SELECTMEN’S MEETING
TENTATIVE AGENDA
Town Hall – Juliani Room
6:30 P.M. Tuesday, January 22, 2019

1. 6:30 Call to Order – Open Session
2. 6:32 Citizen Speak
3. 6:35 Town Hall Visioning Project – Presentation of the Report
4. 7:35 Joint Meeting with Planning Board
   • Review MassHousing Eligibility Letter: 3 Burke Lane
5. 7:55 Update on the Status of the Wellesley Office Park Proposal
6. 8:20 Review 2019 Annual Town Meeting Warrant
7. 8:40 Discuss FY20 Budget
8. 9:00 Executive Director’s Report
9. 9:05 New Business and Correspondence

Please see the Board of Selectmen’s Public Comment Policy

Next Meeting Dates:  Monday, January 28, 2019 7:00 pm – Juliani Room
                Monday, February 4, 2019 7:00 pm – Juliani Room
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<th>Date</th>
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| 1/28       | **Meeting**  
Execute ATM Warrant  
Wellesley Office Park - Continued Public Hearing  
Adopt Unified Plan  
Discuss Amending Alcohol regulations - Intent to Dine |                     |
| 2/4        | **Meeting**  
David Kornwitz - Overview of Pension Fund  
Appoint Two Firefighters  
Appoint Historical Commission Members  
Approve Summer Hall Hours  
Discuss FY20 Budget |                     |
| 2/11       | **Meeting**  
Boston Post Cane  
MLP Appointment |                     |
| 2/18       | President’s Day – Town Hall Closed |                     |
| 2/19       | No Meeting |                     |
| 2/25       | **Meeting**  
Appoint Firefighters |                     |
<p>| 3/4        | No Meeting - Wellesley Club |                     |
| 3/5        | <strong>Meeting</strong> |                     |
| 3/11       | <strong>Meeting</strong> |                     |
| 3/18       | <strong>Meeting</strong> |                     |
| 3/25       | Start of ATM |                     |
| 3/26       | ATM |                     |
| 4/1        | ATM |                     |
| 4/2        | ATM |                     |
| 4/8        | ATM |                     |
| 4/9        | ATM |                     |
| 4/15       | NO ATM – School Vacation |                     |
| 4/16       | NO ATM – School Vacation |                     |</p>
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**Notes**

Quarterly updates

- Traffic Committee (Deputy Chief Pilecki)
- Facilities Maintenance (Joe McDonough)
- Wellesley Club Dates 10/1/18, 11/5/18, 1/7/19, 3/4/19
3. **MOVE** to accept the Town Hall Visioning Group Feasibility Report.

4. **MOVE** to convene a Joint meeting with the Planning Board.

   **MOVE** to elect Jack Morgan as chair of the joint meeting.

   **MOVE** to elect Catherine Johnson as secretary of the joint meeting.

   **MOVE** to approve the letter to MassHousing regarding the Town’s comments on the proposed 40B development at 2 & 3 Burke Lane and authorize the Chair of the Board of Selectmen to make final edits to the letter prior to submission.

   **MOVE** to dissolve the joint meeting of the Board of Selectmen and Planning Board.
Our meeting will begin on Tuesday at 6:30 in the Juliani Room.

1. **Call to Order – Open Session**

   - Announcements
2. **Citizen Speak**
Below are various activities of our office and various departments that I would like to bring to your attention.

- Included in your packet is a copy of a report regarding Social Services and Mental Health Services in Wellesley. This has been a process throughout the fall to pull together in one place information about these services, how they are provided and by whom in Wellesley, the issues that our departments face, and recommendations for FY20 and beyond. The case studies at the end are particularly useful to describe in real terms what these services mean to our residents and what we do to assist them. I’ve enjoyed the opportunity to collaborate with all of the departments on this topic and we hope that it is useful for everyone. We wanted to get it to you and to Advisory prior to next week when they take up the BOH budget, and others after that.

- The work required on the Town Hall roof and gables has resulted in a fair amount of dust and debris impacting our work on the 3rd floor. In response the contractor came up with a plan to hang plastic sheeting over the entire 3rd floor above the desks except for my office and Sheryl’s. While it has been effective on our workspaces below, it is blocking the sprinkler heads up above so it will likely need to be modified. Needless to say the outdoor work continues to be noisy and dusty.

- Sheryl and I had a meeting at the request of HR this week regarding the law that goes into effect on February 1st that will make all municipalities in Massachusetts subject to
the Federal OSHA law requirements. HR is recommending that Jen Glover, who currently works 19-hours week be responsible for the additional work that this will require. In order to do so they would like to increase her hours by six to 25 to coordinate the Town’s responsibilities. This would result in approximately $10,000 in salary costs as well as the $20,000 contribution we budget for benefits for any newly benefited position. We believe that there are sufficient funds in the worker's comp fund to absorb these costs, but we are still analyzing that. Information about the additional duties is included for your information.

- Sheryl and Rachel have been spending a fair amount of time assisting the MLP with the implementation of their internet services to commercial customers to set up the accounting and make needed adjustments. Dick Joyce reached out to me to express his appreciation for all of their work and how well it is going.
- Included in your packet is an email from Sheryl regarding the Town’s reported liability on compensated absences, along with a report from our financial statements. A question about the liability was asked during the budget process.
- Just a reminder that the MLK Breakfast on Monday is at MassBay Community College this year, and it starts at 8:00 AM.
- The DPW engineering division has been working with the owner of the wall at 81 Prospect Street that is on town property. We will likely be bringing a plan to you for review as the removal is not as straightforward as it might seem and we want to make sure all are in agreement.
Proposal to Increase Workers Comp Coordinator Hours

New Law

Beginning February 1, 2019, public employers shall provide public employees at least the level of protection provided under the federal Occupational Safety and Health Act of 1970, 29 U.S.C. 651 et. seq., including standards and provisions of the general duty clause contained in 29 U.S.C. 654.

(a) Each employer --

(1) shall furnish to each of his employees employment and a place of employment which are free from recognized hazards that are causing or are likely to cause death or serious physical harm to his employees;

(2) shall comply with occupational safety and health standards promulgated under this Act.

(b) Each employee shall comply with occupational safety and health standards and all rules, regulations, and orders issued pursuant to this Act which are applicable to his own actions and conduct.

The law requires all public sector employers to implement methods of reducing work-related injury and illness that meet the minimum requirements provided under OSHA. Failure to meet these requirements can result in fines imposed on the town. Fines can run up to $1,000 per violation.

There has been no one in the town who has stepped up to take ownership of this. The WC Coordinator would be the natural person taking the lead on these new responsibilities.

New Responsibilities

1. Reporting to Department of Labor Standards (DLS) within 24 hours of incident any fatality, loss of eye, amputation, or inpatient hospitalization. Report via email or phone.

2. Coordinate any inspections (voluntary or involuntary) performed by DLS. DLS prioritizes inspections in the following order. For all except “Imminent” inspections, DLS makes an appointment with the public sector employer.

- High Hazard Activity (Imminent Danger) – WSHP staff will stop at trench excavations, aerial lift operations, and roofing activities to ensure that public sector workers have adequate cave-in protection and fall protection to prevent injury.

- Accident Investigation – a safety inspection may be conducted after a work-related amputation, burn, electric shock, fall, fracture, or other preventable incident.

- Complaint – WSHP responds to employee complaints about safety conditions, although these do not always result in an inspection.

- Voluntary Inspection – a municipality can proactively request a voluntary safety inspection as a learning tool to identify and correct hazards in the workplace. The WC Coordinator would schedule these.

- Random Inspection – throughout the year, WSHP conducts safety inspections at random municipal departments such as public works, water and sewer, municipal light plants, airports, and schools. The WC Coordinator would be point of contact.

At the conclusion of the inspection, the DLS representative will conduct a closing conference to discuss observations, with the WC Coordinator present.
A written report will be sent to the department management and WC Coordinator. The written report will contain a corrective action due date. Extensions for the corrective action may be requested if the employer can show diligent progress toward correction. The WC Coordinator would be responsible for follow up on all corrective action and communicate with the DLS.

3. Keep OSHA 300 log to have available if requested by DLS or Bureau of Labor Statistics.
   - Identify the employee involved unless it is a privacy concern case.
   - Identify when and where the case occurred. Also describe the case, as specifically as you can.
   - Classify the seriousness of the case by recording the most serious outcome associated with the case, with column G (Death) being the most serious and column J (Other recordable cases) being the least serious.
   - Enter the number of days the injured or ill worker was away from work or was on job transfer or restricted work activity.
   - Identify whether the case is an injury or illness. If the case is an injury, check the injury category. If the case is an illness, check the appropriate illness category.

4. Form and coordinate a separate town-wide Safety & Health Committee. This committee would be made up of designated management and staff across all departments in the town & schools (Building, DPW, FMD, Selectmen, Library, Schools, COA, Warren, Fire, and labor unions). The committee would meet one time per month, roughly one to three hours. Prep and follow up would constitute roughly three to four hours.
   - Analyze data – review all incident reports, look at patterns or unusual injuries.
   - Identify areas of highest risk – look for root cause, work on increasing safety and awareness in these areas.
   - Control risk – establish written safety procedures for department tasks, implement equipment inspections and maintenance schedule, provide new hire and annual training.
   - Employer led accident investigations
   - Promote a safety culture throughout entire town/schools
   - Foster cross department collaboration and improve outcomes
   - Conduct random self-audits – once per month make surprise visit to building/department. Using a checklist, review areas for hazards or potential risks. Identify and meet with department to make any improvements.

5. Receive and provide education to safety committee and employees. Coordinate trainings and programs to prevent work-related injuries and illnesses. Trainings could run several hours, roughly once per month or more. The Department of Industrial Accidents, Office of Safety awards up to $25,000 to organizations to fund workplace safety training. Grants are applied for.

Additional hours requested

An additional day in the office would allow the WC Coordinator be onsite to perform the work listed above. The total hours per week would increase from 19 to 25 hours (5 hours Monday-Friday). The cost in salary would be an additional $191.52 per week (6 hours), or $9,959.04 annually.
3. **Town Hall Visioning Project – Presentation of the Report**

   Included in your packet is both the Executive Summary and a PowerPoint presentation which is a result of the year-long feasibility study led by the Town Hall Visioning Group to analyze the renovation of the interior of Town Hall. Members of the Committee will be joined at the meeting by Joe McDonough and Kevin Kennedy of FMD, as well as Wendall Kalsow and Ryan Foster from MKA Associates. The full report is quite lengthy, which is why it is not included in your packet, but we’d be happy to get you copies either electronically or paper.

   As you know, funds are being carried in the FY20 cash capital budget to study the feasibility of a Town Hall Annex building to be constructed on Municipal Way, which is one of the recommendations of this group.

**MOVE** to accept the Town Hall Visioning Group Feasibility Report.
Wellesley Town Hall
Visioning and Space Utilization Study
Acknowledgements

Town Hall Visioning Group
Brian DuPont, IT Director
Marjorie Freiman, Selectman
Steve Gagosian, Design and Construction Manager
Kevin Kennedy, FMD Project Manager
Joe McDonough Director of Facilities
Blythe Robinson, Executive Director

Boards and Commissions
Board of Selectmen
Natural Resources Commission
Historical Commission

Additional Thanks
Stephanie Hawkinson, Communications & Project Manager
Michael Grant, Inspector of Buildings
All Town Hall Department Heads and Staff
Town Hall Visioning and Space Utilization Study
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1. Executive Summary
1. EXECUTIVE SUMMARY

In November of 2017 the Town of Wellesley initiated the process of selecting an architectural firm to re-envision the use of the historic Wellesley Town Hall for the 21st century. McGinley Kalsow and Associates Inc. (MKA), an historic preservation firm, was chosen to conduct the Wellesley Town Hall Visioning and Space Utilization Feasibility Study.

Construction of the building began with the Library (the eastern portion of the present Town Hall) in 1881. Following its completion, construction of the Town Hall (the western portion) commenced and was completed in 1886. The completed building and surrounding park land were given to the Town of Wellesley by Horatio Hunnewell in 1887 and is today considered to be the most significant historic building in Wellesley.

We have not found any specific written records from Henry Sargent Hunnewell and George Robert Shaw concerning their intent in designing the Richardsonian Romanesque styled Town Hall. Available sources describe both architects as having been influenced by overseas trips to Europe, which is reflected in the building’s French-influenced design. The Town Hall’s pedestal-like location on the top of a hill within a park setting also reflects Hunnewell’s efforts to model the site after similar landscapes designed by Frederick Law Olmsted and Charles Sprague Sargent. The result is a “crown jewel” Town Hall with major views from Washington Street to the south and from the east and west as one approaches the building. The intent behind and success of creating this “monument on top of a hill” makes any addition extremely challenging and carries great risk of detracting from the historic Town Hall.

Many deficiencies were noted in the Town’s Visioning Request for Proposal (RFP) ranging from high humidity levels throughout the Lower Level, to space program deficiencies and visitor experience/way-finding issues.

The 2017 exterior building assessment conducted by MKA identified significant building envelope issues which are being corrected by the 2-year repair and restoration project currently underway. This needed project triggered the correction of fourteen (14) accessibility issues and the need for three “permanent” variances and twelve (12) Time Variances from the Massachusetts Architectural Access Board (MAAB).

The Visioning Study included a comprehensive review of the building’s architectural, structural, mechanical, electrical, plumbing, and fire protection (MEP & FP) systems as well as an inventory of existing space usage. Interviews with personnel from each department in the building were also conducted. Over the last thirty-three years since the 1985 renovation, departments have increased in both staff size and responsibilities, but their space has remained
unchanged. In addition, there is a need to accommodate projected staff increases of six personnel within the present Town Hall departments, and one position at the Facilities Management Department (FMD) which is being considered to be moved from leased office space to permanent Town-owned space. There is also a clear need for additional meeting spaces for municipal and public use. With various MEP deficiencies, these systems are reaching the end of their service life. Because of their age and the need for significant interior use changes, our recommendation is to replace these systems with new, more reliable and energy-efficient systems. There is also a strong need to improve the visitor experience through improvements to way-finding, circulation, and the restoration of some of the lost character-defining elements.

The existing Town Hall has approximately 26,000 Gross Square Feet (GSF). To correct the existing deficiencies without any program improvements, 6,500 GSF would need to be added to the building’s size. To include the proposed program improvements, an additional 2,800 GSF would be added, and to include the FMD another 4,200 GSF would need to be added to the current building.

The need for additional building area became very clear; however, it also became clear that an addition to the historic Town Hall was not a viable solution for the following reasons:

1. Town Hall is situated within Hunnewell Park. State Law, Article 97, restricts the use of park land for non-park purposes without an onerous process which includes a required 2/3 approval from both Town Meeting and the State Legislature.

2. Aside from the impact of any building addition, the required parking would present a significant issue under both Article 97 and Wellesley zoning requirements.

3. After meeting with the Wellesley Historical Commission (WHC), it became clear that any proposed addition to the Town Hall would be controversial and would need to be designed as a contemporary “landmark”.

4. The cost impact of a contemporary “landmark” addition to the historic Town Hall would be dramatically higher than a comparably sized new “Annex” constructed at another site in Wellesley.

An addition would disrupt the architectural design which was contemplated as a finite design to be viewed from all sides on a pedestal-like setting.

In looking at the challenges and obstacles associated with building an addition to the historic Town Hall, the advantages of a more conventional municipal Annex building outweighed the advantages of an addition. See page 37 of this report for the detailed matrix comparing an addition to an “Annex.”
In reviewing how to address space program needs and best use the existing area within the historic Town Hall the decision was made to propose relocation of the Land Use Departments which currently occupies the Ground Floor along with FMD into a new “Annex” building. If this “Annex” building was to be constructed prior to the renovation and restoration of the historic Town Hall and FMD remained in its leased space, the Annex could also be used as the temporary Town Hall during the restoration of the Town Hall. This sequencing would eliminate the need and cost of leasing and fitting-out office space for the approximately twenty-four-month construction period. Please see the following bar chart schedule for the proposed sequence and key dates:

(To view this schedule at a larger scale, please see page 53.)

It is very important to remember that the MAAB Time Variance extends “three years beginning with the date of Substantial Completion of the current Phase 1 EXTERIOR REPAIRS.” By showing a good faith effort to comply with the MAAB decision it is possible to receive an extension of the Time Variance. The MAAB also has the authority to fine the Town of Wellesley up to $1,000 per day per violation of non-compliance (twelve Time Variances were granted). Occupying the fully compliant “Annex” as the temporary Town Hall would bring the Town into compliance. Since the Town Hall will be vacated during renovations, October 2022 (3 years from anticipated Substantial Completion of Phase 1) is the critical MAAB date. If the Town elects not to undertake a comprehensive renovation and restoration of the Town Hall, the Town is required to correct the twelve Time Variances, at a cost of between 2 and 3 million dollars. These MAAB items can be seamlessly incorporated as part of a comprehensive renovation and restoration, thereby providing much more value/benefit to the Town.

The following Total Project Cost estimates were developed for the Town Hall Annex and Town Hall Renovation, and include escalation costs:

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2. Historic Background
2. HISTORICAL BACKGROUND

Built in two phases from 1881 to 1886, Wellesley Town Hall was the first municipal building for the Town of Wellesley after it was incorporated in 1881. The building, along with a surrounding 10-acre park, was deeded to the Town in 1887 by Horatio Hollis Hunnewell. A wealthy financier and railroad investor, Hunnewell owned 500-acres of land in what was once West Needham, operating a second-home estate as well as mansions for seven of his eight children, an arboretum, and the country’s first topiary garden. Hunnewell was instrumental in helping to found Wellesley, financing the construction of the Town Hall and Library and organizing the town’s initial street and water system and other infrastructure elements.

Designed by Henry Sargent Hunnewell and George Robert Shaw, the Town Hall was built according to the Richardsonian Romanesque style with French influences. Granite and red sandstone comprise the primary building materials, as well as a red slate roof with copper trim. The building was one structure with two separate elements, and no interior connection between the Town Hall and Library. The eastern portion was built first and was the Free Library, primarily based on the first floor with a vaulted ceiling and further book storage extending into the second. The western portion was constructed after the library had been completed. The Town Hall contained a large entrance hall, “Voting Room” (now the Juliani Room), and administrative offices on the first floor, and a “Great Hall” auditorium on the second. Defining features include two round towers on the Southwest Façade, flanking the main entrance to the original Town Hall section. The gabled end entrance features a tetrastyle ionic portico with a large clock face above marked with gold leaf roman numerals.

Over the course of the building’s nearly century-and-a-half life, various interior changes have occurred. Following the removal of the library to its own facility across Washington Street in 1959, the eastern portion was significantly altered with the construction of a second and third floor which replaced the mezzanine and lofted ceiling and converted the space into municipal offices. The basement served as the Town “lockup” from 1887 until 1950. The entire building underwent a major renovation designed by Sasaki Associates in 1985. This renovation created more office space as well as updated restrooms, an elevator and other accessibility features, and is essentially the current building floor plans. The building was listed on the National Register of Historic Places in 1976.
3. Existing Conditions Investigation
3. EXISTING CONDITIONS INVESTIGATION

A. Building Constraints and Opportunities

Constraints

Because the current Town Hall was built in two independent phases, the original exterior west masonry wall of the Library remains as an interior load-bearing wall. There was no interior connection between the Town Hall and Library portions of the building. The original Library front entrance remains with stairs on the South Elevation, but the door opening has been infilled with a window and masonry sill. The original exterior load bearing masonry walls of the Library, that have now become interior, impacts the flexibility of program spaces inside the building as well as where connections between the East and West Wings can be made.

The interior partitions were originally plaster on lathe over wood studs. Most of these walls have been removed or heavily modified from past renovations. Currently the majority of interior partitions are gypsum wall board over wood or metal studs. At the basement level, interior partitions with gypsum wall board have been added over the inside face of the exterior walls in the office spaces. On the East Wing of the building at the first and second level, the exterior walls have also had stud walls with gypsum wall board added. At the third floor of the East Wing and the first and second floor of the West Wing the original interior brick finish remains but has been painted over.

The current programmatic layout of Town Hall has significant deficiencies in wayfinding, circulation, level changes, meeting space, and storage. The overall circulation through Town Hall is confusing and inefficient. There are three main entrances to the building with no clear direction for patrons as they approach the building. The most used meeting space, the Juliani Room, is open to the main corridor of the Town Hall, providing no privacy for meetings, and causing congestion and confusion for patrons entering the building. There is a significant lack of office meeting space for inter-office meetings. There are three stairs in the building - two spiral stairs in the west turrets and an enclosed stair located on the South side at the center of the building. There is no public stair in the original East Library Wing of the building and this portion of the building is all office space. There is only one connection point on each floor through the original Library’s West Wall, isolating the East Wing of the building at each floor and further contributing to wayfinding issues. The original design of the first floor of the Library only provided windows on the East and West Elevations, with solid walls on the north and south. This allowed the original reading rooms on the east and west to have natural light, while the original Library stacks in the center of the building had limited natural light. When the Town Hall addition was constructed over the West Elevation of the Library, only the east elevation
remained to bring in natural light. Further, when the mezzanine level of the Library was made into the current second floor, no windows were provided to the second-floor space. This has created a challenge to provide natural light to offices located in the East Wing on the first and second floors.

The program space needs of the Town government have grown larger than the office space available in Town Hall. Office cubicles have been placed on the north and south ends of the Great Hall. The balcony has been overtaken for storage use, and the expansive nature of the space does not lend to accommodating office space very well. The space under the balcony, currently housing the IT Department, works well for offices, but isolates the IT Department from all other offices. The space is also accessed only from the Great Hall, creating a conflict when large meetings are ongoing in the Hall and department employees need to access the office space. In the central space on the third floor are non-compliant bathrooms, an underutilized speaking platform for the Great Hall, and the non-compliant enclosed stair. The East Wing at the third floor has a large open cathedral ceiling with exposed rafters. The verticality of the space makes it difficult to provide comfortable office space that has privacy and function. Currently cubicles are used for offices with minimal privacy and acoustical separation. There is no centralized storage, and each office must provide space in their office to accommodate storage needs.

At the lower level of the building, which is partially below grade, the windows on the south side are very small and located high up on the wall. This makes the south (Washington Street) side of the lower level undesirable office space. The lower level has also experienced a history of moisture problems. There is no vapor barrier below the existing slab and the Town must constantly run dehumidifiers to lower humidity levels throughout the lower level. The floor to ceiling height at the lower level is eight feet and therefore does not provide any space to feed mechanical equipment up to the upper floors.

The walls, which are predominately thick, load-bearing walls, occupy 23.8 percent of the total gross area of the Town Hall. These masonry walls are not only load-bearing but also provided lateral resistance for seismic loads. While significant removal of these walls is not feasible, selective new openings in these masonry walls can be easily made. Structural walls and columns in a modern office building typically occupy less than 10 percent of the gross area.

Opportunities

The Town Hall has a tremendous amount of historic fabric and character that can be used to help influence the best way to restore and renovate the building. There is an opportunity to utilize the original structure to help inform the users wayfinding and dictate where programmatic elements
can be located. The original South Entrance to the Library can be utilized to provide a ground level egress for a new interior stair and provide access to the eastern portion of the building. Relocating the existing stair to the eastern side of the building will help with wayfinding throughout the building. Providing centralized corridors at each level would provide guidance to patrons and simplify the circulation of the building.

There is an opportunity to lower the slab of the building’s ground floor. Lowering the floor elevation will provide more head room for mechanical equipment to be distributed through the building and create more comfortable office space. It will also provide the opportunity to install proper damp-proofing below the slab and at the interior of the exterior walls. This will make the lower level a significantly more comfortable and desirable space, rather than feeling like a damp and musty basement. The South Side of the lower level is a good location for storage, mechanical equipment, and restrooms. With improvements, the north half of the lower level is an ideal location for heavily trafficked offices with its proximity to the accessible entrance. The North Entry can be designed to draw patrons into Town Hall and become the primary public entrance. There is a tremendous opportunity to utilize and restore parts of the Great Hall to return the auditorium to be the most significant space in Town Hall.

B. Site Constraints and Opportunities

The Wellesley Town Hall is surrounded by Hunnewell Park, which is designated park land owned and maintained by the Town’s Natural Resources Commission (NRC). Any addition to the building would require the use of this park land and therefore require a Massachusetts General Law (MGL) Article 97 review. Parking around the Town Hall is typically in high demand. The West Parking Lot and parking spaces along the South entry drive are typically full of cars that not only impact the use of Town Hall, but also detract from the iconic Town Hall–Park setting. The high demand for parking also creates a lot of traffic congestion at the West Parking Lot of Town Hall. The sidewalks that surround Town Hall are tight to the building leaving very little area for plantings. The sidewalks are only 3’-0” wide and are adjacent to the asphalt parking and drive. There are no compliant accessible parking spaces (because of non-compliant cross-slopes), and there is no compliant accessible path to the building.

There is both the space and opportunity to redesign the parking to provide accessible parking spaces that complement the surrounding park land. A new compliant accessible walk can be integrated into the site so that it invites users into the building. Both the new accessible walk and parking can tie into a redesigned building program that provides the closest access to the most visited departments. There is also the opportunity to reduce program in the building which will reduce the parking demand. Moving the parking, hardscapes, and traffic away from the front of Town Hall and from the west entrance will allow the building to reconnect with the parkland and
acknowledge the significance of the building’s original setting. There is also the ability to increase the number of parking space on the west entry drive while reducing the number of spaces on the south entry drive. This will reduce the visual impact of cars that detract from the view of Town Hall from Washington street while increasing the total number of spaces overall.

C. Existing Building Plans and Summary

The Town Hall and Library was designed by Henry Sargent Hunnewell and George Robert Shaw. The building is constructed with an ornate ashlar granite field with decorative Longmeadow brownstone trim. There are numerous carved brownstone elements with more than a dozen heraldic lions’ carvings. The main sloped roof is red slate with copper valley’s, flashings, and gutters. Decorative copper finials adorn the top of the circular turrets and copper cresting caps the top of the main west ridge.

The exterior walls consist primarily of several types of granite and related igneous stones. Interspersed between the granite units are pieces of quartzite. The quartzite units come in a variety of colors and shades that contrast with the granite units. The stone used for the trim, moldings and carvings is East Long Meadow brownstone. “Brownstone” is a trade name for a type of brown and reddish sandstone quarried in the northeastern portion of the United States – roughly between Philadelphia, PA and Springfield, MA. The backup masonry consists of several wythes of brick. The stone units were keyed into the backup brick masonry by varying the depth of the units. During the current Exterior Repair and Restoration Project, the chimneys are the only locations where the metal ties have discolored. Collectively, the stone and brick form a composite loadbearing mass masonry wall. The interior wythe of brick has a cavity behind it separating it from the brick backup and providing a drainage plane. The interior finish of the walls was originally a waxed brick, but the brick has been painted. The painted finish over the brick traps moisture in the wall causing deterioration to the interior brick, and the brick backup. The painted finish is peeling in many locations, and there have been multiple previous attempts to use sealant at the mortar joints, and repainting of the brick to “seal” the interior face of the wall. All these previous campaigns have failed and the paint continues to fail and cause deterioration to the brick.

History of Work

In 1959 the Library (comprising the eastern portion of the building) moved into a new Library facility across Washington Street. The current Library was built in this same general location in 2003. The Town Hall overtook the old Library space and added a new floor level, replacing the book mezzanine. The new floor level intersects the Library windows on the East Elevation of the
building. When the Town Hall renovated the East Wing internal connections between the two sides were installed through the original masonry wall of the Library.

1985 Project

In 1985 Sasaki Associates Inc. designed a full building renovation for the Town Hall. The 1985 renovation took place ten years after the adoption of the Massachusetts Architectural Access Board (MAAB) Rules and Regulations and five years before the Americans with Disabilities Act (ADA) was enacted. Selected drawings from the renovation are included in Appendix I. The project included substantial renovations to the interior of the building as well as modifications to the parking and site. All electrical, mechanical, plumbing and fire alarm services were replaced as part of the renovation. The current South Side elevator and East Side stairs were also installed. On the ground floor all spaces were gutted to the structure and replaced with new finishes. The center portion of the ground floor was raised up 7 inches to match the original door threshold. Non-compliant ramps were installed to access the offices to the east and west of the entry lobby. The circular stairs in the Northwest Turrets remained, while the stairs to the first floor in the Southwest Turret were removed.

On the first floor, all the offices were gutted and renovated with new finishes and transaction counters. All the exposed brick in the Juliani Room and west entry lobby was painted. The previous dropped gypsum wall-board ceiling in the Juliani Room was removed, and all the wood beams in the Juliani Room and west entry lobby were refinished. The existing two circular stairs at both the west end turrets remained up to the second floor. One item that has been lost is the fireplace on the south wall in the original Library. The original plans indicate a large decorative fireplace centered on the South Wall. Currently at this location there is only a flat gypsum wall-board wall. At the mezzanine level all the office spaces were gutted with all new finishes. The floor level that was installed in 1959 remained, and the tops of the East Windows were enclosed behind the new wall finishes.

Before the 1985 renovation, wood stud partitions and a dropped ceiling had been installed at the north and south half of the Auditorium. Prior to 1985, the Auditorium was called the Town Hall Auditorium. As part of the 1985 renovation the Auditorium was restored to its current configuration and was renamed the Great Hall. The renovation removed the partitions and dropped ceiling. The brick walls and the plaster ceiling panels were painted white. The wood trusses, balcony woodwork, and open area underneath the balcony wall were infilled with office partitions to create additional office space. The raised stage was removed down to the Great Hall floor level, and the current speakers’ platform was installed with stairs that access the third floor. The space under the balcony was also infilled to provide office space and enclose the turret stairs. The balcony was opened up and old mechanical equipment was removed. Since the 1985
renovation, the balcony has been filled with Town Hall storage, and used by Wellesley Public Media as a control booth for covering meetings.

In 1997 there was an exterior restoration to the building. The ground and first level of the building had extensive cutting and repointing of the mortar joints. There was little cutting and pointing of mortar above the first-floor level. There was extensive replacement of the original Longmeadow Brownstone with St. Bees sandstone. The original Longmeadow Brownstone was quarried in Longmeadow, Massachusetts. The quarry has been closed for many years and there is no visually matching brownstone currently quarried in New England. St. Bees sandstone is from England and has a redder tone than the original Longmeadow Brownstone. The most extensive replacement was performed at the West Portico where the columns, first floor balustrade, and roof balustrade were replaced. The urns on the West Portico roof balustrade were replaced with replica urns. The replica urns were a much simpler design than the original Brownstone urns. The balustrades at the low south and east roofs were also replaced with St. Bees, and there was selected unit replacement on the building. There was extensive brownstone patching with Jahn brownstone patching material. The patching is performing well except for fading of the color. The windows were restored with prepping and painting of the sash and trim, and replacement of the glazing compound.

As part of the 1997 exterior restoration the entire red slate roof was removed and replaced. The low slope flat seamed copper roofs were also replaced at that time.

The current Existing Floor Plans can be seen on the following pages.
D. Code and MAAB Analysis

Code

The Massachusetts State Building Code (MSBC), 9th Edition, was used as the basis for code review for this study. The proposed renovation of the interior of Town Hall would affect 100% of the existing floor area and puts the renovation into an Alteration Level 3 category of work. All existing systems, restroom fixtures, egress pathways, and stairs would be modified, and therefore all would be required to be brought up to code. The existing enclosed stair does not provide an egress to the exterior of the building. A new stair is required for the building that would provide enclosed access to all levels, with a discharge to the exterior at grade. See Appendix J for additional information including the MSBC “Table 1401.7 Summary Sheet – Building Code.”

MAAB Analysis

The Wellesley Town Hall was granted a three-year time variance from the Architectural Access Board for 12 individual items and was granted three permanent variances (see variance application in Appendix K). The 12 items that a time variance was granted to are required to be upgraded three years after the completion of the exterior restoration, which is scheduled for completion in September of 2019. The MAAB also has the authority to fine the Town of Wellesley up to $1,000 per day per violation of non-compliance (twelve Time Variances were granted). The MAAB’s focus is on full accessibility for the public to all buildings that are open to the public. The following are excerpts from MAAB regulations, which determines the extent of required compliance:

“3.3 EXISTING BUILDINGS

All additions to, reconstruction, remodeling, and alterations or repairs of existing public buildings or facilities, which require a building permit or which are so defined by a state or local inspector, shall be governed by all applicable subsections in 521 CMR 3.00: JURISDICTION.

For specific applicability of 521 CMR to existing multiple dwellings undergoing renovations, see 521 CMR 9.2.1.

3.3.1 If the work being performed amounts to less than 30% of the full and fair cash value of the building and

a. if the work costs less than $100,000, then only the work being performed is
required to comply with 521 CMR

or

b. if the work costs $100,000 or more, then the work being performed is required to comply with 521 CMR. In addition, an accessible public entrance and an accessible toilet room, telephone, drinking fountain (if toilets, telephones and drinking fountains are provided) shall also be provided in compliance with 521 CMR.

Exception: Whether performed alone or in combination with each other, the following types of alterations are not subject to 521 CMR 3.3.1, unless the cost of the work exceeds $500,000 or unless work is being performed on the entrance or toilet. (When performing exempted work, a memo stating the exempted work and its costs must be filed with the permit application or a separate building permit must be obtained.)

a. Curb Cuts: The construction of curb cuts shall comply with 521 CMR 21.00: CURB CUTS.

b. Alteration work which is limited solely to electrical mechanical, or plumbing systems; to abatement of hazardous materials; or retrofit of automatic sprinklers and does not involve the alteration of any elements or spaces required to be accessible under 521 CMR. Where electrical outlets and controls are altered, they must comply with 521 CMR.

c. Roof repair or replacement, window repair or replacement, repointing and masonry repair work.

d. Work relating to septic system repairs, (including Title V, 310 CMR 15.00, improvements) site utilities and landscaping.

3.3.2 If the work performed, including the exempted work, amounts to 30% or more of the full and fair cash value (see 521 CMR 5.00) of the building the entire building is required to comply with 521 CMR.

3.5 WORK PERFORMED OVER TIME

When the work performed on a building is divided into separate phases or projects or is under separate building permits, the total cost of such work in any 36-month period shall be added together in applying 521 CMR 3.3, Existing Buildings.
3.9 HISTORIC BUILDINGS

An historic building or facility that is listed or is eligible for listing in the National or State Register of Historic Places or is designated as historic under appropriate state or local laws may be granted a variance by the Board to allow alternate accessibility. If a variance is requested on the basis of historical significance, then consultation with the Massachusetts Historical Commission is required in order to determine whether a building or facility is eligible for listing or listed in the National or State Register of Historic Places. The Massachusetts Historical Commission may request a copy of the proposed variance request and supporting documentation to substantiate the variance request and its effect on historic resources. A written statement from the Massachusetts Historical Commission is required with the application for variance.”

End of MAAB Excerpt

For the purposes of this report, the Chief Assessor from the Wellesley Assessor’s Office identified a building replacement cost of $12,950,000 for Town Hall. Assuming a building value of $12,950,000 any repair project that exceeds 30% of this value, or $3,885,000 triggers the requirement to bring the building into full compliance with CMR 521. When work is done over time or in separate phases, the total cost of such work in any 36-month period shall be added together in applying the construction cost thresholds. Construction costs shall be based on the date of relevant building permits.

The three permanent variances for the building were granted on upgrades being technologically infeasible. The proposed plan and site layout included in this report will bring the building into full compliance.
4. Visioning and Programming
(By Department)
4. VISIONING AND PROGRAMMING (by Department)

MKA conducted a series of interviews between April and August 2018 with Department Heads, staff and various Board members regarding their needs and requirements for the current building and to discuss future requirements for any proposed building improvements. The following is a summary of each department’s vision and program for future use.

Common Vision Themes

- HVAC: Ability to provide consistent, comfortable heating, ventilation and air-conditioning needs to be improved.
- Security: Ability to secure building and/or departments in case of random incident or public entering private work spaces.
- Common spaces: Ability to have a lunch room/break room for use by public and staff alike. The lunch/break room should be directly accessible from a public corridor and not located within a department.
- Meeting spaces: Ability to have meeting spaces flexibly sized to accommodate groups of all sizes, from small to large.
- Privacy: Ability to have private conversations in workspaces.
- Technology: Ability to have access to state-of-the-art audio-visual equipment in conference/meeting spaces.
- Circulation/wayfinding: Ability to straightforwardly navigate where to go in the Town Hall was a frequent item mentioned by many departments.
- Daylighting: Provide natural light and bright, well-lit spaces whenever possible.
- Lack of parking
- Lack of office spaces and storage space

Staff levels

The current staffing level is a total of 75 full and part-time employees in the Town Hall-based Departments interviewed. During our interviews with the various departments, the number of staff and potential staff increases was discussed. A potential increase of 7 staff members was discussed for planning purposes, which included 4 additional staff in the Planning/Zoning Board of Appeals (ZBA)/Building Departments, 1 in Human Resources (HR), 1 in Sustainable Energy, and 1 in the Facilities Management Department (FMD). Departments anticipating an increase in staff are noted with an asterisk (*).
Assessors’ Office

Staff: 5
- Full-Time: 4
- Part-Time: 1

The Assessors’ Office is currently located in one of the most visible locations in the Town Hall, adjacent to the Juliani Room. This location is advantageous for the number of visitors to the department but makes it difficult to achieve security and privacy. An accessible waiting area, with a transaction counter and some form of security screening is desirable to separate the public from the staff. The staff interacts directly with the public at the counter, a receptionist is not necessary, but the staff needs to see the counter from their workstations. File cabinets for permanent public records are desirable near-by. An accessible meeting room that would allow for confidential conversations, both between department staff and the public, is desired. The Department Head desires a private office, with the staff being in an open office adjacent to the transaction counter. Thought should be given to the department’s workflow (computer access, records and file access, cash drawer access). The Assessors’ Office would prefer to be located near the Tax Collectors office.

Building Department*

Staff: 8
- Full-Time: 8
- Part-Time: 0

The Building Department receives a high volume of visits from the general public on a daily basis. The office was renovated by the FMD in 2017 due to a sewerage back-up, and all new furniture was installed. The current transaction counter for public interaction works well, and an accessible waiting area would be desirable for the public to wait to meet with Building Department staff as well as for the public to review computer records when the Department goes to a digital permitting system as is currently planned. Two receptionists greet the public and do the initial public interaction. The Department Head likes public spaces and does not desire a roll-down security gate, as it might distract from the public nature of the Department, as long as the public and staff are separated at the counter. The Department Head desires a private office. Private workstations, away from the public countertop, are desired to allow staff to work without constant interruption. A common area for printers, filing, and permit review is desired. A multi-function meeting space is desirable, capable of allowing 10 to 12 or more persons to meet, for both staff meetings and meetings with the public. The meeting room should have up-to-date technology, including computer access, closed circuit TV, a projector and screen, video
conferencing, wireless technology, and a whiteboard. The Building Department is moving towards digital permitting, which will likely impact how the department has traditionally been operating. The Building Department desires to be near the Zoning Board of Appeals (ZBA), Planning Department and the Natural Resources Commission.

Custodian

Staff: 2
- Full-Time: 2
- Part-Time: 0

The custodian desires a large storage/office area that would include a workstation as well as secure storage for all the items used in the daily maintenance of the building (cleaning equipment and supplies, vacuum cleaners, snow removal equipment and supplies, utility sink, etc). It is important that the gas-powered snowblower not be stored inside the Town Hall. The custodian also maintains access to the long-term file and voting machine storage areas in the Town Hall and is responsible for opening and closing the building during operating hours.

