



## Town of *Wellesley*

### FY2026 Budget Request

### Executive Director Operating Narrative: Mission, Services & Priorities

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#### **MISSION**

*To implement the policies of the Select Board, manage and direct any and all matters and activities affecting the interests and welfare of the Town that are not specifically assigned by law to any other board or office, and to foster continuous and collaborative improvement of public services and programs.*

#### **OFFICE OF THE SELECT BOARD**

The Select Board (the "Board") have the authority to appoint department heads to various Town offices. The Board appoints the Executive Director of General Government Services (the "Executive Director"), Fire Chief, Police Chief, and Town Counsel. The Office of the Select Board is within the Office of General Government Services, and the administrative duties are managed by the Assistant Executive Director with staff support from the Support Services Manager.

The Board also appoints members to several town committees including the Zoning Board of Appeals, the Registrars of Voters (three of its four members), the Council on Aging, the Municipal Light Board (two of its five members), the Contributory Retirement Board (one of its five members), and the Wellesley Housing Development Corporation.

Working with the Finance Department, the Board coordinates the preparation of General Government budgets for Central Administrative Services, Employee Benefits, Risk Management (Insurance), Law, Memorial and Veterans' Days commemoration, Parking Fine Processing, Traffic and Parking Management, Sealer of Weights and Measures, Town Facilities Maintenance, Town Report, and Unemployment Compensation.

Other Board responsibilities include the authority to issue permits and licenses for alcoholic beverages, common victuallers, take-out food, entertainment, public conveyances, and other commercial activities. It also administers risk management practices and scholarship programs; coordinates, publishes and distributes the annual Town Report; oversees Town facilities maintenance; addresses public safety matters; determines where traffic and regulatory signage, and pavement markings are located; directs traffic engineering; maintains parking facilities and meters; estimates, modifies and maintains voting precincts; administers Town property leases and certain grant applications; and is Town Ombudsman.

#### **EXECUTIVE DIRECTOR OF GENERAL GOVERNMENT SERVICES**

The Executive Director of General Government Services serves as the Chief Operating Officer for the Select Board, overseeing the day-to-day operations of the Office of the Select Board and several critical departments. These include the Finance Department, Facilities Management Department, Climate Action Committee, IT Department, Building Department, Police and Fire Departments (through contractual delegation), the West Suburban Veterans District, and the Sealer of Weights and Measures. Additionally, the Executive Director supervises the Human Resources Director's daily reporting responsibilities (through a Memorandum of Agreement) and manages multiple financial accounts.



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In collaboration with the Board, the Executive Director helps establish the Town's annual goals and objectives and leads staff initiatives to achieve them. Key responsibilities include developing and implementing the Town-Wide Financial Plan, the Five-Year Capital Budget Program, and the Annual Operating Budget. The role also involves providing leadership for cross-departmental projects, supporting various elected and appointed boards and committees, and implementing the Town's Unified Plan.

#### OFFICE OF GENERAL GOVERNMENT SERVICES

Working for the Select Board, the chief executive board of the Town, the Office of General Government Services ("Office") manages and directs any and all matters and activities affecting the interest and welfare of the Town that are not specifically assigned by law to any other board or office. The Office administers all provisions of general and special laws applicable to the Town, all bylaws and votes of the Town, and all rules and regulations made by the Board. The Office is the primary liaison with the state and federal government, local civic and business entities, and other municipalities and municipal organizations. The Office includes the Office of the Select Board.

The Office is staffed by 5 professionals, led by the Executive Director of General Government Services. The staff includes the Assistant Executive Director who provides daily management and administrative support to the Executive Director and to the Select Board, manages the Office of the Select Board and specific personnel and smaller departments, represents the Town at local, state, and regional events, and oversees economic development activities on behalf of the Town. The Public Information Officer organizes and manages the Town's strategic communications efforts, provides public information, town-wide news, event announcements, and operational program materials of community interest. Additionally, the PIO manages social media content and strategy for the Office in collaboration with the Creative Content Coordinator. The Transportation and Mobility Manager works across departments to oversee various transportation activities with a focus of reducing Single Occupancy Vehicle (SOV) trips, increasing bike, pedestrian, and transit trips, and reducing crashes and traffic conflicts. The Support Services Manager position is principally responsible for the management of a variety of required functions of the Select Board including procurement, licensing, public records, appointments, leasing of public lands and support of Town Boards under the jurisdiction of the Select Board.

#### Budget Guidelines

The FY26 operational budget for the Executive Director's office accounts for a 2% salary increase for the Executive Director, whose contract expires on June 30, 2025, as well as a 2% increase for the 50/60 staff members under this budget. To better align operations and address the growing need for communications support, including the increased role of social media, the department has eliminated the Clerk position and is recommending a Creative Content Coordinator position. The budget guideline for FY26 was set at a 3.5% increase, not inclusive of new positions. With the addition of the Creative Content Coordinator, the budget reflects an 7.07% year-over-year increase; without this new position, the budget decreases by 7.96%. The FY26 budget prioritizes advancing key initiatives, including the Unified Plan, Strategic Housing Plan, Sustainable Mobility Plan, Climate Action Plan, and economic development. It also focuses on enhancing communication efforts and implementing social equity measures, such as the Diversity, Equity, and Inclusion Audit and Civil Discourse Initiative, without requiring further operational budget increases.



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#### **FY24-25 (to date) Goals Accomplished**

##### Town Asset Management/Operations

- Efficiently moving all Town Hall Employees back to the completed Town Hall to commence operations on 12/26/24.
- Worked with HR and Town Clerk through a FY24 annual state budget earmark of \$60,000 to digitize public records.
- Worked with the HR Director and the Collins Center to complete an operational analysis report funded through a Community Compact Grant.
- Work with HR Director and HR Board on completion of a Classification and Compensation Study that will be brought to Annual Town Meeting for approval.
- Hired a new Fire Chief who began on July 15, 2024.
- Evaluated the need for additional web/communications position and are bringing forward a proposal for a Creative Content Coordinator. Worked with IT and Finance to hire a staff member in an interim capacity to commence work, including bring the Town's website into ADA compliance and immediately increasing the Office's social media footprint.
- Negotiated a land takings proposal at Weston Road and Linden Street to improve traffic operations and pedestrian safety at the October 2024 STM.
- Negotiated a FLSA Settlement with the Fire Department that was approved at the October 2024 STM.

##### Housing

- Worked with Planning Department and EOHLC to bring articles to STM to reach full compliance with the state's MBTA Communities legislation.
- Continue to work with WHDC on the renovation and leasing for affordable housing the property located at 156 Weston Road.
- Worked with Housing Task Force to bring forward three public engagement sessions and a town-wide housing survey. Strategic Housing Plan is anticipated to be completed in the spring of 2025.
- Worked with WHDC to prepare a warrant article for ATM to transition to an Affordable Housing Trust

##### Economic Development

- Completed RFP for the design of Wellesley Square Amenities Plan which was funded at ATM 2024.
- Coordinated with the Wellesley Square Merchants on using a FY24 state budget earmark to fund new economic development programming that supported the local business community.
- Worked with Traffic Committee to install pilot crosswalk design at Washington Street and Church Street.
- Continue to evaluate alternative Parking Management Plans for Wellesley Square and flexible uses for municipal lots.

##### Sense of Community

- Worked with Diversity, Equity, and Inclusion (DEI) Task Force to conduct Equity Audit, and host educational seminars and trainings. Equity Audit should be completed by March 2025.



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- Worked with DPW to complete an ADA Self-Assessment.
- Conducted two Civil Discourse Dialogues as part of the Strategic Housing Plan (11/14/24 and 11/17/24).
- Worked with MWRTA to expand Catch Connect hours for nights and weekends.

#### Sustainability

- CAC and FMD worked to secure a \$500,000 Green Communities Grant to offset costs at Warren HVAC project.
- Hired new Transportation and Mobility Manager who commenced work on 11/6/24.
- Underway on Safe Routes for All study with Kittelson Associates, which held a public meeting on 10/30/24.
- Worked with MBTA, Congresswoman Clark, and Representative Peisch to make the Wellesley Square Commuter Rail station ADA Accessible with a mini-high platform. Work is currently underway on the construction.
- Continue to promote MWTRA micro-transit platform, Catch Connect and work with Wellesley College, Babson College, and major businesses to have non-single occupancy vehicle options for alternative modes of transportation
- Working with MLP and others to create an Energy Resilience and Transition Working Group to advance the electrification, energy transition, and resilience goals of the Climate Action Plan.

#### **FY25 -26 Goals**

##### Town Asset Management/Operations

- Explore a study of town government structure and efficiency
- Continue to improve Fire Department operations with completion of staff plan to add 2 new positions and purchase a new Fire Engine.
- Pursue new staff position for communications/social media and public engagement to commence in FY26.
- Enhance investment in community efforts and activities that create greater cohesion, including Celebrations Committee and Civil Discourse Initiative.
- Establish a North 40 Committee to determine next steps and future uses of parcel.
- Consider next steps to Fire Department Station Master Plan.

##### Housing

- Implement Strategic Housing Plan recommendations.
- Amend and update Affordable Housing Policy to be consistent with Strategic Housing Plan.
- Work with Planning Board, Housing Authority, WHDC, CPC to evaluate improvements to Housing Authority properties

##### Economic Development

- Strengthen ties with local business community and streamline online licensing process.



