 17,300	\$ (250)	-1.42%
		Total	\$ 26,164	\$ 18,457	\$ 19,764	\$ 25,102	\$ 29,550	\$ 30,300	\$ 750	2.54%
01132200	579000	Advisory Reserve Fund								
			\$ 145,000	\$ 175,000	\$ -	0.00%				



**Town of *Wellesley*
FY2024 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, employee relations, 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, professional development, 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 a Human Resources Specialist and Benefit Specialist.

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.

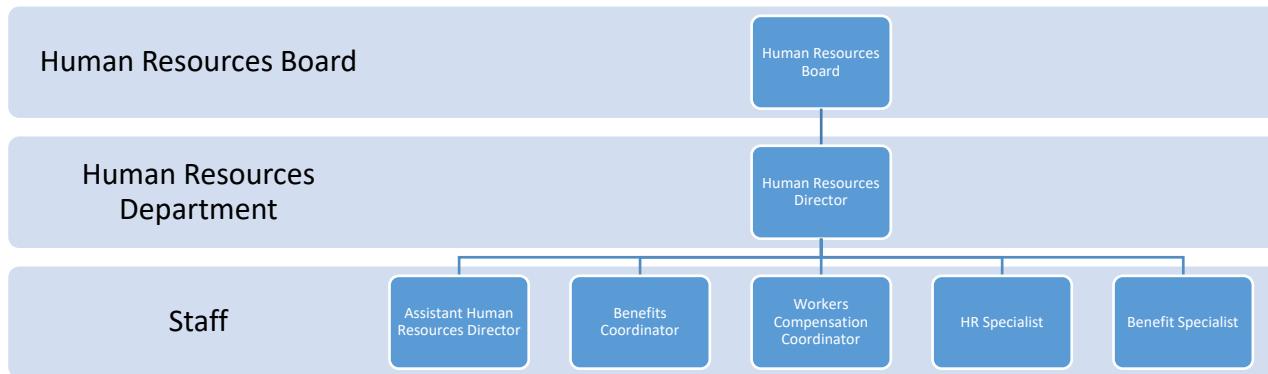
The Human Resources Department assists Town departments in the assignment of work tasks by formulating job descriptions and ranking these descriptions based on several factors, including level of responsibility, education and know-how, thereby establishing and maintaining a job classification system for the Town. The Department also coordinates the various annual performance evaluations for individual employees. The Department also collects and reviews outside employment and market data to recommend wage and benefit package changes to the Town's compensation plans.

FY24 Goals



Town of *Wellesley* FY2024 Budget Request Human Resources: Mission, Services & Priorities

The goals for FY24 are expected to continue to focus on improving the employee experience, introduce programs



discussing diversity, equity and inclusion, updating policies and procedures, continue to promote professional development and ensure that the Town's salary structure remains competitive:

Diversity, Equity and Inclusion

- *Lead initiative to introduce key strategies to help departments make progress on their diversity, equity and inclusion goals. Coordinate Town-wide diversity, equity and inclusion goals into professional development, recruitment, policies and procedures.*

COVID-19

- *Continue to provide leadership and act as a primary resource for all Department Heads and employees for the COVID-19 pandemic. Begin to adjust and update practices, policies and procedures for a post COVID-19 work environment.*

Update Policies and Procedures

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

Operating Budget Summary

The Human Resource Department's budget is considered to be at a base level and is at the recommended guideline with an **overall year-to-year increase of 3.00%**. There are no additional positions or new line items included this year. The increase includes an assumed salary increase of 2.00% for 50/60 Series staff and 3.00% for 40 Series staff.