Facilities Management Department (FMD)*

Staff: 13
- Full-Time: 12
- Part-Time: 1

The FMD currently occupies space in a separate, leased, location away from the Town Hall. The FMD desires to keep a layout similar to their current accessible space, which includes 8 private offices, 4 cubicles, a large meeting room and a small meeting room/library. The two meeting rooms are often booked for public meetings by other departments. Any future meeting and office spaces should have up-to-date technology, including computers, printers, video-conferencing, etc. The Department requires adequate storage facilities for items that are distributed town-wide, including technical equipment, office supplies, and cleaning equipment. The FMD is moving towards a paper-less, digital system, which should allow less space to be devoted to files cabinets and paper storage. The FMD desires to be near the Building/Planning Department and the Department of Public Works.
Finance Department

Staff: 6
- Full-Time: 6
- Part-Time: 0

The Finance Department desires a high level of privacy and security for the staff, as well as more office and meeting space. Because the Finance Department deals with sensitive financial tasks, including payroll, the ability to have multiple private conversations is highly desired, with each of the staff able to have private conversations simultaneously. A common area for printers, scanners, file storage for staff is desired. The Finance Department does not often have unscheduled visits with the public, but the ability to secure the department and provide a second means of egress for the staff was specifically requested. A meeting room for 8 to 10 people, with the ability to video-conference, would be helpful. The Finance Department would like to be near the Retirement office.

Human Resources (HR)*

Staff: 6
- Full-Time: 4
- Part-Time: 2

The Human Resources Department interacts with the public by appointment only, so a small reception and waiting area is desired. Often, during employment interviews, more than one applicant is present in the Department at the same time, so the ability to move persons through the department independently, without interacting with another applicant, is desirable. Four private offices are desired, to allow the staff to have multiple private conversations simultaneously. A common area for printers, scanners, shredders, secure file cabinets is desirable. A meeting room, directly adjacent to the department, that can accommodate 6 to 12 persons is desirable, for staff meetings and interviews. The Human Resources Department desires to be near the Treasurer, Retirement and Finance Departments.

Information Technology & GIS Department (IT)

Staff: 8
- Full-Time: 8
- Part-Time: 0
The Information Technology Department desires a flexible office space for the staff, with a private office for the Department Head. The IT Department staff does not interact with the general public, and generally travels throughout the building and Town to respond to IT requests. A common workspace is desired to allow for computer set-up, large format printers, IT equipment repairs, etc. A secure area is required for sensitive IT equipment, including computer servers, networking equipment, UPS equipment, etc., the secure area also requires separate climate-control for the IT equipment. The ability to secure the department is very important. The IT department also desires that any renovation to the building include providing card-readers at all critical areas for security. The IT Department also requires proximity to an elevator to allow moving of computer equipment around the building.

Natural Resources Commission (NRC)

Staff: 4
- Full-Time: 3
- Part-Time: 1

The NRC receives a high volume of public visitors, with both general inquiries and public meetings occurring in the Department. A transaction counter for the receptionist to greet visitors and provide initial interaction would be useful, a small waiting area would be helpful. The staff needs to be adjacent to the transaction countertop, to allow for discussions with the public and to review public records in files and on computers. The Department Head desires a private office, and a small meeting room for staff meetings or public meetings of 6 to 12 persons is desirable. A common area for printers, file cabinets and plan review is desirable. The NRC also hosts monthly public meetings and needs access to a space large enough to accommodate 10 to 50 people for hearings. The large meeting space also should have the ability to record the meetings with closed-circuit TV and allow for a video screen or a projector for public presentations and allow for video conferencing. The NRC desires to be near the Building/Planning/ZBA Departments.

Parking Clerk

Staff: 1
- Full-Time: 1
- Part-Time: 0

The Parking Clerk needs a space easily accessible by the public, with a transaction countertop with the ability to secure the office during non-business hours and a security camera to record all public transactions. The Parking Clerk is moving to a digital, paperless system, which will
reduce the amount of paperwork processing required. Two additional responsibilities of the Parking Clerk are performed outside of the Parking Clerk’s office but require space in the Town Hall: parking meter repairs are done onsite by a subcontractor, and coin-counting is done on the premises but performed by a security firm (and overseen by the Treasurer).

**Planning Department***

**Staff:** 5  
- Full-Time: 3  
- Part-Time: 2

The Planning receives a high volume of public visitors. A transaction counter for the receptionist to greet visitors and provide initial interaction would be useful, with a small waiting area adjacent. The staff needs to be adjacent to the transaction countertop, to allow for discussions with the public and to review public records in files and on computers. The ability to secure the department is desired. A common area for printers, file cabinets and plan review is desirable. The Department Head desires a private office, as well as a small meeting room for staff or public meetings of 6 to 12 persons. The meeting room should have up-to-date technology, including computer access, closed circuit TV, a projector and screen, video conferencing, and a whiteboard. The Planning Department is moving towards digital permitting, which should reduce paperwork processing. The Planning Department desires to be near the Building/NRC/ZBA Departments.

**Retirement**

**Staff:** 2  
- Full-Time: 1  
- Part-Time: 1

The Retirement Department generally interacts with the public by appointment only, so a small reception and waiting area is desired. Two private offices are desired, in addition to the reception area, to allow staff to have multiple private conversations simultaneously. A common area for printers, scanners, shredders, secure file cabinets is desirable. A meeting room that can accommodate 4 to 6 persons is desirable, for staff and town employee meetings. The Retirement Department desires to be near the Human Resources and Finance Departments.
Selectmen’s Office and Executive Director’s Office

Staff: 9
- Full-Time: 9
- Part-Time: 0

The Selectmen’s Office and Executive Director’s Office desires more meeting space, offices, privacy and security than their current location provides. A small reception area for visitors to wait is desirable, although the Selectmen’s Office has limited visits from the general public. The Executive Director and the Assistant Executive Director desire private offices, with accessible staff offices nearby. The ability to have regular meetings of between 8 to 10 people, with the ability to allow up to 25 people to attend a meeting is desirable. The meeting room should have up-to-date technology, including the ability to have closed-circuit cameras, video playback, conference calls, and access to a white board. Security should be provided, including the ability to secure the offices and to have access to a second means of egress. The Executive Director’s office desires to be adjacent to the Finance Department.

Sustainable Energy Committee*

Staff: 2
- Full-Time: 0
- Part-Time: 2

The Sustainable Energy Committee (SEC) can be flexible in terms of location; they are currently located in a cubicle in the Great Hall and prefer being in a public area. Two workstations would be desirable, with access to a common area for printers, scanners, file cabinets, etc. as well as access to a common meeting space. The SEC desires to interact with all Town Departments to promote sustainable energy and renewable resource awareness for all town properties. Generally, the broader objectives of the SEC are related to Land-Use functions, so adjacency to such is advantageous.

Town Clerk

Staff: 4
- Full-Time: 3
- Part-Time: 1

The Town Clerk needs a secure, climate-controlled vault, in addition to an effective working space. The existing vault space is too small and does not meet the Secretary of State
requirements for a (6-hour) fire-rated, climate-controlled vault. The Town Clerk receives a high volume of public visitors, so an accessible transaction counter for the staff to greet visitors and provide interaction is used now and is desirable in the future. The staff needs to be adjacent to the transaction countertop, to allow for discussions with the public and to review public records in files and on computers. A public waiting area adjacent from a transaction counter is desirable to help with visitors during busy periods. The ability to secure the department is highly desired, with an “invisible” security system suggested. A common area for time stamp, printers, secure file cabinets in a layout that reflects the department’s workflow is desirable. The Department Head desires a private office, as well as access to a small meeting room for staff meetings of 6 to 8 persons. The Town Clerk has a high volume of visitors and desires to be in an easily accessible central location.

**Treasurer / Collector**

**Staff:** 5
- Full-Time: 4
- Part-Time: 1

The Treasurer/Collector Office receives a high volume of visitors at select times of the year (i.e. when taxes are due). An accessible transaction counter for the staff to greet visitors and provide interaction is desired. The staff needs to be adjacent to the transaction countertop, to allow for discussions with the public and to review public records in files and on computers. A small public waiting area across from a transaction counter is desirable. The ability to secure the department is highly desired. A common area for printers, adding machines, scanners, secure file cabinets, check storage boxes, etc. in a layout that reflects the department’s workflow is desirable. The Treasurer and the Assistant Treasurer require private offices, as well as access to a small meeting room for staff meetings of 6 to 8 persons. The Treasurer/Collector hosts periodic public meetings and needs access to a space large enough to accommodate 50 to 75 people for presentations and special events. The large meeting space also should have the ability to record the meetings with closed-circuit TV and allow for a video screen or a projector for public presentations and allow for video conferencing. The Treasurer/Collector Office desires to be near the Assessor, Finance and Human Resources Departments.

**Mailroom**

The Treasurer/Collector department currently operates the Mailroom. The Mailroom is accessed by all departments and should be in an accessible, easily secured, central location. The mailroom layout should be larger than the current space, with the layout reflecting the ability to easily receive and distribute daily mail.
Veterans’ Office

Staff: 1
- Full-Time: 0
- Part-Time: 1

An easily accessible private office with a computer, printer, shredder, secure file cabinets is desired for the Veterans’ Office. Meetings are by appointment or by “drop-in” during office hours, and the ability to have private conversations with 2 to 4 persons is desired.

Youth Commission

Staff: 1
- Full-Time: 1
- Part-Time: 0

The Youth Commission has two cubicles in the Public Hall, one of which is used by the Youth Director and the other is often used by young people. The Youth Commission desires to be in easily accessible public space to encourage civic participation/engagement by young persons. Based on our general knowledge of the Youth Commission, there might be some synergy with the Recreation Department which is located in the Warren Building. This possible synergy should be explored in the next phase of work on the Town Hall.

Zoning Board of Appeals (ZBA)*

Staff: 1
- Full-Time: 1
- Part-Time: 0

The Zoning Board of Appeals interacts with the public on a daily basis, so a reception counter and small waiting area is desired. The office should include workstations for 2 persons, a common area for printers, bookcases and secure file cabinets, with a separate area to perform plan and permit review with the public. The ZBA desires to be near the Building and Planning Departments.

Boards and Commissions – Public Meeting Spaces

The ability to host multiple public meetings of varying size at the same time is desired, with state-of-the-art audio/visual equipment that will allow for public presentations, video
conferencing, video recording and video broadcasting. The desire is to be able to accommodate varying sizes of meetings, from small groups to large hearings of 75 ~ 100 persons. Small private waiting areas adjacent to the public meeting spaces are desired to allow for the public to prepare presentations discreetly before joining a public meeting. Good acoustics in the public spaces are highly desirable, to allow everyone in the room to hear the participants. The public meeting spaces should be welcoming, accessible and emphasize the historic fabric of the Town Hall. Availability of meeting room spaces which have suitable video capabilities to cover meetings (Police Station, Library, Warren and Tolles-Parsons Center) must be considered in determining the number of new public meeting spaces required.
5. Analysis and Conceptual Design Options
5. ANALYSIS AND CONCEPTUAL DESIGN OPTIONS

In addition to the accessibility compliance study, a survey of existing building conditions, an inventory of each office space, and a series of interviews with department heads were conducted. The results of these interviews can be seen in Section 4, Visioning and Programming. The Staff Interview Raw Data can also be viewed in Appendix N. It is interesting to look at the current existing use of the Wellesley Town Hall. Walls and structure occupy 23.8% of the gross area. In addition, walls, structure, circulation, stairs, mechanical and bathroom occupy a total of 44.7% of the gross area. Monumental, load-bearing masonry buildings as a group have a much higher “non Usable” percentage than a typical new, steel-framed office building, which might have less than 10% walls and structure. These monumental, load-bearing masonry walls are the major reason why there is such a dramatic difference between gross area and usable area.
The results of this programmatic work can be summarized in three different options that could be pursued to address the Town’s needs:

Option 1. Addition Requirements - Correct Deficiencies with No Program Improvement (MAAB/ADA Only)

To comply with accessibility standards of the Massachusetts Architectural Access Board (MAAB) many changes are required. These changes include much larger wheelchair usable bathrooms, increased corridor widths, adequate turning radius and proper clearances at doors and stairs as well as an increase in the number of plumbing fixtures and other building code-required upgrades. This option would address accessibility issues but would not correct any program-related deficiencies. With this option all existing offices and meeting room deficiencies will remain as is.

Option 2. Addition Requirements - Program Improvements (No FMD)

Over the last 34 years, departments have increased in both staff and responsibilities, but their space has remained unchanged. Many departments need a small increase in office size. The Town Clerk’s office needs an adequately sized and 6-hour rated vault to meet state record requirements. There is also the need for 3 additional small meeting rooms. A potential growth of 6 staff positions was identified during the Visioning and Programming Interviews. There is also a strong need for additional meeting rooms as well as a more functional staff break room and a centralized high-density storage area. This option would address accessibility and current program needs.

Option 3. Addition/Annex Requirements (All Departments)

Currently the Facilities Management Department (FMD) is located in leased space at 888 Worcester Street. Functionally and economically, it would be desirable to have FMD located with other town departments, especially in the land-use department. A potential future growth of 1 position was identified in interviews with FMD. This option is the same as Option 2, with the addition of space for FMD.
### Summary: Pros and Cons by Program Option

<table>
<thead>
<tr>
<th>Option</th>
<th>Area (GSF)</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
</table>
| 1 Correct Deficiencies with no Program Improvements | 6,500 | • Least expensive | • Doesn’t address program needs  
• Doesn’t add meeting rooms  
• Not long-term solution  
• Either reduces space available for program use or adds an addition with more parking and MGL Article 97 impact. |
| 2 Includes Proposed Program Improvements | 9,300 | • Adds space for 6 future staff  
• Adds 3 small meeting rooms | • Compromise solution  
• Facilities Management Dept. remains as free-standing department in leased space  
• Adds parking and addition with Article 97 site impact |
| 3 Includes Program Improvements and Facilities Management Dept. | 13,500 | • Adds space for 7 future staff  
• Adds 3 small meeting rooms  
• Brings Facilities Management Dept. to central location  
• Maximum consolidation of Town Services | • Most expensive  
• Most adverse parking situation  
• Very difficult or unlikely to get approval under Article 97 for addition and for additional parking |

The same options are presented below with pros and cons.

### Summary: Square Foot Impacts by Program Option

<table>
<thead>
<tr>
<th>Option</th>
<th>Department</th>
<th>Existing Building</th>
<th>Change in SF</th>
<th>Cumulative Increase in SF</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Ex. Net SF</td>
<td>Ex. Gross SF</td>
<td>Gross SF</td>
<td>Gross SF</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exist.</td>
<td>Existing Town Hall</td>
<td>19,800</td>
<td>26,000</td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>Correct Deficiencies with no Program Improvements</td>
<td></td>
<td></td>
<td>6,500</td>
</tr>
<tr>
<td>2</td>
<td>Include Proposed Program Improvements</td>
<td></td>
<td></td>
<td>2,800</td>
</tr>
<tr>
<td>3</td>
<td>Include Facilities Management Department</td>
<td></td>
<td></td>
<td>4,200</td>
</tr>
</tbody>
</table>
6. Final Feasibility Recommendation
6. FINAL FEASIBILITY RECOMMENDATION

A. Addition versus Town Hall Annex

Park Land, Article 97

The Town Hall is surrounded by park land which is subject to MGL Article 97, with the exception of the former Cochituate Aqueduct easement, which was transferred to the Town of Wellesley but not formally part of Hunnewell Park. Article 97 is a state law which restricts the use of park land for non-park purposes. The Facilities Management Department (FMD) and MKA met with the Natural Resources Commission (NRC) to review potential impacts of an addition to the Town Hall. If an addition option were selected, the change in use of park land would need to receive the following approvals:

- Unanimous Approval from NRC
- Unanimous Approval from Board of Selectmen
- 2/3 Approval from Town Meeting
- 2/3 Approval from State Legislature

The former Aqueduct easement is close to the north side of Town Hall but does not touch Town Hall, so any potential addition would need to meet the Article 97 requirements. To comply with Article 97, at a minimum the Town would need to provide “real estate of equal or greater fair market value or value in use of proposed use, whichever is greater, and significantly greater resource value as determined by EOEA...”

To proceed with an addition requiring Article 97 approval introduces significant uncertainty to the project since two unanimous approvals and two 2/3 approvals are required. At the very least, these approvals will significantly extend any project schedule and add cost. NRC was receptive to talk further about a potential, modest addition but was quite negative about an increase in parking dedicated for Town Hall use. (Additional parking for park use doesn’t trigger Article 97 while additional parking for Town Hall use will trigger compliance with Article 97.) In addition, NRC has noted that the most objectionable part of the existing parking arrangement is the parallel parking spaces located as one approaches Town Hall from Washington Street. These are highly visible from Washington Street and therefore detract from the park-like setting.
Potential Impact of an Addition:

**Option 1** – Correct Deficiencies Only: Green – 3 stories

**Option 2** – Include Program Improvements, no FMD: Green + Brown – 3 stories

**Option 3** – Include Program Improvements, with FMD: Green, Brown, and Orange – 3 stories
Historic and Visual Considerations

MKA met with the Wellesley Historical Commission (WHC) for an informal presentation to update the Commission on the Town Hall Visioning and Space Utilization Study and solicit their opinion on a potential addition to the Town Hall. The WHC felt that the Town Hall is the most significant historic building in Wellesley and recognized the need for additional and better program space. The north side (railroad side) of the Town Hall is the only area where an addition could be considered. Commissioners felt that an addition should either faithfully replicate the original design or be dramatically different. The majority felt that if there were an addition, it should be a contemporary “landmark” in keeping with the standard of the additions to the Isabella Stewart Gardner Museum or the Cambridge City Library. One member voiced the opinion that any addition was a “terrible idea.”

Landscape architects Crowley Cottrell, LLC., prepared a preferred proposed site plan which: removes the visually detractive parking spaces, increases the number of overall parking spaces by 4 and reduces the amount of paving by approximately 2,000 SF.

Potential Cost Impact

The meetings with NRC and WHC confirmed that the technical (Article 97), political, visual and historic hurdles which would need to be cleared with any addition are very high. Also, the cost to permit, design, and construct a contemporary “landmark” addition would be very high.

On another of MKA’s Town Hall projects the Town faced the need for a large addition to their historic Town Hall that could not be accommodated on the Town Hall site. The solution was to construct a moderately-sized addition and a remote Town Hall Annex for their land use department, facilities department, and DPW. The cost of the Annex was about half the cost of the very nice but not “landmark” quality addition to their historic Town Hall on a square foot basis.

Zoning and Parking

The Town Hall is located within a “Single Residence District 10.” We have conducted a preliminary zoning by-law review and want to highlight the following information which will need to be further developed as the project design is advanced. The specific Zoning by-law sections are highlighted and included in Appendix H.

The Town Hall is an existing, non-conforming use in the “Single Residence District 10” which pre-dates Wellesley zoning. Any addition to the building would require a Special Permit and depending on the size of the addition, Project of Significant Impact (PSI) review.
Wellesley’s “Single Residence District 10” does not have parking requirements which are applicable to the Town Hall. The off-street parking requirements for Business District A seem to be the most applicable zoning by-law section to apply to see the intent of Business-Use parking requirements. SECTION XXI: OFF-STREET PARKING permits existing off-street parking to remain so long as an addition to a building does not:

1. Increase ground coverage by more than 5%.
2. Increase floor area by more than 15%
3. Result in a change in use.

If an addition is constructed which exceeds either of the above limits, the number of off-street parking spaces needs to be increased to meet the number required under current zoning.

The potential impact to parking for renovating the existing Town Hall with no addition as well as Options 1, 2, and 3 can be summarized as follows:

**Business District A**

- **Renovate Existing Town Hall – No Addition**
  - The existing 58 parking spaces would be acceptable. (If the current Town Hall was constructed today, 84 parking spaces would be required.)
- **Option 1 – 6,500 SF Addition**
  - 104 parking spaces
- **Option 2 – 9,300 SF Addition**
  - 116 parking spaces
- **Option 3 – 13,500 SF Addition**
  - 127 parking spaces

Possible zoning relief might be granted since there are additional public parking spaces available within 600 feet of the Town Hall property line. It is clear from discussions with NRC and other Town leaders that any significant increase in parking area or paved surface would likely not be acceptable.

The adequacy of parking is a subjective topic. Different opinions have been heard regarding parking at Town Hall. The most common opinion heard is that it functions but is not adequate for most days. The Land Use Department seems to generate a higher percentage of traffic than other departments; however, no traffic study has been undertaken as part of this study to support these anecdotal observations. Moving the Land Use Departments to an off-site Annex would significantly reduce the demand for the existing number of parking spaces.
Please see the following pages for the parking impact of Option 2 as well as the Proposed Site Plan which provides 4 additional parking spaces and reduces the paved area by approximately 2,000 SF.

Option 2: 116 Total Parking Spaces

The parking impact of Option 2, a 9,300 SF addition, would have a very dramatic and unacceptably large impact on required parking area.
Proposed (Preferred) Site Plan: 4 more parking spaces, 2,000 SF less paved area and removal of highly visible parking from Washington Street entrance.
The following matrix was proposed to see the advantages and disadvantages of both a separate “Annex” as well as an Addition to the Town Hall.

### Text in Green = Advantages
### Text in Red = Disadvantages

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>SEPARATE “ANNEX”</th>
<th>ADDITION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Management/Program Efficiency</td>
<td>• Separates core town department functions into 2 groups&lt;br&gt;• Loss of single, central location</td>
<td>• There are clear management advantages to have core town departments at one location&lt;br&gt;• Central location known to everyone</td>
</tr>
<tr>
<td>Park Land</td>
<td>• No loss of existing parkland.</td>
<td>• Loss of parkland. Significant challenges of Article 97</td>
</tr>
<tr>
<td>Parking</td>
<td>• Reduces over-crowded parking situation, especially if land use departments are relocated.</td>
<td>• Additional parking will be required and is a major concern of NRC&lt;br&gt;• Adversely impacts site circulation and traffic&lt;br&gt;• Loss of additional parkland</td>
</tr>
<tr>
<td>Construction Cost</td>
<td>• Dramatically less expensive than addition because of unique challenges of an addition to Town Hall</td>
<td>• Dramatically more expensive than Annex because of unique challenges of adding to Town Hall</td>
</tr>
<tr>
<td>NRC</td>
<td>• Retains existing parkland. Eliminates park land issues, Article 97&lt;br&gt;• Opportunity to fix circulation issues on site (sidewalk and driveway)&lt;br&gt;• Potentially reduces parking demand&lt;br&gt;• Opportunity to remove parking in front of Town Hall</td>
<td>• Raises many complex issues, including Article 97&lt;br&gt;• Especially concerned about loss of land for parking</td>
</tr>
<tr>
<td>Historical Commission</td>
<td>• Eliminates the very difficult issue of how to successfully add a major addition to a very significant iconic historic building&lt;br&gt;• Opportunity to restore site and visually separate historic building from parking and drive.</td>
<td>• Alters the most significant iconic historic building in Wellesley.&lt;br&gt;• Presents a very difficult challenge in designing an addition which will be well received by the residents and be affordable</td>
</tr>
</tbody>
</table>

### Addition vs. Separate “Annex” Matrix
The advantages of an Annex clearly outweighed the disadvantages of an addition to the Town Hall.

Following this analysis, the Town Hall Visioning Group (THVG) undertook a review of potential locations for a new Annex Building on properties already owned by the Town of Wellesley. The building size would be approximately 13,500 GSF representing what uses constituted Addition Option #3. The Group identified two potential locations on Municipal Way as the most promising. FMD will study the possibility of building an Annex at this location as part of a separate feasibility study, for which funding is being requested as part of its FY20 Cash-Capital Budget.

B. Renovation of Town Hall

After THVG agreed that the best way to meet the space program needs of the Town Hall was to plan a separate Annex for the Land Use Departments and to renovate and restore the existing Town Hall to meet the space program needs of the remaining “core” Town Hall departments, MKA started to develop and refine conceptual floor plans to show how the Town Hall could be both renovated and restored. These plans focused on:

1. Restoring the character-defining features of Town Hall especially the Great Hall and Julianni Room.
2. Meeting the space program requirements developed through department interviews. The most frequently visited departments (Assessors’, Treasurer, Town Clerk, Finance, and the Board of Selectmen’s Office) being located on the Ground and First Floors.
3. Improving wayfinding as well as the ease and joy of circulating through the Town Hall.
4. Correcting the 16 Time Variances which were granted by the MAAB to make the Town Hall inviting to all visitors regardless of their physical abilities, and correcting code deficiencies including the shortage of bathroom facilities.
5. Providing a dramatically more energy efficient building with less consumption of natural resources, improved air quality and greater user comfort.

Please see the following proposed floor plans (pages 39 to 43) to view how these plans address the above goals and correct short-comings of the existing plans. The existing plans can be seen on pages 11 to 14.
Proposed Plan Description

The Proposed Ground Floor of the Wellesley Town Hall would have a new accessible walk and entrance at the center of the North Elevation. With the new site plan this entrance would draw people in from the expansion of parking along the northwest entrance road, and the new accessible parking spaces. The Ground Floor would be lowered by 12” to provide more headroom space for the offices and mechanical equipment and to address humidity and groundwater issues. The highly visited Treasurer/Collector’s Office and Assessors’ Office would be located on the north side of the ground level and easily accessed from the accessible entrance. Both are accessed off a new central corridor. The Treasurer/Collector’s Office would be located in the East Wing with two separate transaction counters to serve the public. Each counter would be individually served by a department employee. The Treasurer and Assistant Treasurer would each have their own private office. There would be a small private conference room next to the Treasurer/Collector’s Office to be used by the department but also accessible from the corridor for the Assessors’ Office to use. The Assessors’ Office would occupy the Northwest side of the ground floor. There would be one transaction counter to serve the public and an open office for three employees. The Assessor would have a private office with a small conference table inside the office. The Parking Clerk’s Office would be located in the center of the building on the North side with a transaction counter accessed directly off the central corridor. In the Southwest corner of the ground floor, a large break room would be located for the staff. The break room would be outfitted with a kitchenette including a fridge and sink. The Custodians’ office would remain in the turret off the break room.

The South Side of the Ground Floor would contain High Density Storage, Custodial Storage, Unisex Restrooms, Mechanical space and the enclosed stairway. All these items do not need natural daylight and could be accessed directly off the central corridor that runs east to west through the ground floor. The new stair would be located in the original stairwell of the Library on the eastern side of the plan. The existing turret stair in the Northwest Turret would remain.

The First Floor of Town Hall would retain the existing West Portico entrance centered on the West Elevation and would move the South Entrance to the east at the original Library door. The original West Lobby and turret stair would have all the original wood work and brickwork restored. The Town Clerk’s Office would occupy the office space to the West Wing on the north of the central building corridor. A service counter would open directly onto the corridor and allows the Town Clerk to serve as the ambassador to visitors entering the Town Hall from the west entry. A new 6-hour fire-rated vault would be constructed in the Town Clerks office as required by state statute. The Town Clerk would have a private office accessed off the main office space to the east. Both fireplaces would be restored in the open office and the private Town Clerk’s office.
The Juliani Room finishes would be restored. The layout of the Juliani Room was a highly discussed topic. The discussions focused around three options:

**Option 1** would be to leave the existing double door opening into the space aligned with the West Portico doors and install a glass wall to the south of the existing doors. This would separate the Juliani Room from the main building corridor while allowing occupants to see the entirety of the original space. The glass wall would reduce the Juliani Room’s seating capacity down to 43. The corridor outside the Juliani room would be larger than a typical corridor at 13’ and serves as the corridor and waiting area for the Town Clerk.

**Option 2** for the Juliani Room would relocate the West Entrance doors into the space by 5’ to the north. This allows the glass wall to move to the north and expand the size of the Juliani room by 5’ and have a total occupancy of 60 people. To move the entrance door to the north would require costly rebuilding of the brick archway and modifying the decorative wood beams in the Juliani room and the entry lobby.

**Option 3** would leave the Juliani Room open to the corridor as it is currently configured. This would allow the maximum occupants in the Juliani Room and leave the space open to the main corridor of the First Floor. The existing brick detailing and woodwork would remain in its original form.

Located in the center of the building on the South Side would a small conference room that can be used for office meetings as well as executive sessions meetings for the Board of Selectmen. The conference room would enclose the existing South Entry doors, and these doors would be used for egress only. On the opposite side of the corridor would be a small multipurpose Office. This space is overflow space to accommodate possible future internal expansion of Town Hall, and to provide a private office space for existing departments to utilize. The elevator location would remain the same. A new elevator pit will be required. The design and engineering phase will need to determine if it is better to shore the existing hoistway while the new elevator pit is being constructed or to construct a new hoistway. In either case, a new elevator cab and equipment will be installed. The existing elevator cab size needs current MAAB requirements. A new stair would be located off the original South Library Entry Door. The stair is larger than the existing non-compliant enclosed stair and provides access to all levels of Town Hall.

The East wing of the first floor would have the Selectmen’s Office and the Financial Services Office. These two departments have a lot of day to day activities together so they are close to each other. The Selectmen’s Office would have an open office for two employees with counter tops to serve the public with a waiting area with chairs and tables inside the open office. The Executive Director’s office would be in the half round with multiple large windows facing east.
The office would have a glass wall and door allowing natural light to pass through the office into the open office. The Executive Director’s Assistant would have a private office with a glass wall to the Executive Director’s office. The Financial Services Office would have an open office with a central service counter to serve the public. Two office spaces would be provided in the open office, and two additional office stations located in the adjoining space to the east. The openings between the side office and open office would be left open to allow the maximum of natural light to pass into the open office. The Financial Services Director would have a private office in the Northeast Corner with a window to the east and a glass door to allow the natural light to pass through. Two restrooms would be provided in the center of the East Wing to service the first floor.

On the Mezzanine Level the IT and GIS offices would be combined into one large office. The two departments work together and a combined open office allows for the most efficient space usage and work environment for the seven employees. The IT equipment would be located on the eastern side of the space. There are no windows in this space. The IT Director would have a private office in the southeast corner, with a glass wall allowing natural light to pass through the cathedral space of the windows in the half round below. A conference room would be provided with access from the corridor so that it is available for all departments in the building. The enclosed stair would provide access to the Mezzanine Level and would continue up to the Third Floor. There would be a single unisex restroom off of the corridor.

On the Second Floor, the Great Hall would occupy the West Wing, while offices would occupy the Center and East Wings. At the Great Hall the existing finishes would be restored. The existing speaking platform would be removed and a new wall constructed with a 2’ recess behind the east masonry arch that outlines the original stage. This wall would serve as the backdrop to the meeting table and would have a projection screen for presentations. The existing wall under the Balcony would be moved back 5 feet from the leading edge of the Balcony. Moving the wall back would give definition and highlight the beautiful wood work and columns of the Balcony. Folding chair seating could be arranged to provide 138 seats at the Great Hall level, with an additional 51 seats in the balcony. The space under the balcony would serve as restrooms for when events or meetings are held in the Great Hall, and to serve the offices of the Second Floor. A large central storage space would also be included under the balcony for the chairs and tables that would be used in Great Hall. The access from Great Hall to the Second-Floor offices would be through a new hall/vestibule along the North Wall. A small conference room would be located off the corridor for office use and small public meetings. The elevator would be replaced with a new front to back elevator that can provide access to the lower Great Hall level, and the upper Second Floor level. A new open stair on the east side of the elevator shaft would connect the two levels. Behind the new recessed wall at the existing speaking platform, a new floor align with the Second-Floor level would be built. Under this floor additional storage will be provided to the
Great Hall. On the new floor would be a mixed-use Sustainable Energy and Youth Director office.

The East Wing of the Third Floor is a cathedral space with beautiful decorative exposed wood rafters and trim. The Human Resources and Veteran’s services offices would occupy this space. It is important for the HR department to have private office and conference rooms. To separate the spaces 8’ tall solid walls with glass walls on top would connect to the trusses and provide privacy while maintaining the open grand feeling of the space. This concept was successfully used in the restoration and renovation of Upton Town Hall to keep the visual openness of the original grand space (shown right). The HR department would have four (4) private offices off the open HR office space. A counter would greet the public just inside the open HR office. The conference roof would be acoustically and visually separated, providing the private meeting space needed for the HR department.

Landscape Design

The separate goals for the landscape improvements to the site revolved around how to protect the park land while making the Town Hall building function better for all users. The tasks are the following:

1. Improve the relationship between the park land and pedestrians with the Town Hall.
2. Bring the accessible parking space and pedestrian circulation routes into compliance with current codes.
3. Parking: Study how to maintain the current number of parking spaces or accommodate a small increase in parking capacity.
4. Minimize the visibility of parking in front of Town Hall as viewed from Washington Street.
5. Reduce the overall area of impervious surfaces used for parking.
6. Protect existing trees.
7. Create more of a buffer between building and sidewalks.
Parking Capacity/Imperviousness Area: An overall gain of four (4) parking spaces would be achieved through careful modifications of the layout of spaces. The upper parking lot would now be a double-loaded lot accommodating more parking within a condensed space. The west side road leading up to the Post Office would have parallel parking on both sides of the street. Reconfiguring the parallel spaces at the Duck Pond into angled spaces would allow for more parking with less visual impact on the site. While the site has gained four (4) spaces the overall amount of paving on the site would be reduced by approximately 2,000 SF.

Accessible Parking Compliance: The existing accessible parking spaces that service the North Entry of the building are relocated slightly downhill so they would need to be re-graded to meet current codes; an additional parking spot would be added to this area. The path leading to the back door would be accessible in slope and material without the use of railings since the route would meet the requirements of a sloped walkway not ramp.

Visual Improvements: The addition of parking along the driveway leading from the Post Office and the adjustment to the upper parking lot would provide enough additional parking so that spaces can be removed elsewhere on the site. In order to open up views to the Town Hall from Washington Street, the parking spaces along the driveway on the South of the building would be removed. The reconfiguration of the upper parking lot would allow for paving to be pulled away from the building resulting in a larger planting bed at its base and a generous landing at the historic entry.

Pedestrian Improvements: The driveway leading up from Washington Street would be pulled away from the sidewalk creating a lawn buffer between the vehicles and pedestrians. The intent would be to have the pedestrian feel more connected to the park land than to the road. The existing path leading from Washington Street to the historic front of the building would be modified so that the path no longer ends at the parking lot. The path would be extended to run parallel to the parking lot and meet up with a raised crosswalk that connects to the path network around the building.

Please see the following Existing Conditions Site Plan and Proposed Site Plan. On the Proposed Site Plan, the outline of existing parking and roadways can be seen in red. There is a reduction of approximately 2,000 SF in paved area. Although there is an overall reduction in area used for roadways and parking, it is unclear if these changes will trigger the need for MGL Article 97 approval and therefore recommend a review of this issue by the Town Counsel.
Proposed Preferred Site Plan
C. Construction Phasing and Logistics

The recommendation of the Wellesley Town Hall Visioning and Space Utilization Study is to construct a separate “Annex” for the Land Use Departments and FMD and then renovate and restore the historic Town Hall for the “core” Town Hall Departments without an addition to the Town Hall.

This approach to solving building deficiencies, including a shortage of program space needed to better serve the public, is also the most advantageous approach in addressing historical and park land concerns as well as the most economical long-term solution. One key to accomplishing this plan with minimum cost and disruption to Town Hall operations is to have the “Annex” building function as the “Temporary Town Hall” while the historic Town Hall is being renovated and restored.

Since the “Temporary Town Hall” will be fully accessible, it needs to be occupied by Town Hall offices before the MAAB Time Variances expire. The MAAB Time Variance is stated as follows: “Three years beginning with the date of Substantial Completion of the current Phase 1 EXTERIOR REPAIRS.”

Please see Section 7, PROJECT COST AND SCHEDULE for specific project costs and dates.
7. Project Cost and Schedule
7. PROJECT COST AND SCHEDULE

The following Total Project Cost estimates were developed for the Town Hall Annex and Town Hall Renovation, and include escalation costs to reflect the Project Schedule:

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<thead>
<tr>
<th></th>
<th>Design Phase</th>
<th>Construction Phase</th>
<th>Total</th>
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<tbody>
<tr>
<td>Town Hall Annex</td>
<td>$621,889</td>
<td>$7,372,816</td>
<td>$7,994,705</td>
</tr>
<tr>
<td>Town Hall Restoration</td>
<td>$1,611,170</td>
<td>$17,370,957</td>
<td>$18,982,127</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>$26,976,832</strong></td>
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</tbody>
</table>

Please see the following pages which contain the Total Project Cost for the Town Hall Annex and for the Town Hall renovation. See Appendix R for detail of the Town Hall Renovation Construction Cost Estimate.

Please see the proposed Town Hall Annex and Town Hall Renovation Master Schedule on page 53. The proposed schedule relies on the Annual Town Meeting and Debt Exclusion ballot votes for approvals and funding, which is typical Wellesley protocol for major capital projects. The following are key approvals:

<table>
<thead>
<tr>
<th>ANNUAL TOWN MEETING DATE</th>
<th>ITEM</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019</td>
<td>Annex Feasibility Study Approved as part of FMD FY20 Cash Capital</td>
</tr>
<tr>
<td>2020</td>
<td>Annex Design Funds</td>
</tr>
<tr>
<td>2020</td>
<td>Town Hall Design Funds</td>
</tr>
<tr>
<td>2021</td>
<td>Annex Construction Funds (Ballot Vote required for Debt Exclusion)</td>
</tr>
<tr>
<td>2022</td>
<td>Town Hall Construction Funds (Ballot Vote Required for Debt Exclusion)</td>
</tr>
</tbody>
</table>
On February 14, 2018, the Massachusetts Architectural Access Board (MAAB) approved the following Time Variances for twelve (12) Non-Conforming Conditions until “Three years beginning with the Substantial Completion of Phase 1.” If the Annual Town Meeting in 2022 approves Town Hall construction funds with bids in hand, the Time Variance extension deadline will be met since the Town Hall Annex will be occupied and function as the temporary Town Hall.
## Town Hall Annex Total Project Cost

<table>
<thead>
<tr>
<th>Line Item</th>
<th>Design Budget</th>
<th>Construction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contractor (Annex)</td>
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<td>Architects/Engineers (Const.)</td>
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<td>Presentations</td>
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<tr>
<td>Cost Estimates</td>
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<td>$10,000</td>
</tr>
<tr>
<td>Testing &amp; Inspections</td>
<td>$50,000</td>
<td>$183,026</td>
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<tr>
<td>Reimbursables</td>
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<tr>
<td>FF&amp;E Design</td>
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<td>FF&amp;E Budget</td>
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<tr>
<td>Moving (THA-TH + FMD-THA)</td>
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<tr>
<td>Cable TV</td>
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<tr>
<td>CM @ Risk</td>
<td>$50,000</td>
<td>-</td>
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<tr>
<td>Commissioning</td>
<td>$6,000</td>
<td>$6,000</td>
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<tr>
<td>Peer Review</td>
<td>$1,000</td>
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<tr>
<td>Builder’s Risk Insurance</td>
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<tr>
<td>FMD Support</td>
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<tr>
<td>Bid Docs Online</td>
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<tr>
<td>Submittal Exchange</td>
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<td>$1,000</td>
</tr>
<tr>
<td>PBC Expense</td>
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<td>$1,500</td>
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<tr>
<td>Fire Services</td>
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<td>$1,000</td>
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<tr>
<td>Legal</td>
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<tr>
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<td>Soft Cost Continency</td>
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**Sub-Totals**  
$621,889 $7,372,816

**TOTAL COST**  
$7,994,705
## Town Hall Renovation Total Project Cost

<table>
<thead>
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<th>Design Budget</th>
<th>Construction</th>
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<td>Primary Contractor (TH)</td>
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</tr>
<tr>
<td>Testing &amp; Inspections</td>
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<td>$10,000</td>
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<tr>
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<td>$300,000</td>
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<td>IT Relocation &amp; Equipment</td>
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<td>Cable TV Rework</td>
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<td>Builder's Risk Insurance</td>
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<td>PBC Expense</td>
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<tr>
<td>Fire Services</td>
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<td>Hard Cost Continency</td>
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<tr>
<td>Soft Cost Continency</td>
<td>$192,740</td>
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</table>

Sub-Total: $1,611,170  $17,370,957

**TOTAL COST**: $18,982,127
Agenda

• Project Background *(FMD)*
• RFQ Process and Study Scope of Work *(FMD)*
• Report Summary *(MKA)*
  – Historic Background
  – Existing Conditions Investigation
  – Visioning & Programming
  – Analysis & Conceptual Design Options
  – Recommendations
• Town Hall Annex *(FMD)*
• Budgetary Cost Estimates *(FMD)*
• Project Schedule *(FMD)*
• Next Steps *(FMD)*

(This entire PowerPoint Presentation to be posted on FMD website http://www.wellesleyma.gov/Archive.aspx?AMID=38)

Town Hall Visioning Study – January 22, 2019
PROJECT BACKGROUND
Project Background

- 2013 Court Street Architect Study
  - Building Dept., Treasurers and Clerks Offices
  - Many other building needs identified
  - Long-term plan/vision for Town Hall questioned

- Exterior Enclosure Project: Greater Priority
  - 2016 Envelope Study
  - Minimally impacted by future interior work
  - Currently undergoing restoration
  - Accessibility issues identified in this project
Project Background

• 2018 Visioning & Space Utilization Study
• $100,000 FY18 Funded Project
• Issues to be Addressed in Study
  – What’s the vision for Town Hall?
  – 34 Years Since Last Renovation
  – Programming: space, circulation, wayfinding, 6-hr vault, public meeting space, Great Hall use, etc.
  – Building systems at or near end-of-service life
  – Poor indoor air-quality throughout building
  – MAAB required upgrades
  – Inadequate Parking
RFQ PROCESS & STUDY
SCOPE OF WORK
RFQ Process & Town Review

• RFQ/Designer Selection
  – October to December 2017
  – Seven Firms Submitted Proposals
  – Three firms interviewed
  – McGinley Kalsow (MKA) ranked highest and hired

• Study Began March 7, 2018

• Regular Coordination & Review Meetings
  – Town Hall Visioning Group (THVG)
RFQ Scope of Work

Task 1: Existing Conditions Investigation
Task 2: Building Code & Historical Review
Task 3: Visioning & Programming
Task 4: Analysis & Design Recommendations
Task 5: Project Costs & Schedule
Task 6: Prepare Report
Task 7: Meetings & Presentations

Town Hall Visioning Study – January 22, 2019
REPORT SUMMARY

Historical Background
Historical Background

• Built from 1881 to 1886 in two separate but adjoining sections.