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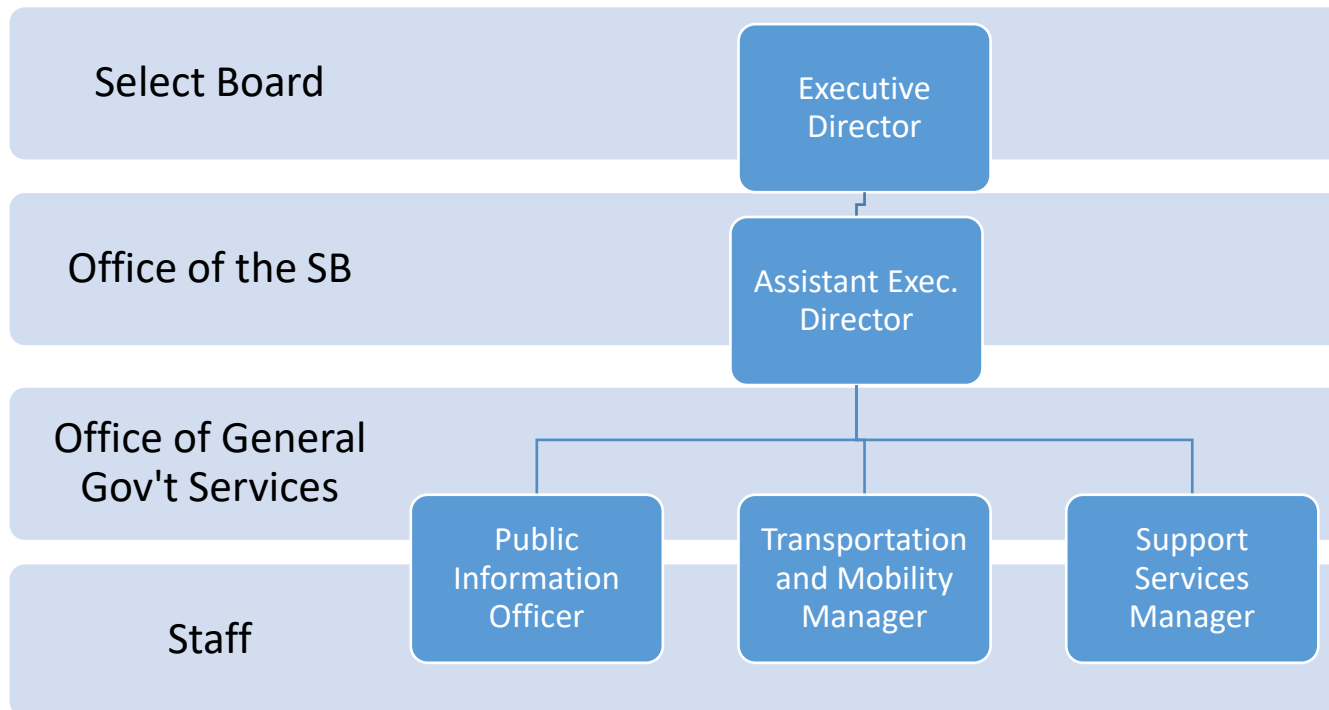
- Seek construction funds for Wellesley Square Amenities Plan.
- Continue to explore grant opportunities and options for enhancements to Arts and Cultural programs with Cultural Council.

#### Sense of Community

- Implement strategies identified in Diversity, Equity, and Inclusion Audit.
- Evaluate War Memorial Improvements.
- Continue working with the Civil Discourse Initiative on promoting healthy dialogues on critical issues in the community.

#### Sustainability

- Continue implementation of Sustainable Mobility Plan and Safe Routes for All plan.
- Evaluate with FMD and School Committee School Climate Controls.





# Town of *Wellesley*

## FY2026 Budget Request

### Executive Director Operating Request

Department: 122

Department Head: Meghan C. Jop, Executive Director

<b>DEPARTMENT EXPENDITURES</b>	<b>FY22 Actual</b>	<b>FY23 Actual</b>	<b>FY24 Actual</b>	<b>FY25 Budget</b>	<b>FY26 Request</b>	<b>\$ Variance FY25-26</b>	<b>% Variance FY25-26</b>
Personal Services							
Full Time	\$ 486,505	\$ 502,582	\$ 540,498	\$ 692,828	\$ 737,384	\$ 44,556	6.43%
Part Time/Temp/Seasonal	665	-	-	-	-	\$ -	0.00%
Longevity	-	-	-	-	-	\$ -	0.00%
Performance/Clerical OT	-	-	4,020	9,500	9,500	\$ -	0.00%
<b>Subtotal, Personal Services</b>	<b>487,170</b>	<b>502,582</b>	<b>544,518</b>	<b>702,328</b>	<b>746,884</b>	<b>44,556</b>	<b>6.34%</b>
Expenses	33,817	21,614	28,505	41,000	49,000	\$ 8,000	19.51%
Encumbrances	-	-	700	-	-	\$ -	0.00%
	<b>33,817</b>	<b>21,614</b>	<b>29,205</b>	<b>41,000</b>	<b>49,000</b>	<b>8,000</b>	<b>19.51%</b>
<b>TOTAL</b>	<b>\$ 520,987</b>	<b>\$ 524,196</b>	<b>\$ 573,723</b>	<b>\$ 743,328</b>	<b>\$ 795,884</b>	<b>\$ 52,556</b>	<b>7.07%</b>

<b>PERMANENT STAFFING (FTEs)</b>	<b>FY22 Actual</b>	<b>FY23 Actual</b>	<b>FY24 Actual</b>	<b>FY25 Budget</b>	<b>FY26 Request</b>
Position Titles:					
Executive Director	1.0	1.0	1.0	1.0	1.0
Assistant Exec. Director	1.0	1.0	1.0	1.0	1.0
Deputy Assistant Director	-	-	-	-	-
Economic Development Director	1.0	-	-	-	-
Public Information Officer*	1.0	1.0	1.0	1.0	1.0
Support Services Manager*	-	1.0	1.0	1.0	1.0
Transportation and Mobility Manager**	-	-	-	1.0	1.0
Creative Content Coordinator***					1.0
Clerical Assistant*	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>	<u>0.0</u>
<b>Total Number of Positions</b>	<b>5.0</b>	<b>5.0</b>	<b>5.0</b>	<b>6.0</b>	<b>6.0</b>

\* FY22 job classifications were modified

\*\*FY25 New Position

**Executive Director Operating Request**

Org	Object	Account # 01-122 Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
<b>PERSONAL SERVICES</b>										
01122100	511010	Senior Administrator	Salary of the Executive Director	\$ 222,302	\$ 228,970	\$ 237,308	\$ 242,985	\$ 261,326	\$ 18,341	7.55%
01122100	511220	Other Professionals	Salaries of Asst. Exec. Dir, PIO, Support Services, Trans.& Mobility Manager	264,204	273,612	303,190	449,843	413,335	\$ (36,508)	-8.12%
01122100	512290	Temporary Help	Substitute Exec. Assistant (vacations/sick leave and transcription)	665	-	-	-	-	\$ -	0.00%
01122100	512290	Funds to complete Performance Review, Reclassification			-	4,020	9,500	9,500	\$ -	0.00%
01122100	515050	Longevity	Longevity payment due personnel with more than 15 years service.	-	-	-	-	-	\$ -	0.00%
01122100	511220	New Creative Content Coordinator	Salary					62,722	\$ 62,722	0.00%
		<b>Benefits</b>	No additional benefits cost - new position offset by elimination of clerical position					-	\$ -	0.00%
			<b>PERSONAL SERVICES SUBTOTAL</b>	<b>487,170</b>	<b>502,582</b>	<b>544,518</b>	<b>702,328</b>	<b>746,884</b>	<b>44,556</b>	<b>6.34%</b>
<b>EXPENSES</b>										
01122200	521010	Electricity	Cover Streetlight Deficit	861	576	245	-	-	\$ -	0.00%
01122200	524050	Computer Equipment Maint.	Computer Accessories as needed	-	374	-	900	900	\$ -	0.00%
01122200	530500	Training & Development	Training for staff members enables the department to stay informed about changes in laws and procedures related to their roles and responsibilities, laws etc.	5,700	605	2,575	4,000	4,000	\$ -	0.00%
01122200	530600	Appraisals & Surveys	Appraisals as required for land/municipal surveys.	-	-	-	2,000	2,000	\$ -	0.00%
01122200	530900	Other Professional Services	Consulting Services as needed	5,000	380	2,450	6,000	6,000	\$ -	0.00%
01122200	534010	Postage	For routine mailing and also to cover additional mailings (e.g., reports, surveys, etc.).	1,053	470	630	2,000	2,000	\$ -	0.00%
01122200	534020	Telephone	Cell Phone for Executive Director						\$ -	0.00%
01122200	534030	Advertising - General	These funds are for the cost of placing legal ads in local newspapers.	480	383	379	900	900	\$ -	0.00%
01122200	534035	Advertising- Employment	For employment advertising.	-	-	-			\$ -	0.00%
01122200	534040	Printing and Binding Expense	For large jobs which can't be handled by office copier (e.g., budgets and reports).	-	-	-	400	8,400	\$ 8,000	2000.00%
01122200	534060	Photocopying	Beginning FY11 all Townhall costs are part of Dept 199						\$ -	0.00%
01122200	534090	Other Communications Services	Digital web images	540	-				\$ -	0.00%

**Executive Director Operating Request**

Org	Object	Account # 01-122 Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
01122200	534095	On Line subscriptions/databases	Social Media analytical tools	4,788	2,994	3,144	4,800	4,800	\$ -	0.00%
01122200	538030	Microfilming Services	Microfilming of department records which must be kept indefinitely.	-	-	-	-	-	\$ -	0.00%
01122200	542010	Office Supplies	Office supplies	3,336	1,939	1,777	2,500	2,500	\$ -	0.00%
01122200	549090	Other Food Service Supplies		83	472	474	500	500	\$ -	0.00%
01122200	555020	Periodicals & Newspapers	Newspaper subscriptions	73	73	73	300	300	\$ -	0.00%
01122200	557010	Programs and Activisties		575	100	275	300	300	\$ -	0.00%
01122200	571010	In-state travel (mileage)	For reimbursement of mileage	29	-	-	300	300	\$ -	0.00%
01122200	571110	Conf/Meetings Administrators	Attendance at in and out-of-state conferences enables the Town to keep current on new topics and ideas, and exert some influence on decisions by the state or other groups which may impact the Town.	545	2,411	5,522	3,400	3,400	\$ -	0.00%
01122200	573010	Dues-Administrators	Dues for professional organizations such as MMMA, AICP	1,305	1,205	1,023	3,000	3,000	\$ -	0.00%
01122200	573040	Dues-Committee/Board Members	Massachusetts Municipal Association and Norfolk County Selectmen's Association dues.	9,449	9,632	9,939	9,700	9,700	\$ -	0.00%
01122200	578090	Unclassified Expenses	Inactive Account	-	-	-	-	-	\$ -	0.00%
01122200	542010	Office Supplies		-	-	-	-	-	\$ -	0.00%
01122200	583120	Office Machines Replacement	Cost for new position-desk,computer,etc.	-	-	-	-	-	\$ -	0.00%
			<b>EXPENSES SUBTOTAL</b>	<b>33,817</b>	<b>21,614</b>	<b>28,505</b>	<b>41,000</b>	<b>49,000</b>	<b>\$ 8,000</b>	<b>19.51%</b>
	570000	Other Charges & Expenses	year	-	-	700	-	-		0.00%
			<b>DEPARTMENT TOTAL WITHOUT NEW POSITI</b>	<b>\$ 520,987</b>	<b>\$ 524,196</b>	<b>\$ 573,723</b>	<b>\$ 743,328</b>	<b>\$ 684,162</b>	<b>\$ (59,166)</b>	<b>-7.96%</b>
			<b>DEPARTMENT TOTAL WITH NEW</b>	<b>\$ 520,987</b>	<b>\$ 524,196</b>	<b>\$ 573,723</b>	<b>\$ 743,328</b>	<b>\$ 795,884</b>	<b>\$ 52,556</b>	<b>7.07%</b>