Town of Wellesley
FY2024 Budget Request
Human Resources: Mission, Services & Priorities

PERMANENT STAFFING (FTEs)	FY20	FY21	FY22	FY23	FY24
	Actual	Actual	Actual	Budget	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*	1.0	1.0	1.0	1.0	1.0
Department Assistant**	0.5	0.5	0.5	0.5	0.5
Total Number of Positions	5.5	5.5	5.5	5.5	5.5

* Benefit Eligible effective FY2020

** Shared with Retirement System. Benefits paid by Retirement

Human Resources Department FY24 Operating Budget Request										
Org	Object	Account # 01-152 Account Title	Explanation	FY20 Actual	FY21 Actual	FY22 Actual	FY23 Budget	FY24 Request	\$ Variance FY23-24	% Variance FY23-24
PERSONAL SERVICES										
01152100	511010	Senior Administrator	Director of Human Resources	\$ 125,503	\$ 127,337	\$ 129,884	\$ 132,677	\$ 134,811	\$ 2,135	1.61%
01152100	511220	Other Professionals	Senior Human Resources Generalist (1.0 FTE) & HR Generalist (1.0 FTE)	141,903	149,578	155,348	\$ 156,338	\$ 158,854	\$ 2,516	1.61%
01152100	511370	Clerical	Administrative Assistant	55,534	56,692	59,629	\$ 61,029	\$ 48,994	\$ (12,035)	-19.72%
01152100	512590	Recognition Award Payment							\$ -	0.00%
01152100	513120	Scheduled Overtime							\$ -	0.00%
01152100	511420	Workers Comp		43,760	41,151	44,683	\$ 45,796	\$ 65,174	\$ 19,378	42.31%
01152100	511425	Other Part-Time		16,900	16,302	21,696	\$ 27,549	\$ 27,997	\$ 448	1.63%
01152100	515050	Longevity		-	-	300	\$ -	\$ -	\$ -	0.00%
		PERSONAL SERVICES SUBTOTAL	PERSONAL SERVICES SUBTOTAL	383,600	391,060	411,538	423,389	435,831	\$ 12,442	2.94%
EXPENSES										
01152200	517020	Medical Check-up	New employee, DOT, return to work examinations	7,488	7,635	\$ 6,185	\$ 12,500	\$ 13,500	\$ 1,000	8.00%
01152200	530500	Training and Development	Professional development, seminars, classes	2,832	840	195	3,500	3,750	\$ 250	7.14%
01152200	534010	Postage	Mailings to applicants, active employees and retirees; business correspondence	559	406	2,122	1,250	1,450	\$ 200	16.00%
01152200	534035	Advertising-Employment	Costs for advertisements, verification of previous employment, education, driver records, criminal background	15,546	5,675	3,435	12,500	12,500	\$ -	0.00%
01152200	542010	Office Supplies	General office supplies	458	877	436	2,000	2,000	\$ -	0.00%
01152200	542090	Other General Supplies	Office improvements, furniture, storage, filing cabinets	2,088	737	2,645	1,250	1,250	\$ -	0.00%
01152200	543040	Equipment M&R Supplies	Copier, toner and other office machines	512	16	426	800	800	\$ -	0.00%
01152200	571010	Travel - Mileage	Reimbursement for department employees' work-related travel - mileage, tolls, public transportation	381	-	-	400	400	\$ -	0.00%
01152200	571510	Town Training & Development	Professional development opportunities for Town employees	5,639	2,342	3,244	5,000	5,000	\$ -	0.00%
01152200	573010	Dues-Administrators and Professional Staff	Professional organizations: Mass. Municipal Personnel Assoc., Soc. for Human Resource Management, NE Human Resources Assoc.	275	275	494	750	750	\$ -	0.00%
		EXPENSE SUBTOTAL	EXPENSE SUBTOTAL	35,779	18,802	19,182	39,950	41,400	\$ 1,450	3.63%
	570000	Other Charges/Expenses		250		479			\$ -	0.00%
		DEPARTMENT TOTAL	DEPARTMENT TOTAL	\$ 419,379	\$ 409,863	\$ 430,720	\$ 463,339	\$ 477,231	\$ 13,892	3.00%