• Designed by Henry Sargent Hunnewell and George Robert Shaw in the Richardsonian Romanesque style.

• Deeded to Town by Horatio Hollis Hunnewell in 1889.

• Two significant renovations in 1959 and 1985.

• Individually listed on the State & National Historic Registers.
Existing Conditions Investigation

Building Constraints

• Original Library West load-bearing masonry walls, now interior, impacts programming and connections.

• Programmatic layout has significant deficiencies in wayfinding, meeting space, and storage.

• Town government’s program needs has outgrown space.

• Air quality issues throughout building.

• Moisture issues in ground level
Existing Conditions Investigation

Building Opportunities

• Utilize Town Hall’s historic features and character to improve wayfinding and programming.

• Original South Entrance to provide a ground level egress for a new interior stair.

• Relocate existing stair and provide centralized corridors to improve circulation.

• Lower the ground floor slab.
Existing Conditions Investigation

**Site Constraints**

- Town Hall Addition, use park land and Article 97.
- Parking detracts from the iconic Town Hall-Park setting.
- Traffic congestion in and around the West Parking Lot.
- Ineffective sidewalk location and configuration.
- Non compliant accessible parking spaces and non compliant accessible path to building.
Existing Conditions Investigation

Site Opportunities

• Redesign parking that complements the surrounding park land and improve accessibility.

• Redesign parking to improve Washington Street view.

• Strategically situate parking and walkway for easy access to most visited departments.

• Redirect traffic and relocate parking area to allow the building to reconnect with the park land.
Existing Conditions Investigation

**Code**

- Proposed renovation is an Alteration Level 3 category.
- All existing systems, restroom fixtures, egress pathways, and stairs to be modified and require being brought up to code.

**MAAB Analysis**

- Town Hall granted time variance from Mass. Architectural Access Board for 12 items and 3 permanent variances.
- The 12 items are required to be upgraded 3 years after the completion of the exterior restoration (*September 2019*).
REPORT SUMMARY

Visioning & Programming
Visioning & Programming

• Interviews conducted between April and August 2018

• Town Hall Department Heads, Staff and Board members interviewed regarding:
  – needs and requirements for current building
  – future requirements for any proposed building improvements

• 75 full and part-time employees currently in Town Hall

• Potential increase of 7 staff members identified.
Visioning & Programming

Common Themes Identified

• Ability to control HVAC systems.
• Ability to secure building/departments in case of incident.
• Meeting spaces to accommodate groups of all sizes.
• Ability to conduct private conversations in workspaces.
• State-of-the-art audio-visual equipment in meeting spaces.
• Improved, straightforward wayfinding and circulation.
• Natural light and bright, well-lit spaces whenever possible.
REPORT SUMMARY

Analysis & Conceptual Designs
Analysis & Conceptual Designs

Existing Gross Square Footage

- Structures/Walls: 23.8%
- Meeting Rooms: 24.8%
- Circulation & Stairs: 15.9%
- Mechanical & Bathrooms: 17.1%
- Land Use Offices: 9.7%
- Support Spaces: 3.7%
- Non-Land Use Offices & Departments: 5%

Town Hall Visioning Study – January 22, 2019
Option 1: Correct ADA Deficiencies (no program improvements)

Compliance with accessibility standards of the Massachusetts Architectural Access Board (MAAB) include:

- Larger ADA compliant bathrooms,
- Increased corridor widths,
- Adequate turning radius and clearances at doors and stairs,
- Increase in number of plumbing fixtures, and
- Other building code-required upgrades.

Results in net *loss* in usable space
Option 2: Program Improvements (no inclusion of FMD)

Proposed program improvements include:

• Many departments need a increases in office size,
• 6-hour rated vault for Town Clerk (state requirement),
• A need for 3 additional small meeting rooms,
• A potential growth of 6 staff identified during interviews,
• A more functional staff break room, and
• A centralized high-density storage area.
Option 3: Addition/Annex Requirements (*All Departments*)

Proposed addition/Annex to include:

- All Land Use Departments (Building, NRC, Planning, Zoning) together in one location.

- Inclusion of the Facilities Management Department (FMD) which is currently in leased space (888 Worcester Street).

- A public meeting room for land use meetings (Planning Board, Permeant Building Committee, ZBA).
## Analysis & Conceptual Designs

### Square Footage Impacts by Option

<table>
<thead>
<tr>
<th>Option</th>
<th>Additional Need (SqFt)</th>
<th>Cumulative Gain (SqFt)</th>
<th>Total Gross (SqFt)</th>
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<tbody>
<tr>
<td><strong>Existing</strong></td>
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<td>0</td>
<td>26,000</td>
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<tr>
<td><strong>Option 1</strong></td>
<td>ADA Deficiencies</td>
<td>6,500</td>
<td>32,500</td>
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<tr>
<td><strong>Option 2</strong></td>
<td>Program Addition</td>
<td>2,800</td>
<td>9,300</td>
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<td><strong>Option 3</strong></td>
<td>Addition/Freestanding</td>
<td>4,200</td>
<td>13,500</td>
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</table>
## Analysis & Conceptual Designs

### Pros and Cons by Program Option

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<tr>
<th>Option</th>
<th>SqFt</th>
<th>Pros</th>
<th>Cons</th>
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</thead>
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<tr>
<td><strong>Option 1</strong></td>
<td>6,500</td>
<td>Least expensive</td>
<td>No program needs</td>
</tr>
<tr>
<td>ADA Deficiencies</td>
<td></td>
<td></td>
<td>No added meeting rooms</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Not long-term solution</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Net loss of space</strong></td>
</tr>
<tr>
<td><strong>Option 2</strong></td>
<td>9,300</td>
<td>Adds space for 6 staff</td>
<td>Compromise solution</td>
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<tr>
<td>Program Addition</td>
<td></td>
<td>Adds 3 meeting rooms</td>
<td>FMD continues to lease</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td><strong>Article 97 process</strong></td>
</tr>
<tr>
<td><strong>Option 3</strong></td>
<td>13,500</td>
<td>Adds space for 7 staff</td>
<td>Most expensive</td>
</tr>
<tr>
<td>Addition/Freestanding</td>
<td></td>
<td>Adds 3 meeting rooms</td>
<td>Most adverse parking</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Includes FMD</td>
<td><strong>Article 97 process</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maximum consolidation</td>
<td></td>
</tr>
</tbody>
</table>
REPORT SUMMARY

Recommendations
1. **Park Land/Article 97**

- Article 97 is a state law which restricts the use of Park Land. Any addition would need to receive the following:
  - Unanimous Approval from NRC
  - Unanimous Approval from Board of Selectmen
  - 2/3 Approval from Town Meeting
  - 2/3 Approval from State Legislature

- NRC was receptive to talk further about a potential, modest addition and was quite negative about an increase in parking dedicated for Town Hall use.

**Recommendations**
2. Historic and Visual Considerations

- The WHC feels the Town Hall is the most significant historic building in Town but recognized its deficiencies.

- Any addition should either faithfully replicate the original design or be dramatically different.

- The majority of Commissioners felt that if there were an addition, it should be a contemporary “landmark”.

- The Landscape Architects proposed site plan:
  - removes the visually unattractive parking spaces
  - increases the number of overall parking spaces by 4
  - reduces the amount of paving approximately 2,000 SF.
Recommendations

3. Potential Cost Impact

• NRC and WHC meetings confirmed that the technical (Article 97), political, visual and historic hurdles that need to be cleared with an addition are very high

• The cost to construct a contemporary “landmark” addition is substantial (potentially 2.5-times the cost of standard construction based on cost per square foot).
4. **Zoning and Parking**

- The Town Hall is an existing, non-conforming use in the “Single Residence District A” which pre-dates Wellesley zoning.

- Any addition to the building would require a Special Permit approval.

- The “Single Residence District A” zoning does not have parking requirements applicable to the Town Hall.
4. **Zoning and Parking**

- Off-street parking requirements for Business District A seem to be the most applicable zoning by-law section. If the current Town Hall was constructed today, 84 parking spaces would be required.

**Business District A**

Existing Town Hall – **58** parking spaces currently  
**Option 1** – 6,500 SF ADA only – **62** total parking spaces  
**Option 2** – 9,300 SF Add – **116** total parking spaces  
**Option 3** – 13,500 SF Add – **127** total parking spaces
Recommendations

Option 2 – 116 Total Parking Spaces

58 additional parking spaces
Recommendations

Proposed Site Plan
Recommendations

• Provide new office layouts to better service the public.

• Provide greater energy efficiency and sustainability.

• Improve wayfinding and circulation.

• Address accessibility and code issues.

• Reduce parking need by relocating Land Use offices.

• Address dampness and air quality/comfort issues.

• Increase and organize storage for all offices.

• Restore important character defining historic features.
Recommendations

Assessor’s Office

Treasurer’s Office

High Density Storage
Recommendations

Town Clerk

Financial Services

Selectmen’s Office
Recommendations

Information Technology
Recommendations

Veteran’s Office

Human Resources
Analysis & Conceptual Designs

Existing Gross Square Footage

- 23.8%
- 15.9%
- 17.1%
- 9.7%
- 3.7%

Proposed Gross Square Footage

- 22.4%
- 27.6%
- 17.8%
- 20.9%
- 3%
- 8.3%
Recommendations

Therefore MKA recommends…
- Land Use Departments be moved into a new Annex Building.
- Facilities Management Department be moved into the new Annex Building with Land Use Departments.
- Town Hall be restored and updated to provide modern office spaces and meeting space to service the Town of Wellesley.
Town Hall Annex – Benefits

- Annex is much less costly
  - Annex = $592/sf
  - TH Renovation = $730/sf
  - “Landmark” addition in $1,600/sf range
- Solves TH “swing space” problem
- Largely keeps like departments together
- Municipal Way Campus is best location
  - Town owned, available space and consistent use
Town Hall Annex – Needham

Public Services Administration “Annex” Building

Town Hall Visioning Study – January 22, 2019
Town Hall Annex – Municipal Way

Former MLP/DPW Admin. Building Location

Town Hall Annex
Footprint (sqft.): 4,400
Total (sqft.): 13,050

Staff Parking Lot
Additional Spaces: 53

Potential Town Hall Annex & Additional Staff Parking (Municipal Way)

Town Hall Visioning Study – January 22, 2019
Town Hall Annex – Municipal Way

Alternate Building Location

Visitor Parking
Additional Spaces: 18

Staff Parking
Additional Spaces: 17

Town Hall Annex
Footprint (sqft.): 4,400
Total (sqft.): 13,050

Potential Town Hall Annex & Additional Staff Parking (Municipal Way)
Town Hall Annex – Phasing

1. Build New Annex
   - FMD moves into Annex

2. ALL Town Hall moves into new Annex

3. Non-Land Use Depts. move back to Town Hall

4. Final Moves

5. Town Hall Renovation

1986 Renovation Photo

Town Hall Visioning Study – January 22, 2019
BUDGETARY COST ESTIMATES
## Budgetary Cost Estimate

**TOTAL PROJECT COST : TOWN HALL (MKA)**

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Construction Costs</td>
<td>$13,246,703</td>
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<tr>
<td>Soft Costs</td>
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<td>Owner’s Other Expenses</td>
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<td>Owner’s Contingency</td>
<td>$2,372,485</td>
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**Total Project Cost**  
$18,982,127
# Budgetary Cost Estimate

**TOTAL PROJECT COST : ANNEX (FMD)**

<table>
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<th>Cost</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Construction Costs</td>
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<tr>
<td>Owner’s Contingency</td>
<td>$621,180</td>
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| Total Project Cost        | $7,994,706      |
# Budgetary Cost Estimate

## TOTAL PROJECT COST : BOTH PROJECTS

<table>
<thead>
<tr>
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<th>DESIGN PHASE COST</th>
<th>CONSTRUCTION PHASE COST</th>
<th>TOTAL COST</th>
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<tbody>
<tr>
<td><strong>Town Hall Renovation</strong></td>
<td>$1,611,170</td>
<td>$17,370,957</td>
<td>$18,982,127</td>
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<tr>
<td><strong>Annex Building</strong></td>
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<td>$7,372,816</td>
<td>$7,994,705</td>
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<td><strong>Total Cost</strong></td>
<td>$2,233,059</td>
<td>$24,743,773</td>
<td>$26,976,832</td>
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Town Hall Visioning Study – January 22, 2019
# Project Schedule

## ANNEX BUILDING

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<th>Timeframe</th>
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<td>Spring 2019 ATM</td>
<td>Feasibility Study funds (FY20 Cash Capital)</td>
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<tr>
<td><strong>Spring 2020 ATM</strong></td>
<td><strong>Design/Bidding Funds approved</strong></td>
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<tr>
<td>Spring 2021 ATM</td>
<td>Construction funds approved (via ballot vote)</td>
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<tr>
<td>Spring 2021</td>
<td>Construction begins</td>
</tr>
<tr>
<td>Summer 2022</td>
<td>Construction complete (Town Hall moves in)</td>
</tr>
<tr>
<td>Summer 2024</td>
<td>Fit-up for FMD move in</td>
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## TOWN HALL RENOVATION

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Description</th>
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<tr>
<td><strong>Spring 2020 ATM</strong></td>
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</tr>
<tr>
<td>Spring 2022 ATM</td>
<td>Construction funds approved (via ballot vote)</td>
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<tr>
<td>Spring 2022</td>
<td>Construction begins</td>
</tr>
<tr>
<td>Spring 2024</td>
<td>Construction complete</td>
</tr>
<tr>
<td>Summer 2024</td>
<td>Non-Land Use Departments move back to TH</td>
</tr>
</tbody>
</table>

Town Hall Visioning Study – January 22, 2019
NEXT STEPS
Next Steps

• Provide information for project to other Town boards

• Answer board questions regarding project

• Obtain approval for Feasibility Study at 2019 ATM

• Obtain approval for Design Funds for both projects at 2020 ATM
QUESTIONS
4. **Joint Meeting with Planning Board - Review MassHousing Eligibility Letter: 3 Burke Lane**

Enclosed with your packet is a draft eligibility letter to MassHousing for this project. This letter is a result of the site visit to the property held in December, comments from abutters received to date, and input from both staff and Town Counsel. The letter is due back to MassHousing by January 28th. While the letter expresses concern about the project, on the whole this site is appropriate for this type of development, and we would suggest the proposal is generally acceptable. A letter has gone out to the abutters who had expressed an interest in being contacted by email to alert them to the meeting and provide them with a copy of this document. We’ve let them know that they are welcomed to attend this meeting on Tuesday and provide the Boards with their concerns.

**MOVE** to convene a Joint meeting with the Planning Board.

**MOVE** to elect Jack Morgan as chair of the joint meeting.

**MOVE** to elect Catherine Johnson as secretary of the joint meeting.

**MOVE** to approve the letter to MassHousing regarding the Town’s comments on the proposed 40B development at 2 & 3 Burke Lane and authorize the Chair of the Board of Selectmen to make final edits to the letter prior to submission.

**MOVE** to dissolve the joint meeting of the Board of Selectmen and Planning Board.
January 18, 2019

Katherine Miller
MassHousing
One Beacon Street
Boston, MA 02108

RE: 3 Burke Lane, Wellesley, MA Site Eligibility Response

Dear Ms. Miller:

On behalf of the Town of Wellesley (the “Town”) Board of Selectmen and Planning Board, please find the following comments with respect to the Comprehensive Permit Site Approval Application recently submitted by Cedar Place, LLC for the construction of a mixed income development at 2 & 3 Burke Lane which would include 16 units of residential housing on approximately 41,307 square feet of land in Wellesley.

Overview
The Town finds that this site is appropriate for the development of affordable housing and that the proposed project, while not ideal for the neighborhood, is generally acceptable. However, the specific details of the proposed development raise some concerns given the context of its surroundings and the layout of the site. While the density is more appropriate than other recent housing projects, it will nonetheless represent a significant change to a neighborhood comprised of smaller single family homes. Burke Lane is a small neighborhood street which provides questionable access for a residential development of this scale, and the added housing units will strain circulation patterns in the vicinity. Burke Lane also lacks sidewalks and public transit is not easily accessible from this site, thus limiting access and accommodations for pedestrians. The developer has included 2 Burke Lane in their proposal; the Town suspects that the purpose is to achieve a slightly lower calculated density, as the additional parcel will serve no practical purpose otherwise. 2 Burke Lane is an undersized, triangular lot consisting of a mere 2,277 square feet and located across the street from the Project site. As such, the inclusion of 2 Burke Lane in the Application does not appear to contribute to the Project in any meaningful way and the Town requests that it be removed from the application. Other Town concerns related to stormwater management, landscaping, and constructability will require additional information from the applicant. Finally, we are not aware that the applicant has experience as a developer of similar housing projects and its ability to successfully complete such a project should be carefully considered.
**Site Constraints**
The Town records indicate the Project parcels (2 and 3 Burke Lane) have a combined area of 41,307 square feet. As noted above, the Town sees no purpose for the inclusion of 2 Burke Lane in this proposal, as this parcel will not be utilized in any other way than to reduce the overall perceived density of the Project on paper. The proposed development has a building foot print of 7,545 square feet and will be 2.5 stories high.

The topography of the rear portion of the site transitions quickly from 112 feet to 142 feet, of which approximately 20 feet would need to be removed by cutting into the hill. The applicant will need to install a retaining wall but no details are provided on this critical structure. Trees in the vicinity that are indicated in the Application to be retained for screening may be impacted by this change. Information on stormwater management has not been provided, so the Town is unable to opine as to how stormwater runoff will be controlled. While the Application does indicate that the driveway will be constructed of pervious material, stormwater analysis will be required to determine how this will be handled.

**Access Limitations**
Access to the site is served by Burke Lane which is a 22’-footwide neighborhood street. There is access from Burke Lane to Route 9 eastbound. Vehicles, however, must navigate an access route along Route 9 before they can safely merge onto Route 9. Access westbound requires either a U-turn once on Route 9, or an altogether different route through the neighborhood streets off Burke Lane. There are no sidewalks on Burke Lane which inhibits pedestrian access. In order to create sidewalks, a retaining wall on the property and/or within the right-of-way would have to be removed. The developer also proposes two curb cuts (less than 25 feet apart) which we believe will cause confusion and will increase the potential accidents.

**Density and Proximity to Other Neighborhoods**
The property is zoned Single Residence District and 15,000 Square Foot Area Regulation District. The maximum density under the Zoning Bylaw for this District is 2.9 units per acre, and the surrounding neighborhood was developed consistent with this level of density. This project comprises 16.84 units per acre which is more than five times the density of the abutting and surrounding residential neighborhoods. Construction of this many units will have the effect of doubling the number of residential units on this small street. This poses a challenge to circulation and neighborhood character but the Town recognizes that the close proximity of Route 9 and a commercial district make this level of development more appropriate.

**Wetlands**
There are no wetlands on this site nor in the immediate vicinity.

**Traffic**
The proposal includes direct access to and from the site via Burke Lane. While Burke Lane connects to Route 9, the intersection only allows for vehicles to enter Route 9 in the eastbound direction via an access route. Vehicles that want to travel westbound must travel eastbound on Route 9 until they can make a U-turn at the Dearborn Street intersection. Alternatively, such vehicles will travel through the neighborhood to the south (McLean Street and Cedar Street) to a westbound Route 9 ramp. The intersection of McLean Street and Cedar Street is also the intersection for Hastings Street and Hunnewell Street. Due to the proximity of Fiske School and the intersection’s location relative to general traffic patterns, it is congested during the morning and evening commute and during morning and afternoon school pick-up and drop-off times. No traffic count information was provided with the Application. The increased traffic from the proposed development is of some concern to the Town and some changes to circulation patterns will likely be required to alleviate congestion and improve safety.

**Utilities**
Existing water and sewer lines are present in Burke Lane in front of the property, and gas service is available on the street.

**Proposed Parking**
The plan indicates that there are 25 parking spaces or 1.56 spaces per unit. A review of the plan only indicates 24 spaces, and three of those are not delineated in front of the existing building. All parking is
exterior, with the majority being to the left of the building. There is no on-street parking allowed on Burke Lane. The angled layout of the five spaces on the left side of the parking area would require a driver to execute a three-point-turn to exit the parking area, and could result in accidents between cars entering and exiting. While the Town finds that the currently proposed parking quantity is adequate, the location and arrangement of parking spaces is poorly designed and, once corrected, may reduce the quantity of parking.

**Public Transportation**
The MetroWest Regional Transit Authority operates the Route 1 bus along Route 9 with a limited schedule Monday through Friday. Residents seeking to take the Route 1 bus must walk to the Cedar Street interchange to get the bus. As mentioned above, there are no sidewalks along this route. The other public transportation services noted in the applicant’s submittal are all located in Newton. Access to those would require a safe route along Route 9 through the 128/95 interchange. There are currently no sidewalks from the property heading east bound until after Dearborn Street, but sidewalks have been improved through the Route 9/Route 128 interchange. There are no sidewalks heading west along the eastbound side of Route 9 from Burke Lane in order for pedestrians to reach Cedar Street for the Route #1 bus. Thus, public transit options in the vicinity of the proposed project are quite limited unless a resident has access to a vehicle to reach them.

**Landscape**
There are no landscaping plans submitted in the Application. The proposed site plan does not specify how the removal of the rear grade will be addressed, including the number of trees to be removed and how screening for abutting properties will be affected. Additionally, tree removal may be required along Burke Lane and a number of those trees may be public shade trees.

**Construction Management**
The Town has significant concerns with compact nature of this site and the applicant’s ability to safely construct this Project given the need for parking for construction workers and storage of site equipment. We believe that the size of the site, narrow street, and lack of on-street parking will create challenges for both the developer and the neighborhood. Deliveries will need to be coordinated and off-site parking of workers may be required. The developer has not detailed in the Site Eligibility Application how construction would be staged and coordinated.

**Wellesley’s Progress on Affordable Housing**
As you are aware, the Town has recently been inundated with 40B Site Eligibility notices. While the Town has not yet reached 10% threshold of affordable housing inventory, the Town has been making steady progress over the last 15 years in increasing the Subsidized Housing Inventory, and anticipates meeting the 10% by 2019-2020. The Town has received approval of its Housing Production Plan to assist the Town in expanding its range of housing, including affordable, suitable for elder residents and those who wish to downsize and remain in Town, accessible to members of the local workforce, and to young families. The Town has also passed a number of zoning provisions to assist with affordable housing as redevelopment opportunities in Wellesley’s commercial districts arise. As of January 7, 2019, the Town is at 6.77% of its 10% goal, with 11 units recently added to the Subsidized Housing Inventory with the issuance of a Comprehensive Permit for the project at 135 Great Plain Avenue. Below are the Town’s actions that have supported development of affordable housing:

**Major Recent Developments**

- **Housing Production Plan**: The Town’s Housing Production Plan (“HPP”) was approved by the Department of Housing and Community Development effective September 27, 2018.
- **On June 4, 2018, John Hancock announced that it will be redeveloping the Wellesley Office Park site and would like to partner with the Town to construct 350 housing units; the Town is actively working with representatives of John Hancock on a 40R proposal for the site.**
- In March of 2018, the Board of Selectmen, with assistance from the Planning Board, released an RFP to develop the Tailby and Railroad Parking Lots for affordable housing and parking. From
the six proposals submitted to the Town in June, 2018 the Board of Selectmen selected Trinity Financial for this project. Negotiations with Trinity are underway which in part will determine how many units of affordable housing would be constructed, as well as an opportunity to diversity the Town’s housing opportunities.

- April 2018: Town Meeting approved the transfer of $200,000 to the Wellesley Housing Authority from the Community Preservation Committee, with support of the Board of Selectmen, to prepare surveys and other studies to ready the Authority’s Barton Road property for potential redevelopment, including the improvement of existing housing and the creation of additional housing opportunities.

**Legal Changes to Promote Affordable Housing**

- The Town adopted the Inclusionary Zoning Bylaw (“IZB”) in 2004 which requires residential projects in commercial districts to provide 20% affordable housing, and commercial projects over 10,000 square feet to provide 2% affordable housing (1 unit for every 50,000 square feet constructed).
- 2005: The Town modified the IZB to require subdivisions having more than five lots to comply with the Bylaw at 20% threshold. 2007: The Town modified the definition of Floor Area Ratio in the Zoning Bylaw to exclude affordable units developed under the IZB from being included in the FAR to increase density and increase opportunities for affordable housing units in commercial districts.
- New units and affordable unit funding resulting from IZB changes:
  - 2007: The Linden Square project was completed, wherein seven affordable housing units were created under the IZB (these units have recently been found to be missing from the Town’s SHI, but are being added now).
  - 2007/2008: permitting began for projects at 978 Washington Street and the former Wellesley Inn site at 576 Washington Street in Wellesley Square; these projects were delayed due to the recession, but both have now been completed, resulting in seven SHI-eligible units at 978 Worcester and 5 SHI-eligible units at 576 Washington Street. Both projects were developed under the Town’s Zoning and subject to the IZB; 978 Worcester St. also resulted in payment in-lieu funds for 1 unit.
  - 2009: the permitting of a CVS resulted in the payment of in-lieu funds under the IZB.
- 2013: The Town amended the Wellesley Square Zoning District to create a special permit to increase density; this benefited and allowed the previously stalled Wellesley Inn project to proceed.

**Additional New Units**

- 2004: The Town’s Community Preservation Committee funded $65,000 in addition to HUD funds to create a DMR house at 4 Marshall Road (SHI).
- 2012: A project was permitted at 27 Washington Street, resulting in the development of 82 SHI-eligible units, as well as seven assisted living units not SHI-eligible but permanently deed restricted to be affordable.
- 2012: The Wellesley Housing Development Corporation purchased a two-family dwelling at Peck Ave and a single-family dwelling at 6 Mellon Road, renovating the homes and creating three affordable units; at this time the Town also purchased 9 Highland Road, although it is not on SHI, but it is affordable due to deed restriction not complying with DHCD requirements (Must wait to add on resale per DHCD).
- 2013/2014: a 40B project was approved at 139 Linden Street and added two SHI units in October 2017.
- 2018: a 40B project was approved at 135 Great Plain Avenue, adding 11 SHI units in December 2018.
Planning Actions to Promote Affordable Housing

- The 2007-2017 Comprehensive Plan recommended actions for affordable housing including exploring the feasibility of using Town-owned parcels for affordable housing and modifying the zoning bylaws to encourage housing diversity, both of which the Town has and continues to implement and explore.
- 2016 to present: The Town has developed the first Unified Plan in the Commonwealth that brings together the Town’s strategic plan and comprehensive plan. The complete draft is available on www.wellesleyunifiedplan.com. The Selectmen and Planning Board will adopt the final plan this month that includes a housing strategy that employs a variety of mechanisms to increase housing type and affordability.
- March 2018: Town Meeting appropriated to the Planning Board funds to develop a sub-area study and plan, with additional funds to be provided from the Community Preservation Committee, with a focus on development/redevelopment opportunities in a defined area to support the development of additional affordable housing.

For reference, 40B projects currently in Comprehensive Permit Review are:

1. Delanson Circle (90 Units) - MHP
2. 148 Weston Road (55 Units) - Masshousing
3. 16 Stearns Road (24 Units) - MassHousing
4. 680 Worcester Street (Previous proposed 20 Units) - MassHousing

Based on all of the reasons articulated above, the Town believes that the proposed site and development are acceptable given the surrounding uses and densities, but maintains substantial concerns related to site access and neighborhood circulation, pedestrian accommodations and public transit, parking on site, screening, and constructability. Given these challenges and the Applicant’s inexperience, the Town has some concerns with this Applicant’s ability to safely execute the proposed development.

Sincerely,

___________________________  _________________________
Jack Morgan, Chair          Marjorie R. Freiman, Vice Chair

___________________________  _________________________
Ellen F. Gibbs, Secretary    Thomas H. Ulfelder

Elizabeth Sullivan Woods
5. **Update on the Status of the Wellesley Office Park Proposal**

The purpose of this item on the agenda is to provide the Board with an update on the status of the conversations with representatives from John Hancock about the proposed redevelopment of the Wellesley Office Park under the 40R Smart Growth Zoning statute. Since the Board opened a public hearing on this project in December, meetings have taken place to discuss the infrastructure (electric, water, sewer, and traffic), the fiscal analysis has been reviewed, and progress made towards consensus on these topics. As you know, the Board is scheduled to continue the public hearing on January 28th, and in preparation for that we would like to go over with you the items listed below on Tuesday. We’d like to understand any questions or concerns that you may have, or additional information that you may need, so that we can address those prior to January 28th at which time we would ask you to consider a motion to authorize the submission of a preliminary application to the Department of Housing and Community Development (DHCD) to invite the Town into the 40R program.

As you will see, Dick Joyce has confirmed the sufficiency of the electrical infrastructure on behalf of the MLP. In general, agreement has been reached that the water and sewer deficiencies would be addressed in the first phase of the project (i.e. the initial 350 units of housing) and we expect to have a letter from Dave Hickey certifying this in the near future. A table in the attachments indicates that John Hancock will pay for a sewer pump station, and the cost of water and sewer lines would be shared with the Town. The Town’s costs would be capped at a total of $500,000 for these, for which the anticipated source of funding would be a portion of the payment from the State once the 40R bylaw is adopted. The group has identified several possible solutions to mitigate the impact of traffic, but no single solution has been reached, in part because MassDOT must be a party to that process. At present John Hancock has identified a cost of $180,000 to install a traffic signal, and has committed to take on that responsibility. Finally, our Judi Barrett has reviewed the financial impact analysis on behalf of the Town and agrees with the conclusions that are drawn. The attached documents include:

- Summary Cover Memo from Peter Tamm and Chris Clements,—Goulston & Storrs, dated January 17, 2019;
- Fiscal Impact Analysis, prepared by Fougere Planning and Development, Inc., dated January 17, 2019;
- Municipal Infrastructure Improvements Proposal Summary Table;
- Infrastructure Improvements Summary and Cost Estimate Memo from Stantec, dated January 17, 2019;
- William Street Access Improvements Memo from Vanasse & Associates, dated January 17, 2019; and
- Electrical Infrastructure Certification Letter regarding Electricity - from Dick Joyce, MLP, dated December 31, 2018

**NO MOTION**
MEMORANDUM

TO: Town of Wellesley Board of Selectmen

CC: Blythe Robinson, Executive Director, Town of Wellesley  
Thomas Harrington, Esq., Town Counsel  
Michael Zehner, Planning Director, Town of Wellesley  
by e-mail only

FROM: Peter Tamm  
Chris Clements

DATE: January 17, 2019

SUBJECT: Wellesley Office Park Redevelopment – Fiscal Impact Analysis and Infrastructure Plan

This memorandum provides an update to facilitate the advancement of the 40R “Smart Growth” overlay zoning under consideration by the Town in coordination with our client, John Hancock Real Estate (“JHRE”) to support the mixed-use redevelopment of the Wellesley Office Park (the “Project”). More specifically, this memo and its accompanying documents provide for the following Project-related planning materials: (i) an analysis of the Project’s potential fiscal impacts upon the Town, (ii) a plan for implementation of new municipal water and sewer infrastructure and (iii) a plan for the implementation of traffic improvements.

The first phase of the Project is limited to the demolition of the office building at 40 William Street and the construction of a 350 unit apartment building and parking garage in its place (“Phase I”). Phase I will also include the construction of some limited accessory retail space, along with site improvements in the vicinity of the Phase I site. Subsequent phases of redevelopment are not yet defined as to scope and will be addressed following the completion of Phase I, subject on market conditions.

Fiscal Analysis

As you know, JHRE commissioned Fougere Planning & Development, Inc. to prepare a fiscal impact analysis of the overall potential impacts of the Project. This analysis is enclosed for your review and consideration. We expect that your review will help to further refine this analysis but its key findings are unlikely to change in any material respect:

I. Phase I will generate approximately $1.5M in tax revenue per year.
A. Even discounting this amount to pay the salaries of (i) a new firefighter, (ii) 50% of the salary of a new police officer and (iii) two new teachers as well as a teacher’s aide, Phase I will still yield over $900,000 annually in new tax revenue to the Town.

II. Additional redevelopment comparable to that reflected in the conceptual 40R master plan has the potential to generate an additional $2.6M+ in annual tax revenues to the Town, or approximately $2.3M net annually after discounting potential costs/impacts.

III. One-time 40R payments of approximately $1.3M will be paid by the Massachusetts Department of Housing and Community Development to the Town upon issuance of building permits for Phase I. Up to an additional $1M may be paid to the Town in connection with a subsequent residential component of the Project. Under c. 40R, these direct payments to the Town are intended to help defray development impacts but there is no limitation on the use of these funds.

**Municipal Infrastructure Improvements**

JHRE proposes to partner with the Town in the planning, design and upgrade of off-site municipal infrastructure identified by the Town in the course of our discussions. Although JHRE initially proposed implementing municipal infrastructure improvements in a phased approach in conjunction with the full build-out of the Project, based on conversations with Town engineers and officials, JHRE is now committed to completing all of the municipal infrastructure improvements identified below in conjunction with Phase I, subject to the cost-sharing approach set forth in the enclosed materials. We expect that final details and commitments can be memorialized in a development agreement that would be authorized by town meeting.

**I. Water and Sewer Improvements**

Water and sewer infrastructure improvements supporting the Project, as proposed, are informed by the attached memorandum by Stantec Consulting Services, Inc. dated January 17, 2019.

**Water**

JHRE will coordinate with the Town to prepare plans, obtain necessary permits, and install a new 12” waterline paralleling the existing 12” waterline running east-west under Route 95. This new water line would provide an upgraded 12” redundant potable water service line to the site. JHRE proposes evenly sharing the costs of these water improvements with the Town, estimated at $500,000 in total.

**Sewer**
JHRE will coordinate with the Town, at JHRE’s sole cost and expense, to complete the design, permitting and installation of a replacement sewer pump station on the site. Upon completion of the new pump station, JHRE will also take responsibility for all costs associated with its ongoing operation and maintenance so that the Town does not have any maintenance obligations. The replacement sewer pump station is estimated to cost $250,000.

JHRE will also install a new 6” force main as a replacement of the existing 4” force main running east-west under Route 95. JHRE proposes evenly sharing the costs of these sewer improvements with the Town, estimated at $500,000 in total.

II. Transportation Improvements

Transportation improvements supporting Phase I of the Project, as proposed, are informed by the attached memorandum and Conceptual Improvement Plan (“CIP”) by Vanasse & Associates, Inc. dated January 17, 2019, with additional consultation from BETA Group on behalf of the Town. The CIP identifies potential improvements to the William Street/Frontage Road intersection and depicts the implementation of traffic signal control of the intersection.

From a traffic flow and safety perspective, the prior traffic analysis has shown that no improvements are necessary to be implemented in conjunction with Phase I. Nevertheless, JHRE is proposing to complete the below improvements in conjunction with Phase I in order to improve existing traffic and safety conditions.

JHRE will coordinate with the Town, at their sole cost and expense, to prepare plans and obtain necessary permits to install a traffic control signal that would control both Frontage Road westbound and traffic exiting from William Street, and would include a pedestrian phase for crossing William Street. This signal will permit egress from Wellesley Office Park without the need for a police detail. The signal is estimated to cost approximately $180,000.

The improvements contemplated will result in improved operations and safety at the intersection of William Street and Frontage Road. The improvements are not anticipated to require significant geometric roadway improvements and will not stop traffic on Route 9.

Additional traffic and pedestrian improvements may be implemented in conjunction with future phases of redevelopment, which are currently undefined in nature and scope. JHRE will undertake a feasibility study of a number of additional potential traffic improvements as set forth in the Vanasse & Associates, Inc. memorandum. Accordingly, the Town can expect that future improvements necessary to address project impacts will be considered and addressed in the course of (i) MassDOT review and approval (ii) issuance of a special permit by the Planning Board and/or (iii) complying with the terms and conditions of a development agreement to be
entered into between JHRE and the Town. Ensuring safe operations in and out of the property is in both JHRE’s and the Town’s interest.

**Summary**

We trust this memorandum, accompanying documentation and proposal is a helpful further step in planning for the redevelopment of Wellesley Office Park. The proposed infrastructure improvements are intended to address identified municipal infrastructure concerns, while the cost-sharing elements are intended to prevent the Town from having to seek new capital funds for replacement infrastructure. The Town can rely on the 40R payments alone to more than address its proposed share of these costs, with the bulk of these items being shouldered by JHRE. We look forward to addressing any further concerns and appreciate your continued coordination in advancing this important project.

**Attachments:**

2. Municipal Infrastructure Improvements Proposal Summary Table;
3. Memorandum by Stantec Consulting Services, Inc., dated January 17, 2019; and
Fiscal Impact Analysis

Planned Mixed-Use Redevelopment of Wellesley Office Park

January 17, 2019

Prepared For John Hancock Real Estate

Prepared By
Fougere Planning & Development, Inc.
I. Introduction

Fougere Planning and Development has been engaged by John Hancock Real Estate to undertake a Fiscal Impact Analysis to assess the estimated new revenue the Town of Wellesley may realize while taking into account the potential service demands that may result from the proposed redevelopment of the Wellesley Office Park into a mixed-use development pursuant to the adoption of a 40R “Smart Growth” overlay zoning district that will provide the flexibility to enable the redevelopment of the Wellesley Office Park for a mix of uses.

This analysis is based upon a phased conceptual master-planned redevelopment of the property. The initial phase of the redevelopment consists of a new 350 unit apartment community in place of the existing 76,000 +/- square foot office building at 40 William Street, which is planned to be razed to accommodate this project. This initial phase will include a new parking garage to be shared with the existing office building at 20 William Street and may also include approximately 5,900 square feet of new amenity retail space. Twenty-five percent of the apartments in this initial residential development will be “affordable”, thereby advancing a key goal of the Town’s newly-adopted Housing Production Plan by producing affordable housing units available to local Wellesley residents and by ensuring that all 350 units will count on the Town’s Subsidized Housing Inventory. It is anticipated that this initial phase will be completed within 3 years.

The master plan for the Wellesley Office Park contemplates further redevelopment that could be realized under the new 40R zoning regulations. Any such further redevelopment will proceed in discrete phases, depending on market conditions, and is unlikely to commence sooner than the completion of Phase I, so as not to adversely impact existing uses within the office park. Despite this uncertainty, this analysis studies a potential
“completed” master plan redevelopment scenario to provide an understanding of the potential municipal impacts that could be realized by approval of the 40R overlay zoning.