# Executive Director Operating Request

Department: 122

Job Title Employee Name	FY25 Rate as of 6/30/2025	Group - Step	FY26 Starting Rate 7/1/2025	Step Adjustment Date	Adjusted Rate	Total Yrly Salary	Salary Request (Dept 122)*
Executive Director <sup>1</sup> Meghan Jop	\$ 4,908.09	69	\$ 5,006.25	N/A	N/A	260,325	261,326
Assistant Executive Director Corey Testa	\$ 2,562.50	62	\$ 2,613.75	N/A	N/A	135,915	136,438
Public Information Officer Stephanie Hawkinson	\$ 1,799.98	57	\$ 1,835.98	N/A	N/A	95,471	95,838
Support Services Manager Cay Meagher	\$ 1,573.64	54	\$ 1,605.11	N/A	N/A	83,466	83,787
Clerical Assistant <sup>2</sup>	\$ 1,027.25	46-4	\$ -				
Funds to complete Performance Review for Executive Director, OT for Clerk	\$ -		\$ -	N/A	N/A	9,500	9,500
Transportation and Mobility Manager Sheila Page	\$ 1,826.92	57	\$ 1,863.46	N/A	N/A	96,900	97,273
Creative Content Coordinator			\$ 1,206.19				62,722
Temporary help - transcribing minutes	\$ -		\$ -	N/A	N/A	-	
<sup>1</sup> . Contract expires 6/30/2025						681,577	\$ 746,884
<sup>2</sup> . Position eliminated 12/2024							
*Note: FY26 Salary is based on 52.2 weeks							

Assumptions:

40 series increase	3.00%	1.030
50,60 series increase	2.00%	1.020
Contract Employee	2.00%	1.020
Temp. Help \$30/hr for 4.5 weeks		

\*Pay weeks in FY26 = 52.2



## Town of *Wellesley*

### FY2026 Budget Request

### Climate Action Committee: Mission, Services & Priorities

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## CLIMATE ACTION COMMITTEE

### Mission

The Climate Action Committee (CAC) leads efforts to reduce town-wide GHG emissions. In 2021, Annual Town Meeting adopted revised goals aligned with Massachusetts and United States climate targets: to reduce town-wide emissions 50% below a 2007 baseline by 2030, 75% below this baseline by 2040, and to net-zero by 2050.

### Department Description

Guided by Wellesley's Climate Action Plan, the CAC leads, supports, advises, and collaborates with Town of Wellesley departments and committees, and community stakeholders on initiatives to reduce GHG emissions from Wellesley's municipal, residential, commercial, and institutional sectors. The CAC also engages with other towns and with state and federal agencies to advance Wellesley's climate goals. The CAC tracks and reports annually on GHG emissions by sector.

### Organizational Structure

The CAC has seven appointed members, with staggered terms of three years. The Select Board (SB), Wellesley Municipal Light Plant (MLP), and School Committee each appoint one board member, officer, official, or paid employee. The SB appoints the remaining four members from among residents or others with relevant interests and expertise. As depicted in Figure 1, the CAC is under the Select Board and has two staff members: a Sustainability Director, at 35 hours/week, who reports to the Executive Director of General Government Services, and a Sustainability Analyst, at 35 hours/week.

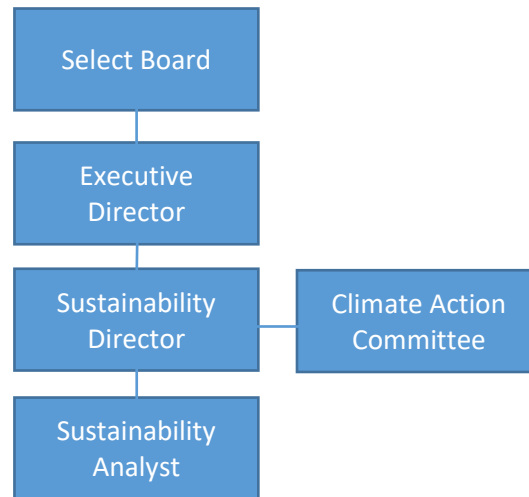


## Town of *Wellesley*

### FY2026 Budget Request

### Climate Action Committee: Mission, Services & Priorities

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**Figure 1: Climate Action Committee Organizational Chart**

### Department Activities

**Climate Action Plan** – The CAC leads initiatives and advises departments on implementation of Wellesley’s town-wide Climate Action Plan (CAP, 2022), a road map for achieving town-wide GHG emissions reduction goals and for building resilience to climate change impacts. CAP implementation involves action by municipal staff and boards, residents, businesspeople, and institutions across six pathways: governance, energy, buildings, mobility, natural resources, and waste. The CAC works to facilitate and accelerate climate action through education, advice, advocacy, policy development, and technical and financial grant resources.

**Green Communities** – The CAC develops, coordinates, and implements the Town’s Green Communities activities, seeks state funding for Green Communities projects, and reports to the Massachusetts Department of Energy Resources (DOER) on municipal energy use, vehicle purchases, and grant implementation. Since 2018, Wellesley received \$975,170 in Green Communities grant funding,



## Town of *Wellesley*

### FY2026 Budget Request

### Climate Action Committee: Mission, Services & Priorities

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including a \$500,000 Green Communities Building Decarbonization grant to support electrification of the Warren Building. The CAC recently submitted an application seeking Wellesley's certification as a DOER Climate Leader Community.

**Tracking of Energy Use and Greenhouse Gas Emissions** – Every year, the CAC tracks energy use and estimates town-wide GHG emissions from municipal, residential, commercial, and college sectors.

**Reducing Residential Building Emissions** – The CAC partners with HomeWorks Energy, a Mass Save-approved provider. HomeWorks Energy canvasses Wellesley neighborhoods to invite Wellesley residents who are gas customers of National Grid, to schedule no-cost home energy assessments.

**Building Energy Tracking and Reporting Program (BETR)** - BETR is a Town of Wellesley initiative to assist large commercial, multi-family, and institutional properties in Wellesley with lowering energy costs, making buildings more sustainable, and reducing GHG emissions. The program includes energy tracking and reporting and a Building Energy Roundtable which meets one to two times a year.

**Gas Leaks** – The CAC participates in the Multi-Town Gas Leaks Initiative which brings together cities and towns in National Grid territory to work with the utility to accelerate progress on gas leaks.

**WasteWise Wellesley** – The CAC participates in the 3R (Reduce, Reuse, Recycle) Working Group (Department of Public Works, Natural Resources Commission, and CAC) to encourage sustainable materials management, a goal identified in the Unified Plan. CAC staff work closely with the Town's new Waste Reduction Coordinators. The CAC is sponsoring an Annual Town Meeting article to reduce single-use service wear and packaged condiments.

**Mobility Programs** – The CAC participates in the town-wide Mobility Working Group and the Electric Vehicle (EV) Working Group. The CAC also collaborates with the MLP and Sustainable Wellesley to host electric vehicle showcase and test drive events. In FY23-24, the CAC wrote and garnered support for a Zero-Emission-Vehicle-First Fleet Policy (ZEV Policy).

**Municipal Engagement** – The CAC and Town Departments, including the Municipal Light Plant, Department of Public Works, Police Department, Facilities Management Department, Health Department, and Natural Resources Commission are deepening their collaborations on climate action in areas such as energy coaching, decarbonization, EV adoption, and waste reduction.



## Town of *Wellesley*

### FY2026 Budget Request

### Climate Action Committee: Mission, Services & Priorities

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**Community Engagement** – Outreach to community members takes place through multiple events and channels including energy coaching, Climate Action - Be Part of It! webpages, the BETR program, EV showcase and test drive events, Wellesley Wonderful Weekend, webinars, and digital and print media.

### Fiscal Year (FY) 26 Goals

The CAP contains 90 actions to be implemented over the next five to ten years. Together, these actions involve every town department and every sector of our community in mitigating climate change and enhancing Wellesley's resilience to climate change impacts. To coordinate and support this work the CAC carries out data collection, research, analysis, public education, and municipal and community engagement. The CAC also develops and implements local programs, collaborates with other towns, and advocates for state and federal policies that advance progress toward our climate targets.

Specific goals for FY26 include:

- Through the Energy Coaching Program, door-to-door canvassing, interdepartmental and community collaborations, public programs, direct mailings, news outlets, websites, social media, and in-person and Zoom events, expand and deepen climate action engagement with Wellesley's:
  - Residents, including under-resourced communities
  - Community-based organizations
  - Commercial and institutional partners
- Strengthen and augment the CAC's social media presence
- Work with the EV Working Group and departments on ZEV Policy implementation and strategic planning for EV charging
- Support town-wide waste reduction initiatives
- Catalyze and collaborate on initiatives to make Town of Wellesley bylaws and processes more sustainable
- Catalyze and collaborate on initiatives to strengthen Wellesley's climate resilience
- Update Municipal Sustainable Building Guidelines
- Seek grant-funded and technical assistance for CAP actions
- Complete the annual greenhouse gas inventory
- Update the CAP dashboard for tracking progress on Wellesley's climate action goals.



Town of *Wellesley*  
**FY2026 Budget Request**  
**Climate Action Committee: Mission, Services & Priorities**

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### Operating Budget Summary

The CAC's FY25 operating budget includes funding for the Sustainability Director, CAC Analyst, and expenses for dues, professional development, events, postage, and supplies required to run the CAC's programs.

The CAC's FY25 operating budget request includes within-guideline increases of 2.0% for personnel and 3.0% for expenses. Together these increases reflect a 2.06% increase in the total CAC budget. The expense increase of \$300 in "Programs and Activities" will support the purchase of software and supplies to advertise and convene CAC events.

### Capital Budget Summary

The capital budget request includes \$75,000 for a Climate Action Plan update in FY29.

### Revenue and Cost Savings

The CAC will continue to identify and pursue Green Communities and other grant opportunities, alert the municipality to sustainability-related incentives, and work with departments across Town to reduce energy use and save on energy-related costs.



Town of *Wellesley*  
**FY2026 Budget Request**

<b>Climate Action Committee Operating Request</b>									
Org	Object	Account Title	Actual FY22	Actual FY23	Actual FY24	Budget FY25	Request FY26	\$ Variance FY25-26	% Variance FY25-26
01126100	511220	Other Professional Staff	41,595	42,319	87,307	90,205	92,009	1,804	2.00%
01126100	511420	Other Support Staff	33,189	64,512	67,647	71,692	73,126	1,434	2.00%
		<b>PERSONAL SERVICES SUBTOTAL</b>	<b>\$ 74,784</b>	<b>\$ 106,830</b>	<b>\$ 154,954</b>	<b>\$ 161,897</b>	<b>\$ 165,135</b>	<b>3,238</b>	<b>2.00%</b>
01126200	579999	ICLEI Dues	600	1,200	1,200	1,200	1,200	-	0.00%
01126200	571110	Conf/Mtgs/USDN Dues	2,200	2,019	2,000	2,200	2,200	-	0.00%
01126200	557010	Programs and Activities	314	648	1,035	2,791	3,091	300	10.75%
01126200	542010	Office Supplies	386	41	-	300	300	-	0.00%
01126200	534010	Postage	25	-	-	3,500	3,500	-	0.00%
		<b>EXPENSES SUBTOTAL</b>	<b>\$ 3,524</b>	<b>\$ 3,908</b>	<b>\$ 4,235</b>	<b>\$ 9,991</b>	<b>\$ 10,291</b>	<b>300</b>	<b>3.00%</b>
	57000	Encumbrances	-	-	120	-	-	-	0.00%
		<b>TOTAL</b>	<b>\$ 78,308</b>	<b>\$ 110,739</b>	<b>\$ 159,189</b>	<b>\$ 171,888</b>	<b>\$ 175,426</b>	<b>\$ 3,538</b>	<b>2.06%</b>



# Town of Wellesley

## FY2026 Budget Request

### Climate Action Committee Operating Request

Department : 126

Department Head: Marybeth Martello, Sustainability Director

<b>DEPARTMENT EXPENDITURES</b>	<b>FY22 Actual</b>	<b>FY23 Actual</b>	<b>FY24 Actual</b>	<b>FY25 Budget</b>	<b>FY26 Request</b>	<b>\$ Variance FY25-26</b>	<b>% Variance FY25-26</b>
Personal Services							
Sustainability Director	41,595	42,319	87,307	90,205	92,009	1,804	2.00%
Sustainability Analyst	33,189	64,512	67,647	71,692	73,126	1,434	2.00%
<b>Subtotal, Personal Services</b>	<b>74,784</b>	<b>106,830</b>	<b>154,954</b>	<b>161,897</b>	<b>165,135</b>	<b>3,238</b>	<b>2.00%</b>
General Expenses	3,524	3,908	4,235	9,991	10,291	300	3.00%
Encumbrances	-	-	120	-	-	-	0%
<b>Subtotal, Expenses</b>	<b>3,524</b>	<b>3,908</b>	<b>4,355</b>	<b>9,991</b>	<b>10,291</b>	<b>300</b>	<b>3.00%</b>
<b>TOTAL</b>	<b>\$ 78,308</b>	<b>\$ 110,739</b>	<b>\$ 159,309</b>	<b>\$ 171,888</b>	<b>\$ 175,426</b>	<b>\$ 3,538</b>	<b>2.06%</b>

<b>FTE</b>	<b>FY22 Actual</b>	<b>FY23 Actual</b>	<b>FY24 Actual</b>	<b>FY25 Budget</b>	<b>FY26 Request</b>
Director	1.00	1.00	1.00	1.00	1.00
Analyst	0.50	1.00	1.00	1.00	1.00
	<b>1.50</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>	<b>2.00</b>

#### **Base Budget**

Director at 35 hrs/wk

Analyst at 35 hrs/wk

#### **Unified Plan/Climate Action Plan**

Director at 35 hrs/wk

Analyst at 35 hrs/wk



# Town of *Wellesley*

## FY2026 Budget Request

### Climate Action Committee Operating Request

Org	Object	Account Title	Actual FY22	Actual FY23	Actual FY24	Budget FY25	Request FY26	\$ Variance FY25-26	% Variance FY25-26
01126100	511220	Other Professional Staff	41,595	42,319	87,307	90,205	92,009	1,804	2.00%
01126100	511420	Other Support Staff	33,189	64,512	67,647	71,692	73,126	1,434	2.00%
		<b>PERSONAL SERVICES SUBTOTAL</b>	<b>\$ 74,784</b>	<b>\$ 106,830</b>	<b>\$ 154,954</b>	<b>\$ 161,897</b>	<b>\$ 165,135</b>	<b>3,238</b>	<b>2.00%</b>
01126200	579999	ICLEI Dues	600	1,200	1,200	1,200	1,200	-	0.00%
01126200	571110	Conf/Mtgs/USDN Dues	2,200	2,019	2,000	2,200	2,200	-	0.00%
01126200	557010	Programs and Activities	314	648	1,035	2,791	3,091	300	10.75%
01126200	542010	Office Supplies	386	41	-	300	300	-	0.00%
01126200	534010	Postage	25	-	-	3,500	3,500	-	0.00%
		<b>EXPENSES SUBTOTAL</b>	<b>\$ 3,524</b>	<b>\$ 3,908</b>	<b>\$ 4,235</b>	<b>\$ 9,991</b>	<b>\$ 10,291</b>	<b>300</b>	<b>3.00%</b>
	57000	Encumbrances	-	-	120	-	-	-	0.00%
		<b>TOTAL</b>	<b>\$ 78,308</b>	<b>\$ 110,739</b>	<b>\$ 159,189</b>	<b>\$ 171,888</b>	<b>\$ 175,426</b>	<b>\$ 3,538</b>	<b>2.06%</b>



**126 Climate Action Committee FY26 Operating Request**

<b>Job Title Employee Name</b>	<b>FY25 Rate as of 6/30/24</b>	<b>Group - Step</b>	<b>FY26 Hrly rate</b>	<b>Hrs/Week</b>	<b>FY26 Rate as of 7/1/25</b>	<b>Step adjustment Rate</b>	<b>Adjusted Date</b>	<b>General Fund Budget Request</b>
Sustainability Director Marybeth Martello (35 hr/wk)	\$ 49.37	55	\$ 50.36	35	\$ 1,762.62			92,009
Janet Mosley CAC Analyst (35 hr/wk)	\$ 39.24	53	\$ 40.03	35	\$ 1,400.89			73,126
								<b>\$ 165,135</b>

40 series increase      3.00%      1.0300

50,60 series increase      2.00%      1.0200

Number of payweeks in FY26 =      52.2



Town of *Wellesley*  
FY2026 Budget Request  
Finance Department: Mission, Services & Priorities

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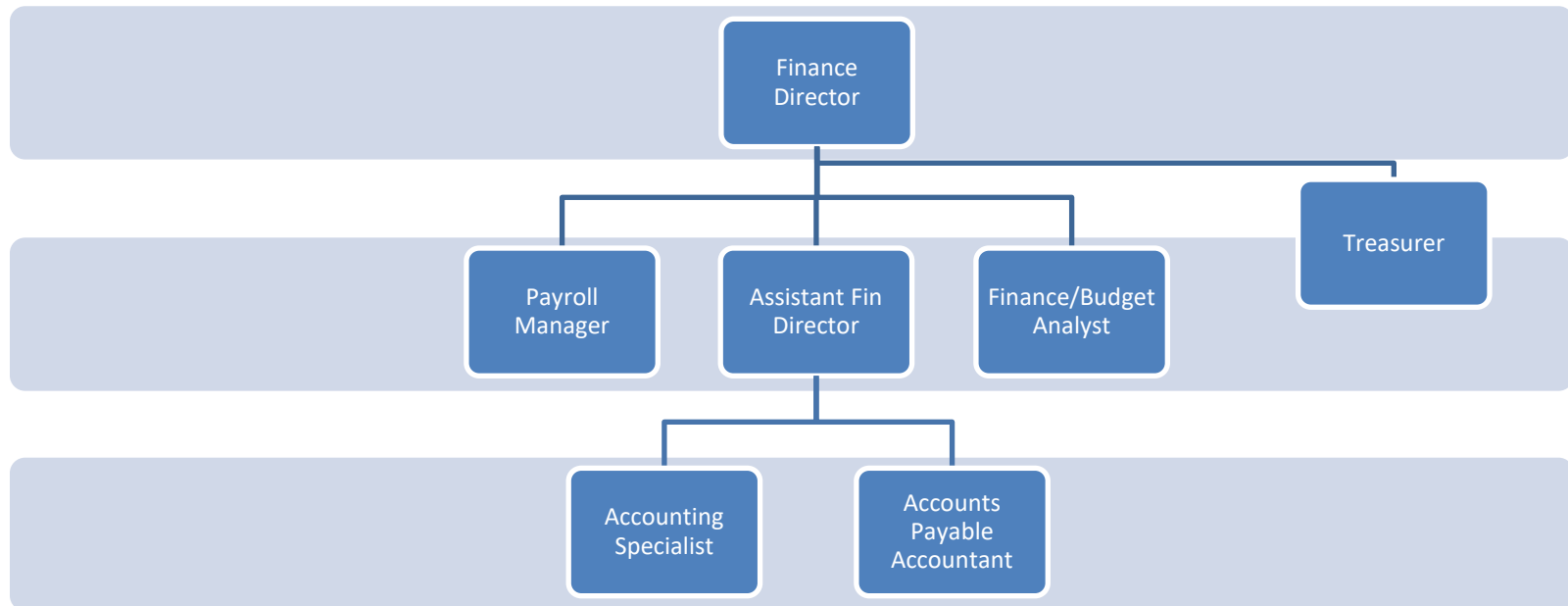
### Mission

The Mission of the Finance Department is to provide the financial transactions, reconciliations, analytics, and timely reporting necessary to manage the finances of this fast-paced municipality and its four separate Enterprise Funds, and maintain its significant assets; while maintaining an environment of **strong financial controls**. The department provides outreach to educate and assist other departments and boards to help them maintain **the highest financial standards**. The department continually strives to improve **transparency** to all stakeholders through public reporting of its financial statements and budget data.