This scenario, which shall be described as the “Master Plan,” contemplates a redevelopment of additional parcels on the site resulting in (i) up to 250 additional multifamily residences (also 25% affordable), (ii) a new, select service hotel, (iii) 5,600 additional square feet of amenity retail space and (iv) a new 240,000+/- square foot Class A office building. In terms of site impacts, as shown conceptually on the Master Plan, these potential new uses would likely require razing additional existing buildings on the site; an additional multifamily community could replace the 31,207 square foot office building fronting the Charles River at 65 William Street. A new Class A office building of approximately 240,000 square feet could be developed in the place of the existing office buildings located at 60 and 80 William Street containing, in total, 125,002 square feet of office space. Table One outlines this project mix contemplated by the Master Plan.

Table One
Phase One1
(removes 76,000+/- sf office at 40 William St)

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Amenity Retail 5,900 Sq. Ft.

Later Phases of the Master Plan1
(would replace 156,000+/- sf of office by razing 3 buildings at 60, 65 and 80 William St)

<table>
<thead>
<tr>
<th>Unit Type</th>
<th>Market</th>
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<td>Studio</td>
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<td>25</td>
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<tr>
<td>Totals</td>
<td>188</td>
<td>62</td>
<td>250</td>
</tr>
</tbody>
</table>

Amenity Retail 5,600 Sq. Ft.

Hotel 120 Rooms

Office Space 241,200 Sq. Ft.2

1 Unit mix is preliminary and subject to change.

2 Net “new” office area will be 116,198 Sq. Ft. as two office buildings presently exist that total 125,002 Sq. Ft.
II. Local Trends

Census figures report that from 2000 to 2010 Wellesley’s population increased from 26,613 to 27,982, showing a 5.1% growth rate over the 10-year period. The Census Bureau estimates the 2016 population to be 28,909, indicating a continued -- but more modest -- increase (only 3.3%) in the Town’s population. From 2000 to 2016, children under 5 years of age have decreased from 7.3% of the community’s population to 4.9%, highlighting the decreasing school enrollment trend which will be further discussed later in this Report.

As identified in the Housing Production Plan, the Town’s housing stock is critically lacking in rental housing options (and affordable units in particular), as a majority of Wellesley’s housing stock consists of single family homes, with the most recent Census data (2016) reporting 7,490 units out of a total housing stock of 9,134 units as outlined in Figure 1.

![Figure 1: Housing Unit Breakdown](image)

Budget

Education, along with the Public Safety departments, are some of the largest cost centers in the community as outlined in Table Two and therefore will be the primary focus of this analysis as they relate to the potential redevelopment of the office park.

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### Table Two
**Town Budgets 2017 - 2019**

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<td>$7,063,089</td>
<td>$7,649,404</td>
<td>$8,029,259</td>
</tr>
<tr>
<td>Public Works</td>
<td>$6,976,624</td>
<td>$6,763,669</td>
<td>$7,027,888</td>
</tr>
<tr>
<td>Public Safety</td>
<td>$11,752,898</td>
<td>$11,858,251</td>
<td>$12,503,493</td>
</tr>
<tr>
<td>Library &amp; Recreation</td>
<td>$2,717,840</td>
<td>$2,785,937</td>
<td>$2,890,485</td>
</tr>
<tr>
<td>Employee Benefits</td>
<td>$26,304,938</td>
<td>$28,406,725</td>
<td>$30,049,712</td>
</tr>
<tr>
<td>Debt Service</td>
<td>$16,522,953</td>
<td>$16,740,608</td>
<td>$16,554,172</td>
</tr>
<tr>
<td>Reserve &amp; Insurance</td>
<td>$696,651</td>
<td>$715,454</td>
<td>$710,679</td>
</tr>
<tr>
<td>Cash Capital</td>
<td>$5,152,079</td>
<td>$6,703,374</td>
<td>$5,305,108</td>
</tr>
</tbody>
</table>

### III. Per Capita Methodology & Marginal Cost Approach

There are a number of methodologies that are used to estimate fiscal impacts of proposed development projects. The Per Capita Multiplier Method is the most often used analysis to determine municipal cost allocation. This method is the classic “average” costing method for projecting the impact of population growth on local spending patterns and is used to establish the costs of existing services for a new development. The basic premise of this method is that current revenue/cost ratios per person and per unit are a potential indicator of future revenue/cost impacts occasioned by growth. New capital expenditures required for provision of services to a development are not added to current costs; instead, the present debt service for previous improvements is included to represent ongoing capital projects. The advantage of this approach is its simplicity of implementation and its wide acceptance by both consultants and local officials. The downside of this approach is that the methodology calculates the “average” cost as being the expected cost, which is often not the case and costs are exaggerated - significantly in some instances. (For example, if one student is added to a school system, limited cost impacts will occur; however based on an “average” cost to educate one student the cost could be noted as $15,000/year, which includes such costs as existing debt, building maintenance, administrative and other factors, all of which will be minimally impacted by the addition of one student. The “true cost” could be significantly less, especially in those communities with declining enrollment.)

The Marginal Cost Approach is a more realistic methodology that can be used to estimate and measure developmental impacts based on actual costs that occur in the community. At this time, a “level of service” exists in Wellesley to serve the community. This existing
service level, for the most part, addresses the needs of the community through existing tax collections. As new development occurs, pressures are placed on some departments to address increased demands, while other departments experience negligible, if any impacts. In reviewing the potentially impacted town departments specifically, a truer picture of anticipated cost impacts can be determined.

Given the nature of the contemplated redevelopment of the Wellesley Office Park, as will be shown by the analysis below, measurable impacts will be limited to a few Town departments. Any required off-site traffic and roadway improvements are expected to be addressed during the approval processes with the Town and MassDOT, and may be documented in a development agreement with the Town. Solid waste generated by new buildings within the office park will be removed by a private hauler, consistent with existing practices. Any ongoing sewer and water expenses associated with potable water use and sewage generated by new uses within the office park will be offset through user fees, and the costs of any required municipal utility upgrades are in the process of being assessed and are expected to be addressed in a development agreement between the Town and the property owner. All on-site property improvements will be private and all maintenance expenses will be paid for by this project owner. The existing sewer pump station may be upgraded with the initial phase of redevelopment and the property owner is prepared to take sole responsibility for its future maintenance costs, thereby relieving the community of any associated cost burden. This report does not intend to imply that no costs will occur as a result of this project. Measurable impacts of the redevelopment are expected to result to a few Town departments, most notably the School Department along with the Police and Fire Departments. Other Town agencies are projected to experience little or no measurable impacts from the redevelopment of the office park.

IV. Local Revenues from Development

1) Revenue

Local property taxes provide the bulk of general fund revenues for the Town, with fiscal year 2018 figures showing that 75.2% will be generated from this revenue source, with the remaining income being received from state aid and local receipts. The 2018 tax rate for the Town is $11.95.
Table Three outlines the estimated municipal tax revenue that may be generated by the redevelopment, based upon the anticipated assessed value\(^4\) for both Phase I & the remainder of a completed Master Plan. To arrive at this estimated value, local and regional properties were analyzed in order to estimate assessments (see list of properties in Appendix). In addition, discussions took place with Town Assessing officials. Based upon these values, Phase I will generate $1,237,602 in gross annual property tax revenue and the completion of the Master Plan could generate an additional $2,164,480 annually. For planning purposes, assuming the completion of both the Phase I project and the remainder of the Master Plan, the total property tax revenue realized to the Town would amount to $3,402,081 annually.

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Value/Unit</th>
<th>Total Value</th>
<th>Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>350 Apt. Units</td>
<td>$290,000</td>
<td>$101,500,000</td>
<td>$1,212,925</td>
</tr>
<tr>
<td>Comm. Space 5,900 Sq. Ft.</td>
<td>$350/sq. ft.</td>
<td>$2,065,000</td>
<td>$24,677</td>
</tr>
<tr>
<td><strong>Phase I Annual Revenue(^5)</strong></td>
<td></td>
<td></td>
<td><strong>$1,237,602</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Phase II</th>
<th>Value/Unit</th>
<th>Total Value</th>
<th>Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>250 Apt. Units</td>
<td>$290,000</td>
<td>$72,500,000</td>
<td>$866,375</td>
</tr>
<tr>
<td>Hotel 120 Keys</td>
<td>$105,000</td>
<td>$12,600,000</td>
<td>$150,570</td>
</tr>
<tr>
<td>Office - 241,200 sq. ft.</td>
<td>$390 Sq. Ft</td>
<td>$94,068,000</td>
<td>$1,124,113</td>
</tr>
<tr>
<td>Comm. Space - 5,600 Sq. Ft.</td>
<td>$350/Sq. Ft.</td>
<td>$1,960,000</td>
<td>$23,422</td>
</tr>
<tr>
<td><strong>Phase II Annual Revenue(^6)</strong></td>
<td></td>
<td></td>
<td><strong>$2,164,480</strong></td>
</tr>
</tbody>
</table>

**Total Revenue Phase I & II** | | | **$3,402,081**

2) Miscellaneous Yearly Revenues

Another major revenue source for the community is from motor vehicle excise taxes. In fiscal year 2017, the Town received a total of $5,451,064\(^7\) from this revenue source. Table Four outlines the projected excise tax revenue stream for the redevelopment project, which is estimated to be $210,000 annually from Phase I and $150,000 from the remaining elements of the Master Plan.

---

\(^4\) Assessments are based on current market conditions and assume high occupancy rates for all uses.
\(^5\) The existing office space at 40 William Street currently generates $277,407 in property tax payments; its replacement with Phase I project will result in a net increase in property taxes of $709,245 annually.
\(^6\) The buildings at 60, 65 and 80 William Street currently generate $568,688 in property tax payments; replacement of these buildings with a redevelopment comparable to the Master Plan will result in an additional net increase in property taxes of $1,595,792.
\(^7\) Town Report.
Table Four
Motor Vehicle Excise Taxes

<table>
<thead>
<tr>
<th></th>
<th>Phase I</th>
<th>Master Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg. Car Value</td>
<td>$20,000</td>
<td>$20,000</td>
</tr>
<tr>
<td>Total Cars⁸</td>
<td>420</td>
<td>300</td>
</tr>
<tr>
<td>Total Value</td>
<td>$8,400,000</td>
<td>$6,000,000</td>
</tr>
<tr>
<td>Excise Rate</td>
<td>$25/$1,000</td>
<td>$25/$1,000</td>
</tr>
<tr>
<td>Est. Excise Taxes</td>
<td>$210,000</td>
<td>$150,000</td>
</tr>
</tbody>
</table>

3) Occupancy Tax

The Town of Wellesley assesses a 4% Occupancy Tax on hotel rooms and collected $92,998 from this revenue source in 2017. Based on area market conditions and the assumptions outlined in Table Five, it is estimated that a 120 room hotel as contemplated in the Master Plan would generate $306,600 in annual revenue.

Table Five
Estimated Annual Occupancy Tax Revenue

<table>
<thead>
<tr>
<th>Hotel Tax</th>
<th>Occupancy Rate</th>
<th>Ave. Rate/Night</th>
<th>Yearly Income</th>
<th>Occupancy Tax</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.00%</td>
<td>70%</td>
<td>$200</td>
<td>$7,665,000</td>
<td>$306,600</td>
</tr>
</tbody>
</table>

4) Total Revenues from Redevelopment

The planned redevelopment of the office park is expected to generate $1,447,602 in annual tax revenue at the completion of Phase I, along with $12,364 in CPA revenues. An additional $2,621,080 could be generated annually upon the completion of the Master Plan, along with $21,633 in CPA revenues; see Table Six. In this scenario, upon completion of the redevelopment contemplated by the Master Plan, total revenues (Phase I plus the remainder of the Master Plan) are estimated to be $4,068,681 annually.

⁸ 1.2 cars per unit.
Table Six
Estimated Gross Revenues

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Value/Unit</th>
<th>Total Value</th>
<th>Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>350 Apt. Units</td>
<td>$290,000</td>
<td>$101,500,000</td>
<td>$1,212,925</td>
</tr>
<tr>
<td>Vehicle Excise</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>420 Vehicles</td>
<td>$20,000/car</td>
<td>$8,400,000</td>
<td>$210,000</td>
</tr>
<tr>
<td>Comm. Space 5,900 Sq. Ft.</td>
<td>$350/sq. ft.</td>
<td>$2,065,000</td>
<td>$24,677</td>
</tr>
<tr>
<td><strong>Phase I Annual Revenue</strong></td>
<td></td>
<td></td>
<td>$1,447,602</td>
</tr>
<tr>
<td>CPA Surcharge 1%</td>
<td>$1,236,407</td>
<td></td>
<td>$12,364</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Master Plan</th>
<th>Value/Unit</th>
<th>Total Value</th>
<th>Tax Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>250 Apt. Units</td>
<td>$290,000</td>
<td>$72,500,000</td>
<td>$866,375</td>
</tr>
<tr>
<td>Vehicle Excise</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>300 Vehicles</td>
<td>$20,000/car</td>
<td>$6,000,000</td>
<td>$150,000</td>
</tr>
<tr>
<td>Hotel 120 Rooms</td>
<td>$105,000</td>
<td>$12,600,000</td>
<td>$150,570</td>
</tr>
<tr>
<td>Hotel Occupancy Tax 4%</td>
<td></td>
<td></td>
<td>$306,600</td>
</tr>
<tr>
<td>Office - 241,200 Sq. Ft.</td>
<td>$390 Sq. Ft.</td>
<td>$94,068,000</td>
<td>$1,124,113</td>
</tr>
<tr>
<td>Comm. Space - 5,600 Sq. Ft.</td>
<td>$350/Sq. Ft.</td>
<td>$1,960,000</td>
<td>$23,422</td>
</tr>
<tr>
<td><strong>Master Plan Annual Revenue</strong></td>
<td></td>
<td></td>
<td>$2,621,080</td>
</tr>
<tr>
<td>CPA Surcharge 1%</td>
<td>$2,163,285</td>
<td></td>
<td>$21,633</td>
</tr>
<tr>
<td><strong>Total Phase I &amp; Master Plan</strong></td>
<td></td>
<td></td>
<td>$4,068,681</td>
</tr>
<tr>
<td>Total CPA Surcharge</td>
<td></td>
<td></td>
<td>$33,997</td>
</tr>
</tbody>
</table>

5) Community Preservation Surcharge

In 2002 the Town adopted the Massachusetts Community Preservation Act (CPA), agreeing to a 1% surcharge on the total property taxes paid. Based on the estimated taxes from the proposed redevelopment, the CPA surcharge revenue is estimated to be $12,364 annually from Phase I and $21,633 from the completion of the remainder of the Master Plan as outlined in Table Seven. Upon completion of both Phase I and the remainder of the Master Plan, the total estimated revenue is estimated to be $33,997 annually. As these funds are designated for a number of specific uses including preservation and affordable housing, they are not allocated to the general fund revenue but set aside for specific purposes outlined under the Act.

Table Seven
Estimated CPA Revenue

<table>
<thead>
<tr>
<th>CPA</th>
<th>Property Tax Revenue</th>
<th>Estimated CPA Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>1% CPA Surcharge</td>
<td>Phase I $1,236,407</td>
<td>$12,364</td>
</tr>
<tr>
<td>1% CPA Surcharge</td>
<td>Phase II $2,163,285</td>
<td>$21,633</td>
</tr>
</tbody>
</table>
Other income sources were reviewed for this analysis but not included in the income figures. The Town receives state aid from a number of sources based upon the Town’s population and school enrollments. The anticipated new residents will create demand for local services, thereby creating a positive impact on the local economy. In addition, one-time building permit fees will be paid to the Town, and the construction economy will be enhanced from this new development project.

6) 40R Payments

Also, to incentivize the adoption of zoning with greater housing density through the 40R overlay zoning process, the Massachusetts Department of Housing and Community Development (DHCD) provides communities one-time direct incentive payments in the form of so-called zoning incentive payments and bonus payments based on the number of residential units permitted as of right beyond the number permitted under existing zoning. Should the 40R overlay zoning district contemplated for the Wellesley Office Park allow for more than 500 multifamily housing units as-of-right, the town can expect to receive zoning incentive payments totaling $600,000. In addition, the Town would be paid “bonus” payments of $3,000 per unit by DHCD upon issuance of building permits for particular projects. If 600 total residential units were developed within the office park, these “bonus” payments would total approximately $1,725,000 (this figure assumes that 25 housing units are permitted under existing zoning). For Phase I alone (350 units), the Town can expect zoning incentive payments and bonus payments to total approximately $1,325,000. For the remainder of 250 residential units contemplated the Master Plan, the Town could realize an additional $1,000,000 in incentive payments and bonus payments. Under c. 40R, these one-time 40R payments are intended to help the municipality defray municipal costs associated with resulting development, whether for deferred maintenance or capital costs associated with municipal infrastructure upgrades or for any other municipal purposes.

V. Department Impacts

As noted above, the Police, Fire and School Departments account for a significant percentage of the Town’s operating expenses. These Departments employ the largest number of personnel and have the most dramatic impact on Wellesley’s municipal budget. Given the large budgetary impact these Departments have on the Town, they are closely analyzed in this Report.
1) **Police & Fire**

Both the Police and Fire Departments will see a measurable increase in demand for services which can be attributed to the planned redevelopment of the office park. To gain a firm understanding of the degree of impact this redevelopment would have on these departments, over 2,400 units of housing within 40B apartment complexes were reviewed to collect the emergency call volume generated by these land uses. In addition, call data was obtained from office space and hotels to estimate demands from these uses. The data was analyzed to arrive at an average emergency call ratio per unit, which was then used to generate projected emergency calls for each department. Extrapolating from the comparable call data, increases in calls are projected for both the Town’s Police and Fire Departments. Table Eight and Nine outline the findings from this research.

Table Eight

<table>
<thead>
<tr>
<th>Use</th>
<th>Net New Calls: New Use – Existing Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase One 350 Apartments</td>
<td>141 – 7 = 134 New Calls</td>
</tr>
<tr>
<td>Remainder of Master Plan 250 Apartments</td>
<td>101 - 3 = 98 New Calls</td>
</tr>
<tr>
<td>Hotel – 120 Rooms</td>
<td>32 New Calls</td>
</tr>
<tr>
<td>Office – 116,198 Sq. Ft.</td>
<td>10 New Calls</td>
</tr>
<tr>
<td>Total Remainder of Master Plan</td>
<td>140 New Calls</td>
</tr>
</tbody>
</table>

Table Nine

<table>
<thead>
<tr>
<th>Use</th>
<th>Net New Calls: New Use – Existing Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phase One 350 Apartments</td>
<td>64 - 5 = 59 New Calls</td>
</tr>
<tr>
<td>Remainder of Master Plan 250 Apartments</td>
<td>46 - 2 = 44 New Calls</td>
</tr>
<tr>
<td>Hotel – 120 Rooms</td>
<td>13 New Calls</td>
</tr>
<tr>
<td>Office – 116,198 Sq. Ft.</td>
<td>7 New Calls</td>
</tr>
<tr>
<td>Total Remainder of Master Plan</td>
<td>64 New Calls</td>
</tr>
</tbody>
</table>

2) **Police Department**

Police Department calls are estimated to increase by up to 134 calls annually or 2.6 calls per week for Phase I and up to an additional 140 calls at the completion of the Master Plan.

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9 Complete list of emergency calls located in Appendix.
10 Calls to existing office buildings have been credited in the analysis.
To put the call volume into perspective, the Department received approximately 32,441 calls for service in 2017 (623 per week).

To gain an understanding of the impact of the contemplated redevelopment of the office park on the Police Department, we met with both Police Chief Pilecki and Deputy Chief Whittemore. The planned redevelopment and estimated call data was discussed. Both the Chief and Deputy concurred that the estimated calls provided an accurate representation of the impact from the planned redevelopment. However, it was pointed out that the type of calls that will be received will be different, because of the residential use, from calls currently generated from the office park. The category of calls to residential uses involve matters that may require more of an officer’s time and resources. In some cases, more than one officer may become involved with a specific call, which might include following up on details over time. Introducing these new uses into the office park may change the complexity of responses and alter activities in comparison to those that exist today. This is not a unique consideration to the planned residential use within a redeveloped Wellesley Office Park but will be a consideration wherever multifamily development is to occur in Wellesley; it is noteworthy that the Housing Production Plan calls for at least 45 new Subsidized Housing Inventory units be developed annually at locations within the Town.

The Chief believes that should the redevelopment contemplated by the Master Plan be completed, staffing levels will be impacted with the proposed new uses resulting in staffing demands making a new police officer position necessary. Although new staffing would not be required for Phase I, we have taken a conservative approach in accounting for these potential costs and included in our cost profile the full yearly expense of a police officer ($100,000), with such cost split 50% for Phase I and 50% for the remainder of the Master Plan.

In addition, to improve radio communications in this area, the Department has requested the installation of a satellite receiver with two antennas (police/fire). The installation cost is estimated to be approximately $20,000 and can be considered as a commitment within the development agreement between the property owner and the Town.
3) **Fire Department**

A much more modest call volume increase is anticipated for the Fire Department, with 59 estimated calls from Phase I and an additional 64 from the remainder of the Master Plan. In 2017 the Department responded to 4,221 incidents (81 calls per week), with a majority of the calls (1,792) being emergency medical.

We met with both Fire Chief DeLorie and Deputy Chief Peters to review the planned redevelopment and estimated call data. The Chief believes the calls presented in this Report are a reasonable estimate of the potential impacts to his Department. He shared the same concerns as the Police Department that the type of response calls will be different as compared to the character of calls presently seen at the Wellesley Office Park. In addition, he observed, more generally, that the Department has already experienced an increase in call volume in this particular area of the community created by new land uses and changing traffic patterns. As a result of this activity, the Chief is considering undertaking a response analysis, for planning purposes, to better understand future demands of service and how best to allocate resources moving into the future.

Given the Chief’s observed increase in current call volume from other uses in the general area of the Office Park, in considering the potential impacts of a completed Master Plan development, the Chief is assessing the need to increase staffing levels with a new shift of four firefighters to account for both current needs and this potential additional redevelopment. At an annual cost of $80,000 for each firefighter position, the total cost associated with a new shift would be $320,000. The Chief believes much of this cost is attributable to more recent increases in call volumes associated with growth trends in the area which are projected to increase through the full redevelopment of the office park; there is some degree of uncertainty at this time as to the percentage of these cost that is appropriate to allocate to the potential redevelopment reflected in the Master Plan.

Therefore, to determine an estimate of costs to fire departments associated with development, we often derive a cost per call to generate an estimated impact. The Department’s 2019 budget is $5,481,195; dividing this figure by the annual call volume of 4,221, derives a cost of $1,299 per call. Multiplying this cost figure by the estimated 123 total new fire calls associated with the full redevelopment of the Master Plan, results in an estimated cost of $151,167. For the purposes of this Report, similar to the police staffing cost allocation associated with the Phase I and the Master Plan, while Phase I and the
Master Plan may not, in and of themselves, implicate new staffing needs, to be conservative, we will carry the full cost of two firefighters, with $80,000 allocated for Phase I and $80,000 carried for the remainder of the Master Plan for a total cost impact of $160,000.

4) **Other Departments**

Given the minimal impacts associated with the proposed apartment community planned as Phase I or other elements of the Master Plan on other Town Departments; few financial impacts are expected. Permits will be required by the Health Department for any food related business, pools or health clubs. All on site trash and snow removal will continue to be privately maintained. Water and sewer use will be addressed through the current fee structure and responsibilities for any upgrades to existing infrastructure will be addressed in a development agreement, separate from this analysis that may involve both private commitments and use of some proceeds of 40R payments from DHCD. No new public roads are proposed in association with the redevelopment and any roadway improvements are expected to be addressed in the course of review and approval by MassDOT and in a development agreement between the Town and the property owner, which is beyond the scope of this Report. To assign some costs to miscellaneous expenses that may incur to the Town, we have allocated a general government impact of $20,000 for this redevelopment assuming the completion of the Master Plan.

5) **School Department**

The School Department’s budget is the largest in the Town, with a fiscal year 2019 budget of $74,428,918 representing 45.1% of the total Town budget.

To allocate expected costs associated with the development, the number of children that may live in a multi-family community must be calculated. As outlined in Table 1 above, the proposed apartment community planned for Phase I is expected to be comprised of 35 studio units, 175 one bedroom units, 105 two bedroom units and 35 three bedroom units. To obtain a local understanding of the potential of school age children residing in apartments, 1,503 comparable 40B apartment units in the region were reviewed (see list in Table Nine below) Studio and one bedroom units typically do not generate school age children. By reviewing the number of two and three bedroom units in each comparable
apartment community, a refined School Age Children (SAC) ratio can be calculated. Based on this methodology, an average per unit SAC ratio of .463 was derived and when applied to the proposed 140 two and three bedroom units, results in an estimated 65 new school children in Phase I and 46 school children in the potential additional multifamily project within the Master Plan as outlined in Table Ten. However, while these numbers will be used for this Report, other evidence suggests these projections (and SAC ratio) may overestimate the actual school impact; for comparative, purposes, Hastings Village, a 53 unit 40B apartment complex (which was excluded because all units are two bedroom) in Wellesley was reviewed and 14 school age children presently reside there, resulting in a per unit SAC ratio of .269 (14/52).

<table>
<thead>
<tr>
<th>Complex</th>
<th>Total Units</th>
<th># Two/Three Bedrooms Units</th>
<th>Total SAC</th>
<th>SAC per 2/3 Unit Apt.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Concord Mews</td>
<td>350</td>
<td>176</td>
<td>85</td>
<td>0.483</td>
</tr>
<tr>
<td>Newton (Three Complexes)</td>
<td>678</td>
<td>467</td>
<td>239</td>
<td>0.512</td>
</tr>
<tr>
<td>Charles River Landing (Needham)</td>
<td>350</td>
<td>105</td>
<td>28</td>
<td>0.267</td>
</tr>
<tr>
<td>Lincoln Woods</td>
<td>125</td>
<td>85</td>
<td>34</td>
<td>0.400</td>
</tr>
<tr>
<td><strong>Average:</strong></td>
<td><strong>1,503</strong></td>
<td><strong>833</strong></td>
<td><strong>386</strong></td>
<td><strong>0.463</strong></td>
</tr>
<tr>
<td><strong>Wellesley Office Phase One</strong></td>
<td><strong>350</strong></td>
<td><strong>140</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Est. School Age Children</strong></td>
<td></td>
<td></td>
<td><strong>65</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Wellesley Office Phase Two</strong></td>
<td>250</td>
<td>100</td>
<td>46</td>
<td></td>
</tr>
</tbody>
</table>

Based upon the grade enrollment profile of the apartment complexes noted above, the estimated grade level profiles are outlined in Table 11.

<table>
<thead>
<tr>
<th>Grade Level</th>
<th>%</th>
<th>Est. SAC Phase I</th>
<th>Est. SAC Phase II</th>
</tr>
</thead>
<tbody>
<tr>
<td>K - 5</td>
<td>56%</td>
<td>36</td>
<td>26</td>
</tr>
<tr>
<td>6 - 8</td>
<td>20%</td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>9 - 12</td>
<td>24%</td>
<td>16</td>
<td>11</td>
</tr>
</tbody>
</table>

11 Although Hastings Village was not used in Table Nine as a comparable project (because it contains all two bedrooms units) it should be noted that the grade profile for Hastings Village indicated 50% of the students were high school, 36% elementary and 14% middle school grades. If enrollments from the proposed apartments follows this profile, more high school children will be present, potentially reducing cost impacts.
Schools

As outlined above, the proposed multifamily apartment development planned for Phase I may result in up to approximately 65 school age children within residences in Phase I, a majority of which will be enrolled in the elementary grades. Upon completion of the additional multifamily development as contemplated by the Master Plan up to an additional 46 school age children might reside in new residences. Table 12 illustrates a seven-year enrollment trend for the schools along with total school enrollment, shown in Figure Two below. Elementary students residing within any residences within a redeveloped office park are currently within the Fiske School District. Enrollments have shown a general declining tendency over the last seven years in the Elementary Schools, with the Middle School remaining relatively flat and the High School increasing. Current enrollment projection estimates indicate a declining enrollment at all grade levels moving into the future.

Table 12
School Enrollments

<table>
<thead>
<tr>
<th>Grades</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>K - 5</td>
<td>2,309</td>
<td>2,341</td>
<td>2,305</td>
<td>2,307</td>
<td>2,256</td>
<td>2,209</td>
<td>2,175</td>
</tr>
<tr>
<td>6 - 8</td>
<td>1,165</td>
<td>1,164</td>
<td>1,178</td>
<td>1,153</td>
<td>1,147</td>
<td>1,130</td>
<td>1,159</td>
</tr>
<tr>
<td>9 - 12</td>
<td>1,383</td>
<td>1,435</td>
<td>1,486</td>
<td>1,515</td>
<td>1,514</td>
<td>1,569</td>
<td>1,529</td>
</tr>
<tr>
<td>Total</td>
<td>4,857</td>
<td>4,940</td>
<td>4,969</td>
<td>4,975</td>
<td>4,917</td>
<td>4,908</td>
<td>4,863</td>
</tr>
<tr>
<td>Fiske</td>
<td>335</td>
<td>334</td>
<td>343</td>
<td>342</td>
<td>335</td>
<td>298</td>
<td>291</td>
</tr>
</tbody>
</table>

Figure Two
School Enrollment Trends 2012 - 2018
To obtain a full understanding of potential school system impacts, the Consultant met with Superintendent David Lussier and Assistant Superintendent Cynthia Mahr to discuss the planned redevelopment. A host of issues were reviewed, including the estimated number of school children that may reside within both Phase I and subsequent phases of the Master Plan, teacher needs, busing, school assignments, capacity, enrollment trends and other topics.

Given the estimated enrollment impact, the Superintendent believes that between Fiske and Schofield Elementary Schools, the facilities could easily absorb the proposed total number of students anticipated through the completion of the Master Plan, using current enrollment trends. He estimates that, should the new student impacts projected by this Report be realized, the department would have to hire two new teachers and a teacher’s aide to accommodate the students from Phase I ($227,500\textsuperscript{12})\textsuperscript{12}. In addition, two new bus routes would have to be added at an annual cost of $180,000. For potential additional children within the additional residences contemplated in the Master Plan, two additional teachers may have to be hired ($190,000).

\textsuperscript{12} Costs include benefits, $95,000 per teacher and $37,500 for aide.
SUMMARY

As outlined in Table 13, this fiscal impact analysis indicates that there will be a net positive annualized impact related to construction of the proposed development, in both Phase I and the remainder of the Master Plan.

<table>
<thead>
<tr>
<th>Table 13 Fiscal Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Gross Projected Revenues</td>
</tr>
<tr>
<td>Estimated Municipal Costs</td>
</tr>
<tr>
<td>Police</td>
</tr>
<tr>
<td>Fire</td>
</tr>
<tr>
<td>Schools</td>
</tr>
<tr>
<td>Other General Fund Impacts</td>
</tr>
<tr>
<td>Total Costs</td>
</tr>
<tr>
<td>Net Positive Fiscal Impact</td>
</tr>
<tr>
<td>CPA Revenue</td>
</tr>
</tbody>
</table>

This summary does not take into consideration the one-time zoning and bonus payments to the Town from DHCD associated with the 40R overlay zoning process.

Key findings supporting this development include:

- The planned redevelopment of the Wellesley Office Park will generate approximately $1,447,602 in gross taxes per year at the completion of Phase I and an additional $2,621,080 if the remaining elements of the Master Plan are subsequently completed. Taking into consideration estimated municipal costs, the redevelopment will yield $900,102 in positive net tax revenue from Phase I and, if redevelopment along the lines of the remainder of the Master Plan is completed, an additional $2,291,080 annually. In addition, $12,364 in CPA revenue will be realized from Phase I and $21,633 from the completion of the remainder of the Master Plan;

- One time 40R DHCD payments will be realized, with an estimated $1,325,000 in zoning and incentive payments paid to the Town upon construction of Phase I and up to an additional $1,000,000 in payments associated with any subsequent residential component within the Master Plan. As intended by c. 40R, these funds can be used to help minimize municipal development costs, such as addressing infrastructure in need of replacement or for other municipal purposes.
All on-site property maintenance and trash collection will remain private, no new public roads are proposed. Infrastructure upgrades and project sequencing are to be addressed in a development agreement.

The property owner is prepared to assume responsibility for operational costs associated with the existing sewer pump station resulting in cost savings to the Town, as may be documented in a development agreement.

Calls to the Police Department are projected to increase by 134 in Phase I and 140 calls for the remainder of the Master Plan, compared with an annual Town wide call volume of 32,461.

The Fire Department is expected to receive approximately 59 calls a year from Phase I and 64 calls from the remainder of the Master Plan, adding to the 4,221 calls a year that are presently received by the Department.

It is estimated that up to 65 school age children may reside in the Phase I residential apartment community and up to 46 in the residences contemplated in the remainder of the Master Plan;

The property owner is prepared to install necessary communications equipment at the site, at a cost of $20,000, to improve emergency call signals in the area. Such a commitment may be reflected in a development agreement with the Town.

Both short-term and long-term positive economic benefits are anticipated to occur, with construction related jobs being created and local business activity enhanced by new residential community. Additional community benefits will be realized through proactive planning to make progress in the goals of the Town’s Housing Production Plan thereby enabling the community to take greater control over future development.

The building costs associated with the construction of Phase I are anticipated to be $90,000,000 which will generate $900,000 in building permit fees. Additional fees will be collected for electrical and plumbing permits. Subsequent redevelopment projects following completion of Phase I will result in additional significant municipal permit fees.
Office Park Comps:

- All office properties on Williams Street
- Office buildings located at 93, 96, 110, & 110 Worcester Street, Wellesley.
- 1,265 Main Street, Waltham.
- 128 First Street, Needham.

Apartments

- Hanover Company’s portfolio of apartment units.

Hotels

- Residence Inn, Needam.
- Homeward Suites, Needam.
### Police Department

#### Apartment Calls

<table>
<thead>
<tr>
<th>Project</th>
<th>Town</th>
<th>Units</th>
<th>Avg. Police Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Lodge</td>
<td>Foxborough</td>
<td>250</td>
<td>74</td>
<td>0.296</td>
<td></td>
</tr>
<tr>
<td>Union Place</td>
<td>Franklin</td>
<td>297</td>
<td>73</td>
<td>0.247</td>
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<tr>
<td>Fairfield Green</td>
<td>Mansfield</td>
<td>200</td>
<td>146</td>
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</tr>
<tr>
<td>Pembroke Woods</td>
<td>Pembroke</td>
<td>240</td>
<td>92</td>
<td>0.385</td>
<td></td>
</tr>
<tr>
<td>Blue Hills</td>
<td>Randolph</td>
<td>274</td>
<td>148</td>
<td>0.540</td>
<td></td>
</tr>
<tr>
<td>Avalon Newton Highlands</td>
<td>Newton</td>
<td>294</td>
<td>153</td>
<td>0.520</td>
<td></td>
</tr>
<tr>
<td>Avalon Chestnut Hill</td>
<td>Newton</td>
<td>204</td>
<td>67</td>
<td>0.328</td>
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<tr>
<td>Arborpoint Woodland</td>
<td>Newton</td>
<td>180</td>
<td>22</td>
<td>0.120</td>
<td></td>
</tr>
<tr>
<td>Cloverleaf</td>
<td>Natick</td>
<td>183</td>
<td>82</td>
<td>0.448</td>
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<tr>
<td>The Gables</td>
<td>Westwood</td>
<td>350</td>
<td>155</td>
<td>0.442</td>
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<tr>
<td>Hastings Village</td>
<td>Wellesley</td>
<td>52</td>
<td>3</td>
<td>0.058</td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
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<td>1,015</td>
<td><strong>0.402</strong></td>
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<tr>
<td><strong>Phase I Apartments</strong></td>
<td></td>
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<td></td>
<td>141</td>
<td></td>
</tr>
<tr>
<td><strong>Remainder of Apartments in Master Plan</strong></td>
<td></td>
<td>250</td>
<td></td>
<td>101</td>
<td></td>
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</table>

#### Hotel Calls

<table>
<thead>
<tr>
<th>Project</th>
<th>Town</th>
<th>Rooms</th>
<th>Avg. Police Call Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampton Inn</td>
<td>Norwood</td>
<td>139</td>
<td>44.50</td>
<td>0.320</td>
<td></td>
</tr>
<tr>
<td>Holiday Inn Express</td>
<td>Norwood</td>
<td>85</td>
<td>17.00</td>
<td>0.200</td>
<td></td>
</tr>
<tr>
<td>Courtyard Marriott</td>
<td>Foxborough</td>
<td>149</td>
<td>46.50</td>
<td>0.312</td>
<td></td>
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<tr>
<td>Residence Inn</td>
<td>Needham</td>
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<tr>
<td><strong>Total Hotel</strong></td>
<td></td>
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<td>135.00</td>
<td><strong>0.269</strong></td>
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<tr>
<td><strong>Hotel in Master Plan</strong></td>
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<td>120</td>
<td></td>
<td>32</td>
<td></td>
</tr>
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</table>

#### Office Calls

<table>
<thead>
<tr>
<th>Office Square Footage</th>
<th>Calls per Sq. Ft.</th>
<th>Total Fire Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Occupied Space</td>
<td>500,669 Sq. Ft.</td>
<td>.00009</td>
</tr>
<tr>
<td>Existing Office Space Fully Occupied</td>
<td>652,306 Sq. Ft.</td>
<td>.00009</td>
</tr>
<tr>
<td>Master Plan - Net New Space 116,198 Sq. Ft.</td>
<td>768,504 Sq. Ft.</td>
<td>.00009</td>
</tr>
</tbody>
</table>
## Fire Department

### Apartment Calls

<table>
<thead>
<tr>
<th>Project</th>
<th>Town</th>
<th>Units</th>
<th>Avg. Fire Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Lodge</td>
<td>Foxborough</td>
<td>250</td>
<td>26</td>
<td>0.105</td>
<td></td>
</tr>
<tr>
<td>Union Place</td>
<td>Franklin</td>
<td>297</td>
<td>19</td>
<td>0.063</td>
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<tr>
<td>Fairfield Green</td>
<td>Mansfield</td>
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<td>43</td>
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<tr>
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<td>Pembroke</td>
<td>240</td>
<td>9</td>
<td>0.036</td>
<td></td>
</tr>
<tr>
<td>Blue Hills</td>
<td>Randolph</td>
<td>274</td>
<td>10</td>
<td>0.035</td>
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<tr>
<td>Avalon Newton Highlands</td>
<td>Newton</td>
<td>294</td>
<td>26</td>
<td>0.088</td>
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<tr>
<td>Avalon Chestnut Hill</td>
<td>Newton</td>
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<td>11</td>
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<tr>
<td>Arborpoint Woodland</td>
<td>Newton</td>
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<td>12</td>
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<tr>
<td>Cloverleaf</td>
<td>Natick</td>
<td>183</td>
<td>7</td>
<td>0.038</td>
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<tr>
<td>The Gables</td>
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<td>350</td>
<td>17</td>
<td>0.049</td>
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<tr>
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<td>180</td>
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</table>

### Phase I Apartments

<table>
<thead>
<tr>
<th>Town</th>
<th>Units</th>
<th>Avg. EMS Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
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</thead>
<tbody>
<tr>
<td>The Lodge</td>
<td>250</td>
<td>24</td>
<td>0.096</td>
<td></td>
</tr>
<tr>
<td>Union Place</td>
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<td>44</td>
<td>0.148</td>
<td></td>
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<tr>
<td>Fairfield Green</td>
<td>200</td>
<td>25</td>
<td>0.123</td>
<td></td>
</tr>
<tr>
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<td>70</td>
<td>0.293</td>
<td></td>
</tr>
<tr>
<td>Blue Hills</td>
<td>274</td>
<td>28</td>
<td>0.101</td>
<td></td>
</tr>
<tr>
<td>Avalon Newton Highlands</td>
<td>294</td>
<td>26</td>
<td>0.088</td>
<td></td>
</tr>
<tr>
<td>Avalon Chestnut Hill</td>
<td>204</td>
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<td>0.044</td>
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</tr>
<tr>
<td>Arborpoint Woodland</td>
<td>180</td>
<td>7</td>
<td>0.036</td>
<td></td>
</tr>
<tr>
<td>Cloverleaf</td>
<td>183</td>
<td>24</td>
<td>0.131</td>
<td></td>
</tr>
<tr>
<td>The Gables</td>
<td>350</td>
<td>26</td>
<td>0.074</td>
<td></td>
</tr>
<tr>
<td>Hastings Village</td>
<td>52</td>
<td>2</td>
<td>0.038</td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>2,524</td>
<td>284</td>
<td>0.112</td>
<td></td>
</tr>
</tbody>
</table>