Conservative policies and creative strategies for financial management will allow the Town to continue to have the long term **fiscal stability** to fund past service liabilities, current 'best in class' operations, capital purchases, and the Town's strategic objectives as articulated under the Unified Plan.

### Organization

The department is comprised of Five full-time (**5 FTE**) employees: the Finance Director/CFO/Town Accountant, Assistant Finance Director, Finance & Budget Analyst, and two staff (Payroll Manager and Accounts Payable Accountant), who review and process all disbursements for the organization. There is also a **.5 FTE** Accounting Specialist who handles the Town's Insurances and who provides support to the West Suburban Veteran's District.



Michael DiPietro began as CFO/Finance Director in March 2024.

The Finance Director is the liaison to the Audit Committee, the Ex-Office Member of the Wellesley Contributory Retirement Board and appoints the Treasurer/Collector. The Finance Director works with the Executive Director, Treasurer/Collector, and Select Board to craft financial policies, establish controls, and manage debt. Maintaining the Town's longstanding Aaa Bond rating and history of financial conservatism continues to be a key value.

Finance is responsible for accounting, analysis, and financial statement preparation for the organization; coordinating the town-wide budget process, and preparing/auditing warrants for all vendor disbursements and employee payrolls. The department also administers the Town's liability insurance program, performs financial activities for the West Suburban Veteran's District, and maintains contract files. The department annually processes tens of thousands of payroll and deduction records for over 1,200 employees, and remits payments to thousands of vendors (\$200 million annual disbursements). Financial records are maintained for 24 funds and 45 departments. The Town uses sophisticated, fully integrated financial software (MUNIS) to perform all financial functions (including general ledger, accounts payable, purchasing, payroll, fixed assets, billing, collections, and treasury). Finance staff perform detailed monthly general ledger account reconciliations, prepare various operating analytics, and train other departments' management and staff on using the system. Finance staff are cross trained and routinely support each-other and the treasurer's office during vacations and absences, to ensure critical processes are performed timely. Finance performs State and Federal reporting, closes the financial books, and works with the Independent Auditors on the annual audit and preparation of the Annual Comprehensive Financial Report. The department communicates the Select Board's annual budget guidelines to the other departments, issues templates/instructions to coordinate departmental budget submissions, prepares summary schedules of Select Board budgets, and summarizes town-wide budget submissions. Staff assist other departments in preparing budgets and upload final balanced budgets to the MUNIS system. Staff also create graphs, charts, and analyses in support of the Town Wide Financial Plan and Long-term Capital plan.

#### FY2025 /FY2026

The department continues to be committed to producing its **Annual Comprehensive Financial Report (ACFR)**, which has won annual **Awards for Excellence in Financial Reporting every year since 2004**. These documents can be found on the Town's website.

The Town earned the Distinguished Budget Award from the Government Finance Officers' Association for its 2021 and 2022 budget efforts and will continue to improve the budget document and address the recommendations from the adjudication process. During the 2023 budget process, the award program changed to a direction supporting a more centralized approach to government than Wellesley's structure affords; with a focus on mapping departmental goals to a central strategic plan and then (centrally) measuring outcomes. Wellesley's form of government presented a challenge to keeping the award, but the Finance department continues to be committed to maintaining and enhancing the improved transparency created by continuing to prepare this detailed document.

The department experienced turnover in the Accounting Specialist position, but was fortunate to hire an experienced person from another municipality.

#### FY2026 Goals

The Town has issued most of the long-term debt, exempt from the constraints of Proposition 2 ½ authorized during the last couple of years related to the two new Elementary Schools. In addition to the added record keeping for this debt, the projects themselves continue to generate added disbursement activity and accounting and auditing requirements.

The Department continues to prepare the Water and Sewer financial statements after the departure of the DPW Accountant. Town meeting added a Stormwater Enterprise Fund effective in fiscal 2024, and Finance will also prepare its monthly statements.

Finance continues to invest in staff cross-training, and to support (their) career advancement by encouraging involvement in (Municipal Accounting) Certification programs. There has been recent turnover within the department, as the labor market has provided many new opportunities. Cross-training and documentation of policies and procedures will continue, to ensure that financial controls are maintained through any staffing transitions.

#### Base Level request

The budget requested for FY2026 provides the resources necessary to meet the department's objectives. It meets guideline and maintains current staffing levels.



# Town of *Wellesley*

## FY2026 Budget Request

### Finance Department Operating Request

Department: 133

Department Head: Michael DiPietro, Finance Director

<b>DEPARTMENT EXPENDITURES</b>	<b>FY22 Actual</b>	<b>FY23 Actual</b>	<b>FY24 Actual</b>	<b>FY25 Budget</b>	<b>FY26 Request</b>	<b>\$ Variance FY25-26</b>	<b>% Variance FY25-26</b>
Personal Services							
Full Time	\$ 455,698	\$ 471,287	\$ 495,199	\$ 574,351	\$ 600,860	\$ 26,508	4.62%
Part-Time	-	-	-	-	-	\$ -	0.00%
Assessment Offset (W&S, WSVD)	(34,000)	(34,850)	(34,850)	(36,244)	(36,244)	\$ -	0.00%
Longevity/ and temp clerical	-	-	-	-	-	\$ -	0.00%
<b>Subtotal, Personal Services</b>	<b>421,698</b>	<b>436,437</b>	<b>460,349</b>	<b>538,107</b>	<b>564,616</b>	<b>26,508</b>	<b>4.93%</b>
Expenses	3,054	4,999	10,005	12,200	14,100	\$ 1,900	15.57%
Encumbrances	-	-	10	-	-	\$ -	0.00%
<b>Subtotal, Expenses</b>	<b>3,054</b>	<b>4,999</b>	<b>10,015</b>	<b>12,200</b>	<b>14,100</b>	<b>1,900</b>	<b>15.57%</b>
<b>Total</b>	<b>\$ 424,752</b>	<b>\$ 441,436</b>	<b>\$ 470,364</b>	<b>\$ 550,307</b>	<b>\$ 578,716</b>	<b>\$ 28,408</b>	<b>5.16%</b>

<b><u>PERMANENT STAFFING (FTEs)</u></b>	<b>FY22 Actual</b>	<b>FY23 Actual</b>	<b>FY24 Actual</b>	<b>FY25 Budget</b>	<b>FY26 Request</b>
Position Titles:					
Finance Director/Accountant	1.0	1.0	1.0	1.0	1.0
Assistant Town Accountant	1.0	1.0	1.0	1.0	1.0
Finance and Budget Analyst	1.0	1.0	1.0	1.0	1.0
Payroll Manager	1.0	1.0	1.0	1.0	1.0
Accounts Payable Accountant	1.0	1.0	1.0	1.0	1.0
Accounting Specialist*	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>
<b>Total Number of Positions</b>	<b>5.5</b>	<b>5.5</b>	<b>5.5</b>	<b>5.5</b>	<b>5.5</b>

\* The Town administratively supports the West Suburban Veterans' District, which is a separate entity from the Town. The Town charges WSVD the equivalent of 1/2 position in lieu of an assessment for Accounting and Treasury services, use of the financial software, and other Town resources.

### Finance Department Operating Request

Org	Object	Account # 01-133 Account Title	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
<b>PERSONAL SERVICES</b>									
01133100	511010	Senior Administrator	\$ 170,808	\$ 180,692	\$ 173,619	\$ 174,921	\$ 191,366	\$ 16,445	9.40%
01133100	512490	Other Salaries ( Payroll Mgr)	81,061	40,189	81,420	\$ 94,142	\$ 96,025	\$ 1,883	2.00%
01133100	511220	Other Professionals	136,024	134,107	174,391	180,931	184,550	\$ 3,618	2.00%
01133100	511420	Other Professional Staff	63,421	61,409	65,769	69,364	71,674	\$ 2,311	3.33%
01133100	512290	Fill position at existing step	-	26,574	-	-	-	\$ -	0.00%
01133100	569555	Assessments	(34,000)	(34,850)	(34,850)	(36,244)	(36,244)	\$ -	0.00%
01133100	511370	Clerical	5,618	28,316	-	54,993	57,245	\$ 2,252	4.09%
01133100	511399	Retirement Administrator Dep	(1,236)	695	(0)			\$ -	0.00%
01133100	515050	Longevity		-	-			\$ -	0.00%
			<b>421,698</b>	<b>437,133</b>	<b>460,349</b>	<b>538,107</b>	<b>564,616</b>	<b>26,508</b>	<b>4.93%</b>
01133200	529050	Recycled Materials Disposal	-	-	-	-		\$ -	0.00%
01133200	530200	Accounting & Auditing Services	575	-	-	-		\$ -	0.00%
01133200	530500	Training & Development	60	-	4,794	4,500	5,750	\$ 1,250	27.78%
01133200	530900	Other Professional	-	-	642	-		\$ -	0.00%
01133200	534010	Postage	18	202	18	200	200	\$ -	0.00%
01133200	534020	Telephone	-	-	146	-	650	\$ 650	100.00%
01133200	534035	Advertising- General	-	-	-	200	200	\$ -	0.00%
01133200	542010	Office Supplies	1,561	1,990	1,659	2,500	2,500	\$ -	0.00%
01133200	549090	Food Supplies	-	193	-	-		\$ -	0.00%
01133200	571010	In-state travel (mileage)	51	188	-	800	800	\$ -	0.00%
01133200	571110	Conf/Meetings Administrators	-	1,823	2,304	3,000	3,000	\$ -	0.00%
01133200	573010	Dues-Administrators	790	603	440	1,000	1,000	\$ -	0.00%
01133200	578010	Approved Special Dept Exp	-	-				\$ -	0.00%
01133200	583120	Office Machines Rep	-	-				\$ -	0.00%
			<b>3,054</b>	<b>4,999</b>	<b>10,005</b>	<b>12,200</b>	<b>14,100</b>	<b>1,900</b>	<b>15.57%</b>
	570000	Other Charges & Expenses		-	10	-		\$ -	0.00%
			<b>\$ 424,752</b>	<b>\$ 442,131</b>	<b>\$ 470,354</b>	<b>\$ 550,307</b>	<b>\$ 578,716</b>	<b>28,408</b>	<b>5.16%</b>

Finance Department Operating Request						
Job Title Employee Name	FY25 Rate as of 6/30/2025	Group - Step	FY26 Rate as of 7/1/25		General Fund Budget	
Finance Director/Town Accountant M DiPietro	\$ 3,619.04	66	\$ 3,666.02		191,366	
Payroll Manager T Lamarre	\$ 1,803.49	56	\$ 1,839.56		96,025	
Assistant Finance Director T Moreau	\$ 1,858.49	56	\$ 1,895.66		98,953	
Finance & Budget Analyst P Manganaro	\$ 1,607.62	56	\$ 1,639.77		85,596	
Accounting Specialist WSVD S Wong	\$ 1,346.15	53	\$ 1,373.07		71,674	
WSVD Assessment Offset					(36,244)	
	\$ -		\$ -		-	
Clerical	\$ 1,064.70	49-2	\$ 1,096.64		57,245	
Human Resources article does not provide funding for management under contract				-	564,616	

<sup>1</sup> Water & Sewer enterprise funds are no longer assessed accounting charges for A/P , payroll processing, and financial statement preparation.

<sup>2</sup> Accounting Assistance for Veteran's District

\*Note: FY26 Salary is based on 52.2 weeks

Assumptions:

40 series increase	3.00%	1.0300
50,60 series increase	2.00%	1.0200
Pay weeks in FY26=	52.2	



## Town of *Wellesley*

### FY2026 Budget Request

### Treasurer/Collector Department: Mission, Services & Priorities

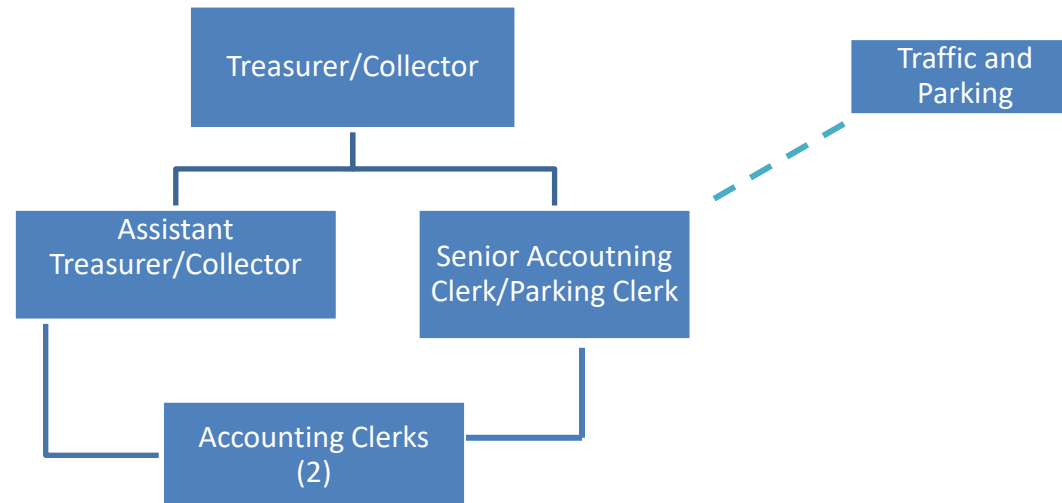
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#### Mission

The mission of the Treasurer/Collector's office to provide the highest level of customer service and support to all of the Town's constituencies (i.e., taxpayers, employees, retirees or vendors), as well as satisfy the legal requirements set forth in Massachusetts General Laws and the Town's bylaws.

#### Organization

The department is comprised of Five full-time (4.5 FTE) employees: the Treasurer/Collector, Assistant T/C, Sr. Accounting Clerk for Parking & Collections (funded half in this budget and half from Traffic & Parking), and 2.0 Accounting Clerks.



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The office of the Treasurer/Collector is responsible for all cash management activities of the Town. Activities include:

- Collecting all taxes and certain other bills due to the Town
- Accounting for and investing all available cash (excluding the Retirement System and OPEB)
- Disbursing all Town funds requested by Financial Services via the accounts payable and payroll processes.
- Maintaining all records for and properly disbursing the Town's various tax obligations; and administering all Town Trust Funds



The Treasurer/Collector administers the Town's employee group benefit programs (except retirement), including the following activities:

- Administering the group health insurance program, in conjunction with the Human Resources Department, assisting with the Budget preparation and payment of invoices
- Administering the Town's additional insurances programs, including Life Insurance, Dental Insurance, AFLAC and Eyemed in conjunction with Human Resources, assisting with the Budget preparation and payment of invoices
- Administering the Town's defined contribution plan; both the voluntary deferred compensation plan for benefit eligible employees and the mandatory plan for part-time, temporary, and seasonal employees not eligible to join the retirement plans.
- Administering the Town's Long Term Disability program in conjunction with the Human Resources Department, assisting with the Budget preparation and payment of invoices

The Treasurer/Collector is responsible for the debt management activities of the Town, including:

- Producing all documentation required for both short and long-term borrowing issues.
- Working with the finance team and rating agencies to maintain the Town's bond rating and dispersing all town debt payments.

Other responsibilities include:

- Administering the Town's self-insured Workers' Compensation program in conjunction with Human Resources
- Serving as backup to the Office of the Parking Clerk, and aiding with the supervision of the Town's parking enforcement function in conjunction with the Police Department

Coordinating all incoming and outgoing mail activities for Town Hall

### Prior Year Projects

Personnel changes happened again within the Department in FY25, having one of our Department Clerks give their notice, but we were lucky to find an excellent new hire quickly to fill this position with relevant experience, enthusiasm and has assimilated with ease. We had two rather significant changes in FY25 - adopting the prudent investor rule which will allow us to diversify our investment choices and realize higher gains on these investments, and the other big change was the outsourcing our real estate and personal property bills in the 2<sup>nd</sup> qtr of FY25 – taking the burden of printing, stuffing and mailing out approximately 9400 bills in house every quarter.

### Goals

Continue the effort of cross-training and succession planning. Preparing department manual for reference.

### Base Level Budget

This budget has increased primarily because we are outsourcing our real estate and personal property bill printing. We anticipate interest income will continue to decline in FY26 due to interest rate cuts and lower cash levels with the mostly complete large construction projects.



# Town of Wellesley

## FY2026 Budget Request

### Treasurer/Collector Department Operating Request

Department: 145

Department Head: Maura O'Connor, Treasurer /Collector

DEPARTMENT EXPENDITURES	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
Personal Services							
Permanent Employees	\$ 287,130	\$ 288,488	\$ 344,715	\$ 372,350	\$ 422,690	\$ 50,340	13.52%
Longevity/Temporary/Seasonal	9,056	-	-	19,000	19,000	\$ -	0.00%
<b>Subtotal, Personal Services Without Traffic &amp; Parking Reallocation</b>	<b>296,187</b>	<b>288,488</b>	<b>344,715</b>	<b>391,350</b>	<b>404,263</b>	<b>\$ 12,914</b>	<b>3.30%</b>
<b>Subtotal, Personal Services</b>	<b>296,187</b>	<b>288,488</b>	<b>344,715</b>	<b>391,350</b>	<b>441,690</b>	<b>50,340</b>	<b>12.86%</b>
Expenses	106,883	104,989	111,657	133,100	140,700	7,600	5.71%
Encumbered Expended	-	-	205	-	-	-	0.00%
<b>Subtotal, Expenses</b>	<b>106,883</b>	<b>104,989</b>	<b>111,862</b>	<b>133,100</b>	<b>140,700</b>	<b>7,600</b>	<b>5.71%</b>
<b>Total Without Traffic &amp; Parking Reallocation</b>	<b>\$ 403,070</b>	<b>\$ 393,477</b>	<b>\$ 456,372</b>	<b>\$ 524,450</b>	<b>\$ 544,963</b>	<b>\$ 20,514</b>	<b>3.91%</b>
<b>TOTAL TAX IMPACT</b>	<b>\$ 403,070</b>	<b>\$ 393,477</b>	<b>\$ 456,576</b>	<b>\$ 524,450</b>	<b>\$ 582,390</b>	<b>\$ 57,940</b>	<b>11.05%</b>

PERMANENT STAFFING (FTEs)	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request
Position Titles:					
Treasurer/Collector	1.0	1.0	1.0	1.0	1.0
Ass't. Treasurer/Collector	1.5	1.0	1.0	1.0	1.0
Sr. Accounting Clerk Parking & Collections	0.5	0.5	0.5	0.5	1.0
Accounting Clerks	1.5	2.0	2.0	2.0	2.0
Part-Time/Intern	0.0	0.0	0.0	0.0	0.0
<b>Total Number of Positions</b>	<b>4.5</b>	<b>4.5</b>	<b>4.5</b>	<b>4.5</b>	<b>5.0</b>

Treasurer/Collector Department Operating Request										
Org	Obj	Account # 01-145 Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
<b>PERSONAL SERVICES</b>										
01145100	511010	Senior Administrator	Treasurer/Collector	\$ 113,257	\$ 125,022	\$ 130,908	\$ 137,728	\$ 140,482	\$ 2,754	2.00%
01145100	511015	Senior Accounting Clerk	Senior Accounting Clerk/Parking Clerk - Starting in FY20 (50% paid by parking)	\$ 32,702	\$ 33,222	\$ 34,876	\$ 37,500	\$ 74,853	\$ 37,353	99.61%
01145100	511220	Other Professional Staff	Assistant Treasurer/Collector	76,644	76,153	84,370	84,208	85,893	\$ 1,684	2.00%
01145100	511370	Clerical	Full-Time Clerks	64,528	54,091	94,561	112,914	121,463	\$ 8,549	7.57%
01145100	512290	Part-time Help	Part-Time Clerk/Intern	9,056	-	-	19,000	19,000	\$ -	0.00%
01145100	515050	Longevity		-	-	-	-		\$ -	0.00%
			<b>PERSONAL SERVICES WITHOUT TRAFFIC AND PARKING REALLOCATION</b>	<b>\$ 296,187</b>	<b>\$ 288,488</b>	<b>\$ 344,715</b>	<b>\$ 391,350</b>	<b>\$ 404,263</b>	<b>\$ 12,914</b>	<b>3.30%</b>
			<b>PERSONAL SERVICES SUBTOTAL</b>	<b>\$ 296,187</b>	<b>\$ 288,488</b>	<b>\$ 344,715</b>	<b>\$ 391,350</b>	<b>\$ 441,690</b>	<b>\$ 50,340</b>	<b>12.86%</b>
<b>EXPENSES</b>										
01145200	524030	Equipment Maintenance	This covers the cost of maintenance for the Department's copier, typewriter and postal equipment.	2,308	-	1,829	3,000	2,000	\$ (1,000)	-33.33%
01145200	527030	Equipment Rental/Lease	Cover cost of postage system that was installed in FY05.	2,315	3,087	3,087	3,500	3,100	\$ (400)	-11.43%
01145200	530900	Other Professional Services	Banking services include lockbox, depository, custodial and checking services.	38,364	43,621	39,564	53,000	40,000	\$ (13,000)	-24.53%
01145200	534010	Postage	The postage budget for the Treasurer's Office covers postage costs for mailing real estate, personal property and motor vehicle excise bills and payroll and expense checks, W-2 and 1099 forms, miscellaneous billings plus all departmental correspondence. The Treasurer's Office oversees the processing of outgoing mail from the Town Hall. Of the approx. 77,000 (exclusive of tax bills which are mailed by MLP but paid for out of this budget) pieces of mail processed annually, this budget covers the department's 31,000 pieces while the 46,000 other pieces are charged back to various departments.	43,375	23,054	27,452	48,000	26,000	\$ (22,000)	-45.83%
01145200	534011	Land Use Postage		-	15,000	10,787	-	-	\$ -	0.00%
01145200	534030	Advertising - General	Notification to the public that tax bills have been mailed and legal advertisement for tax takings.	113	-	-	700	-	\$ (700)	-100.00%