### Remaining Apartments in Master Plan

<table>
<thead>
<tr>
<th>Town</th>
<th>Units</th>
<th>Avg. EMS Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Lodge</td>
<td>250</td>
<td>24</td>
<td>0.096</td>
<td></td>
</tr>
<tr>
<td>Union Place</td>
<td>297</td>
<td>44</td>
<td>0.148</td>
<td></td>
</tr>
<tr>
<td>Fairfield Green</td>
<td>200</td>
<td>25</td>
<td>0.123</td>
<td></td>
</tr>
<tr>
<td>Pembroke Woods</td>
<td>240</td>
<td>70</td>
<td>0.293</td>
<td></td>
</tr>
<tr>
<td>Blue Hills</td>
<td>274</td>
<td>28</td>
<td>0.101</td>
<td></td>
</tr>
<tr>
<td>Avalon Newton Highlands</td>
<td>294</td>
<td>26</td>
<td>0.088</td>
<td></td>
</tr>
<tr>
<td>Avalon Chestnut Hill</td>
<td>204</td>
<td>9</td>
<td>0.044</td>
<td></td>
</tr>
<tr>
<td>Arborpoint Woodland</td>
<td>180</td>
<td>7</td>
<td>0.036</td>
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</tr>
<tr>
<td>Cloverleaf</td>
<td>183</td>
<td>24</td>
<td>0.131</td>
<td></td>
</tr>
<tr>
<td>The Gables</td>
<td>350</td>
<td>26</td>
<td>0.074</td>
<td></td>
</tr>
<tr>
<td>Hastings Village</td>
<td>52</td>
<td>2</td>
<td>0.038</td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td>2,524</td>
<td>284</td>
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</tr>
</tbody>
</table>
### Hotel Calls

<table>
<thead>
<tr>
<th>Project</th>
<th>Keys</th>
<th>Avg. Fire Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampton Inn Norwood</td>
<td>139</td>
<td>6.00</td>
<td>0.043</td>
<td></td>
</tr>
<tr>
<td>Holiday Inn Express Norwood</td>
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<td>0.047</td>
<td></td>
</tr>
<tr>
<td>Courtyard Marriott Foxborough</td>
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<td>6.00</td>
<td>0.040</td>
<td></td>
</tr>
<tr>
<td>Residence Inn Needham</td>
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<tr>
<td><strong>Total Hotel</strong></td>
<td>501</td>
<td>23.00</td>
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</table>

**Proposed Hotel**

<table>
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<tr>
<th>Avg. EMS Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampton Inn Norwood</td>
<td>8.00</td>
<td>0.058</td>
</tr>
<tr>
<td>Holiday Inn Express Norwood</td>
<td>8.00</td>
<td>0.094</td>
</tr>
<tr>
<td>Courtyard Marriott Foxborough</td>
<td>5.00</td>
<td>0.034</td>
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<tr>
<td>Residence Inn Norwood</td>
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<tr>
<td><strong>Total Hotel</strong></td>
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**Hotel in Master Plan**

<table>
<thead>
<tr>
<th>Avg. EMS Calls Per Year</th>
<th>Avg. Call Per Unit</th>
<th>Projected Yearly Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hampton Inn Norwood</td>
<td>8.00</td>
<td>0.058</td>
</tr>
<tr>
<td>Holiday Inn Express Norwood</td>
<td>8.00</td>
<td>0.094</td>
</tr>
<tr>
<td>Courtyard Marriott Foxborough</td>
<td>5.00</td>
<td>0.034</td>
</tr>
<tr>
<td>Residence Inn Norwood</td>
<td>9.00</td>
<td>0.070</td>
</tr>
<tr>
<td><strong>Total Hotel</strong></td>
<td>30.00</td>
<td>0.060</td>
</tr>
</tbody>
</table>

### Office Calls

<table>
<thead>
<tr>
<th>Office Square Footage</th>
<th>Calls per Sq. Ft.</th>
<th>Total Fire Calls</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Occupied Space 500,669 Sq. Ft.</td>
<td>.00006</td>
<td>28</td>
</tr>
<tr>
<td>Existing Office Space Fully Occupied 652,306 Sq. Ft.</td>
<td>.00006</td>
<td>36</td>
</tr>
<tr>
<td>Master Plan - Net New Space 116,198 Sq. Ft. 768,504 Sq. Ft.</td>
<td>.00006</td>
<td>43</td>
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</table>
Wellesley Office Park - Smart Growth Rezoning (40R)

Proposed Municipal Infrastructure Improvements and Cost Share

<table>
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<tr>
<th>Improvement</th>
<th>Estimated Cost to Developer</th>
<th>Estimated Cost to Town</th>
</tr>
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<td><strong>Infrastructure Improvements</strong></td>
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<td></td>
</tr>
<tr>
<td>Water Line</td>
<td>Installation of new 12” water line under Route 95 [50/50 split - est. cost $500,000]</td>
<td>$250,000</td>
</tr>
<tr>
<td>Sewer Pump Station</td>
<td>Replacement of pump station</td>
<td>$250,000</td>
</tr>
<tr>
<td>Sewer Line</td>
<td>Replacement of force main under Route 95 [50/50 split - est. cost $500,000]</td>
<td>$250,000</td>
</tr>
<tr>
<td>Gas</td>
<td>Gas service as required</td>
<td>TBD</td>
</tr>
<tr>
<td>Electrical</td>
<td>Electrical service as required</td>
<td>TBD</td>
</tr>
<tr>
<td><strong>Transportation Improvements</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Roadways</td>
<td>Signalization of William Street / Frontage Road</td>
<td>$180,000</td>
</tr>
<tr>
<td><strong>Miscellaneous</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Emergency Services</td>
<td>Police/fire communications equipment</td>
<td>$20,000</td>
</tr>
<tr>
<td><strong>Estimated Total</strong></td>
<td></td>
<td>$950,000</td>
</tr>
</tbody>
</table>

Further redevelopment phases within Wellesley Office Park may require additional municipal infrastructure or roadway improvements based upon impacts and subject to (i) approval by MassDOT, (ii) issuance of a special permit and/or (iii) terms and conditions of the development agreement to be entered into and authorized by town meeting.
To: Michael Zehner  From: Frank Holmes, P.E.  
File: Wellesley Office Park – Infrastructure Improvements Summary and Cost Estimate  Date: January 17, 2019

Reference: Wellesley Office Park – Residential Redevelopment

This memorandum summarizes the order of magnitude cost associated with the infrastructure improvements proposed to support the phased redevelopment of Wellesley Office Park. Table 2 on page 2 itemizes each infrastructure improvement under consideration and the order of magnitude cost.

Water System Summary

The Wellesley Office Park is serviced by two municipal water lines. The first is a 12” line crossing beneath I-95 and entering the site on the northwestern side. The second is a 6” entering the site from Route 9 and following the William Street alignment. Within the boundary of route 9, approximately 1,700 feet to the West of the Williams Street and Route 9 intersection, these lines connect forming a loop.

The Town of Wellesley’s DPW has informed us leaks have occurred in the 6” water line in Route 9 that have required repair. Furthermore, the DPW points to the age of the 12” municipal water line under Route 128 as a concern to the DPW with respect to its condition. Without upgrades, one concern that has been raised is that in the event the existing 12” water line under Route 128 were to fail, the 6” service from route 9 would not be able to provide adequate fire protection service to the Wellesley Office Park.

A flow test was conducted on January 16th, 2019 to determine available pressure and flow. The results are summarized in table 1 below.

Table 1 - Flow Test Results

<table>
<thead>
<tr>
<th>Location</th>
<th>Static Pressure (psi)</th>
<th>Residual Pressure (psi)</th>
<th>Discharge Pressure (psi)</th>
<th>Calculated Discharge (gpm)</th>
<th>Calculated Discharge at 20psi (gpm)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wellesley Office Park</td>
<td>116</td>
<td>100</td>
<td>80</td>
<td>1,501</td>
<td>3,950</td>
</tr>
</tbody>
</table>

Proposed Improvements:

As a result of these identified concerns regarding the present condition of both municipal water lines, we are proposing to install a new 12” water service crossing I-95 parallel to the existing 12” service (See Table 2, Item 1).

It is assumed that the new 12” service line would be installed and connected to the existing looped network allowing domestic potable water and fire protection service for the site to continue by this
Sanitary System Summary

The Wellesley Office Park sanitary main flows by gravity through the park following the Williams Street alignment. At the rear of #80 Williams Street is an ejector pit with a duplex 200 gallon per minute pump system that pumps sanitary waste through a 4" force main crossing I-95 that connects to the Wellesley municipal gravity system on the western side of I-95. Due to the increased flow resulting from the Phase 1 residential development, an increase of inflow exceeding the capacity of the 200 GPM pump system is expected.

Proposed Improvements:

As part of the Phase 1 residential development, the force main (Table 2, Item 2) and pump station (Table 2, Item 3) will be replaced. The force main will be upsized from 4" to a 6", and the new pump station will include 350GPM pumps in a duplex configuration, new controls, 3,500-gallon pump station structure and back-up power.

Table 2 - Order of Magnitude Cost Estimates

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
<th>Order of Magnitude Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Installation of Redundant 12&quot; Water line crossing I-95</td>
<td>$500,000</td>
</tr>
<tr>
<td>2</td>
<td>Installation of 6&quot; Sanitary Force Main crossing I-95</td>
<td>$500,000</td>
</tr>
<tr>
<td>3</td>
<td>Sanitary Pump Station</td>
<td>$250,000</td>
</tr>
</tbody>
</table>

Cost Estimate Methodology

Cost estimates have been completed based on historical data available from Stantec projects of similar scope. The estimates are high level estimates without detailed design drawings and do not reflect site specific conditions. Projects used as a reference and assumptions for each estimate are included in the following sections.

Water and Sanitary infrastructure crossing I-95 (Items 1 and 2)

Estimates for this scope have been derived based on two projects, each utilizing an alternate method of trenchless installation. One of the projects is a water infrastructure improvement project for the Dedham – Westwood water district involving a 600’ crossing of I-95 using pipe jacking. The second project was a directional drill installation across the Annisquam River in Gloucester. For each of the projects detailed cost estimates were performed based on engineered plans, and the approximate average per linear foot cost used a baseline to estimate the order of magnitude costs for the Wellesley Office Park project.
January 17, 2019
Michael Zehner, Town of Wellesley
Page 3 of 3

Reference: Wellesley Office Park - Residential Redevelopment

Assumptions

- 20% contingency included
- Design / engineering costs not included
- Ledge removal / ledge drilling not included
- Assumes access for jacking pits on abutting properties
- Assumes no dewatering is required and installation will occur above ground water

Sanitary Pump Station (Item 3)

<table>
<thead>
<tr>
<th>Description</th>
<th>Unit Cost ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td>(2) 350 GPM Pumps</td>
<td>$80,000</td>
</tr>
<tr>
<td>Controls</td>
<td>$60,000</td>
</tr>
<tr>
<td>3,500 Gallon Structure</td>
<td>$30,000</td>
</tr>
<tr>
<td>Interior Piping and Valves</td>
<td>$30,000</td>
</tr>
<tr>
<td>Contingency</td>
<td>$50,000</td>
</tr>
<tr>
<td><strong>Order of Magnitude Estimate</strong></td>
<td><strong>$250,000</strong></td>
</tr>
</tbody>
</table>

Assumptions

- 25% contingency included
- Back-up power will be required. This estimate does not include provisions for a generator or sound attenuation enclosure.
- Design / engineering costs not included
- Assumes electrical service is provided in the vicinity
- Annual operation and maintenance costs not included

Stantec Consulting Services Inc.

Frank Holmes, P.E.
Principal

Phone: (617) 654-6059
Fax: (617) 523-4333
frank.holmes@stantec.com
In furtherance of our discussions concerning the planned mixed-use redevelopment of the Wellesley Office Park which is located off William Street in Wellesley, Massachusetts (hereafter referred to as the “Project”), Vanasse & Associates, Inc. (VAI) has refined the phased improvement strategy for William Street. These refinements were discussed at the working group meeting on January 16, 2019 that included representatives from Town Departments, including the Planning Department, Police Department and the Department of Public Works, as well as the Town’s transportation consultant BETA Group, Inc. Consistent with the discussions at our meeting, the two (2) step approach to improving William Street has been refined as follows:

- **Step 1: Traffic Control** – The initial improvement is depicted on the attached “Conceptual Improvement Plan” and would entail the installation of a traffic control signal that would control both Frontage Road westbound and the exit from William Street, and would include: i) a pedestrian phase for crossing William Street; ii) police officer override capability; and iii) video monitoring capability for use by the Police Department. The intent of this improvement is to eliminate or reduce the need to assign a police officer to the intersection in order to facilitate exiting movements from William Street. Visibility of the traffic signal indications for Frontage Road would be suitably shielded from view by approaching motorists on Route 9 westbound. The traffic control signal would include the installation of an emergency vehicle pre-emption system (OPTICOM™ or similar) to clear the intersection of vehicles for emergency response to William Street. No substantial geometric roadway improvements are anticipated to be necessary to implement the Step 1 improvements.

- **Step 2: Full Access to Route 9** – The second step of the William Street improvements would entail initiation of a feasibility study and preparation of conceptualized plans for additional improvements to the William Street/Frontage Road/Route 9 intersection that shall consider the addition of a right-turn slip-lane from William Street to the I-95 northbound on-ramp and providing a full access intersection with Route 9, as well as any other appropriate improvements and alternatives, considering specific uses and traffic patterns/impacts. The feasibility study and
associated concept plans would be presented to the Town for review prior to initiating discussions with MassDOT.

To the extent that MassDOT is agreeable, the Step 1 improvements can be designed and permitted through MassDOT prior to the issuance of a Certificate of Occupancy (CO) for the first multifamily residential building (350 units) to be located within the office park, with the Step 1 improvements to be constructed and operational prior to achieving 60 percent occupancy of said building, subject to receipt of all necessary rights, permits and approvals. We have provided supporting documentation and analyses that demonstrate that the existing transportation infrastructure affords sufficient capacity to accommodate the relatively modest increase in traffic that the first multifamily residential building will generate during the weekday peak traffic volume periods when compared to those of the fully occupied office building that the multifamily building will replace (approximately 17 additional vehicle trips during the weekday morning peak-hour and 53 additional vehicle trips during the weekday evening peak-hour). That being said, the Stage 1 improvements are intended to address the comments received from the Police Department concerning the potential need to add a police detail during the weekday morning peak period in order to facilitate exiting maneuvers from William Street as a result of the addition of the multifamily building.

The feasibility study associated with the Step 2 improvements would be completed prior to the issuance of the final CO for the first multifamily residential building and presented to the Town and MassDOT. To the extent that MassDOT approves the feasibility study and the associated improvements, the Step 2 improvements would be designed, permitted and constructed prior to the issuance of a CO for any additional new building constructed within the office park, including additional multifamily residential development beyond the first residential building, again, subject to receipt of all necessary rights, permits and approvals from the Town of Wellesley and MassDOT, as may be applicable.

cc: Wellesley Office Park Redevelopment Team (via email)
CONCEPTUAL IMPROVEMENT PLAN
ROUTE 9 AT WILLIAM STREET

WELLESLEY OFFICE PARK REDEVELOPMENT
WELLESLEY, MASSACHUSETTS

JOHN HANCOCK LIFE INSURANCE COMPANY (U.S.A)
BOSTON, MASSACHUSETTS

NOTE:
1. THIS PLAN IS FOR REVIEW PURPOSES ONLY AND IS NOT INTENDED FOR CONSTRUCTION.
2. BASE PLAN INFORMATION OBTAINED FROM MADDOX & HANCOCK ENGINEERING PLANS
PROJECT NO. NAF-05-21(22).
1. ALL SIGNALS SHALL HAVE 12" L.E.D. WITH 5" FLAT BACKPLATES AND 3" YELLOW RETROREFLECTIVE BORDERS.

2. ALL SIGNALS SHALL HAVE TUNNEL VISORS.

CONCEPTUAL IMPROVEMENT PLAN
ROUTE 9 AT WILLIAM STREET

WELLESLEY OFFICE PARK REDEVELOPMENT
WELLESLEY, MASSACHUSETTS

JOHN HANCOCK LIFE INSURANCE COMPANY (U.S.A)
BOSTON, MASSACHUSETTS

NOTES:
1. THIS PLAN IS FOR DESIGN PURPOSES ONLY
   AND IS NOT INTENDED FOR CONSTRUCTION.
2. SCALE PLAN INFORMATION OBTAINED FROM
   MASSDOT SDP AND PRESENT WORKING PLANS
   PROJECT NO. 99-95-21(22).

Scales in Feet

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December 31, 2018

Mr. William Reyelt, Director
Smart Growth Zoning Program
Department of Housing and Community Development
100 Cambridge Street, Suite 300
Boston, Massachusetts 02114

Re: Wellesley Office Park Redevelopment, William Street, Wellesley, MA

Dear Mr. Reyelt:

In connection with the application for approval of the Sustainable Growth Overlay District and the “Wellesley Office Park Redevelopment” in William Street, Wellesley, MA, the Wellesley Municipal Light Plant (“WMLP”) is providing an overview and conditional certification as required by Chapter 40R of the General Laws of Massachusetts.

**Electric Service**

Electric service to the existing Wellesley Office Park buildings on William Street is provided by two WMLP supply lines emanating from Eversource’s Station 292 in Newton. The WMLP’s service terminates at the source side of the customer-owned, auto-transfer switchgear located approximately 100 feet from the intersection of Route 9 and William Street. As a Large General Primary Rate customer Wellesley Office Park is responsible for the electric service to each of the buildings. The WMLP has evaluated its “Use Rights” at Station 292 and the available capacity on the supply lines. Based on this evaluation the WMLP has determined the existing infrastructure up to the source side of the customer-owned, auto transfer switchgear has capacity available to serve the proposed electrical load. The Wellesley Office Park Redevelopment design, however, separately meters the new facilities and will require significant modifications to the customer-owned infrastructure.

Please do not hesitate to contact me via email, djoyce@wellesleyma.gov or direct dial, 781-235-7601 if any further explanation is required.

Yours truly,

Richard F. Joyce
Director
6. **Review 2019 Annual Town Meeting Warrant**

 Included in your packet is a second draft of the warrant for the 2019 annual town meeting that begins on March 25th. Our schedule calls for this to be executed on January 28th ahead of the Advisory Public Hearing on January 30th. Changes from the last version include:

- Dollar amounts have been removed from articles where we are not confident as to the amount at this time in the process. Town Counsel’s advice has been requested for Articles 17 & 19 where the funds are coming from multiple sources as to how to draft them appropriately.
- Article 14.1: An article has been inserted to authorize additional borrowing for the water meter replacement project. We are having discussions with DPW as to whether this stays in its own article or is merged into the water budget.
- Article 15: A line has been removed from the budget per the MLP.
- Article 17: A comment is present to follow up on the wording of this article as it may not need to be written as broadly as it is at present.
- Article 20: Staff has determined that monies for this article can be transferred from a prior year capital project thus eliminating the need to borrow the funds. Hence borrowing language will be removed.
- Article 26: Finalized, but a decision will be made for the motion on how the money will be spent.
- Article 37: The preamble has been modified and a comment inserted by Town Counsel with regard to item #2 concerning modifications to the General Bylaws.
- Article 38: The correct reference to the proponent has been inserted.
Commonwealth of Massachusetts
Norfolk, ss.

To any Constable of the Town of Wellesley in the County of Norfolk,

GREETINGS:

In the name of the Commonwealth aforesaid, you are hereby required to notify the qualified voters of said Town of Wellesley to meet in their respective voting places on March 5, 2019:

The voters of Precinct A, in Katharine Lee Bates School, 116 Elmwood Road;

The voters of Precinct B, in Isaac Sprague School, 401 School Street;

The voters of Precinct C, in Ernest F. Upham School, 35 Wynnewood Street;

The voters of Precinct D, in Otho L. Schofield School, 27 Cedar Street;

The voters of Precinct E, in Joseph E. Fiske School, 45 Hastings Street;

The voters of Precinct F, in Dana Hall School, Shipley Center, 142 Grove Street;

The voters of Precinct G, in Wellesley Free Library, 530 Washington Street;

The voters of Precinct H, in Tolles Parsons Center, 500 Washington Street.

at 7:00 A.M., at which time the polls in said precincts will be opened and remain open continuously until 8:00 P.M. of said day when they will be closed, during which time aforesaid qualified voters of said Town may bring in their ballots to the Election Officers, duly appointed and sworn for said precincts of said Town of Wellesley, in said meetings so assembled for the following:
To cast their votes in the Town Election for the election of candidates for the following offices:

<table>
<thead>
<tr>
<th>OFFICE</th>
<th>VACANCIES</th>
<th>TERM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Board of Assessors</td>
<td>One</td>
<td>Three Years</td>
</tr>
<tr>
<td>Board of Health</td>
<td>One</td>
<td>Three Years</td>
</tr>
<tr>
<td>Board of Public Works</td>
<td>One</td>
<td>Three Years</td>
</tr>
<tr>
<td>Board of Selectmen</td>
<td>One</td>
<td>Three Years</td>
</tr>
<tr>
<td>Housing Authority</td>
<td>One</td>
<td>Five Years</td>
</tr>
<tr>
<td>Moderator</td>
<td>One</td>
<td>One Year</td>
</tr>
<tr>
<td>Natural Resources Commission</td>
<td>One</td>
<td>Three Years</td>
</tr>
<tr>
<td>Planning Board</td>
<td>One</td>
<td>Five Years</td>
</tr>
<tr>
<td></td>
<td>One</td>
<td>One Year</td>
</tr>
<tr>
<td>Recreation Commission</td>
<td>Two</td>
<td>Three Years</td>
</tr>
<tr>
<td>School Committee</td>
<td>One</td>
<td>One Year</td>
</tr>
<tr>
<td>Trustees of the Wellesley Free Library</td>
<td>Two</td>
<td>Three Years</td>
</tr>
</tbody>
</table>

and for **TOWN MEETING MEMBERS**, under the provisions of Chapter 202 of the Acts of 1932, as amended.

You are further required to notify the qualified Town Meeting Members of said Town of Wellesley to meet in the

**Wellesley Middle School Auditorium**  
50 Kingsbury Street  
Monday, March 25, 2019

at 7:00 P.M., at which time and place the following articles are to be acted upon and determined exclusively by Town Meeting Members in accordance with Chapter 202 of the Acts of 1932, as amended, and subject to referendum as provided therein:
ARTICLE 1. To receive and act on the reports of Town officers, boards and committees, including the Annual Town Report, the Report to this Town Meeting of the Advisory Committee, and the Report of the Community Preservation Committee, and to discharge presently authorized special committees, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 2. To receive the Reports of the Board of Selectmen on the Town-Wide Financial Plan and Five-Year Capital Budget Program in accordance with Sections 19.5.2 and 19.16 of the Town Bylaws, or to take any other action in relation thereto.

(Board of Selectmen)

APPROPRIATIONS – OPERATING AND OUTLAY

ARTICLE 3. To see if the Town will vote to take action on certain articles set forth in this warrant by a single vote, pursuant to a consent agenda, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 4. To see if the Town will vote to amend ARTICLE 31 of the Town Bylaws by making changes to the appendix to the Classification and Salary Plans established under Sections 31.1 and 31.6 respectively, which constitutes part of said Bylaws, relating to the establishment of new classifications, reclassifications of current positions, and the deletion of classifications, or to take any other action in relation thereto.

(Human Resources Board)

ARTICLE 5. To see if the Town will vote to amend ARTICLE 31 of the Town Bylaws by making changes to Schedule A, entitled “Job Classifications by Groups,” and Schedule B, entitled “Salary Plan – Pay Schedule,” copies of which are available for inspection at the Human Resources Department, and to authorize the Town to raise and appropriate, transfer from available funds, or borrow a sum of money for the purposes of complying with said Schedule B, as so amended, or to take any other action in relation thereto.

(Human Resources Board)
ARTICLE 6. To see if the Town will vote to fix the salary and compensation of the Town Clerk at $92,127.00, as provided by Section 108 of Chapter 41 of the General Laws, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 7. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money to supplement or reduce appropriations approved by the 2018 Annual Town Meeting, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 8. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money for the following:

1) The operation and expenses of certain Town departments, including capital outlay, maturing debt and interest, and the provision of a Reserve Fund;

2) Extraordinary maintenance, special capital projects and other capital outlay items for the several Town departments;

3) Such purposes as may be voted contingent upon passage by the voters of referendum questions as authorized by Section 21c(g) of Chapter 59 of the General Laws, and further to authorize the Board of Assessors to use any monies paid to the Town from the Wellesley Municipal Light Plant as an estimated receipt when computing the Fiscal Year 2020 Tax Rate, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 9. To see if the Town will vote pursuant to Section 53E1/2 of Chapter 44 of the Massachusetts General Laws, as amended by Section 86 of Chapter 218 of the Acts of 2016, to:

(1) amend Article 55 of the Town Bylaws by adding a new subsection 55.1.m as follows:

m. Cultural Council Revenues Fund.
   Funds held in the Cultural Council Revenues Fund shall be expended for Cultural Council programs under the direction of the Cultural Council. Receipts credited to this fund shall include user fees from Cultural Council programs.
and

(2) set the limit on the total amount that may be spent from each revolving fund for Fiscal Year 2020 as follows:

a. Street Opening Maintenance Fund: $225,000.00
b. DPW Field Use Fund: $200,000.00
c. Turf Field Fund: $500,000.00
d. Tree Bank Fund: $75,000.00
e. Baler, Compacters and other RDF Equipment Repair Fund: $50,000.00
f. Council on Aging Social and Cultural Programs Fund: $140,000.00
g. Teen Center Program Revenues Fund: $50,000.00
h. Library Room Rental Fund: $35,000.00
i. Lost/Damaged Library Materials Replacement Fund: $20,000.00
j. Brookside Community Gardens Fund: $3,000.00
k. Weston Road Gardens Fund: $7,000.00
l. Library Copier Fees Fund: $20,000.00
m. Cultural Council Revenues Fund: $500,000.00

or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 10. To see if the Town will vote raise and appropriate, transfer from available funds, or borrow $48,672.00 (FORTY-EIGHT THOUSAND SIX HUNDRED SEVENTY-TWO DOLLARS), or any other sum, to the Special Injury Leave Indemnity Fund established under Article 9 of the 2017 Annual Town Meeting; or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 11. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money to the Special Education Reserve Fund established by the vote taken under Article 10 at the 2017 Annual Town Meeting to pay,
without further appropriation, for unanticipated or unbudgeted costs of special education, out-of-district tuition or transportation, or to take any other action in relation thereto.

(Board of Selectmen)

**ARTICLE 12.** To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow the sum of $50,000.00 (FIFTY THOUSAND DOLLARS), or any other sum, to the Baler Stabilization Fund established by the vote taken under Article 10 at the 2016 Annual Town Meeting for replacement of the RDF Baler, Compactors and other RDF equipment, or to take any other action in relation thereto.

(Board of Public Works)

**ARTICLE 13.** To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow the sum of $9,055,934.00 (NINE MILLION FIFTY-FIVE THOUSAND NINE HUNDRED THIRTY-FOUR DOLLARS), or any other sum, to be expended under the direction of the Board of Public Works for the purposes of operating and managing the Water Program as follows:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>$1,886,544</td>
</tr>
<tr>
<td>Expenses (incl. interest, and all non-op exp.)</td>
<td>4,078,803</td>
</tr>
<tr>
<td>OPEB (Other Post-Employment Benefits)</td>
<td>38,500</td>
</tr>
<tr>
<td>Depreciation</td>
<td>965,330</td>
</tr>
<tr>
<td>Capital Outlay</td>
<td>1,180,000</td>
</tr>
<tr>
<td>Debt</td>
<td>471,841</td>
</tr>
<tr>
<td>Emergency Reserve</td>
<td>434,916</td>
</tr>
<tr>
<td><strong>Total Authorized Use of Funds</strong></td>
<td><strong>$9,055,934</strong></td>
</tr>
</tbody>
</table>

And that $9,055,934 be raised as follows:

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Receipts</td>
<td>$6,797,121</td>
</tr>
<tr>
<td>Depreciation</td>
<td>965,330</td>
</tr>
<tr>
<td>Retained Earnings</td>
<td>1,293,483</td>
</tr>
<tr>
<td><strong>Total Sources of Funds</strong></td>
<td><strong>$9,055,934</strong></td>
</tr>
</tbody>
</table>

or to take any other action in relation thereto.

(Board of Public Works)

**ARTICLE 14.** To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow the sum of $9,825,658.00 (NINE MILLION EIGHT HUNDRED TWENTY-FIVE THOUSAND SIX HUNDRED FIFTY-EIGHT DOLLARS) to be expended under the direction of the Board of Public Works for the purposes of operating and managing the Sewer Program, as follows:
Salaries $ 863,586
Expenses (incl. interest, and all non-op exp.) 6,809,113
OPEB (Other Post-Employment Benefits) 16,500
Depreciation 458,179
Capital Outlay 900,000
Debt 286,707
Emergency Reserve 491,573
Total Authorized Use of Funds $9,825,658

And that $9,825,658 be raised as follows:
Department Receipts $8,861,469
Depreciation 458,179
Retained Earnings 506,010
Total Sources of Funds $9,825,658

or to take any other action in relation thereto.

(Board of Public Works)

ARTICLE 14.1. To see if the Town will vote to amend the vote taken pursuant to Article 17 of the 2016 Annual Town Meeting by increasing the appropriation approved thereby from $4,100,000.00 (FOUR MILLION ONE HUNDRED THOUSAND DOLLARS) to $4,500,000.00 (FOUR MILLION FIVE HUNDRED THOUSAND DOLLARS) for the purpose of completing water system improvements authorized by said vote, and that the Treasurer, with the approval of the Board of Selectmen, is authorized to borrow the additional sum of $400,000.00 (FOUR HUNDRED THOUSAND DOLLARS) in accordance with Chapter 44, Section 7(1), of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or take any other action in relation thereto.

(Board of Public Works)

ARTICLE 15. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow the sum of $36,135,600.00 (THIRTY-SIX MILLION ONE HUNDRED THIRTY-FIVE THOUSAND SIX HUNDRED DOLLARS) to be expended under the direction of the Municipal Light Board for purposes of operating and managing the Municipal Light Plant, as follows:

**Operating Budget:**

- Operating Salaries: $1,113,700
Materials and Services  1,054,900
Health Insurance  236,700
Contribution to Employee Retirement  258,500
Purchase Power  22,577,700
Transmission  5,592,000
Sub Total  30,833,500

**Capital Outlays:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salaries</td>
<td>1,139,100</td>
</tr>
<tr>
<td>Services/Materials</td>
<td>1,549,700</td>
</tr>
<tr>
<td>Vehicles</td>
<td>189,600</td>
</tr>
<tr>
<td>Health Insurance</td>
<td>274,200</td>
</tr>
<tr>
<td>Contribution to Employee Retirement</td>
<td>299,500</td>
</tr>
<tr>
<td><strong>Sub Total</strong></td>
<td><strong>3,452,100</strong></td>
</tr>
</tbody>
</table>

**Payments That Benefit The Town:**

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Payment in Lieu of Taxes</td>
<td>1,000,000</td>
</tr>
</tbody>
</table>

**Power Supply Contingencies**  850,000

Total Fiscal Year 2020 Budget Request  $36,135,600

Excludes depreciation expense in the amount of * $3,650,000.

or to take any other action in relation thereto.

(Municipal Light Board)

**APPROPRIATIONS – SPECIAL CAPITAL PROJECTS**

**ARTICLE 16.** To see if the Town will vote to hear and act on the report of the Community Preservation Committee on the Fiscal Year 2020 Community Preservation Budget, to appropriate or reserve for future appropriation, from FY 2020 Community Preservation Fund annual revenues and reserves, sums of money to meet the administrative expenses and all other necessary and proper expenses of the Community Preservation Committee for the Fiscal Year beginning July 1, 2019, to make debt service payments, and to undertake community preservation projects as recommended by the Community Preservation Committee, as follows:

<table>
<thead>
<tr>
<th>Open Space</th>
<th>Historical</th>
<th>Housing</th>
<th>Undesignated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reserve revenues for Specific Purpose and Administrative</td>
<td>$160,000</td>
<td>$160,000</td>
<td>$(65,000)</td>
</tr>
</tbody>
</table>
or to take any other action in relation thereto.

(Community Preservation Committee)

ARTICLE 17. To see if the Town will vote to raise and appropriate, transfer from available funds, including Community Preservation Funds and Gifts, or borrow a sum or sums of money to be expended under the direction of the Board of Public Works for construction services and all other associated services and costs related to the construction or reconstruction of softball field (Lee Field) and multipurpose field located at the Hunnewell Field, which shall include, but not be limited to, construction and installation of appurtenant structures and site enhancements; and for the purpose of meeting such appropriation, to authorize the Treasurer, with the approval of the Board of Selectmen, to borrow a sum in accordance with Chapter 44, Section 7(1), of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or to take any other action in relation thereto.

(Playing Fields Task Force/School Committee)

ARTICLE 18. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money, to supplement funds for the rehabilitation, restoration or repair of the Town Hall exterior as voted under Article 22 of the 2018 Annual Town Meeting; and for the purpose of meeting such appropriation, to authorize the Treasurer, with the approval of the Board of Selectmen, to borrow said sum in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or to take any other action in relation thereto.

** These projects have not yet been voted on by the CPC
North 40 Debt service $550,244 appropriated from Open space reserve and Undesignated funds and applied to Article 8 Omnibus Budget

<table>
<thead>
<tr>
<th>Appropriations from Reserves</th>
<th>Open Space</th>
<th>Historical</th>
<th>Housing</th>
<th>Undesignated</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wellesley Free Library – digitization of historic maps</td>
<td>($21,500)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DPW - reconstruction of softball fields</td>
<td></td>
<td>($500,000)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NRC – Restoration of Church Park</td>
<td>($30,000)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NRC-Phase II Reconstruction of Duck Pond Bridge</td>
<td>($91,000)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>NRC – Phase I Morse’s Pond Erosion Mitigation</td>
<td>($150,000)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>($271,000)</td>
<td>($21,500)</td>
<td></td>
<td>($500,000)</td>
</tr>
</tbody>
</table>
with Chapter 44, Section 7(1), of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or to take any other action in relation thereto.

(Permanent Building Committee)

ARTICLE 19. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum or sums of money, to be expended under the direction of the Board of Public Works for design, architectural, engineering and other professional services, bid documents, construction services and all associated costs related to the replacement of the synthetic turf fields located at the Sprague School; and for the purpose of meeting such appropriation, to authorize the Treasurer, with the approval of the Board of Selectmen, to borrow a sum in accordance with Chapter 44, Section 7(1), of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or to take any other action in relation thereto.

(Playing Fields Task Force/School Committee)

ARTICLE 20. To see if the Town will vote to raise and appropriate or transfer from available funds $150,000.00 (ONE HUNDRED FIFTY THOUSAND DOLLARS), or any other sum, to be expended under the direction of the Board of Public Works, for engineering designs, bid documents, and associated costs related to the construction, reconstruction, rehabilitation, and repair of Walnut Street, including street, sidewalk and/or drainage repairs and improvements; or take any other action in relation thereto.

(Board of Public Works)
with Chapter 44, Section 7(1) of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or take any other action in relation thereto.

(School Committee)

ARTICLE 22. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money, to be expended under the direction of the Permanent Building Committee, for architectural and engineering designs, plans and other specifications and any associated costs related to repairs and renovations at the Middle School including but not limited to: exterior façade repairs, replacement of selected HVAC system, replacement of selected interior doors, renovation of Art Rooms, and replacement of cabinetry/millwork and in selected classrooms, renovation of the kitchen, and for any other services in connection therewith and, for the purpose of meeting such appropriation, to authorize the Town Treasurer, with the approval of the Board of Selectmen, to borrow said sum in accordance with Chapter 44, Section 7(1) of the Massachusetts General Laws, or any other enabling authority and to issue bonds or note of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such costs by a like amount; or to take any other action in relation thereto.

(School Committee)

ARTICLE 23. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money, to be expended under the direction of the Board of Selectmen, for the purchase of a Quint Fire Truck and, for the purpose of meeting such appropriation, to authorize the Town Treasurer, with the approval of the Board of Selectmen, to borrow said sum in accordance with Chapter 44, Section 7(1) of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 24. To see if the Town will vote to raise and appropriate, transfer from available funds, accept gifts, or borrow a sum of money, to be expended under the
direction of the Permanent Building Committee for architectural and engineering plans, specifications and other services in connection with the reconstruction, remodeling, rehabilitation and/or renovation of the Wellesley Free Library located at 530 Washington Street, including the payment of all costs incidental and related thereto, and, for the purpose of meeting such appropriation, to authorize the Town Treasurer, with the approval of the Board of Selectmen, to borrow said sum in accordance with Chapter 44, Section 7(1) of the Massachusetts General Laws, or any other enabling authority and to issue bonds or notes of the Town therefor, and that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of the issuance of such bonds or notes, may be applied to payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount to be borrowed to pay such cost by a like amount; or take any other action in relation thereto.

(Board of Library Trustees)

STREET ACCEPTANCE

ARTICLE 25. To see if the Town will vote to accept as a public way (with betterments) the following street as laid out by the Board of Selectmen: Polaris Circle; or take any other action in relation thereto.

(Board of Selectmen)

AUTHORIZATIONS

ARTICLE 26. To see if the Town will vote to appropriate the sum of $19,337.70 (NINETEEN THOUSAND THREE HUNDRED THIRTY-SEVEN DOLLARS AND SEVENTY CENTS), received from the Commonwealth Transportation Infrastructure Fund ("Fund") pursuant to St. 2016, c. 187, § 8(c)(i) for calendar year 2017 to address the impact of transportation network services on municipal roads, bridges and other transportation network services in the Town including the complete streets program established in Section 1 of Chapter 90I of the General Laws and other programs that support alternative modes of transportation; or take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 27. To see if the Town will vote to authorize the Board of Selectmen to enter into a lease of certain parcels of Town-owned land within the Cochituate Aqueduct; on such terms and conditions, including dollar amounts, as said Board deems to be in the Town’s interest; or take any other action relative thereto.

(Board of Selectmen)
ARTICLE 28. To see if the Town will vote to approve amendments, as recommended by the Board of Selectmen, to the Development Agreement for Linden Square dated June 3, 2005, between the Town of Wellesley and Lindwell SC, Inc., Lindwell OP, Inc., and Lindwell Realty Trust, authorized by Town Meeting on June 13, 2005, as amended, relative to the replacement of the service station with an office building provided that the structure shall not exceed 3,500 square feet of floor area in the aggregate; or take any other action in relation thereto.

(Board of Selectmen)

ARTICLE XX. To hear the report of the Board of Public Works that certain easements for drainage utilities are to be abandoned and a new easement granted, and to see if the Town will vote, pursuant to Chapter 40, Section 15 of the Massachusetts General Laws, to authorize the Board of Public Works to make the required declaration to grant a new drainage easement and abandon a portion of the drainage easement for the property at 37 Ravine Road, Wellesley, MA, as described herein, without charge for said declaration. The easements for drainage are more fully described as follows:

WHEREAS, by instrument dated May 17, 1935, recorded with Norfolk Registry of Deeds in Book 2074, Page 539 (the “1935 Grant”), and modified by agreements on May 8, 1939, recorded in Book 2225, Page 378, August 26, 1952, recorded in Book 3110, Page 503, and November 10, 1997, recorded in Book 12084, Page 72 (the “1997 Agreement”), the Owner’s predecessor in title agreed to construct and to allow the Town of Wellesley to construct and maintain certain drains across their land between Ledgeways and Ravine Road in Wellesley, to carry off surface waters from said Ledgeways and the watershed tributary to it, as follows:

1. Grant of Easement and Acceptance by Town.

The Owner of 37 Ravine Road grants to the Town a drainage easement shown on the 2018 Plan as the “Proposed 15’ Wide Drainage Easement”, which grant is on the same terms and conditions and is to be held by the Town on the terms and conditions of the 1935 Grant, as amended by the 1997 Agreement, except that the Owners may only change the location of the easement upon the approval of the Board of Public Works. The Town hereby accepts the grant of easement as set forth herein.

WHEREAS, the location of said easement, as amended by the 1997 Agreement, is shown as “Proposed 10’ Wide Drain Easement” on a plan entitled “Plan of Drain Easement at #37 Ravine Road, Wellesley, Mass”, dated September 26, 1997, and recorded with the Norfolk Registry of Deeds as Plan 775 of 1997. The Town abandon portions of the abovementioned drain easement, said portions being shown as “10’ Wide Drain Easement (To Be Abandoned)” on a plan entitled “Easement Plan of Land, 37 Ravine Road in Wellesley, Mass (Norfolk County)”, dated November 28, 2018, and prepared by Metrowest Engineering, Inc. (the “2018 Plan”).

2. Abandonment of Drainage Easement.

The Town abandons and discharges all its rights, title and interest to the area shown on the 2018 Plan as “10’ Wide Drain Easement (To Be Abandoned)” and the Town hereby
conveys to the Owners of 37 Ravine Road all rights, title and interest to the parcel of land shown on the 2018 Plan as the “10’ Wide Drain Easement (To Be Abandoned)”. The Town is released from any liability or responsibility arising from or in any way connected with any obligations with respect to the area shown on the 2018 Plan as the “10’ Wide Drain Easement (To Be Abandoned)”. or take any action in relation hereto. 

(Board of Public Works)
The Zoning Bylaw of the Town of Wellesley, Massachusetts, is enacted in accordance with the provisions of the Zoning Act, Massachusetts General Laws (M.G.L.), c. 40A, and any and all amendments thereto.

C. Purpose

This Zoning Bylaw is enacted for the following intended purposes, as authorized by, but not limited to, the provisions of the Zoning Act, M.G.L., c. 40A, as amended, Section 2A of 1975 Mass. Acts 808, and Article 89 of the Amendments to the Constitution of the Commonwealth of Massachusetts:

1. To lessen congestion in the streets;
2. To conserve health;
3. To secure safety from fire, flood, panic, and other dangers;
4. To provide adequate light and air;
5. To prevent overcrowding of land;
6. To avoid undue concentration of population;
7. To encourage housing for persons of all income levels;
8. To facilitate the adequate provision of transportation, water, water supply, drainage, sewerage, schools, parks, open space, and other public requirements;
9. To conserve the value of land and buildings, including the conservation of natural resources and the prevention of blight and pollution of the environment;
10. To encourage the most appropriate use of land throughout the Town, consistent with the goals and policies of the Town of Wellesley Comprehensive Plan; and
11. To preserve and increase amenities by the promulgation of regulations to fulfill said objectives.

D. Applicability

All buildings or structures hereinafter erected, reconstructed, altered, enlarged, or moved, the use of all premises in the Town, and any applicable permitting, shall be in conformity with the provisions of this Zoning Bylaw. No building, structure or land shall be used for any purpose or in any manner other than as expressly permitted within the district in which such building, structure or land is located. Where the application of this Zoning Bylaw imposes greater restrictions than those imposed by any other regulations, permits, restrictions, easements, covenants, or agreements, the provisions of this Zoning Bylaw shall control.

E. Other Laws and Regulations
Nothing contained in this Zoning Bylaw shall be construed as repealing or modifying any existing bylaw or regulation of the Town, but it shall be in addition thereto. Furthermore, this Zoning Bylaw shall not be construed to authorize the use of any land or structure for any purpose that is prohibited by any other provision of the General Laws or by any other bylaw, rule, or regulation of the Town of Wellesley; nor shall compliance with any such provision authorize the use of any land or structure in any manner inconsistent with this Zoning Bylaw, except as required by the Massachusetts General Laws.

F. Amendment

This Zoning Bylaw may from time to time be changed by amendment, addition, or repeal by the Town Meeting in the manner provided for in M.G.L., c. 40A, § 5, and as required by M.G.L., c. 40, § 32, and any amendment(s) thereto.

G. Severability

The invalidity of any section or provision of this Zoning Bylaw shall not invalidate any other section or provision herein.

(Planning Board)

ARTICLE 31. To see if the Town will vote to amend the Zoning Bylaw by deleting Section XXI, Off-Street Parking, and readopting the Section, as follows. This amendment to be effective as of July 1, 2019, or upon receipt of the Attorney General's approval if later.

SECTION XXI. OFF-STREET PARKING.

A. Purpose

It is the intent of this Section that any use of land involving the arrival, departure, parking or storage of motor vehicles upon such land be so designed and operated as to assure that all structures and land uses shall have sufficient off-street automobile parking to meet the needs of persons employed at, or making use of, such structures or land uses.

B. Definitions

As used herein the following words and phrases shall have and include the following respective meanings:
Parking Space - An area exclusive of maneuvering area and driveway for the parking of one motor vehicle.

Parking Area - An area either used or required for parking of five or more motor vehicles not for sale or rental, including necessary maneuvering space, maneuvering aisle, and driveway, but not including such areas on a lot used for one or two-family dwellings.

Storage Area - An area either used or required for the storage of motor vehicles held for sale or rent.

Maneuvering Space - An area in a parking area which (1) is immediately adjacent to a parking space, (2) is used for and/or is necessary for turning, backing, or driving forward a motor vehicle into such parking space but (3) is not used for the parking or storage of motor vehicles.

Maneuvering Aisle - A maneuvering space which serves two or more parking spaces, such as the area between two rows of parking spaces.

Driveway - An area on a lot, in addition to parking and maneuvering spaces and aisles, which is designed or used to provide for the passage of motor vehicles to and from a street or way.

Motor Vehicle - Any vehicle for which registration is required in order to travel legally on Massachusetts highways.

Use - The purpose for which land or buildings are employed, arranged, designed, or intended, or for which either is occupied or maintained.

Service Area - An area used for maneuvering and/or temporary parking of motor vehicles or storage containers employed in providing the pickup and delivery of goods and services.

C. Applicability

The following activities shall be subject to the requirements of this Section, and a Parking Plan demonstrating compliance with this Section and submitted in accordance with subsection E., Administration, shall be required for any of these activities:

1. The erection, enlargement, or alteration of a building or structure for which a parking area or storage area would be required by subsection D., Regulations and Restrictions, 2., Required Parking;
2. The construction of a new parking area or storage area, or the enlargement or alteration of an existing parking area or storage area; enlargement or alteration shall include any installation, removal, or relocation of any curbing, landscaping islands, traffic islands, or driveways, and any striping or restriping of pavement markings on an existing parking area or storage area which alters the configuration of the parking area or number of parking spaces; and

3. Any change in the use or uses of the structure or land that would require greater parking requirements, as required by D., Regulations and Restrictions, 2., Required Parking, from those applicable to the former use(s) of said structure or land.

D. Regulations and Restrictions


The following general provisions shall apply:

a. No existing off-street parking spaces shall be eliminated by the replacement or enlargement of an existing structure, unless replaced by spaces provided in accordance with this Section;

b. No existing parking area or existing storage area shall be discontinued or altered if the requirements of this Section would not thereafter be satisfied;

c. Enlargements or alterations to existing structures with less parking than is required by this Section (unless such deficient parking was allowed by a Variance or Special Permit) shall only be required to provide additional parking to accommodate the additional use (e.g. based on the applicable square footage, ground coverage, dwelling unit, guest room);

d. Changes in the use or uses of existing structures, or parts thereof, or of land, shall require additional off-street parking spaces in accordance with the provisions of this Section, but only to the extent of such change;

e. Nothing herein shall be construed to prohibit the owner of a parking or storage area from restricting the use thereof to his customers, employees, or other invitees, nor from charging a reasonable fee for the use thereof; and

f. Areas required to be kept open and unoccupied by buildings or structures under Section XVIII, Area Regulations, C.,
Ratio of Building to Lot Area, and Section XIX, Yard Regulations, may be used to satisfy the provisions of this Section.

2. Required Parking

In all districts which require off-street parking in accordance with this Zoning Bylaw, off-street parking shall be provided for uses (excluding public housing for the elderly) according to Table 21.1, Off-Street Parking Requirements. The Table provides the minimum number of parking spaces required for various uses in the zoning districts, but is not intended to indicate the allowed uses in the districts.

Where two or more uses are conducted on a single lot, the minimum number of required parking spaces shall be the sum of the requirements for the uses.

<table>
<thead>
<tr>
<th>USE</th>
<th>ZONING DISTRICT</th>
<th>MINIMUM NUMBER OF PARKING SPACES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apartment house, apartment hotels.</td>
<td>Business Districts A, Industrial Districts A.</td>
<td>One space for each apartment dwelling unit contained in buildings.</td>
</tr>
<tr>
<td>Hotel, inn, lodging house, restaurant or other eating place.</td>
<td>Single Residence Districts A, General Residence Districts A, Limited Residence Districts, Business Districts A, Industrial Districts A.</td>
<td>Either one space per two guest rooms or one space for each 100 sq. ft. of area in which food is served, whichever is greater.</td>
</tr>
<tr>
<td>Building used for administrative, clerical, statistical &amp; professional offices, and other similar uses.</td>
<td>Administrative and Professional Districts ***, Limited Business Districts.</td>
<td>One space for 100 sq. ft. of ground coverage of buildings but not less than 3.2 &amp; spaces per 1,000 sq. ft. of floor area of buildings.**</td>
</tr>
<tr>
<td>Hotel, motel, inn, restaurant operated in conjunction with such similar uses.</td>
<td>Limited Business Districts.</td>
<td>One space per guestroom and one space for each 100 sq. ft. of area in which food is served.</td>
</tr>
<tr>
<td>Any building where the principal use is motor vehicle sales or service.</td>
<td>Business Districts A, Industrial Districts A.</td>
<td>One space per employee and one space per motor vehicle (not for sale or rental) owned, operated or associated with the establishment and one space per 100 sq. ft. of area occupied by buildings.</td>
</tr>
<tr>
<td>USE</td>
<td>ZONING DISTRICT</td>
<td>MINIMUM NUMBER OF PARKING SPACES</td>
</tr>
<tr>
<td>--------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Apartment building or group of buildings containing three or more dwelling units.</td>
<td>Limited Residence Districts.</td>
<td>One space on the lot for each dwelling unit.</td>
</tr>
<tr>
<td>Apartment building or group of buildings containing 20 or more dwelling units.</td>
<td>Limited Apartment Districts.</td>
<td>1.5 spaces for each dwelling unit of two bedrooms or less and two parking spaces for each dwelling unit providing three bedrooms or more.</td>
</tr>
<tr>
<td>Any building used for any business, industrial, educational or commercial purpose residential uses accessory to an educational use.</td>
<td>Educational Districts A, Business Districts A, Industrial Districts A.</td>
<td>One space for each 150 sq. ft.* occupied by buildings but not less than 3.2 spaces per 1,000 sq. ft. of floor area of buildings.**</td>
</tr>
<tr>
<td>Any building used for physical education or physical recreation purpose.</td>
<td>Educational Districts B, Business Districts A, Industrial Districts A.</td>
<td>One space for every 3 permanent spectator seats, which shall include folding bleachers that are attached to buildings, but not less than one space per 1,000 sq. ft. of floor area of buildings.**</td>
</tr>
<tr>
<td>Any allowed use with or without a special permit.</td>
<td>Lower Falls Village Commercial District.</td>
<td>3.2 spaces per 1,000 sq. ft.* of first floor area of buildings.** 2 spaces per 1,000 sq. ft.* of upper floor space in excess of 4,000 sq. ft.** ****</td>
</tr>
<tr>
<td>Assisted Elderly Living, Independent Elderly Housing.</td>
<td>Residential Incentive Overlay District.</td>
<td>0.65 spaces per dwelling unit.</td>
</tr>
<tr>
<td>Conventional Multi Family Housing.</td>
<td>Residential Incentive Overlay District.</td>
<td>2 spaces per dwelling unit.</td>
</tr>
<tr>
<td>Nursing Home and/or Skilled Nursing Facility.</td>
<td>Residential Incentive Overlay District.</td>
<td>1 space for 5 nursing home beds.</td>
</tr>
<tr>
<td>Any building used for any business, industrial, educational or commercial purpose.</td>
<td>Wellesley Square Commercial District, Business Districts, Industrial Districts.</td>
<td>One space for each 150 sq. ft.* of ground coverage of buildings but not less than 3.2 spaces per 1,000 sq. ft. of floor area of buildings.**</td>
</tr>
<tr>
<td>Town House.</td>
<td>Town House, General Residence, General Residence A.</td>
<td>Two spaces on the lot for each dwelling unit.</td>
</tr>
</tbody>
</table>
### Table 21.1, Off-Street Parking Requirements

<table>
<thead>
<tr>
<th>USE</th>
<th>ZONING DISTRICT</th>
<th>MINIMUM NUMBER OF PARKING SPACES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any residential use.</td>
<td>Linden Street Corridor Overlay District.</td>
<td>2.5 spaces per one, two or three bedroom unit.</td>
</tr>
<tr>
<td>Any nonresidential use.</td>
<td>Linden Street Corridor Overlay District.</td>
<td>5 spaces for each 1,000 square feet of ground coverage of buildings*, but not less than 3.2 spaces per 1,000 square feet of floor area of buildings.**</td>
</tr>
</tbody>
</table>

For purposes of the above parking requirements, any increase in on-street parking spaces included in a proposed Linden Street Corridor Overlay District Development Site at the expense of the proponent shall be counted towards satisfaction of the off-street parking requirement.

* Computed to the nearest ten square feet.

** Floor area shall be the sum of the horizontal areas of the several floors (including basement) of a building to the nearest 100 square feet, except that such floor area as is provided for deck parking or other in building parking shall be counted for required parking space and not in figuring floor area for which parking must be provided. For the purpose of computing the requirements, the area shall be measured from the exterior surface of the exterior walls.

*** No parking facilities other than those for transient motor vehicles shall be located between the principal building and the principal street line.

**** If any portion of a parcel is within 600 feet of any portion of a public parking area or areas, having individually or jointly 50 or more parking spaces, off-street parking shall be provided at a ratio of 2.5 spaces per 1,000 gross square feet of commercial floor area, excluding uninhabitable basement areas.

---

3. Development Standards

Each parking area hereafter devoted to the off-street parking of fifteen (15) or more vehicles regardless of whether said parking area is required by this Bylaw, shall comply with the standards as hereinafter set forth:

**DESIGN**

a. Parking spaces and maneuvering aisles shall have the minimum dimensions set forth in the following table:

<table>
<thead>
<tr>
<th>MINIMUM PARKING SPACE AND AISLE DIMENSIONS FOR PARKING AREAS (in feet)</th>
</tr>
</thead>
</table>
Parking spaces for the exclusive use of handicapped individuals shall be provided in accordance with the Rules and Regulations of the Architectural Barriers Board.

Provided however, that compact car spaces having the minimum dimensions set forth in the following table may be used to satisfy up to a maximum of 30% of the off-street parking spaces required. Such spaces shall be designated for "Compact Cars Only" by signs or pavement markings.

**MINIMUM PARKING SPACE AND AISLE DIMENSIONS FOR PARKING AREAS (in feet) DEVOTED TO COMPACT CARS**

<table>
<thead>
<tr>
<th>Angle of Parking</th>
<th>Width of Parking Space</th>
<th>Depth of Parking Space</th>
<th>Width of Maneuver Aisle</th>
</tr>
</thead>
<tbody>
<tr>
<td>61° - 90°</td>
<td>8'6&quot;</td>
<td>18'</td>
<td>24'</td>
</tr>
<tr>
<td>45°</td>
<td>8'6&quot;</td>
<td>18'</td>
<td>18'</td>
</tr>
<tr>
<td>Parallel</td>
<td>8'0&quot;</td>
<td>22'</td>
<td>12'</td>
</tr>
</tbody>
</table>

b. The number of driveways permitting entrance to and for exit from a lot shall be limited to two per street line. Driveways shall be located so as to minimize conflict with traffic on public streets and where good visibility and sight distances are available to observe approaching pedestrian and vehicular traffic.

c. The width of a driveway for one-way traffic shall be not less than twelve (12) feet as measured at its narrowest point. The width of a driveway for two-way use shall be a minimum of eighteen (18) feet and a maximum of twenty-four (24) feet, as measured at its narrowest point.

d. All parking areas shall be so arranged and designed that the only means of access and egress to and from such areas shall be by driveways meeting the requirements of this Section.

e. Driveways shall be arranged for the free flow of vehicles at all times, and all maneuvering spaces and aisles shall be so
designated that all vehicles may exit from and enter into a public street by being driven in a forward direction.

f. On any parking area in any District, all paved portions of all parking spaces and maneuvering aisles shall be set back five (5) feet from any wall of a building, and five (5) feet from any private or public way, or any lot line of any land in residential districts or used for residential, conservation or park purposes.

g. Each required off-street parking space shall be designed so that any motor vehicle may proceed to and from said space without requiring the moving of any other vehicle or by passing over any other parking space, except where the parking area is attended or limited to employees.

CONSTRUCTION

a. All required parking spaces, maneuvering aisles, and driveways shall have a durable, dustless, all-weather surface, such as bituminous concrete or cement concrete, and shall provide for a satisfactory disposal of surface water by grading and drainage in such a manner that no surface water shall drain onto any public way or onto any lot in other ownership and such surfaces shall be well maintained.

b. Parking areas in all Districts shall be provided with curbing, wheel stops, or other devices to prevent motor vehicles from being parked or driven within required setback areas or onto the required landscaped open space.

c. In any parking area the surface shall be painted, marked or otherwise delineated so that each parking space is apparent.

LANDSCAPING

a. For an outdoor parking area containing twenty (20) or more parking spaces, there shall be planted at least one tree for every ten (10) parking spaces on any side of the perimeter of such parking area that abuts the side line of a private or public way, or abuts the lot line of land in residential districts or land used for residential purposes.

b. In any outdoor parking area a landscaped open space having an area of not less than 10% of the outdoor parking area on the lot shall be provided. A minimum of one half of the required landscaped open space shall be located in the interior of the parking area.
c. Trees required by the provisions of this Section shall be at least two (2) inches in diameter at a height of five (5) feet at the time of planting and shall be of a species characterized by rapid growth and by suitability and hardiness for location in a parking lot. To the extent practicable, existing trees shall be retained and used to satisfy the provisions of this Section.

SCREENING

Any parking, storage, or service area which abuts residential districts or uses shall be screened from such residential districts or uses and any parking area shall be screened from a public or private way in accordance with the following requirements:

a. Materials - plant materials characterized by dense growth which will form an effective year-round screen shall be planted, or a fence or a wall shall be constructed, to form the screen. Where a grill or open-work fence or wall is used it shall be suitable in appearance and materials. Screening may consist of both natural and man-made materials. To the extent practicable, existing trees shall be retained and used to satisfy the provisions of this Section.

b. Height - screening shall be at least five (5) feet in height. Plant materials when planted, may be not less than 3 1/2 feet in height if of a species or variety which shall attain the required height and width within three (3) years of planting. Height shall be measured from the finished grade.

c. Width - screening shall be in a strip of landscaped open space at least five (5) feet wide, and so located as not to conflict with any corner visibility requirements or any other Bylaws of the Town.

d. Maintenance - all required plant materials shall be maintained in a healthy condition and whenever necessary replaced with new plant materials to insure continued compliance with screening requirements. All required fences and walls shall be permanently maintained in good repair and presentable appearance and whenever necessary they shall be repaired or replaced.

e. Lighting - all artificial lighting used to illuminate a parking or storage area, maneuvering space or driveway shall be arranged and shielded so as to prevent direct glare from the light source into any public street or private way or onto adjacent property.
E. Administration

1. Permits

Any application for a permit for the activities listed in subsection C. Applicability shall be accompanied by a Parking Plan showing compliance with the requirements of this Section. For activities that constitute a Major Construction Project or Project of Significant Impact as defined by Section XVI.A. Project Approval B. Part 1. Principal Definitions, the required Parking Plan shall be submitted to the Zoning Board of Appeals for review. The Zoning Board of Appeals shall grant a Parking Plan Permit if the requirements of this Section are satisfied. For all other activities, the required Parking Plan shall be submitted to the Building Inspector. The Building Inspector shall grant a Parking Plan Permit if the requirements of this Section are satisfied. If the Building Inspector or Zoning Board of Appeals, as applicable, determines that the Plan is not in compliance with this Section, they shall deny the application setting forth their grounds for denial in writing.

A Parking Plan shall include:

a. The quantity, location, and dimensions of all driveways, maneuvering spaces and aisles, parking spaces, storage areas, and drainage facilities;

b. The location, size, and type of materials for surface paving, curbing or wheel stops, landscaping, screening and lighting;

c. The location of all building and lot lines; and

d. Such other information as the Building Inspector or Zoning Board of Appeals, as applicable, may require.

The Plan shall be a drawing at a scale of 1 inch equals 20 feet or 1 inch equals 40 feet or at such other scale as the Building Inspector or Zoning Board of Appeals, as applicable, may direct.

Where necessary for the administration of this Section, the Building Inspector or Zoning Board of Appeals, as applicable, may require that the owner, operator or occupant of a lot or any building thereon, furnish a statement as to the number of employees customarily working at any one time on the premises. The Building Inspector or Zoning Board of Appeals, as applicable, may, at any reasonably time, enter upon a lot or into any building thereon, in order to make such determinations as are necessary for the administration of this Section.
2. Special Permits

a. In the case of such activities which do not meet the requirements of this Section, or are not otherwise exempt, the Zoning Board of Appeals may grant a Special Permit, pursuant to Section XXV, Special Permit Granting Authority.

b. Standards: In considering the issuance of a Special Permit from the requirements of this Section, the Zoning Board of Appeals shall make a finding that the standards specified in Section XXV, Special Permit Granting Authority, D. Special Use Permit Standards, are satisfied.

, or take any other action relative thereto.

(Planning Board)

ARTICLE 32. To see if the Town will vote to amend the Zoning Bylaw by adding a new section, Section XVIG, Outdoor Lighting, to regulate the installation and use of outdoor lighting in association with certain projects, as follows. This amendment to be effective as of July 1, 2019, or upon receipt of the Attorney General's approval if later.

SECTION XVIG. OUTDOOR LIGHTING

A. Title

The Section shall hereafter be known and cited as the “Town of Wellesley Outdoor Lighting Bylaw” or “Outdoor Lighting Bylaw.”

B. Purpose and Intent

The purpose of this Section is to enhance public safety by providing for adequate and appropriate outdoor lighting, protect community character, promote energy conservation, protect against light trespass and glare, protect the privacy of residents, and minimize sky glow.

C. Definitions
Cutoff Angle - The angle formed by a line drawn from the direction of the direct light rays at the light source with respect to the vertical, beyond which no direct light is emitted. (See Figure 1 for examples of Cutoff Angle)

Direct Light - Light emitted from the lamp, off the reflector or reflector diffuser or through the refractor or diffuser lens, of a luminaire.

Fixture - The assembly that houses a lamp or lamps and which may include a housing, a mounting bracket or pole socket, a lamp holder, a ballast, a reflector or mirror, and/or a refractor, lens, or diffuser lens.

Foot-candle - A unit that measures light illumination on a surface or area that is one foot from a uniform point source.

Fully Shielded Luminaire - A lamp and fixture assembly designed with a cutoff angle of 90 degrees or less so that no direct light is emitted above a horizontal plane. (See Figure 2 for examples of Fully Shielded Luminaires that would be acceptable and permitted under this Section, or would be unacceptable/discouraged and therefore prohibited under this Section)

Glare - Light emitted from a luminaire with an intensity great enough to produce annoyance, discomfort, or a reduction in a viewer’s ability to see.

Height of Luminaire - The vertical distance from the finished grade of the ground directly below to the lowest direct-light-emitting part of the luminaire.

Illuminance - The luminous flux per unit area at any point on a surface exposed to incident light. Measured in foot-candles or lux.

Lamp - The component of a luminaire that produces the actual light.
Light Trespass - The shining or spillage of direct light produced by a luminaire beyond the boundaries of the lot or parcel on which the luminaire it is located, or beyond the boundaries of multiple lots or parcels under common ownership.

Lumen - A unit that measures light energy generated by a light source. For the purposes of this Section, the lumen output shall be the initial lumen output of a lamp, as rated by the manufacturer.

Luminance - The intensity of light emitted from a surface per unit area in a given direction; measured in candela per meter squared (cd/m²).

Luminaire - A complete lighting system, including a lamp or lamps and a fixture.

Lux - A unit that measures light illumination on a surface or area that is one meter from a uniform point source. On a photometric plan, the lux measurement is often converted from meters to feet and referred to in terms of foot-candles.

Sky Glow - The diffuse luminance of the night sky derived from artificial lighting, apart from discrete natural light sources such as the Moon and stars. It is the most commonly noticed aspect of light pollution.

D. Applicability

The provisions of this Section shall apply to the following project types which include the proposed installation of one or more outdoor luminaires for exterior lighting:

1. Major Construction Projects and Minor Construction Projects, as defined by Section XVI A, Project Approval; and

2. Externally illuminated signs requiring Design Review and/or a Special Permit, as required and defined by Section XXII A, Signs.

Where these regulations are more specific and/or more restrictive with respect to lighting associated with an applicable project type for which other standards may exist within the Zoning Bylaw, the regulations contained in this Section shall take precedence.

The provisions of this Section shall not apply to one-family or two family dwellings, or structures and uses accessory to such dwellings.
The provisions of this Section shall not apply to the ordinary maintenance, repair, and/or replacement of luminaires not approved as part of and/or associated with one or more of the aforementioned project types; furthermore, the provisions of this Section shall not apply to the installation of new luminaires on properties not subject to one or more of the aforementioned project types following the effective date of this Section.

E. Administration

For the project types subject to the provisions of this Section, the following information shall be submitted, except to the extent as such information may be waived by the Design Review Board or Zoning Board of Appeals, as applicable:

1. Information identifying the location, orientation, height, and type of outdoor luminaires to be installed;

2. The luminaire manufacturer's specification data, including, at a minimum, lamp type (light emitting diode, metal halide, compact fluorescent, high pressure sodium), lumen output, correlated color temperature ("CCT"), and photometric data showing light distribution and polar plots;

3. A photometric plan showing the intensity of illumination expressed in foot-candles and/or lux at ground level within the interior of the property and at the property boundaries, except that such plans shall not be required for externally illuminated signs; and

4. Sufficient evidence to confirm that all proposed outdoor luminaires and lighting conditions comply with subsection F., General Regulations, of this Section.

F. General Regulations

All exterior luminaires and/or the outdoor lighting conditions associated with the project types subject to the provisions of this Section, shall comply with the following regulations, unless otherwise specified:
1. All luminaires shall be fully shielded. *(See Figure 2 for examples for Fully Shielded Luminaires that would be Acceptable and permitted under this Section, or would be unacceptable/discouraged and therefore prohibited under this Section)*

2. For residential uses, the correlated color temperature ("CCT") of any lamp shall not exceed 2,700K; for all other uses, the CCT of any lamp shall not exceed 3,000K.

3. Building-Mounted Fixtures: Luminaires attached to the exterior of a building or structure, including those to light signs, shall be mounted no higher than fifteen (15) feet above grade.

4. Ground-Mounted Fixtures: Luminaires mounted on the ground, including on poles or attached to Ground Signs, shall have a height no greater than twenty (20) feet.

5. Illuminance Levels and Light Trespass Limitations: Exterior lighting shall not exceed the illuminance levels (measured horizontally on the ground) or exceed the light trespass limits specified below in Table XVIG.1.; Table XVIG.1 shall not apply to externally illuminated signs; however, luminaires associated with such signs shall not have lamps which produce more than 60 watts and/or 800-900 lumens.

<table>
<thead>
<tr>
<th>TABLE XVIG.1, LIGHTING LEVELS AND LIGHT TRESPASS LIMITATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use</strong></td>
</tr>
<tr>
<td>Residential Uses</td>
</tr>
</tbody>
</table>

*Figure 2 - Examples of Non-Shielded (unacceptable) and Fully Shielded (acceptable) Luminaires*
G. Exempt and Prohibited

1. Exempt: The following luminaires or lighting conditions shall be exempt from regulation under this Section:
   a. Luminaires associated with security/emergency call boxes;
   b. Luminaires located greater than 1,000 feet from a property line not in common ownership; and
   c. Seasonal lighting of a temporary nature.

2. Prohibited: The following luminaires or lighting conditions shall be prohibited in conjunction with the project types identified in subsection D. of this Section:
   a. Luminaires mounted to or otherwise attached to any trees or similar vegetation; and
   b. Searchlights for commercial purposes.

H. Special Permits

1. Special Permits, Generally: In the case of such projects which incorporate one more outdoor luminaires not meeting the requirements of subsection F., General Regulations, or not otherwise exempt, the Zoning Board of Appeals may grant a Special Permit, per Section XXV, Special Permit Granting Authority.

2. Standards: In addition to those standards specified in Section XXV,
Special Permit Granting Authority, in considering the issuance of a Special Permit from the requirements of this Section, the applicable Special Permit Granting Authority shall make a finding that one or more of the following conditions are met:

a. The proposed lighting is necessary to enhance public safety;

b. The proposed lighting enhances, or does not negatively impact, community ambiance and character; or

c. The proposed lighting does not produce unacceptable light trespass, glare, sky glow, or compromise the privacy of abutting property owners.

, or take any other action relative thereto.

(Planning Board)

ARTICLE 33. To see if the Town will vote to amend the Zoning Map of the Town of Wellesley, Massachusetts, to resolve discrepancies, by rezoning the following properties, as specified:

a. To rezone the parcel located at 36 Pleasant Street (Assessor’s Parcel ID# 135-19), totaling approximately 23,125 square feet in area, from the General Residence District and Single Residence District and 10,000 Square Foot Area Regulation District, an error depicted on the current Zoning Map, to the Single Residence District and 10,000 Square Foot Area Regulation District or to the General Residence District in its entirety; and

b. To rezone four (4) parcels located at 42R Winding River Road, 56R Winding River Road, 70R Winding River Road, and 86R Winding River Road (Assessor’s Parcel ID#s 142-1, 142-2, 142-3, and 129-8, respectively), and one parcel known as Assessor’s Parcel ID# 142-4, the properties totaling approximately 93,670 square feet, 72,797 square feet, 30,743 square feet, 3,682 square feet, and 128,954 square feet in area, respectively, from the Single Residence District and 20,000 Square Foot Area Regulation District, an error depicted on the current Zoning Map, to the Single Residence District and 40,000 Square Foot Area Regulation District or to the Parks, Recreation, and Conservation District, in their entirety;

, or take any other action relative thereto.

(Planning Board)
ARTICLE 34. To see if the Town will vote to amend the Zoning Map of the Town of Wellesley, Massachusetts to rezone the parcel located at 999 Worcester Street (Assessor’s Parcel ID# 200-27), totaling approximately 29,420 square feet, from the Business District and Single Residence District and 10,000 Square Foot Area Regulation District, to the Business District in its entirety, or take any other action relative thereto.  

(Planning Board)

ARTICLE 35. To see if the Town will vote to DELANSON CIRCLE  

(Planning Board)

ARTICLE 36. To see if the Town will vote to 148 WESTON ROAD  

(Planning Board)

AMEND TOWN BYLAWS

ARTICLE 37. To see if the Town will vote to amend the General Bylaws in order, to improve consistency of language and style throughout, to bring the Bylaws into conformance with existing practice, and to assign to the Human Resources Board responsibility for Town personnel policies and procedures, by:

1. Amending Section 8.3, Notice of Elections by eliminating the words “Wellesley Square” and replacing them with “the Police Station”;

2. Amending Section 26.3, Duties, by inserting after subsection h., a new subsection i. as follows: “Be authorized to assign appropriate numbers or letters to bylaw sections, subsections, paragraphs and subparagraphs where none are approved by Town Meeting; and if such numbering or lettering is approved by Town Meeting, to make non-substantive editorial revisions to the same to ensure consistent and appropriate sequencing and numbering; and to make non-substantive editorial revisions to references regarding such numbering or lettering as contained within the bylaws to ensure accuracy and conformity.”;

3. Amending Section 26.7, Fees, by:
   a. Inserting in parentheses, after the words “Business Certificates,” the acronym “(D/B/A);”
   b. Deleting the Item “For Furnishing an Abstract Copy of a Record of Birth” and the corresponding Fee of $8.00;
   c. Increasing the Fee for “Entering Delayed Record of Birth” from $20.00 to $30.00;
   d. Inserting after “Entering Delayed Record of Birth” a new Item: “For Registration of a Home Birth” and a corresponding Fee in the amount of $50.00;
e. Deleting the Item “For Furnishing an Abstract Copy of a Record of Death” and the corresponding Fee of $8.00;
f. Deleting the Item “For Furnishing an Abstract Copy of a Record of Marriage” and the corresponding Fee of $8.00;
g. Inserting after the last Item a new Item, “Publications”, and a table of Fees as follows:

<table>
<thead>
<tr>
<th>Description</th>
<th>Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Residence Book or CD</td>
<td>$15.00</td>
</tr>
<tr>
<td>Zoning Bylaw Book</td>
<td>$20.00</td>
</tr>
<tr>
<td>Town Bylaw Book</td>
<td>$15.00</td>
</tr>
<tr>
<td>Large Maps</td>
<td>$10.00</td>
</tr>
<tr>
<td>Small Maps</td>
<td>$ 5.00</td>
</tr>
</tbody>
</table>

4. Replacing Section 30.10 substantially for the purpose of transferring responsibility for the maintenance of personnel policies and procedures from Town Meeting to the Human Resources Board.

A redlined copy of the General Bylaw showing said amendments shall be made available on the Town’s website for inspection.

or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 38. To see if the Town will vote to amend the General Bylaws by inserting in Article 8 a new section 8.25 as follows:

8.25. Electronic Voting. Notwithstanding any provision of these bylaws to the contrary, subject to the availability of a system to enable electronic voting by Town Meeting Members using wireless handheld mobile devices, the Moderator may count the vote, or conduct a roll call vote, on any matter before the Town Meeting by the use of such system.

and further, to see if the Town will vote to raise and appropriate, transfer from available funds or free cash, or borrow the sum of $15,000.00 (FIFTEEN THOUSAND DOLLARS) to be expended under the direction of the Town Clerk for the purpose of consulting services, leasing, maintaining, operating, and/or purchasing the use of Electronic Voting Systems to be used in Town Meeting sessions, or to take any other action in relation thereto.

(Committee on Electronic Voting)

CITIZEN PETITIONS

ARTICLE 39. To see if the Town will vote to amend the Zoning Map of the Town of Wellesley by rezoning the following properties from a General Residence District to a Single Family Residence District 10,000 square feet area.
ARTICLE 40. RESOLUTION TO SUPPORT THE ESTABLISHMENT OF INDIGENOUS PEOPLES DAY IN WELLESLEY

We the undersigned support a resolution being accepted by Wellesley Town Meeting, for Wellesley to recognize Indigenous Peoples Day on the second Monday of October, and to no longer celebrate Columbus.

We have heard the voices of Indigenous People who are calling for an end to the celebration of Columbus. We support joining the dozens of other cities, states, and colleges (including Cambridge, Somerville, Brookline, Amherst, Northampton, and Harvard) who recognize the second Monday of October as Indigenous Peoples Day.

We support this resolution because it reflects our values and the values of our schools in educating our children about human rights. We want our children to know the truth that indigenous peoples have lived on this land since time immemorial, long before Columbus arrived in 1492. The people of hundreds of indigenous nations continue to live amongst us, despite 527 years of colonization and institutionalized genocide that began with Columbus. Historical records show unequivocally that Columbus perpetrated human rights abuses against the indigenous people he encountered, including rape, mutilation, enslavement, torture, and murder. He initiated the transatlantic slave trade. He is not a person to be celebrated. We choose instead to honor and celebrate the resistance and resilience of indigenous peoples in Massachusetts and around the world.

To our Indigenous friends and neighbors, by this act of abolishing Columbus Day and instituting Indigenous Peoples Day, we the people of Wellesley, Massachusetts, hereby acknowledge the land on which our town is built as the traditional territory of the Massachusetts People. We acknowledge and grieve the genocide of millions of your indigenous relatives. We acknowledge and grieve the theft and destruction of your homelands. We acknowledge and grieve the many attempts at cultural genocide historically and presently perpetrated against you. We commit to teaching our children the true histories and present-day realities of indigenous peoples. We celebrate the resilience of your cultures and communities.

It is our hope that the people of Wellesley will engage in a tradition of honoring this land’s first people, our earth, land, air, and water, and all our relations, by taking part in a
celebration on the 2nd Monday of October and joining with the World of Wellesley to create new opportunities for connection and learning.

We as people who reside, work, and engage in Wellesley acknowledge this town is located on the traditional territory of the Massachusett People.

(Citizen Petition)

**GENERAL**

**ARTICLE 41.** To see if the Town will vote to rescind authorized and unissued loans, to authorize the transfer of unused proceeds from previously issued loans to one or more eligible appropriations, and/or to amend existing borrowing authorizations on unissued debt authorized prior to November 7, 2016, in order to allow the use of premiums for project costs and to reduce the amount of the borrowing so authorized in accordance with Section 20 of Chapter 44 of the Massachusetts General Laws, as amended by Section 67 of Chapter 218 of the Acts of 2016, as follows:

1) **Amounts to be rescinded:**

<table>
<thead>
<tr>
<th>Town Meeting Vote</th>
<th>Project</th>
<th>Total Debt Authorization</th>
<th>Amount to be Rescinded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art. 15, April 8, 2013, ATM</td>
<td>Wales Street Bridge Planning</td>
<td>$400,000</td>
<td>$20,000.00</td>
</tr>
<tr>
<td>Art. 16, April 16, 2014, ATM</td>
<td>Fire Station #2 Floor</td>
<td>$173,140</td>
<td>$13,140.00</td>
</tr>
<tr>
<td>Art. 2, January 20, 2015, STM</td>
<td>North 40 Land Acquisition School Security Improvements Planning</td>
<td>$35,140,399</td>
<td>$399.00</td>
</tr>
<tr>
<td>Art. 17, April 7, 2015, ATM</td>
<td></td>
<td>$408,300</td>
<td>$4,300.00</td>
</tr>
<tr>
<td>Art.6.1 October 14, 2014 STM</td>
<td>Schofield/Fiske</td>
<td>$19,634,824</td>
<td>$400,240.72</td>
</tr>
<tr>
<td>Art. 20.1 April 25, 2017 ATM</td>
<td>Cliff Road</td>
<td>$2,470,000</td>
<td>$306,016.31</td>
</tr>
</tbody>
</table>

2) **Unused proceeds to be transferred and to rescind a like amount of debt in project to be supplemented:**

<table>
<thead>
<tr>
<th>Town Meeting Vote</th>
<th>Original Project</th>
<th>Amount to be Transferred</th>
<th>Project to be Supplemented</th>
<th>Town Meeting Vote</th>
</tr>
</thead>
</table>
4//2014  Fuller Brook  $ 970,205  $384,805.99  Grove Street  ATM 2018
4/2017 - Cliff Road  $2,470,000  $503,508.55  Grove Street  ATM 2018
10/2014 Fisk/Schof.  $19,634,824  $ 31,488.52  Grove Street  ATM 2018
10/2014 MS Windows  $4,909,300  $ 63,006.00  Grove Street  ATM 2018
4/2016 Police Env.  $1,845,000  $ 52,772.19  Grove Street  ATM 2018
??  $3,450,000  $ 325.50  Grove Street  ATM 2018

or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 42. To see if the Town will vote to raise and appropriate, transfer from available funds, or borrow a sum of money, to be expended under the direction of the Board of Selectmen, for the purpose of paying expenses related to the settlement of claims, actions and proceedings against the Town, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 43. To see if the Town will vote to authorize the Board of Selectmen, on behalf of the Town, to dispose of tangible Town property having a value in excess of $10,000.00 (TEN THOUSAND DOLLARS), on such terms as it may deem advisable, or to take any other action in relation thereto.