Treasurer/Collector Department Operating Request										
Org	Obj	Account # 01-145 Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
01145200	534040	Printing & Mailing Expense	The printing/mailling budget for the Treasurer's Office covers the cost of printing the stock forms for real estate, personal property, excise bills, W-2's, 1099's and the check stock for payroll and expense checks. In addition, envelopes for mailing all the above items are purchased from this account. Tax billing is contracted to the MLP through their Pitney Bowes equipment.	4,591	4,084	8,275	5,500	50,000	\$ 44,500	809.09%
01145200	542010	Office Supplies	Standard office supplies plus supplies for personal copier, LaserJet and mail machine. Annual Quickbooks subscription.	5,784	5,650	9,054	6,800	7,200	\$ 400	5.88%
01145200	571110	Conf. Meetings - Administrators	The Treasurer attends meetings of the Mass. Govt. Finance Officers Assoc. and the Mass Collector/Treasurer Assoc. This also covers the cost of attending the annual MMA Meeting in Boston.	60	861	1,270	1,200	1,200	\$ -	0.00%
01145200	572110	Conf/Mtgs - Administrators	The Treasurer & Asst. Treasurer attends the annual MCTA Conference.	955	1,983	2,069	2,000	2,300	\$ 300	15.00%
01145200	573010	Dues - Administrators	Treasurer and Asst. Treasurer belong to Mass. Collectors & Treasurers Assoc. and the Treasurer belongs to the Mass. Government Finance Officers Assoc. & Government Finance Officers Assoc. of U.S. & Canada.	530	295	604	400	400	\$ -	0.00%
01145200	574120	Public Employee Bond	M.G.L.'s require that the Treasurer/Collector and both Assistant maintain bonds each and that the Town's Deputy Collector be bonded.	3,345	2,496	2,182	4,000	2,500	\$ (1,500)	-37.50%
01145200	578035	Over/Short	Deposit Over/Short						\$ -	0.00%
01145200	569998	Check Error/Bank Fees		-	-				\$ -	0.00%
01145200	569999	IRS Penalties	Charges for tax payment errors						\$ -	0.00%
01145200	583090	Other Equipment		798	-				\$ -	0.00%
01145200	595540	Tax Title Costs	Tax Taking costs, including attorney and filing.	4,134	4,860	5,483	5,000	6,000	\$ 1,000	20.00%
01145200	599999	Unapprop/Unassigned		212	-				\$ -	0.00%
			<b>EXPENSES SUBTOTAL</b>	<b>106,883</b>	<b>104,989</b>	<b>111,657</b>	<b>133,100</b>	<b>140,700</b>	<b>\$ 7,600</b>	<b>5.71%</b>
		570000 Other Charges & Expenses	Encumbered expenses from prior fiscal year	-	-	205			\$ -	0.00%
			<b>DEPARTMENT TOTAL WITHOUT TRAFFIC AND PARKING REALLOCATION</b>	<b>403,070</b>	<b>393,477</b>	<b>456,372</b>	<b>524,450</b>	<b>544,963</b>	<b>\$ 20,514</b>	<b>3.91%</b>
			<b>DEPARTMENT TOTAL</b>	<b>\$ 403,070</b>	<b>\$ 393,477</b>	<b>\$ 456,576</b>	<b>\$ 524,450</b>	<b>\$ 582,390</b>	<b>57,940</b>	<b>11.05%</b>

Treasurer/Collector Department Operating Request								
Job Title Employee Name	FY25 Rate as of 6/30/25	FY26 RATE REQUEST						
		Group - Step	Hrs/Week	FY26 Starting Rate 7/1/2025	Adjustment Date	Group - Step	Step adjustment Rate	Total Budget Request
Treasurer/Collector Maura O'Connor	\$ 2,638.45	63	35	\$ 2,691.22				140,482
Assistant Treasurer/Collector Greg Copeland	\$ 1,613.19	56	35	\$ 1,645.45				85,893
Senior Accounting Clerk Parking & Collections (50%) Kathryn Rumsey	\$ 702.92	52	17.5	\$ 716.98				37,426
Senior Accounting Clerk Parking & Collections (50%) <b>Reinstated from Traffic and Parking FY26</b>	\$ 702.92	52	17.5	\$ 716.98				37,426
Accounting Clerk Barbara Jeannie Koushouris	\$ 36.29	49-6	30	\$ 37.38				58,535
Accounting Clerk Dorothy Beattie	\$ 33.44	47-6	35	\$ 1,205.51				62,928
Part-time/Intern - Vacant	\$ 25.00	DGEN						19,000
								<b>\$ 441,690</b>
*Note: FY26 Salary is based on a 52.2 week year.								

Assumptions:

40 series increase	3.00%	1.0300
50,60 series increase	2.00%	1.0200
Pay weeks in FY26 =		52.2



## Town of *Wellesley*

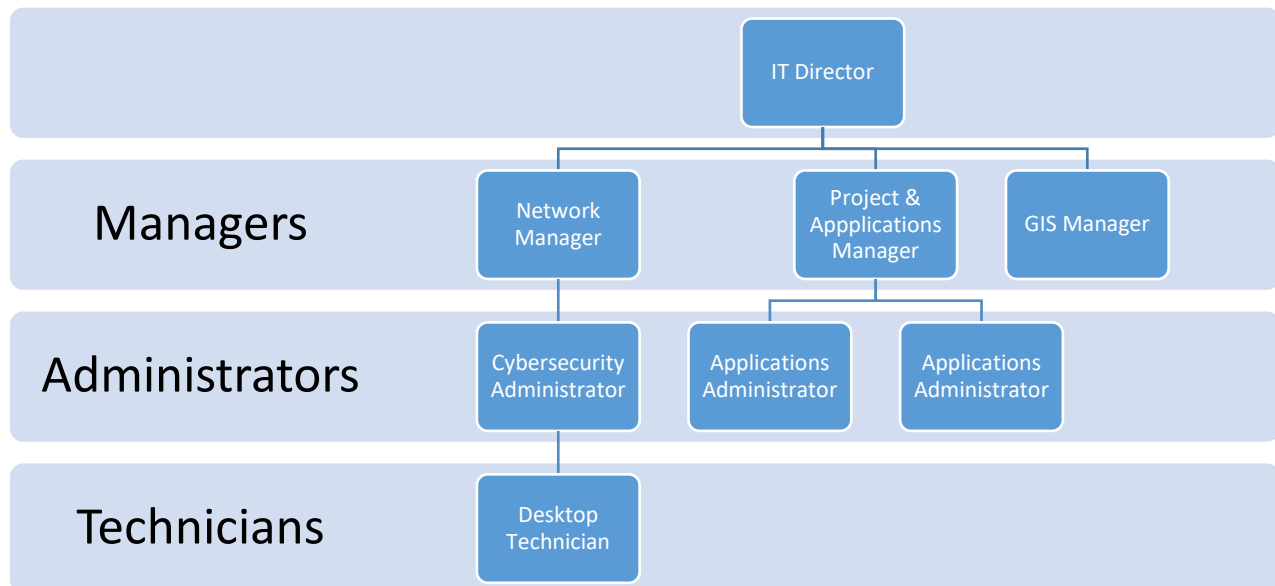
### FY2026 Budget Request

### Information Technology: Mission, Services & Priorities

#### Mission

The Information Technology Department enables Town managers to make informed decisions, reduce costs, and create operational efficiencies in their efforts to serve Wellesley's residents. We achieve this mission by maintaining a secure and reliable high-speed campus network; installing and troubleshooting computers and related equipment; administering enterprise applications; and by providing excellent customer service to Town Government staff and elected/appointed officials.

The Department is staffed by a team of 8 full-time technology and customer service professionals who possess a deep understanding of municipal operations and expertise in networking, cybersecurity, database management, and Geographic Information Systems (GIS). This team is led by the IT Director, who is principal staff to the Executive Director of General Government Services. Three managers are supported by three administrators and one technician, as shown in the organizational chart below:



Like most organizations in the public and private sector, Wellesley's Town Government has become increasingly dependent on technology. Funds requested in this FY26 budget submission will provide for a wide array of application and database services that support core municipal functions like...

- Finance / accounting
- CAMA / assessing
- Payroll / HR
- Tax billing
- Asset management
- Utility metering / billing
- Document management
- Reporting / analytics
- GIS / CAD
- Building automation
- Program registration
- Permitting / licensing



## Town of *Wellesley*

### FY2026 Budget Request

#### Information Technology: Mission, Services & Priorities

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Funds will also provide for resilient data center and communication services like...

- Firewalls and web filters
- Switching and routing
- Backup and disaster recovery
- Multifactor authentication
- Virtualized servers
- Remote access
- Wi-Fi
- Endpoint protection
- Email
- Phones
- Town website
- Virtual meetings

Any interruption in these technology services caused by equipment failures, network outages, or cybersecurity incidents could have serious consequences for the Town's finances or service delivery to residents and could result in deterioration in public relations and confidence.

The FY26 operating budget submitted for the IT Department is a **level services** budget with an appropriate level of funding for the Department to maintain a secure and reliable suite of information technology resources. The Department is requesting an increase of \$25,023 in Personal Services, which is **2.95%** over FY25 and within the 3% guideline established by the Select Board. The Department is also requesting an increase of \$64,990 in Expenses, which is also within the 8% guideline established by the Select Board. Increases in specific expense accounts are driven by rising software subscription, support, and maintenance fees for applications and cybersecurity services --- most of which increase somewhere between 5-12% year-over-year.