(Board of Selectmen)

ARTICLE 44. To see if the Town will vote to authorize the Board of Selectmen to appoint one or more of its members as a fire engineer, or to take any other action in relation thereto.

(Board of Selectmen)
And you are directed to serve this Warrant by posting attested copies in not less than two conspicuous places in the Town and by causing this warrant to be posted to the Town of Wellesley website (www.wellesleyma.gov) at least seven days before the date on which the meeting is to be held.

Hereof fail not and make due return of this Warrant and your doings thereon unto the Town Clerk at or before the time of holding said meeting.

Given under our hands this 28th January 2019.

____________________________________________
Jack Morgan, Chairman

____________________________________________
Marjorie R. Freiman, Vice-Chair

____________________________________________
Ellen F. Gibbs, Secretary

____________________________________________
Thomas H. Ulfelder

____________________________________________
Elizabeth Sullivan Woods

A true copy, __________________________________
Attest: Constable, Town of Wellesley

COMMONWEALTH OF MASSACHUSETTS

Norfolk, ss.

Wellesley, MA January ___, 2019
I have this date caused the within Warrant to be served by posting two copies in two conspicuous places in the Town, i.e., the Town Hall and Wellesley Square, and causing the Warrant to be posted to the Town of Wellesley website.

________________________

Constable, Town of Wellesley
7. **Discuss FY20 Budget**

As requested at last week’s meeting, included in the packet is a list of items that staff has prepared for the Board’s consideration regarding reductions to various budgets. A copy of the full sources and uses is also included. These budgets would enable us to reduce the percentage that we are out of guideline without materially affecting the operation. Once we have a better handle on the School Committee vote on that budget and health insurance, the Board can decide whether you’d like us to prepare other adjustments for discussion.

**NO MOTION**
### Potential reductions to BOS 2020 Budget

1/17/2019

<table>
<thead>
<tr>
<th>Department</th>
<th>Item</th>
<th>Budget</th>
<th>Amount</th>
<th>explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>IT</td>
<td>Time Management System</td>
<td>Operating</td>
<td>$ (25,000)</td>
<td>Causes deferral of $30,000 in Library capital</td>
</tr>
<tr>
<td>FMD</td>
<td>Cameras back to capital</td>
<td>Operating</td>
<td>$ (50,000)</td>
<td>Put camera replacement back in capital</td>
</tr>
<tr>
<td>FMD</td>
<td>Cameras back to capital</td>
<td>Capital</td>
<td>-</td>
<td>Joe will move the security project to 2021</td>
</tr>
<tr>
<td>Legal</td>
<td>Less public records work</td>
<td>Operating</td>
<td>$ (10,000)</td>
<td>Budget recently incr due to 40B needs</td>
</tr>
<tr>
<td>Health Insurance</td>
<td>Reduce est enrollments</td>
<td>Operating</td>
<td>$ (54,000)</td>
<td>remove 2 family and 2 indiv benchmark</td>
</tr>
<tr>
<td>Exec Director</td>
<td>Temp help Adm Asst vac</td>
<td>Operating</td>
<td>$ (2,000)</td>
<td></td>
</tr>
<tr>
<td>Library</td>
<td>Delay Library timecard project</td>
<td>Capital</td>
<td>$ (30,000)</td>
<td>Need to discuss with Library</td>
</tr>
</tbody>
</table>

**Total** $ (141,000)

Current total deficit $ 631,175
Sum of reductions $ (171,000)
Revised deficit $ 460,175

### Current year adjustments needed (causing "out of guideline")

<table>
<thead>
<tr>
<th>Department</th>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Building</td>
<td>understated 2019- need HR trf</td>
<td>$ 17,000</td>
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<tr>
<td>Finance</td>
<td>understated 2019 - need HR trf</td>
<td>$ 5,000</td>
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</table>

$ 22,000
# TOWN OF WELLESLEY - TOWN MEETING APPROVED ALLOCATION OF FUNDS

## SOURCES OF FUNDS

<table>
<thead>
<tr>
<th></th>
<th>FY19 SOURCES OF FUNDS</th>
<th>FY20 SOURCES OF FUNDS</th>
<th>CHANGE - FY19 to FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td>$ Change $ % Change</td>
</tr>
<tr>
<td><strong>Real Estate &amp; Personal Property Tax</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Within the Levy Limit</td>
<td>128,943,120</td>
<td>133,960,096</td>
<td>5,023,576 3.90%</td>
</tr>
<tr>
<td>Outside the Levy Limit</td>
<td>12,107,180</td>
<td>10,888,406</td>
<td>(1,218,772)-10.07%</td>
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<tr>
<td><strong>Subtotal - Real Estate &amp; Personal Property Tax</strong></td>
<td>141,050,300</td>
<td>144,848,496</td>
<td>3,798,196 2.70%</td>
</tr>
<tr>
<td><strong>From the Commonwealth</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter 70 Aid</td>
<td>8,955,295</td>
<td>8,955,295</td>
<td>0 0.00%</td>
</tr>
<tr>
<td>Lottery Aid</td>
<td>1,339,443</td>
<td>1,339,443</td>
<td>0 0.00%</td>
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<tr>
<td>Other Aid</td>
<td>53,236</td>
<td>53,236</td>
<td>0 0.00%</td>
</tr>
<tr>
<td><strong>Subtotal - From the Commonwealth</strong></td>
<td>10,347,974</td>
<td>10,347,974</td>
<td>0 0.00%</td>
</tr>
<tr>
<td><strong>Local Revenue</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motor Vehicle Excise</td>
<td>5,000,000</td>
<td>5,500,000</td>
<td>500,000 10.00%</td>
</tr>
<tr>
<td>Licenses and Permits</td>
<td>2,200,000</td>
<td>2,200,000</td>
<td>0 0.00%</td>
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<tr>
<td>Interest Earnings</td>
<td>450,000</td>
<td>750,000</td>
<td>300,000 66.67%</td>
</tr>
<tr>
<td>RDF Revenue</td>
<td>600,000</td>
<td>600,000</td>
<td>0 0.00%</td>
</tr>
<tr>
<td>Fines &amp; forfeits</td>
<td>450,000</td>
<td>450,000</td>
<td>0 0.00%</td>
</tr>
<tr>
<td>Recreation</td>
<td>50,000</td>
<td>75,000</td>
<td>25,000 50.00%</td>
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<tr>
<td>Meats/Hotel/Motel Tax</td>
<td>700,000</td>
<td>750,000</td>
<td>50,000 7.14%</td>
</tr>
<tr>
<td>Pilot Payments</td>
<td>76,000</td>
<td>76,000</td>
<td>0 0.00%</td>
</tr>
<tr>
<td>MLP Payment in Lieu of Taxes</td>
<td>1,000,000</td>
<td>1,000,000</td>
<td>0 0.00%</td>
</tr>
<tr>
<td>Other Local Revenues</td>
<td>505,434</td>
<td>525,000</td>
<td>19,566 3.87%</td>
</tr>
<tr>
<td><strong>Subtotal - Local Revenue</strong></td>
<td>11,031,434</td>
<td>11,925,000</td>
<td>893,566 8.11%</td>
</tr>
<tr>
<td><strong>Other Sources</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MLP Water/Sewer reimbursements to IT</td>
<td>299,584</td>
<td>307,072</td>
<td>7,488 2.50%</td>
</tr>
<tr>
<td>Parking Meter Receipts</td>
<td>1,097,219</td>
<td>1,097,219</td>
<td>0 0.00%</td>
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<tr>
<td>Free Cash to balance budget</td>
<td>2,646,079</td>
<td>2,500,000</td>
<td>(146,079)-5.52%</td>
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<tr>
<td>Other free cash FY20 items Voting machines</td>
<td>0</td>
<td>15,000</td>
<td>15,000</td>
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<tr>
<td>FY18 free cash items appropriated at ATM1*****</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Appropriated CPA Surchage</td>
<td>916,000</td>
<td>916,000</td>
<td>0 0.00%</td>
</tr>
<tr>
<td>CPA Funds applied to North 40</td>
<td>550,244</td>
<td>552,044</td>
<td>1,800 0.33%</td>
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<tr>
<td>Police detail</td>
<td>112,950</td>
<td>130,116</td>
<td>17,166 14.35%</td>
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<tr>
<td><strong>Subtotal - Other Sources</strong></td>
<td>5,624,076</td>
<td>5,518,451</td>
<td>-105,625 -1.86%</td>
</tr>
<tr>
<td><strong>TOTAL SOURCES OF FUNDS</strong></td>
<td>168,053,784</td>
<td>172,645,591</td>
<td>4,591,807 2.73%</td>
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1/8/2019 10:11 AM
## USES OF FUNDS

<table>
<thead>
<tr>
<th></th>
<th>FY19 USE OF FUNDS (Tax Rate)</th>
<th>FY20 USE OF FUNDS (Request)</th>
<th>CHANGE - FY19 to FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Pers Srvs</td>
<td>Expenses</td>
<td>Total Ops</td>
</tr>
<tr>
<td><strong>GENERAL GOVERNMENT</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Board of Selectmen - Administration</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Executive Director’s Office</td>
<td>468,023</td>
<td>33,225</td>
<td>499,248</td>
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<td>Sustainable Energy</td>
<td>33,452</td>
<td>5,425</td>
<td>38,877</td>
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<tr>
<td>Central Administrative Services</td>
<td>0</td>
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<td>20,500</td>
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<tr>
<td>Finance Department</td>
<td>447,204</td>
<td>10,950</td>
<td>458,154</td>
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<tr>
<td>Information Technology</td>
<td>671,445</td>
<td>120,750</td>
<td>1,092,195</td>
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<tr>
<td>Treasurer &amp; Collector</td>
<td>314,307</td>
<td>129,750</td>
<td>444,057</td>
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<tr>
<td>Town Report</td>
<td>0</td>
<td>4,000</td>
<td>4,000</td>
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<tr>
<td><strong>Board of Selectmen - Human Services</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Council on Aging</td>
<td>373,713</td>
<td>63,446</td>
<td>437,159</td>
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<td>West Suburban Veterans District</td>
<td>0</td>
<td>69,150</td>
<td>69,150</td>
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<tr>
<td>Youth Commission</td>
<td>82,998</td>
<td>17,090</td>
<td>100,088</td>
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<tr>
<td><strong>Board of Selectmen - Facilities</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Facilities Management</td>
<td>4,585,030</td>
<td>3,457,749</td>
<td>8,042,779</td>
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<tr>
<td><strong>Board of Selectmen - Other Services</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing Development Corporation</td>
<td>0</td>
<td>6,500</td>
<td>6,500</td>
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<tr>
<td>Historical Commission</td>
<td>0</td>
<td>750</td>
<td>750</td>
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<tr>
<td>Memorial Day</td>
<td>0</td>
<td>2,500</td>
<td>2,500</td>
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<tr>
<td>Celebrations Committee</td>
<td>0</td>
<td>4,700</td>
<td>4,700</td>
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<tr>
<td>Zoning Board of Appeals</td>
<td>76,725</td>
<td>11,940</td>
<td>88,665</td>
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<tr>
<td><strong>Board of Selectmen - Shared Services</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Law</td>
<td>0</td>
<td>375,000</td>
<td>375,000</td>
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<tr>
<td>Audit Committee</td>
<td>0</td>
<td>58,200</td>
<td>58,200</td>
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<tr>
<td>Risk Management</td>
<td>0</td>
<td>635,679</td>
<td>635,679</td>
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<tr>
<td>Street Lighting</td>
<td>0</td>
<td>145,000</td>
<td>145,000</td>
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<tr>
<td><strong>Subtotal - Board of Selectmen - General Government</strong></td>
<td>7,050,897</td>
<td>5,378,304</td>
<td>12,429,201</td>
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</tbody>
</table>

1/8/2019 10:11 AM
## USES OF FUNDS

### FY19 USE OF FUNDS (Tax Rate)

<table>
<thead>
<tr>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other General Government</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Town Clerk/Election &amp; Registration</td>
<td>272,331</td>
<td>40,465</td>
<td>312,796</td>
<td>270,190</td>
<td>39,815</td>
</tr>
<tr>
<td>Board of Assessors</td>
<td>280,812</td>
<td>83,050</td>
<td>363,862</td>
<td>289,572</td>
<td>101,800</td>
</tr>
<tr>
<td>Planning Board</td>
<td>282,528</td>
<td>42,750</td>
<td>325,278</td>
<td>290,395</td>
<td>43,000</td>
</tr>
<tr>
<td>Advisory Committee</td>
<td>7,000</td>
<td>25,000</td>
<td>32,000</td>
<td>10,000</td>
<td>22,000</td>
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<tr>
<td>Reserve Fund</td>
<td>0</td>
<td>175,000</td>
<td>175,000</td>
<td>0</td>
<td>175,000</td>
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<tr>
<td>Permanent Building Committee</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Human Resources Board</td>
<td>314,183</td>
<td>37,000</td>
<td>352,183</td>
<td>322,902</td>
<td>37,950</td>
</tr>
<tr>
<td>HR Salary adjustments</td>
<td>33,772</td>
<td>33,772</td>
<td>0</td>
<td>(33,772)</td>
<td>0</td>
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<tr>
<td>Subtotal - Other General Government</td>
<td>1,190,528</td>
<td>404,185</td>
<td>1,594,713</td>
<td>1,183,089</td>
<td>418,563</td>
</tr>
<tr>
<td>GENERAL GOVERNMENT TOTAL</td>
<td>5,693,471</td>
<td>648,555</td>
<td>6,342,026</td>
<td>5,888,463</td>
<td>684,810</td>
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</table>

### PUBLIC SAFETY - BOARD OF SELECTMEN

<table>
<thead>
<tr>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Var En</th>
<th>Var Exp</th>
<th>Var Total</th>
<th>Var Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Police Department</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>see Risk Management Dept 945</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Injured on Duty</td>
<td>127,006</td>
<td>3,183</td>
<td>130,189</td>
<td>129,254</td>
<td>3,283</td>
<td>132,537</td>
<td>1,048</td>
<td>80</td>
<td>1,128</td>
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<tr>
<td>Special School Police</td>
<td>5,215,425</td>
<td>265,770</td>
<td>5,481,195</td>
<td>5,351,153</td>
<td>287,270</td>
<td>5,638,423</td>
<td>135,728</td>
<td>1,500</td>
<td>137,228</td>
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<tr>
<td>Fire Department</td>
<td>508,397</td>
<td>40,600</td>
<td>548,997</td>
<td>542,076</td>
<td>41,000</td>
<td>583,076</td>
<td>33,779</td>
<td>400</td>
<td>34,179</td>
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<tr>
<td>Building Department</td>
<td>16,000</td>
<td>2,550</td>
<td>18,550</td>
<td>15,000</td>
<td>2,700</td>
<td>17,700</td>
<td>(1,000)</td>
<td>150</td>
<td>(850)</td>
</tr>
<tr>
<td>Sealer of Weights &amp; Measures</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PUBLIC SAFETY TOTAL - BOARD OF SELECTMEN</td>
<td>11,580,799</td>
<td>990,588</td>
<td>12,521,447</td>
<td>11,925,946</td>
<td>988,043</td>
<td>12,914,489</td>
<td>385,147</td>
<td>38,355</td>
<td>423,502</td>
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### DEPARTMENT OF PUBLIC WORKS

<table>
<thead>
<tr>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Var En</th>
<th>Var Exp</th>
<th>Var Total</th>
<th>Var Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Engineering</td>
<td>534,515</td>
<td>65,500</td>
<td>600,015</td>
<td>545,354</td>
<td>65,500</td>
<td>610,854</td>
<td>10,839</td>
<td>0</td>
<td>10,839</td>
</tr>
<tr>
<td>Highway</td>
<td>1,070,982</td>
<td>456,550</td>
<td>1,527,532</td>
<td>1,098,490</td>
<td>470,450</td>
<td>1,568,940</td>
<td>25,506</td>
<td>13,000</td>
<td>38,506</td>
</tr>
<tr>
<td>Fleet Maintenance</td>
<td>160,922</td>
<td>43,462</td>
<td>204,384</td>
<td>165,000</td>
<td>43,462</td>
<td>208,462</td>
<td>4,078</td>
<td>0</td>
<td>4,078</td>
</tr>
<tr>
<td>Park</td>
<td>1,243,054</td>
<td>372,570</td>
<td>1,615,624</td>
<td>1,299,144</td>
<td>372,570</td>
<td>1,671,714</td>
<td>25,490</td>
<td>0</td>
<td>25,490</td>
</tr>
<tr>
<td>Recycling &amp; Disposal</td>
<td>1,084,020</td>
<td>2,173,874</td>
<td>3,257,944</td>
<td>1,108,873</td>
<td>2,125,947</td>
<td>3,234,820</td>
<td>22,853</td>
<td>(9,927)</td>
<td>12,926</td>
</tr>
<tr>
<td>Management</td>
<td>366,809</td>
<td>24,070</td>
<td>390,879</td>
<td>378,745</td>
<td>24,070</td>
<td>402,815</td>
<td>9,936</td>
<td>0</td>
<td>9,936</td>
</tr>
<tr>
<td>Winter Maintenance</td>
<td>0</td>
<td>357,420</td>
<td>357,420</td>
<td>0</td>
<td>369,355</td>
<td>369,355</td>
<td>0</td>
<td>8,935</td>
<td>8,935</td>
</tr>
<tr>
<td>PUBLIC WORKS TOTAL</td>
<td>4,460,902</td>
<td>2,593,446</td>
<td>7,054,348</td>
<td>4,559,606</td>
<td>2,806,354</td>
<td>7,365,960</td>
<td>98,704</td>
<td>12,908</td>
<td>111,612</td>
</tr>
</tbody>
</table>

### WELLESLEY FREE LIBRARY

<table>
<thead>
<tr>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Var En</th>
<th>Var Exp</th>
<th>Var Total</th>
<th>Var Total %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Library Trustees</td>
<td>1,983,068</td>
<td>554,621</td>
<td>2,537,679</td>
<td>2,031,232</td>
<td>570,015</td>
<td>2,601,247</td>
<td>48,174</td>
<td>15,304</td>
<td>63,478</td>
</tr>
<tr>
<td>LIBRARY TOTAL</td>
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### RECREATION

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<th>Pers Srvs</th>
<th>Expenses</th>
<th>Total Ops</th>
<th>Var En</th>
<th>Var Exp</th>
<th>Var Total</th>
<th>Var Total %</th>
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<tbody>
<tr>
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<td>339,464</td>
<td>28,040</td>
<td>367,504</td>
<td>348,900</td>
<td>28,741</td>
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<td>10,137</td>
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<tr>
<td>RECREATION TOTAL</td>
<td>339,464</td>
<td>28,040</td>
<td>367,504</td>
<td>348,900</td>
<td>28,741</td>
<td>377,641</td>
<td>9,436</td>
<td>701</td>
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### Exhibit B

#### USES OF FUNDS

<table>
<thead>
<tr>
<th></th>
<th>FY19 USE OF FUNDS</th>
<th>FY20 USE OF FUNDS</th>
<th>CHANGE - FY19 to FY20</th>
</tr>
</thead>
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<tr>
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<td>Pers Srvs</td>
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<td>HEALTH</td>
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<tr>
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<td>Instruction</td>
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## Exhibit B

### USES OF FUNDS

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<thead>
<tr>
<th>CAPITAL &amp; DEBT</th>
<th>FY19 USE OF FUNDS (Tax Rate)</th>
<th>FY20 USE OF FUNDS (Request)</th>
<th>CHANGE - FY19 to FY20</th>
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</thead>
<tbody>
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<td>Expenses</td>
<td>Total Ops</td>
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<td>Planning Board</td>
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### DEBT SERVICE

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<tr>
<th>Receipts Reserved for Appropriation</th>
<th>FY19 USE OF FUNDS (Tax Rate)</th>
<th>FY20 USE OF FUNDS (Request)</th>
<th>CHANGE - FY19 to FY20</th>
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<td>Pers Srvs</td>
<td>Expenses</td>
<td>Total Ops</td>
<td>Pers Srvs</td>
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<td>3,765,881</td>
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### TOTAL USES OF FUNDS

<table>
<thead>
<tr>
<th>TOTAL USES OF FUNDS</th>
<th>FY19 USE OF FUNDS (Tax Rate)</th>
<th>FY20 USE OF FUNDS (Request)</th>
<th>CHANGE - FY19 to FY20</th>
</tr>
</thead>
<tbody>
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<td>Pers Srvs</td>
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<td>Total Ops</td>
<td>Pers Srvs</td>
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<td>172,684,531</td>
<td>3,544,748</td>
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### TOTAL SOURCES OF FUNDS

<table>
<thead>
<tr>
<th>TOTAL SOURCES OF FUNDS</th>
<th>FY19 USE OF FUNDS (Tax Rate)</th>
<th>FY20 USE OF FUNDS (Request)</th>
<th>CHANGE - FY19 to FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pers Srvs</td>
<td>Expenses</td>
<td>Total Ops</td>
<td>Pers Srvs</td>
</tr>
<tr>
<td>0</td>
<td>(637,170)</td>
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<td>(637,170)</td>
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### SURPLUS (DEFICIT)

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<tr>
<th>SURPLUS (DEFICIT)</th>
<th>FY19 USE OF FUNDS (Tax Rate)</th>
<th>FY20 USE OF FUNDS (Request)</th>
<th>CHANGE - FY19 to FY20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pers Srvs</td>
<td>Expenses</td>
<td>Total Ops</td>
<td>Pers Srvs</td>
</tr>
<tr>
<td>0</td>
<td>(637,170)</td>
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<td>(637,170)</td>
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1/8/2019 10:11 AM
8. Executive Director’s Report
9. **New Business and Correspondence** - Other Documents: The Board will find documents the staff are not seeking action on, but is for informational purposes only. Please find the following:

- Social Services and Mental Health Services Report
- Email re: FY18 Compensated Absences
- FY18 Compensated Absence Report
A number of Wellesley Town departments, supported in part by contracted services currently offer various social and mental health subsidies, services and programs to residents of all ages. The Town’s most vulnerable residents are often identified by Wellesley’s public health nurses, Police officers and Fire first responders in coordination with hospital emergency and discharge departments and the Wellesley Housing Authority. Wellesley police and fire first responders coordinate with the health department to follow-up on individuals identified through emergency calls. School nurses, psychologists, counselors, teachers and youth services staff in addition to their general educational responsibilities, often identify, triage, refer and counsel children and their families to mental health and social services. The over 60-year old population is served by the Council on Aging, who coordinates with the other departments dependent upon case needs. Overall, Wellesley town services provide a safety net not only to stabilize crisis situations whether it be for an individual, group or catastrophic event, but also to meet the social service and mental health needs of individual residents when private agency and clinical services are not readily available, accessible nor affordable. Furthermore, there are always certain situations where Town services are the most effective response to an individual or family in need.

During the development of the FY19 budget, questions arose as to how these services are provided. There was general awareness amongst Town decision makers that social services are provided by a number of Town departments, but not how those services are delivered, what coordination exists between then, and whether services provided are meeting the needs of the Town’s residents. The purpose of this report is to give all Boards a thorough overview of the topic, and to use this as a basis for discussing what changes could be considered in the future.

The critical issues identified by this group of professionals are the following:
There is a significant rise in the number of cases that are complex and not easily resolved.

People are not necessarily willing to ask for help or accept assistance.

Town Social Workers indicate that their biggest challenge is having the time to follow up on cases and make sure that person/family is doing well or doesn’t need additional help.

Vulnerable populations may need more intense assistance or for a longer period if they don’t speak the language, or have difficulty comprehending or providing information needed to submit to receive housing assistance, Medicaid, MassHealth and other programs.

There is a growing population of non-English speakers for which may not have translators readily available to assist in a crisis (Mandarin, Russian, Somalian, Korean are some of the languages identified).

There aren’t enough mental health professionals to provide care in our area, and many of those do not accept insurance so people may not get the help they need.

Insurance reimbursements where available are limited.

During the summer, school staff is not available to follow up on cases. Board of Health addresses some of these, others may go unserved.

The Town both coordinates care (Social Workers) and provides care (psychologists, contracts with HRS). More often than not we assist in finding appropriate resources – but it is up to that resident to access them.

Some residents refuse assistance or need help over and over again for various reasons, these take away from services to others.

Unknown cases – there are cases where we could help, but don’t know about them.

Time of day when situations arise – while Police & Fire provide a 24/7 response, there may be cases that come up at nights or weekends when staff is not available to help.

**RECOMMENDATIONS FOR THE FUTURE**

The FY20 budget includes three requests that this group supports and recommends for funding:

- **Schools** – 1 full-time Adjustment Counselor, split between the Middle School and the High School. This position will provide social work services to this population.

- **Board of Health** – 9 hours/week of additional social work services. The Board is seeking to increase the number of hours for three part-time staff from 26 to 35 hours/week to address community needs.

- **Board of Health** – a 2.5% increase in the contract with Human Relations Service.

Other non-monetary recommendations include:

- Continue to collaborate with Town houses of worship to both be aware of cases and obtain support for some situations.

- Communicate with all Town departments to raise awareness of the services and agencies that are available to assist residents.

- Continuously update and share among departments the list of available resources which is used to make referrals for residents.
The group also believes that ideally the Town would be in a position to provide more outreach to our vulnerable residents. The opportunity to prevent situations or intervene before they become more complex is a far more effective strategy than responding once a resident is in crisis. Perhaps some situations can’t be avoided, but hopefully they can be minimized. In addition, follow up on cases to ensure clients are not declining back into crisis, and coordinating services to help maintain their improved situation would also be a key objective. To achieve this, the group would recommend that the Town, dependent upon available funding either hire or contract for three additional positions:

1. Licensed Independent Clinical Social Worker (LICSW) – this primary role of this position would be to provide direct services to residents, however approximately 10-20% of the time would be focused on coordination of care across all departments, ensuring that outreach and follow up was organized on a town-wide basis. Filling this position would present an opportunity for the Town to attract social work interns who could provide services under the direction of the LICSW, thereby expanding services to residents at little or no cost.

2. Licensed Social Worker (LSW) – this position would work with the current LSW’s to follow up on cases and help meet the growing demand for services, particularly as experienced by the Board of Health

3. Emergency services social worker – the group has identified gaps in times of day or times of year when a social worker is not available to follow up on a crisis situation. This type of position might be best filled on a contractual basis with an agency that could respond 24/7 when needs arise. Police and Fire note that they have trouble obtaining adequate support for people with mental health issues on nights, weekends and holidays.
THE SOCIAL AND MENTAL HEALTH SERVICES WORKFORCE

The social and mental health workforce described in this report includes professionals with specialization, training, certification and licensing in a number of different areas. To assist in describing their functions as they relate to the delivery of social and mental health services, they can be categorized into three groups.

- The first group is composed of mental health individual care workers, such as psychiatrists, psychiatric nurses, psychologists, mental health social workers (LICSW)\(^1\), and occupational therapists. All of these individuals are licensed by the state to deliver individual specialized mental health clinical care and treatment.
- The second group is formed of more general health professionals including general practice physicians, nurses, LCSW, LSW and LSWA social workers\(^1\), community health and public health professionals.
- In the third group, other professionals specializing in related areas primarily for social and mental health identification and triage functions include police and fire first responders, emergency medical services (paramedics and EMT’s), teachers, educational psychologists, youth and education counselors, and community-level non-health social service workers.

To help distinguish among the roles, responsibilities and services delivered by these distinct, but interrelated professionals, we have provided a glossary of terms in Appendix 1 describing the various occupations and subspecialties of licensed professionals providing social and mental health services.

SERVICE NEEDS AND DELIVERY CHALLENGES

There is a strong sense across departments that although they are doing their best to keep up with their current caseloads and help residents obtain support and resolve issues, the needs of residents are accelerating. The overwhelming message that each department brought forth is that simple statistics do not tell the complete story of the services being provided. Cases are more complex, take more time and coordination to try to support and treat, cases are recurrent and chronic, and the increase in these trends has significantly outstripped the supply of qualified and affordable mental health services. One cannot simply conclude that a social worker can successfully manage a certain number of cases, because the needs of each person are different. Perhaps this whole matter was summed up best by Rob Evans of HRS. With 45 years of experience in our community, he is very well positioned to provide commentary on what we are experiencing. He notes:

“For more than a decade now, we at HRS have faced a sustained rise in requests for counseling (up 35% in just the past five years), and in the severity of the conditions that need

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\(^1\) The Board of Registration of Social Work protects the public through regulation of the practice in the Commonwealth of Massachusetts. It determines eligibility for admission to examinations for social work, conducts examinations and licenses qualified individuals at one of four levels of licensure (Licensed Independent Clinical Social Worker, LICSW; Licensed Certified Social Worker, LCSW; Licensed Social Worker, LSW; Licensed Social Work Associate, LSWA). Social workers provide services to consumers as defined by the statutes and described in the regulations. Social workers provide services to consumers as defined by the statutes and described in the regulations. Generally, social work professionals provide services to individuals, couples, families, groups, and communities directed towards specific goals.
treatment. There have been marked increases in anxiety, serious depression, and in behavior disorders, among other conditions, and starting at ever earlier ages. These trends are reported in all nearby towns and indeed nationwide. I consult in schools throughout the country and I hear about these issues everywhere; schools of all kinds must contend with a population that is harder to manage, motivate, and teach. Colleges including Tufts and Yale report that up to 25% of their students have sought counseling. In addition to all this, the suicide rate among young people has increased nationally. These trends have overtaxed the mental health system. Finding a clinician who can treat their child or teenager is now a real challenge for families. I’m pretty sure I also said at the very end that Wellesley is not doing worse than other towns in terms of funding support. The problem is that the need is mushrooming well beyond the current supports.”

The challenges the group believes we face include:

- There is a significant rise in the number of cases that are complex and not easily resolved
- People are not necessarily willing to ask for help or accept assistance
- Town Social Workers indicate that their biggest challenge is having the time to follow up on cases and make sure that person/family is doing well or doesn’t need additional help
- Vulnerable populations may need more intense assistance or for a longer period if they don’t speak the language, or have difficulty comprehending or providing information needed to submit to receive housing assistance, Medicaid, MassHealth and other programs
- There is a growing population of non-English speakers for which we do not necessarily have translators readily available to assist in a crisis (Mandarin, Russian, Somalian, Korean are some of the languages identified)
- There aren’t enough mental health professionals to provide care in our area, and many of those do not accept insurance so people may not get the help they need
- Insurance reimbursements where available are limited
- During the summer, school staff is not available to follow up on cases. Board of Health addresses some of these, others may go unserved
- The Town both coordinates care (Social Workers and provides care (psychologists, contracts with HRS). More often than not we assist in finding appropriate resources – but it is up to that person to access them.
- Some residents refuse assistance or need help over and over again for various reasons, these take away from services to others
- Unknown cases – there are certainly cases where we could help, but don’t know about them
- Time of day when situations arise – while Police & Fire provide a 24/7 response, there may be cases that come up at nights or weekends when staff is not available to help

Social services connecting and triaging vulnerable adult populations to local and state programs supporting mental health treatment and counseling, housing, transportation, child care, nutrition, legal, addiction prevention, financial assistance, health insurance and employment are provided primarily by the Wellesley Health Department and the Council on Aging. The Police and Fire Departments respond to 911 calls for service and are often in a position to be the first to interact with a resident at risk. They may transport a resident to a medical facility or refer a case to the
Board of Health or Council on Aging for next steps. Human Relation Service (HRS), a private, non-profit mental health agency provides Wellesley families and children a broad range of outpatient diagnosis and treatment to residents and sliding-scale self-pay fees through contracted town services. HRS also provides consultation and an outreach worker to Wellesley Public Schools. The School Department provides a social worker to assist children whose social and behavioral problems interfere with learning and education. Moreover, while there are many mental health and social service resources available at the state level, navigating and accessing those services is usually most optimally accomplished with the assistance of local town agencies and staff.

In the next section of this report, we have provided an overview of the responsibilities of each department, how they interact with others, and what gaps they see in that service delivery. In alphabetical order they are:

**DEPARTMENT OVERVIEWS:**

**Board of Health (BOH):**

The BOH social services staff includes 26 hours/week (non-benefitted hours totaling $37,153) for delivery of social and counseling services provided by three part-time or per diem social workers. While the BOH serves residents of all ages as required by its jurisdictional authority under M.G.L., these 26 hours are targeted to adult residents *not already served* by the social workers at the COA that focuses on individuals aged 60 years and older or the School Department that focuses on children enrolled in Wellesley public schools. As such, BOH staff regularly partner and coordinate services with the COA and the School Department. Moreover, during school vacations including summers, the Health Department assumes responsibility for the case load of the School Department. In addition, referrals are received from other town departments (e.g. Police, Fire, COA, Schools, Housing Authority, Library, DPW) and local agencies and providers (e.g., Wellesley Friendly Aid, the Food Pantry, houses of worship, local colleges etc.). The types of issues that are commonly seen by the BOH include:

- Assessments and interventions
- Referrals for mental health treatment
- Addiction treatment referral
- Assistance with short- and long-term housing, including rental assistance programs
- Assistance with preventing utility shut offs
- Fuel and food assistance
- Homelessness
- Home visits and well-being checks
- Connecting and referring to community health and human services agencies (Federal and state-provided legal aid, housing assistance, food stamps and nutrition programs, unemployment and disability, Massachusetts Department of Mental Health services, medical care providers etc.)
- Matters involving children and their families during school breaks and summer months that would have otherwise been handled by the schools
- Issues involving tenants of the Wellesley Housing Authority
• Issues involving other large housing units and living conditions

In addition to the Health Department staffing described above, the BOH budget also includes funds for contracts with two local agencies that provide mental health services directly to the community. In FY19 those include:

• Charles River Association for Retarded Citizens - $3,000.00
• Human Relations Service - $234,884.00 (for more details see HRS description below)
  o 40% ($93,953) is allocated to School Outreach Workers: HRS provides skilled outreach clinicians who work in Wellesley public schools alongside their staff to help middle school and high school students who need extra assistance with social-emotional issues
  o 60% ($140,930) is allocated to general town mental health clinical counseling, treatment and referral services for residents of all ages.

Council on Aging:

The Council on Aging’s full-time social worker on staff is Kate Burnham whose official title is Health and Social Services Administrator (Kate is a LICSW) address the needs of Wellesley seniors aged 60 years and older, as well as caregivers and families that support this population. This work includes the following:

• Responds to requests by seniors, family members of such or caregivers seeking information about elder services and programs
• Makes frequent referrals to Springwell (area agency on aging) and/or private social service or elder service organizations
• Responds to referrals from families, police, fire, health and elder care professionals. Offers Home visits to assess elder situations
• Advocates for seniors on issues facing the community
• Participates in monthly meetings with Police and Fire personnel on cases they have identified from public safety activities
• Develops and manages programs such as support groups and informational sessions on issues important to this population

It is difficult to quantify the work performed in this role because each client’s situation is unique and the level of staff involvement varies from brief interactions to intensive case management. The Health and Social Services Administrator is often assisting seniors and families through complex situations who, at times, are in the midst of crisis. Common issues include mental health, cognitive impairments, caregiver stress, and elder abuse or neglect. There is no question that the opening of the Tolles Parsons Center (TPC) has raised awareness that this type of town support is available. Referrals to the outreach program come from residents of all ages – often younger residents looking for guidance for parents or loved ones who reside outside of Wellesley – a perfect example of how the COA is as a rich resource to the community at large.
Fire Department

The Fire Department’s primarily role is to respond to 911 emergency calls for fire or ambulance service, or other types of emergencies for which a resident needs immediate service. As first responders they are likely to encounter residents with addictions, mental health problems, and living conditions that indicate that there are underlying problems that may need to be addressed. While keeping in mind HIPPA privacy protections, department personnel are in a good position to alert other town departments and agencies of situations that are of concern, and which department may be best able to follow up and seek to provide support. The sorts of issues that are commonly seen by the Firefighters and Medics include:

- Wellbeing checks are common, staff gain entrance to the home to identify the resident is safe. While in the home the firefighters may at that time identify a variety of issues. Any issues that require additional action are referred to the appropriate service provider.
- Administering Narcan has been minimal, however any incident involving a repeat patient, both patient and family would be encouraged to seek additional services.
- Medics transport patient to the hospital for a mental health evaluation, then released, and continue to call 911 for the same issues are offered HRS referrals.
- An elderly resident might call on a miscellaneous issue and the firefighters will address any number of concerns they observe (failing health or dementia, hoarding, poor hygiene, lack of adequate heat or food). Any issue of immediate threat is immediately addressed or connected to appropriate community service provider.
- Any safety issues are identified such as issues with egress access, detectors or any other potentially hazardous conditions are addressed by the engine company or referred to the Fire Prevention Office for follow up.

Police Department

Like the Fire Department, Police are often first responders to calls for service or situations that indicate a resident is in need. Whether on their own or in concert with the Fire Department or ambulance service they respond to calls in the community. A growing issue in recent years are situations where they may provide a service, only to find that in the days or weeks to come they may repeatedly be called back for similar services. The resident is still in need, but refuses care or follow up to address the underlying situation. Situations they experience include:

- Administering Narcan to an overdose victim on several occasions
- Transporting someone to the hospital for a mental health evaluation after which they are quickly released, yet there are follow up 911 calls for the same problem
- An elderly resident might call to report a missing item in their home and suspect a crime, when there has been no crime. Similar calls by that resident over the ensuing days or weeks points to issues such as failing health or dementia

Earlier this year the department launched a “Community Crisis Intervention Team” in response to the growing demand for services for these types of cases. The team is made up of police, fire, health department and COA staff. Also included are regional agencies such as Springwell and Riverside Community Health, the State departments of mental health and Division of Families
and Services, and local clergy. This group meets quarterly to discuss cases and work together to determine the best course of action and which agency or office should follow up. The goal being to link the resident with services that can address their situation. Additionally, all CIT trained officers meet monthly to discuss ongoing cases. This group is led by Sergeant Brian Spencer, Community Affairs Division. The Department also became one of approximately 40 communities nationwide to adopt the “One Mind Campaign” spearheaded by the International Association of Police Chiefs. This campaign “seeks to ensure successful interactions between police officers and persons affected by mental illness” and unite communities, public safety, and mental health organizations to become “of one mind” to establish a partnership of these three groups to improve response to mental health issues. The department has met the training requirements and developed a policy required to implement the campaign.

School Department

Among all Town departments, Wellesley Schools has the largest number of FTE’s involved in providing social and emotional support services for the school age population. It is important to note that this serves children from age 3 through age 22 if they are found eligible for special education services. Presently the FTE count is broken down by:

- School Nurse – 12.6 FTE’s – 1 at each elementary school & PAWS, 2.2 and 2.4 at the Middle & High Schools
- Guidance Counselors – 16 FTE’s – seven at the Middle School, nine at High School
- School Psychologists – 16.1 FTE’s – .8 to 1.8 FTE’s at elementary schools, 3.5 at Middle School, 4.0 at High School and one Human Relations Service employee at High School
- Social Workers – total of 1.0 FTE located at the elementary level.

The Schools see a number of issues that are the result of individual emotional disabilities or ones that come about due to influences from their home life. Such issues they support include:

- Students with disorders that require support and individualized education programs
- Students with mental health or substance abuse problems
- Anxiety and depression issues
- Problems in the home environment that impact the ability to learn
- Crises that occur at school that have an emotional origin
- Management of cases where students must be placed in specialized programs in or outside of the district

In the past, the typical school staffing model included school nurses at each campus, and guidance counselors at the Middle and High school level. As these issues have grown in number and complexity, the schools have added more guidance counselors at the higher grade levels, school psychologists at every grade level, and a combination of staff and contracted social workers that respond and support cases across the district. Layered on to this is the separate contract with HRS to provide some direct counseling when needed, as well as consulting services to School staff as to how best to address cases they are managing separate from the outreach worker provided through the Board of Health as discussed in more detail below. Even
with the staffing schools have today to address the needs presented, they are experiencing the following issues:

- Student issues are more complex and take longer to resolve
- The number of students experiencing anxiety and depression has grown, especially among younger students
- Outside threats to the schools or the fear of such has impacted the learning environment
- Families may not follow up or ensure that students are receiving the treatment they need

Youth Services

Youth Services plays a small but important role in the Town providing programs and services to Wellesley’s youth to ensure that they feel they are a valued part of the community. Their target audience is middle and high school age youth and their families. Through programs and interaction with other town departments the Youth Services Director is in a position to take note of issues that youth in this age group may be having, and try to help ensure that follow up as needed is taken.