In total, the FY26 operating budget requested for the IT Department is **\$1,763,606**, which is **5.38%** over FY25 levels.



# Town of *Wellesley*

## FY2026 Budget Request

### Information Technology Department Operating Request

Fund - 01  
 Department: 155  
 Department Head: Brian DuPont, IT Director

#### DEPARTMENT EXPENDITURES

	<u>FY22 Actual</u>	<u>FY23 Actual</u>	<u>FY24 Actual</u>	<u>FY25 Budget</u>	<u>FY26 Request</u>	<u>\$ Variance FY25-26</u>	<u>% Variance FY25-26</u>
Personal Services							
Full Time	\$ 670,699	\$ 620,647	\$ 670,423	\$ 848,952	\$ 874,005	\$ 25,053	2.95%
Part Time	-	-	-	-	-	\$ -	0.00%
<b>Subtotal, Personal Services</b>	<b>670,699</b>	<b>620,647</b>	<b>670,423</b>	<b>848,952</b>	<b>874,005</b>	<b>25,053</b>	<b>2.95%</b>
Expenses	598,512	607,638	610,038	824,610	889,600	\$ 64,990	7.88%
Encumbrances	-	-	115,920	-	-	\$ -	0.00%
<b>Subtotal, Expenses</b>	<b>598,512</b>	<b>607,638</b>	<b>725,959</b>	<b>824,610</b>	<b>889,600</b>	<b>64,990</b>	<b>7.88%</b>
 <b>TOTAL</b>	 <b>\$ 1,269,211</b>	 <b>\$ 1,228,285</b>	 <b>\$ 1,396,382</b>	 <b>\$ 1,673,562</b>	 <b>\$ 1,763,605</b>	 <b>\$ 90,043</b>	 <b>5.38%</b>

#### PERMANENT STAFFING (FTEs)

	<u>FY22 Actual</u>	<u>FY23 Actual</u>	<u>FY24 Actual</u>	<u>FY25 Budget</u>	<u>FY26 Request</u>
Position Titles:					
Director	1.0	1.0	1.0	1.0	1.0
Managers	3.0	3.0	3.0	3.0	3.0
Administrators	3.0	3.0	3.0	3.0	3.0
Technicians	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>	<u>1.0</u>
<b>Total Number of Positions</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>	<b>8.0</b>



**Information Technology Department Operating Request**

Org	Object	Account # 01-155 Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
<b>PERSONAL SERVICES</b>										
01155100	511010	Senior Administrator	IT Director	\$ 118,911	\$ 122,538	\$ 133,614	\$ 141,193	\$ 144,017	\$ 2,824	2.00%
			3 Managers (Project & Apps., Network & Cyber, & GIS); 3 Administrators (Cybersecurity, Applications x2), 1 Technician (Desktop)							
01155100	511220	Other Professionals		551,788	498,109	536,809	707,759	729,988	\$ 22,229	3.14%
			<b>PERSONAL SERVICES SUBTOTAL</b>	<b>670,699</b>	<b>620,647</b>	<b>670,423</b>	<b>848,952</b>	<b>874,005</b>	<b>\$ 25,053</b>	<b>2.95%</b>
<b>EXPENSES</b>										
01155200	524030	Equipment Maintenance	Annual support/maintenance contracts for servers, switches, and Town Hall AV equipment.	32,274	5,108	3,978	30,000	35,000	\$ 5,000	16.67%
01155200	530400	Information Technology Services	Provides for outside application development and professional services for special projects.	7,949	954	5,200	8,000	8,000	\$ -	0.00%
01155200	530405	Cybersecurity	For hardware, software, and services specifically related to cybersecurity systems. Some items budgeted here were previously budgeted under Equipment Maintenance or Computer Software Services.	-	17,174	93,774	185,000	190,000	\$ 5,000	2.70%
01155200	530500	Training & Development	For professional development and continuing education of IT staff.	3,960	-	3,869	2,500	2,500	\$ -	0.00%
01155200	530800	Computer Software Services (Tyler)	Annual support/maintenance contracts for all Tyler Enterprise ERP modules (formerly, MUNIS).	189,259	198,176	220,640	244,760	253,294	\$ 8,534	3.49%
01155200	530800	Computer Software Services (Other)	Annual subscription, support, and maintenance contracts for all other enterprise applications (e.g. Office365, GIS, VMWare, Citrix, CivicPlus/website, OpenGov, GovOS, Kronos, Zoom).	238,612	237,964	197,555	250,250	288,706	\$ 38,456	15.37%
01155200	534010	Postage	Mail	-	1	-	100	100	\$ -	0.00%
01155200	534020	Telephone	Provides for phone lines for all extensions on the Town's VoIP system. Also provides for high-speed internet access for all PCs on the Town's network, cell phones for staff of the IT Dept., and Comcast / Verizon phone lines for Town buildings.	32,945	33,187	30,967	35,000	38,000	\$ 3,000	8.57%
01155200	534035	Advertising		390	-	-	-		\$ -	0.00%
01155200	534090	Other Communications	Maintenance/usage fees and supplies for the Town's fiber optic data and phone networks.	2,365	2,399	2,260	8,000	8,000	\$ -	0.00%
01155200	542040	Paper & Stationary	Paper and other supplies for the GIS Office's wide-format printer.	-	137	500	500	500	\$ -	0.00%
01155200	542090	Other General Supplies	Print cartridges, office supplies, and other technology accessories.	2,361	2,687	2,674	4,000	4,000	\$ -	0.00%
01155200	553060	Computer Supplies	For scheduled maintenance, upgrades, and replacement of over 300 laptops and desktop computers on the Town's network.	37,160	46,005	48,455	55,000	60,000	\$ 5,000	9.09%
01155200	571010	Travel - Mileage	Reimburse staff for use of personal vehicles as needed.	18	-	165	500	500	\$ -	0.00%
01155200	571120	Conf/Mtgs - Professional & Administration Staff	Registration, travel, and accommodations for IT/GIS conferences (e.g. MMA Annual Conference, NortheastArc User Group, MUNIS / Tyler Connect).	30	290	-	1,000	1,000	\$ -	0.00%
01155200	573020	Dues - Professional Staff	Dues for IT/GIS professional organizations.	-	-	-	-		\$ -	0.00%
			<b>EXPENSES SUBTOTAL</b>	<b>547,323</b>	<b>544,082</b>	<b>610,038</b>	<b>824,610</b>	<b>889,600</b>	<b>64,990</b>	<b>7.88%</b>
	570000	Other Charges & Expenses	Encumbered expenses (invoices received/paid in the following fiscal year)	51,189	63,556	115,920	-			
			<b>EXPENSES TOTAL</b>	<b>598,512</b>	<b>607,638</b>	<b>725,959</b>	<b>824,610</b>	<b>889,600</b>	<b>64,990</b>	<b>7.88%</b>
			<b>DEPARTMENT TOTAL</b>	<b>1,269,211</b>	<b>1,228,285</b>	<b>1,396,382</b>	<b>1,673,562</b>	<b>1,763,605</b>	<b>90,043</b>	<b>5.38%</b>

Information Technology Department Operating Request				
Job Title Employee Name	FY26 RATE REQUEST*			
	FY25 Rate as of 6/30/2025	Group - Step	FY26 Starting Rate 7/1/2025	Total Budget Request
Director Brian DuPont	\$ 2,704.84	61	\$ 2,758.94	144,017
Project & Apps. Manager Suzanne Newark	\$ 2,202.52	58	\$ 2,246.57	117,271
Network & Cyber. Manager Vernon Ng	\$ 2,345.36	58	\$ 2,392.27	124,876
GIS Manager Mike Thompson	\$ 2,166.66	57	\$ 2,209.99	115,362
Applications Administrator <b>vacant</b>	\$ 1,750.00	55	\$ 1,785.00	93,177
Applications Administrator John Morse	\$ 1,821.06	55	\$ 1,857.48	96,961
Cybersecurity Administrator Alfredo Rodriguez	\$ 1,800.65	56	\$ 1,836.66	95,874
Desktop Technician Conor Mahoney	\$ 1,623.99	54	\$ 1,656.47	86,468
Temporary Help				
			<b>Total Salary \$</b>	<b>874,005</b>

\*Note: FY26 Salary is based on 52.2 weeks

Assumptions:	40 series increase	3.00%	1.030
	50,60 series increase	2.00%	1.020
	Pay weeks in FY26 =	52.2	



# Town of *Wellesley*

## FY2026 Budget Request

### Town Report Operating Request

Department: 195

Department Head: Meghan Jop, Executive Director

Org	Object	Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
01195200	534040	Town Report	For printing the Town Report and mailing copies to Town Meeting members.	\$ 1,417	\$ 2,031	\$ 1,922	\$ 2,250	\$ 2,250	\$ -	0.00%



# Town of *Wellesley*

## FY2026 Budget Request

### Central Administrative Services Operating Request

Department: 199

Department Head: Meghan Jop, Executive Director

Org	Object	Account Title	Explanation	FY22 Actual	FY23 Actual	FY24 Actual	FY25 Budget	FY26 Request	\$ Variance FY25-26	% Variance FY25-26
01199200	523010	Water		1,910	1,490	1,529	1,000	1,100	100	10.00%
01199200	524030	Equipment Maintenance Contracts	Maintenance for 2 copiers	4,987	4,624	1,132	9,000	9,000	-	0.00%
01199200	534020	Telephone Usage	Telephone & Cell Phone monthly charges.			-	-		-	0.00%
01199200	534025	Telephone Repairs				-	-		-	0.00%
01199200	542010	Office Supplies	Centralized Office Supply Account for all of Townhall - administered by Treasurers Office	752	-	1,879	2,000	2,000	-	0.00%
01199200	542020	Copier Supplies	Centralized paper for all Town Hall copiers, printers & faxes.	2,841	4,117	6,285	2,500	2,500	-	0.00%
01199200	542090	Other Supplies/Copy Charges	Beginning FY2011 Copy charges will not be charged back to departments.			-			-	0.00%
011998xx	570000	Other Charges & Expenses	Encumbered expenses from prior fiscal year			2,800			-	0.00%
<b>Total Expenses</b>				<b>\$ 10,491</b>	<b>\$ 10,231</b>	<b>\$ 13,625</b>	<b>\$ 14,500</b>	<b>\$ 14,600</b>	<b>100</b>	<b>0.69%</b>