Human Relations Service (HRS)

HRS, located at Chapel Place in Wellesley is the first community mental health agency in the nation. It is a private, non-profit agency that serves families and children in Wellesley, Wayland and Weston. Its mission is to “heal lives and strengthen our community: to treat, reduce and prevent mental illness and to support the well-being of children, families and institutions in our towns”. They are the principal provider of outpatient mental health services in these communities. Their staff includes psychologists, psychiatric social workers, social workers, post-doctoral fellows and support staff. They provide services regardless of the ability to pay. They assist clients who need additional services or services in other specialties with referrals to other agencies and clinicians.

The Town has two contracts through the Board of Health with HRS for clinical services:

Mental Health
- Counseling services to residents focused on families and children
- Crisis intervention services as needed
- Prevention and community education services

School Outreach
- The two School Outreach Workers, mentioned above, are based in Wellesley High school and Middle School and provide counseling and crisis intervention to students who are not on special education plans, whose significant needs typically exceed what guidance counselors can meet, and who, for a variety of personal and family reasons, are unable or unlikely to participate in standard outpatient treatment.

HRS also provides two other related programs to the Town.
Wellesley Schools Consultation – this contract, which totals $42,000 in FY19 provides consultation services to our schools including:

- Regular meetings with teachers, guidance counselors and administrators to provide assistance working with students and enhance skills of school staff in the area of mental health
- Consultation and coaching for special education staff who work with the most challenging students, including students at risk for placement in special schools at potential great expense to the Town
- Immediate response to a crisis at a school
- Emergency evaluations and safety assessments for students deemed at potential risk of danger to self or others

Employee Assistance—this contract, for $68,400, provides up to 10 visits/employee/year short term counseling services, education programs, and coaching for managers on personnel and organizational issues.

Wellesley Housing Authority (WHA)

The WHA is a State and Federally funded public housing authority consisting of several properties and 246 rental units or housing opportunities. The WHA has a Resident Coordinator position which was created by the Authority to manage issues that arise among residents of low income housing. This population, perhaps more than others, is among the most vulnerable in Wellesley. Over the years, the greatest number of issues have arisen from residents in the 88 units at the Barton Road location off of Route 9. Due to both turnover in the resident coordinator position as well as the abilities of the persons holding this position, their ability to support resident needs and resolve issues has been uneven. In fact, the BOH social worker position was added in part to help support the calls for service they were receiving from this population. Issues that have arisen from residents in WHA properties include:

- Mental health including substance abuse, anxiety and depression issues
- Inability to afford or obtain access to counseling services
- Residents with disabilities
- General social services including assistance with obtaining nutrition, health care, childcare, transportation, legal, housing, rental, and heating services and subsidies

RECOMMENDATIONS FOR THE FUTURE

The FY20 budget includes three requests that this group supports and recommends for funding:

- Schools – 1 full-time Adjustment Counselor, split between the Middle School and the High School. This position will provide social work services to this population. A description of this position is included in Appendix 1.
Board of Health – 9 hours/week of additional social work services. The Board is seeking to increase the number of hours for three part-time staff from 26 to 35 hours/week to address community needs.

Board of Health – a 2.5% increase in the contract with Human Relations Service.

Other non-monetary recommendations include:

- Continue to collaborate with Town houses of worship to both be aware of cases and obtain support for some situations.
- Communicate with all Town departments to raise awareness of the services and agencies that are available to assist residents.
- Continuously update and share among departments the list of available resources which is used to make referrals for residents.

The group also believes that ideally the Town would be in a position to provide more outreach to our vulnerable residents. The opportunity to prevent situations or intervene before they become more complex is a far more effective strategy than responding once a resident is in crisis. Perhaps some situations can’t be avoided, but hopefully they can be minimized. In addition, follow up on cases to ensure clients are not declining back into crisis, and coordinating services to help maintain their improved situation would also be a key objective. To achieve this, the group would recommend that the Town, dependent upon available funding either hire or contract for three additional positions:

1. Licensed Independent Clinical Social Worker (LICSW) – this position would coordinate care across all departments, ensuring that outreach and follow up was organized on a town-wide basis. Filling this position would present an opportunity for the Town to attract social work interns who could provide services under the direction of the LICSW, thereby expanding services to residents at little or no cost.
2. Licensed Social Worker (LSW) – this position would work under the direction of the LSW to follow up on cases, work and meet the growing demand for services, particularly as experienced by the Board of Health.
3. Emergency services social worker – the group has identified gaps in times of day or times of year when a social worker is not available to follow up on a crisis situation. This type of position might be best filled on a contractual basis with an agency that could respond 24/7 when needs arise. Police and Fire note that they have trouble obtaining adequate support for people with mental health issues on nights, weekends and holidays.

This report has been compiled by representatives of all of the departments listed who have contributed their time and expertise to creating a better understanding of the services we provide to our residents. In alphabetical order our Town staff consisted of:

Kate Burnham, COA Health & Social Services Administrator
Lenny Izzo, Director – Board of Health
David Lussier, Superintendent of Schools
Jeff Peterson, Assistant Fire
Maura Renzella, Youth Services and WHA
Blythe Robinson, Executive Director
Brian Spencer, Police
Gayle Thieme, COA Director
Scott Whittemore, Deputy Police Chief

We were also supported by:

Ellen F. Gibbs, Board of Selectmen
Elizabeth Sullivan Woods, Board of Selectmen
Shep Cohen – Board of Health Chair
Marcia Testa Simonson, Board of Health
Lloyd Tarlin, Board of Health
CASE STUDIES

Sometimes the best way to understand human services is to share stories of what they respond to on any given day. Job descriptions, budgets and metrics are important, but they don’t give a sense of how those services are delivered, and what a successful outcome or on-going challenge means. Below are a number of case studies from the perspective of each department that help tell those stories:

Council on Aging:

1. Mr. Smith, a 52 year-old Wellesley resident, contacted the Wellesley Council on Aging with concerns about his elderly neighbor Mr. D., who for legal reasons, had recently been forced to sell his family home and had not made a plan on finding a new place to live. Mr. Smith generously offered to provide temporary shelter for Mr. D in the basement of his home and requested I support Mr. D by sharing information and helping with applications for senior housing as well as linking him to other benefits and local resources.

Mr. D is 74 years old and has no family, no children and very limited supports. He suffers from depression, Chronic Obstructive Pulmonary Disease (COPD) and has limited mobility. I met with Mr. D and educated him on a wide variety of resources and we discussed various housing options in the area. Mr. D explained he was no longer able to work due to his medical conditions but felt his social security income would meet his needs - if he could find an affordable place to live such as subsidized senior housing. After determining he was financially eligible, we completed an application to the Wellesley Housing Authority, an application for food stamps (SNAP) and the Wellesley Food Pantry. Within about a 4-month time frame, Mr. D. was offered a first floor apartment in a subsidized senior housing building in Wellesley. Mr. D now has settled in to his new home, has a better quality of life and has maintained a friendship with his former neighbor.

2. Mr. B is an 87-year-old frail Wellesley resident who lives alone in his single family home. He suffers from kidney disease, leukemia and cardiac issues and is followed closely by his medical team at Newton Wellesley Hospital. I received a call from the social worker at his Primary care doctor’s office who expressed her concern about Mr. B’s living situation. She described his home to be “filthy” and referred to Mr. B as a hoarder. She said that his son refuses to have any conversations with professionals about his father’s medical care. This social worker shared concerns about the son controlling the elders in-home care and his finances.

The same social worker also contacted the Wellesley Health Department as the condition and safety of Mr. B’s home was in question. The Health Department Public Health nurse and I had a consult to discuss our respective conversations and agreed that seeing Mr. B without an appointment would be a good plan as he would be less likely to refuse us. Together, we met Mr. B at his home for a “Well Being Check” on an August afternoon. The home had no air conditioners but there was a fan. Upon entering the home, we observed a strong odor of both human and cat urine. Mr. B was dressed in only a stained t-shirt and adult diaper and was sitting hunched on the edge of a twin bed in the middle of a small living room watching TV. In this living room, there were multiple large couches and chairs filled high with bags, blankets, clothing, papers, and other clutter. The floor was not visible. The windows were covered with blankets, wall paper was peeling off walls, ice dam water damage on ceiling and black mold in the bathroom.

We asked Mr. B about his daily routine and he reported that he only sponge bates so he does not disturb the mold growing in the shower. He has a clear pathway to the toilet and to the kitchen and he receives meals on wheels daily. We chatted about grandkids, local sports teams and old movies in
attempts to build rapport. Mr. B explained that his son helps him make all decisions and he wasn’t comfortable accepting any outside care or services unless his son was informed and agreeable. This presented a challenge as per the medical providers, his son has a long history of immediately shutting down any conversation with medical professionals and social workers and does not answer his phone or return voice mails.

Given the unique set of circumstances, I decided to contact the Social Worker I had spoken with at the doctor’s office and asked to meet Mr. B’s son while he was accompanying his father at the next scheduled appointment. (This happened to be scheduled for the following week.) The Doctor and Social Worker were receptive to this plan and agreed that it may be the only way to meet Mr. B’s son in person and encourage him to work with us to coordinate care and assistance for his father. Knowing he would not accept support without his son’s agreement, I was able to meet with Mr. B and his son in private, in the examination room. The son accepted my plan of clearing out his father’s living room, getting Mr. B a lift chair recliner and moving the twin bed to the other side of the room. Son agreed to the plan and to the use of the Almira N. Simons Fund to pay for this. Upon hearing son’s agreement, Mr. B appeared quite pleased and then remarked that he had always wanted a recliner.

A few weeks later, a team of strong professional “heavy duty” cleaners came in and moved out all of the clutter and old furniture. While the work was being done, I sat with Mr. B in his kitchen to provide reassurance as it was quite stressful for him; I warmed up his home delivered meal and got him water to stay hydrated. When the work was completed, he could not believe he was able to see his red shag carpet again, that the thick layer of dust was gone and that he now had space to enjoy his new recliner. As soon as the recliner was delivered, Mr. B sat down in it, turned on his TV, elevated his feet and was overjoyed. Mr. B could finally have comfort and dignity in his older years.

Board of Health:

Homeless female contacted the Wellesley Health Department seeking support and assistance. Client lives with a relative in Wellesley following eviction from her family’s home after her elderly mother’s death. Client stayed in two different shelter placements which she left due to safety concerns. Community Social Worker (CSW) has helped client complete housing application, referred to HRS, referred to local food pantry and to Dress for Success for appropriate work and interview attire, and provided a list of local churches. Client is actively seeking employment and attends employment readiness workshops in the Boston area. Client was her mother’s primary caretaker and has been unemployed for several years. She connected with a local Catholic church where she attends mass, volunteers, and attends a weekly bereavement group. She participates in individual therapy every other week at HRS and finds it very helpful. Client goes to the food pantry monthly or as often as needed and receives additional supports offered through the Congregational Church. CSW meets client at different locations in the community usually every other week. Client also calls or emails CSW weekly with different needs or to simply provide an update. (age mid 50’s)

Ongoing work with a Wellesley Housing Authority (WHA) female resident with various mental health needs, trauma and cognitive limitations in addition to chronic medical needs (diabetes and renal failure) and recent vision loss. The Wellesley Health Department has provided different types of support and assistance throughout the years including regular home visits and wellness checks, assistance with housing applications, referrals to different services and agencies as needed and regular communication with providers involved. The resident is currently working with new providers and new supports to help her learn how to safely navigate and live with recent vision loss. CSW has helped coordinate, and schedule team meetings involving all providers (WHD, Advocates, Mass Commission for the Blind,
Department of Mental Health, and Wellesley Housing Authority) with all parties involved to ensure client’s needs are met. CSW visits the client every other week or as needed. CSW has helped resident make phone calls, place orders for medical supply, and has assisted with scheduling appointments. CSW has advocated on behalf of the client and worked with other community resources and providers to help secure the necessary services and supports. (age: late 40’s)

**New Wellesley resident** contacted the Health Department seeking support and assistance and referrals to community resources. Resident is a single mother of an adolescent daughter, and an adult daughter and toddler grandchild who also live in the home. The family has “section eight” and rents a three-bedroom apartment. The family recently moved to Wellesley from Bedford due to poor living conditions including mold in the previous home and as a result lost a number of personal belongings such as clothes, bedding and furniture. CSW connected the resident to the local food pantry, Wellesley Friendly Aid, referred to a furniture bank and provided gift cards to Roche Bros. CSW connected the family to medical and dental providers that accept MassHealth in the area. Additionally, the resident asked for help in addressing her daughter’s school transportation. The family lives in a commercial and resident area and the school bus does not have a designated pick up in the area. CSW is currently in communication with Wellesley High School and the transportation company to discuss options and/or potential bus stop for the child in their area. CSW communicates with the resident regularly via email and/or phone calls in addition to home visits as needed.

Ongoing work with a **WHA female resident** and her young adult son with a number of mental health concerns and learning disabilities. The young man is connected to other agencies and supports such as Advocates, Department of Mental Health and Springwell. The resident is her son’s legal guardian and has an extensive history with numerous community supports and state agencies. There is a history of trauma and complicated family dynamics. The mother is making efforts to ensure her son’s mental health needs are met and that he is complaint with taking prescribed medication however her son is depressed and not motivated to interact, engage and participate in services. Additionally, the resident/mother has her own challenges and mental health needs as she is diagnosed with PTSD. The client feels lonely, isolated and frustrated and is considering having the courts appoint a new guardian for her son. The CSW visit the family as needed provides support, encouragement, and connects the family to any community supports they might need and communicates with providers involved. The resident/mother is interested in becoming involved with the Council on Aging and participate in the groups and activities offered to become more involved in the community and more active. CSW helped schedule a time to meet with the COA and accompanied the client. (ages: mother 60, son: 23)

For a **WHA resident single mother** with a young preschool three-year old son, CSW provides ongoing support and home visits as the resident struggles with mental health concerns. She is diagnosed with depression and anxiety, and is isolated as she doesn’t have healthy family support or friends in the community. CSW has helped with financial assistance and other community referrals as needed and encourages the resident to attend and participate in counseling services at HRS. The young child attends PAWS, however the school has reported concerning behaviors such as aggression. The child has witnessed altercations and arguments in the home involving young adult siblings in the past. The resident and young child currently live alone. (age: mother 30’s)

**WHA female resident single mother** of three. Resident is having a very difficult time financially and has asked for assistance with household bills. She works part-time hours and pays a babysitter to care for her toddler daughter while she works. The client was living with her boyfriend and father of youngest child, but they recently separated which has caused great emotional and financial strain for the family. Client has expressed feeling depressed and overwhelmed. CSW connected the family to a dentist and
medical provider in the area. CSW has arranged transportation (Veteran’s taxi) for the family to get to medical and dental appointments. CSW encourages resident to attend and participate in therapy at HRS on a more regular basis to help address areas of concern. CSW makes referrals to community supports and resources as needed by the family. CSW communicates with the resident regularly and visit the home as needed. (ages: mother 30’s, children 14, 8, 2)

**Resident contacted the Wellesley Health Department** asking for support and assistance. The resident, a married mother of two young adult sons, expressed great concern for her oldest son, a 23- year old recent college graduate. The younger son is away as a student at UMass Amherst. The resident is seeking professional help and guidance for her son who is very depressed, isolated and not productive or even functioning well. The mother expressed that her son is not motivated, engaging or interested in seeking employment or working and stays in his bedroom all day. The young man doesn’t interact with his parents and has expressed delusional thoughts. The son meets with a therapist every other week at Harvard Vanguard, but his mother doesn’t believe therapy has been helpful as she doesn’t see any improvement in her son’s behaviors. The resident expressed feeling anxious and overwhelmed about her son and family. She is currently the sole provider and breadwinner as her husband recently became ill and is unable to work. CSW meets with resident to offer support and connect her to community resources where she might receive support. CSW communicates with the son’s therapist in an effort to find appropriate services or supports that would best help meet his mental health needs. (ages: parents 50’s, sons: 20’s)

**Fire Department:**

Assistant Chief Peterson provided a case that highlights the outstanding work that the COA does on a regular basis in spite of a workload that spreads resources way too thin. This case involves my neighbor who I have lived across from for close to 40 years. This individual has always been very active, gardening as well as a martial arts expert. Several years ago, his wife passed away and family contact with his children is sporadic at best. Several car accidents resulted in the loss of his driver’s license. He began to show a change in mental status as well as a profound hearing loss. He did begin riding a bike to get around town for groceries, but that ended after a few months. The Fire and Police department have been to his house several times for lifeline activations. Early on, when I began to see a decline in his mental and physical health, I reached out to Kate Burnham to see if any help could be available. Kate immediately contacted my neighbor and assisted in getting him food as well as reaching out to family members for support. The Fire Department’s last contact with my neighbor occurred on 12/20/18 when his daughter called for a well-being check. Police and Fire found him on the floor and got him back into bed. Subsequently, the next morning, we were called again for a well-being check and found him in distress on the floor where he had been possibly all night. He was brought to NWH. I notified Kate of the situation and she was in contact with the daughter who informed Kate that he was now in a nursing home and would most likely not be coming home. This situation is a great example of how involved our folks at COA are with residents in spite of the fact the staff is saddled with more case load than it should be, especially as it relates to the Housing Authority. Anytime I talked to Kate regarding my neighbor, she took the time to hear my concerns and always was ready to reach out and try to come up with plans to make his life in his home as comfortable and safe as possible. I usually do not get to see a case from beginning to end, but this allowed me to see how well our various town entities from first responder to resident services are in synch with each other.
The Wellesley Police Department handles calls with residents that range in age and for different mental health issues. It could be an emergency situation where the person needs to be brought to the hospital involuntarily, or just someone who is not in crisis but needs services from another agency.

Below are two examples of cases that WPD has responded to.

1. **Subject**  
   Male  
   Age late 20s  
   Renting apartment in Wellesley.  
   Family lives in nearby community
   
   This person has heard voices telling him that people are out to get him. He has been under different Doctors care over the years and has been subscribed medication to help with his paranoia. He tends not to stay on his medication for long periods of time. Calls for service with him increase when he stops taking his medication. The Wellesley Police Department has had over 20 different calls for service with this individual since 2015. Most of the call we have received have involved him yelling at people and accusing them of harassing him. Wellesley Police Officers in the past have had to involuntarily section him to the hospital for being a danger to himself or others. He has also been sent a letters of trespass at different businesses for his out bursts.

   The Community Crisis Intervention Team met about this individual this past October to discuss a strategy for the future plan to help this person. A Crisis Intervention Officer from the Wellesley Police Department has been assigned this case. The Officer has met with concerned family members, Department of Mental Health and Riverside Community Care Mental Health Emergency Service. A plan has been put in place for guardianship. The Officer has been checking in with this person regularly, this has dropped calls for service with him.

   This will be and ongoing case for some time.

2. **Subject**  
   Female  
   Age early 80s  
   Lives in Wellesley by herself  
   Family lives nearby community.

   This person has been diagnosed with Dementia. On different occasions officers have been called for her being in Wellesley Square and not knowing how to get home. Officers have brought her home and made sure she was safe. Officers have checked and the home was in good condition and the individual food in the refrigerator. Officers have reached out to family members and Springwell Elder Services because they felt her Dementia was getting worse. This person’s photo and information was added to WPD data base.
The Elder Affairs Officer for WPD was forwarded this person information and the concern for the safety of the individual living home alone. The Elder Affairs Officer met with the Wellesley Council on Aging Health & Social Services Administrator Ms. Kate Burnham. They were able to work with the family and fine a safe living arraignment for this person.

This is only one example of WPD Elder Affair Officer working with Wellesley Council on Aging Health & Social Services Administrator Ms. Kate Burnham.

Wellesley Public Schools

D and Family
I began working with D and her family in September 2015. D was 24 at the time and had been a resident of WHA for a number of years, however prior to securing housing, D experienced significant trauma and homelessness. D suffered the loss of her mother when she was 17 years old and pregnant with her first child. D then entered the shelter system, was unable to complete high school, and remained homeless for years while trying to process the loss of her young mother and begin raising her two daughters. D’s father was incarcerated for most of her life and her other family members were scattered across various states. The father of D’s young children also moved out of state and she was left to find a way to survive on her own. She has battled severe depression and anxiety, inconsistently treated with medication and therapy over the years. D currently has two elementary aged children and a toddler at home. D has no driver’s license or vehicle to get around. She has at times self-medicated her mental illness with marijuana and she has had at least one suicide attempt in recent years. D has faced ongoing issues with budgeting and making ends meet. She has fallen behind on rent, electricity and other bills consistently over the past several years. She has been threatened with eviction, electric shut-off, and has had her phone shut off numerous times. D has made decisions she felt she had to make in order to survive which have resulted in court involvement, a brief incarceration and probation. D’s children undoubtedly are hugely impacted by her struggles with mental health, substance use, financial stress and limited education. Both of D’s elementary aged children present with symptoms of depression and emotional dysregulation. They are bright students and they show great resilience, however they require significant attention and social/emotional support from school staff. I meet for weekly counseling with the oldest child and check in frequently with the younger child. I also provide ongoing consultation to classroom teachers and collaboration with school staff to ensure all are familiar with the unique and complex needs of the family which make the students particularly vulnerable.

Over the past few years, I have supported D and her family in a number of ways in my role as Elementary Social Worker. I have provided frequent home visits and 1:1 support to D, offering parental guidance and support, clinical case management and crisis intervention. I have connected D with many resources to support basic needs such as food and transportation, ensuring she not only connects with a resource but is able to follow through (i.e. support in securing transportation to the food pantry, WIC office and other vital appointments). I’ve helped her complete countless applications for resources, programs, etc. and have helped her prepare for important meetings and interviews. I have advocated with the WMLP and the WHA, as well as DTA and probation. I have gathered donations of baby items, children’s clothing, winter gear and household items when urgent needs arise. I have responded at times of crisis and involved DCF or the police department if safety was uncertain. I have spent time understanding D and her history in order to develop a meaningful and trusting relationship where she has allowed me to support her and begin to empower her in self-advocating and working towards goals. In recent months, D has returned to school, obtained her driver’s license, obtained part-time employment and successfully secured childcare for her toddler. Her older children have started after school programming and she is nearing completion of probation and has begun meeting with a therapist at HRS. As of a result of this marked progress, at
school we have begun to observe more stability and success in our students. They are presenting with increased emotional regulation, improved classroom engagement, higher energy levels and academic motivation.

L and Family
I met L in September 2016, shortly after she and her three young children moved into WHA. Prior to securing housing in Wellesley, L and her kids were living in a homeless shelter for nearly two years after fleeing an abusive relationship. L will describe the experience as “hard and traumatic” where they were frequently exposed to gun violence, substance abuse and unsanitary conditions. Prior to shelter, L was a victim of domestic violence and her two older children bore witness to the abuse. When L moved into housing, she became overwhelmed by the expectations of budgeting for rent and utilities. She quickly fell behind and found herself facing eviction just months after moving in. I spent time with L during this period, developing trust and helping her to navigate the system and advocate for her family. I supported her in developing communication with WHA staff and other agencies in order to achieve stability. Given L and her family were new to the community, I immediately connected them with resources such as the Wellesley Food Pantry, Wellesley Friendly Aid, after school and summer opportunities. I helped L obtain part-time employment and supported her with transportation needs given she has no driver’s license or vehicle. Over the following months, I provided frequent home visits and connected L with additional resources such as local pediatricians, dentists and therapists. I spent a lot of time with L 1:1 offering parental guidance and support, clinical case management and crisis intervention as needed. It became evident rather quickly that L’s middle child had very significant learning needs that could not be met in her initial school placement in Wellesley. I supported L and consulted with school staff in order to complete an evaluation, where the student would ultimately be placed in a specialized program. Mom felt overwhelmed by an added transition but with my support, was able to navigate the process, attend tours and meetings at the new school and confidently choose to help her daughter succeed. Soon after that transition was complete, concerns were raised about L’s oldest child presenting with learning difficulties. I met with him weekly for counseling to support his emotional needs and he was subsequently evaluated and determined eligible for special education services. I again helped to walk L through this process, attended all meetings and supported her in getting this child ready for middle school.

Throughout the past few years of work, L has presented with significant symptoms of Depression and Anxiety. She has struggled to maintain part-time employment and financial stability. She has self-medicated at times with marijuana and has had difficulty keeping a clean and comfortable home when her symptoms are heightened. After working with L for over two years, she eventually agreed to a referral for therapy and psychiatry, however she has not been able to consistently engage in treatment. L has very limited family support and has essentially been on her own and raising her children since very young adulthood. L currently has a child in middle school, elementary school and a pre-school aged child. The older children have both presented with symptoms of Depression and Anxiety. I have worked closely with the middle school and the elementary school to provide wrap-around support to the family and ensure the children have their needs met. I provide consultation to school staff given the family’s complex history and unique vulnerabilities. I continue to help L navigate the school and other systems and I am currently supporting her in seeking out preschool opportunities and scholarships for her youngest child. I have worked with the schools and community agencies to ensure that not only the social emotional needs of the children are addressed, but that they have clothing, food, diapers and other basic needs fulfilled at all times. Once all three children are successfully stabilized in school, L hopes to more adequately address her own mental health needs, return to school and obtain more stable employment.
Glossary of terms describing the different types of licensed social and mental health service professionals.

**Psychiatrists:** Psychiatrists are licensed medical doctors who have chosen psychiatry as their residency, or specialization. Psychiatrists mainly diagnose, treat, and help prevent mental, emotional, and behavioral disorders. They use psychiatric medicine, physical exams, and laboratory tests. A psychiatrist is a physician with either a doctor of medicine (MD) degree or a doctor of osteopathic medicine (DO) degree. The Massachusetts Board of Registration in Medicine’s ensures that only qualified and competent physicians of good moral character are licensed to practice in the Commonwealth of Massachusetts and that those physicians and health care institutions in which they practice provide to their patients a high standard of care and support an environment that maximizes the high quality of health care in Massachusetts. General practice doctors can also prescribe medications to help with mental and emotional problems. However, many people prefer to go to a psychiatrist for complicated disorders. Psychiatrists’ specialties can include: children and adolescents, forensic psychiatry and learning disabilities.

**Psychologists:** Psychologists observe, describe, evaluate, interpret, and modify human behavior by the application of psychological principles, methods, and procedures, in order to assess or change symptomatic, maladaptive, or undesired behavior. Psychologists may have a Ph.D., Psy.D. or Ed.D. Within the broader category of psychologists, there are many subspecialties including aviation, biopsychology, clinical, community, comparative, consumer, counseling, cross-cultural, developmental, educational, engineering, environmental, forensic, health, intra-organizational, military, personality, school and social psychologists. We describe below some of the most common types of psychologists employed in medicine, public health, education and public safety:

- **Clinical psychologists** assess, diagnose and treat individuals suffering from psychological distress and mental illness. They also perform psychotherapy and develop treatment plans. Counseling psychologists provide psychotherapy to people suffering from psychological disturbances, behavioral problems, emotional difficulties, stress, and related issues. These professionals share many commonalities with clinical psychologists. Clinical psychologists often work in hospitals, mental health clinics, and private practice. They are trained in a variety of treatment techniques but may specialize in treating certain disorders or working with certain populations. For example, a clinical psychologist might specialize in an area such as substance abuse treatment, child mental health, adult mental health, or geriatric mental health. While clinical psychologists often work in medical settings, they are not physicians, and in most cases cannot prescribe medications.

- **Developmental psychologists** research human development across the entire lifespan. Some focus on a specific period such as early childhood, adolescence, adulthood, or old age. These professionals may perform tasks such as evaluating children who may have a developmental delay or disability, investigating issues associated with aging, and studying how language skills are acquired.
Educational psychologists study how people learn and the educational process. This might involve developing instructional strategies and teaching techniques. Some educational psychologists study giftedness or learning disabilities.

Health psychologists are centered on how psychology, biology, social groups, and behavior influence wellness, illness, and overall health. They work with clients to help maximize well-being and improve both mental and physical health. Some professionals in this field perform clinical work where they assess and treat clients who are seeking assistance with a variety of health issues. This might involve providing psychotherapy, administering different psychological assessments, teaching people about different coping techniques, and educating clients about healthy behaviors.

School psychologists help children cope with emotional, academic, social, and behavior problems in school settings. Professionals who work in this field of psychology play a vital role in the educational system, typically collaborating with parents, teachers, students, and other school staff to ensure that the learning environment is healthy, safe, supportive, and productive. Children who are struggling with some sort of issue, whether it is behavioral, emotional, or academic in nature, can work with a school psychologist to come up with an effective plan to deal with the difficulty. School psychologists provide direct intervention or behavioral management when needed or may simply offer support and advice to students who need someone to talk to.

Social psychologists study the behavior of groups including how people behave in social settings and how groups influence individual behavior. A social psychologist might investigate a wide range of topics including attitudes, prejudice, communication, interpersonal relationships, aggression, and persuasion. This type of psychologist looks at how social, cognitive, and emotional factors impact the learning process. Some professionals in this field specialize in identifying and dealing with potential problems that might interfere with how children learn.

The Board of Registration of Psychologists in Massachusetts is responsible for licensing qualified individuals to practice psychology and protect the public health and welfare through regulation of the practice of psychology as specified by Massachusetts Statutes and Regulations depending upon whether or not their subspecialty includes clinically treating individuals for mental health problems. They work in places such as private offices, hospitals, or schools. Psychologists treat a range of issues, from relationship problems to mental illnesses, through counseling. Psychologists cannot prescribe medication in most states.

Counselor: The professional term “Counselor” is applied to a number of different types of professionals including rehabilitation counselors, mental health counselors, marriage and family therapists and educational psychologists. In Massachusetts, the Board of Registration of Allied Mental Health and Human Services Professionals is responsible for licensing individuals in these professions. Similar to psychologists, counselors cover a broad range of functions and responsibilities each requiring certification under different examinations and testing requirements, including:

- **Mental Health Counselors:** The National Board of Clinical Counselor's (NBCC) National Clinical Mental Health Counseling Exam (NCMHCE) is required for the LMHC.
• **Marriage and Family Therapists**: The Association of Marriage and Family Therapy Regulatory Boards' National Marital and Family Therapy Examination is required for the LMFT.

• **Rehabilitation Counselors**: The Rehabilitation Counselor examination is the national exam administered by the Commission for Rehabilitation Counselor Certification (CRCC).

• **Educational Psychologists**: The National School Psychology Examination of the National Association of School Psychologists (NASP) administered by Education Testing Service (ETS) is required for the LEP.

**Social Worker**: Social work is a broad profession that intersects with several disciplines. Social workers help people solve and cope with problems in their everyday lives. Clinical social workers also diagnose and treat mental, behavioral, and emotional issues. Social workers work in a variety of settings, including mental health clinics, schools, child welfare and human service agencies, hospitals, settlement houses, community development corporations, and private practices. Similar to psychologists, there are many subspecialties within the broader category of social work, including: case, child protection, forensic, medical, psychiatric, rehabilitation worker, school, welfare and clinical social workers. Schools of Social Work offer bachelors, masters and doctoral degrees. Specialized academic training and supervised practice are required in addition to academic credentials for licensing in each state. In Massachusetts, the Board of Registration of Social Workers protects the public through the regulation of the practice of social work. The Board licenses qualified individuals at one of four levels of licensure, depending on that candidate's level of education and experience including:

- Licensed Independent Clinical Social Worker, LICSW;
- Licensed Certified Social Worker, LCSW;
- Licensed Social Worker, LSW;
- Licensed Social Work Associate, LSWA).

Social Workers must have an undergraduate or graduate degree in social work or a related mental health field and are trained in psychotherapy and social work techniques to apply for licensure. Family therapists and employee assistance program counselors are often social workers. Social workers who work in private agencies or independent practice must hold state licenses from the Board of Registration of Social Workers requiring an L.I.C.S.W. (Licensed Independent Clinical Social Worker). These practitioners have master's degrees and additional supervised experiences. A L.C.S.W. (Licensed Certified Social Worker) or a L.S.W (Licensed Social Worker) may practice in an agency setting under proper supervision. Professional conduct is monitored by the Massachusetts Board of Registration of Social Workers. Generally, social work professionals provide services to individuals, couples, families, groups, and communities directed towards specific goals. Independent of degree and licensure, there are many subspecialties. Some subspecialties such as clinical social work permit billing to insurance companies (LICSW). At the masters and doctoral level, social workers typically specialize in areas such as those listed below.

- Clinical Group Worker
- Family Practitioner
• School Social Worker
• Marriage and Family Therapist
• Medical Social Worker
• Clinical Social Worker
• Substance Abuse Social Worker
• Social Work Supervisor
• Program Director

Adjustment Counselor: The School Adjustment Counselor (SAC) is dedicated to addressing the mental health needs of students within a school. This role is intended to be a resource for all students at Wellesley Middle and High School by working both individually and in small groups to promote the social-emotional well-being of students in order to achieve academic success. Students often experience a difficult adjustment to middle and high school or may be experiencing some social or emotional upset and will see the school adjustment counselor to help them build skills and develop strategies to better access the curriculum and prevent barriers to learning.

The SAC may serve as a member of the Student Support Team working with administration to ensure a safe and positive school climate, can provide referrals to outside community services so ongoing therapeutic relationships can be established, and consults with families and school personnel to provide appropriate support services within the school setting. To serve in this capacity, a SAC must complete a Master’s Degree in counseling to receive their initial license.
From: Strother, Sheryl  
Sent: Friday, January 11, 2019 10:01 AM  
To: Robinson, Blythe  
Subject: Accrued time calculation  
Attachments: FY18 Comp Absence YTD Report.pdf  

Good morning Blythe,

Following up on some of the Discussion about the Selectmen’s budget:

Every year as part of closing, the Town and Enterprise Funds make an accrual for the liability for unused time to be reported on the external financial statements. The breakdown is attached, and the total was $428,332.33 fro general fund departments.

This liability is different that the time reported on employee paychecks, because in most cases, the Town would not have to pay our unused sick time. For example, my paystub shows over 22 weeks of unused sick time. If I left or retired, the Town would not have to pay me. The only time it would be an issue would be in the case of a prolonged illness (god forbid!).

This liability is also different than the amount budgeted for compensated absences. Some of the union contracts (Police and Fire, for example) allow payout of a portion of unused time at retirement. If an employee is of retirement age, an accrual is recorded, regardless of the employee’s immediate plans. The liability may often be larger than the compensated absence budget, because not everyone retires as soon as they’re eligible. In addition, the new DPW contract allows some carryover of unused personal time, and most 50/60 DPW employees have been allowed to carry over two weeks’ vacation. There would only be a provision in compensated absences if they were eligible for retirement.

Except for Police and Fire, departments usually absorb any accrued time paid out, because there is often an extended vacancy before the employee is replaced. It’s unusual to charge employees other than Police and Fire against the compensated absence accrual.

Sheryl Strother / Finance Director/CFO  
Town of Wellesley / 525 Washington Street / Wellesley, MA 02482  
P 781-431-1019 ext 2214  
sstrother@wellesleyma.gov
## Vacation Sick Time Breakdown per Function

### GENERAL GOVERNMENT

<table>
<thead>
<tr>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>Difference</th>
</tr>
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<tbody>
<tr>
<td>Selectmen</td>
<td>$356.28</td>
<td>$5,374.88</td>
<td>$2,452.05</td>
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<td>Financial Services</td>
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<td>Assessors</td>
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<tr>
<td>Treasurer/Collector</td>
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<td>Human Resources</td>
<td>$11,568.52</td>
<td>$9,915.65</td>
<td>$3,545.15</td>
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<tr>
<td>NIS</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td>Town Clerk</td>
<td>$1,174.62</td>
<td>$1,601.38</td>
<td>$2,879.93</td>
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<tr>
<td>Planning</td>
<td>$3,164.95</td>
<td>$2,376.45</td>
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<tr>
<td>ZBA</td>
<td>$783.34</td>
<td>$2,048.80</td>
<td>$1,253.86</td>
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<tr>
<td>Facilities Maint</td>
<td>$2,229.19</td>
<td>$2,404.20</td>
<td>$2,338.01</td>
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<tr>
<td>Total</td>
<td>$44,369.86</td>
<td>$59,867.65</td>
<td>$57,698.66</td>
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### PUBLIC SAFETY

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<tbody>
<tr>
<td>Fire</td>
<td>$291,558.41</td>
<td>$320,090.81</td>
<td>$272,401.72</td>
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<tr>
<td>Police</td>
<td>$9,124.67</td>
<td>$9,510.21</td>
<td>$17,130.01</td>
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<tr>
<td>Total</td>
<td>$300,683.08</td>
<td>$329,601.02</td>
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### PUBLIC WORKS

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<tbody>
<tr>
<td>Engineering</td>
<td>$6,889.14</td>
<td>$7,495.46</td>
<td>$6,188.26</td>
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<tr>
<td>Highway</td>
<td>$609.41</td>
<td>$192.15</td>
<td>$2,503.18</td>
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<tr>
<td>Park</td>
<td>$136.05</td>
<td>$2,769.06</td>
<td>$655.03</td>
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<tr>
<td>RDF</td>
<td>$2,220.67</td>
<td>$1,212.32</td>
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<tr>
<td>Administration</td>
<td>$5,655.61</td>
<td>$7,819.63</td>
<td>$5,904.81</td>
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<tr>
<td>Fleet</td>
<td>$4.68</td>
<td>$1,129.60</td>
<td>$28.50</td>
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<tr>
<td>Water/Sewer</td>
<td>$9,904.78</td>
<td>$10,256.66</td>
<td>$8,553.65</td>
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<tr>
<td>Total</td>
<td>$26,420.13</td>
<td>$28,794.54</td>
<td>$49,942.33</td>
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### MLP

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<tr>
<td>Library/Recreation</td>
<td>$25,325.00</td>
<td>$25,607.00</td>
<td>$26,028.00</td>
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### HEALTH & HUMAN SERVICES

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<th>Difference</th>
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<td>Health</td>
<td>$13,379.87</td>
<td>$10,984.88</td>
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<tr>
<td>COA</td>
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<td>$1,918.12</td>
<td>$4,558.58</td>
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<tr>
<td>Youth</td>
<td>-</td>
<td>-</td>
<td>$2,021.33</td>
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<tr>
<td>Veterans</td>
<td>-</td>
<td>-</td>
<td>$2,021.33</td>
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<tr>
<td>Total</td>
<td>$15,369.68</td>
<td>$12,440.25</td>
<td>$13,192.81</td>
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### SCHOOL DEPARTMENT

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<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>Difference</th>
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</thead>
<tbody>
<tr>
<td>Administration</td>
<td>$19,116.72</td>
<td>$20,680.70</td>
<td>$16,230.00</td>
</tr>
<tr>
<td>Total</td>
<td>$19,116.72</td>
<td>$20,680.70</td>
<td>$16,230.00</td>
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### Total Liability for All Depts

<table>
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<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>Difference</th>
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<tbody>
<tr>
<td>Total Liability</td>
<td>$445,581.12</td>
<td>$493,998.31</td>
<td>$462,913.98</td>
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</table>

### Total Town Liability (excludes Water/Sewer & MLP)

<table>
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<tr>
<th>FY16</th>
<th>FY17</th>
<th>FY18</th>
<th>Difference</th>
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</thead>
<tbody>
<tr>
<td>Total Town Liability</td>
<td>$408,143.53</td>
<td>$456,208.84</td>
<td>$426,332.33</td>
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School amount for FY18 does not include sick time.

**Fire Department amount represents sick time owed for those individuals who are aged 50 or older and have 25 or more years of service**

**Police Department totals represents employees that were eligible to retire on 6/30/2018 and the total amount of sick and days owed hours**

**DPW Production Unit can carry up to 80 hours personal time, which is paid out upon termination and/or retirement. New accrual to FY18**