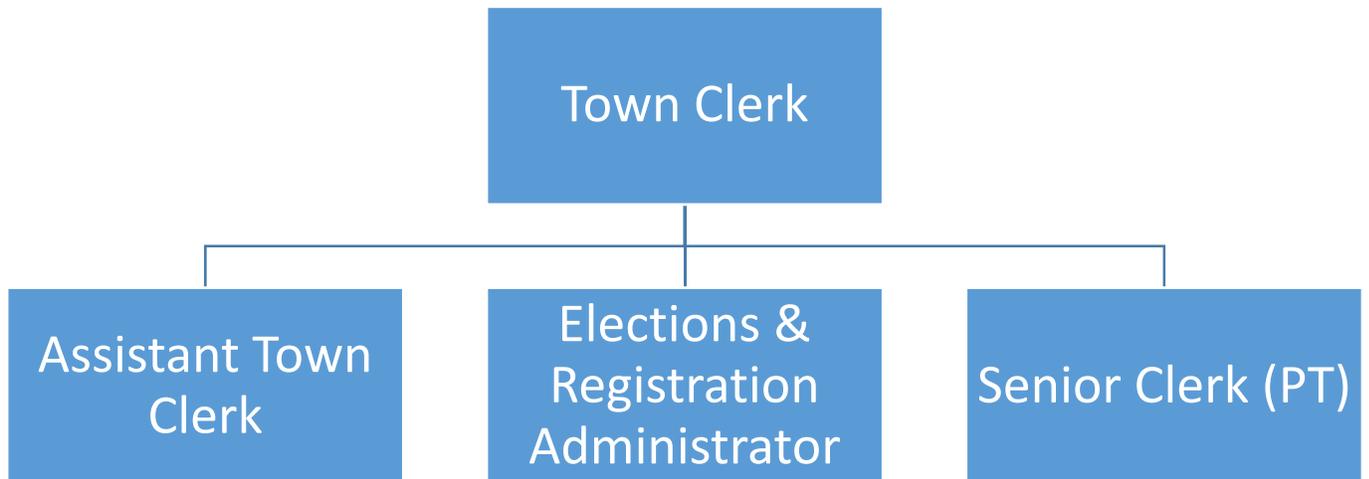




Town of *Wellesley*
FY2021 Budget Request
Office of the Town Clerk: Mission, Services & Priorities

Mission

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



Services

Census and Elections

- The Town Clerk's Office conducted three elections in FY 2019, the State Primary September 2018, the State General election November 2018, and the Annual Town election March 2019.
- The State Primary 2018 election participation rate was 28%. The State General Election 2018 election participation rate was 79%. And the March 2019 election participation rate was 19%. There were no ballot questions. In the Local Election, there were contested races for the offices of Board of Selectmen, Natural Resources Commission, Board of Health, and Planning Board that contributed to the turnout.
- The administration of elections requires the assistance of over 100 poll workers and the cooperation of the Department of Public Works, the Wellesley Public Schools, the Police Department, and IT department. Without the support of these departments and citizens we would not be able to fulfill our mandate.
- The Board of Registrars of Voters is charged with the responsibility of certifying the validity of voter signatures on registrations, absentee ballots, nomination papers, and petitions.

As of the March 2019 election the Town of Wellesley had 16,799 active registered voters. The members of the Board of Registrars for FY 2019 were: Jane Kettendorf, and George P. D. Porter, Republicans, and Mary (Toby) Sullivan, Democrat, who served as chair and KC Kato, Town Clerk, Unenrolled.

Town Meeting

- The Town Clerk is responsible for keeping and publishing the minutes of Town Meeting. There was a Special Town Meeting on October 2, 2019, to fund a feasibility study of the Upham and Hardy schools. The 139th Annual Town Meeting met for 5 sessions, beginning March 25, 2019 and ending April 8, 2019. There was also a Special Town meeting on May 13, 2019 to discuss Zoning Articles.
- The Town Clerk is also responsible for shepherding the approval process through the Attorney General's office for all Town and Zoning bylaw changes that result from Town Meeting.

Vital Records and Miscellaneous

- During the period July 1, 2018, to June 30, 2019, the office processed:
 - 158 Birth records
 - 78 Marriage Intentions
 - 224 Death Records
 - 134 Business Certificates
 - 3207 Dog Licenses (FY2019)
- The office maintained a variety of other public records and conducted other miscellaneous activities:
 - Zoning Board of Appeals decisions
 - Ethics and open meeting law training and compliance
 - Public records requests in partnership with the Schools, the Selectmen's Office and the Police Department.

FY21 Budget Priorities

The Town Clerk's office is predominantly salaries and has limited capital needs. FY21 Capital Budget has been adjusted by the following:

- At ATM 2019, Town Meeting voted to pilot Electronic Voting. The FY19 budget included \$15,000 to support the purchase or lease and the operations of electronic voting devices for Special and Annual Town Meetings in FY19. The expense in FY19 is an operating expense. It will continue to be in the pilot phase in FY21. If successful, there will likely be a capital expenditure of \$15,000 to purchase the devices in FY22.
- \$36,000 for Electronic Poll Pad devices continues to be included in the FY21 capital budget. The State Elections office is reviewing the use of electronic poll pads for use in State and National elections. It is currently only approved for use in early voting. If it is approved, then we would consider purchasing poll pads for use at all 8 precincts.

The FY21 Operating Budget includes the following variances from FY20.

- In FY19, the Dog License administration transitioned to Viewpoint Cloud. The system allows the community to register their dogs online. Previously, dog owners submitted their registration fee and a self-addressed stamped envelope. With the new system, the Town Clerk’s office incurred the postage expense for all online registrations.
- We expect to have 5 elections in FY21 as compared to 2 in FY20. Elections (excluding early voting expenses) are approximately \$13,000 per election.
- We expect to have 15 days of early voting in FY21. Secretary of State Galvin is currently working with the state legislators to include early voting for the Presidential Primary and the Presidential elections.

PERMANENT STAFFING (FTEs)	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request
Position Titles:					
Town Clerk	1	1	1	1	1
Assistant Town Clerk	1	1	1	1	1
Elections & Reg.					
Administrator	1	1	1	1	1
Voter Registration Clerk	0	0	0	0	0
Clerk	<u>0.6</u>	<u>0.6</u>	<u>0.45</u>	<u>0.5</u>	<u>0.5</u>
Total Number of Positions	3.6	3.6	3.5	3.5	3.5

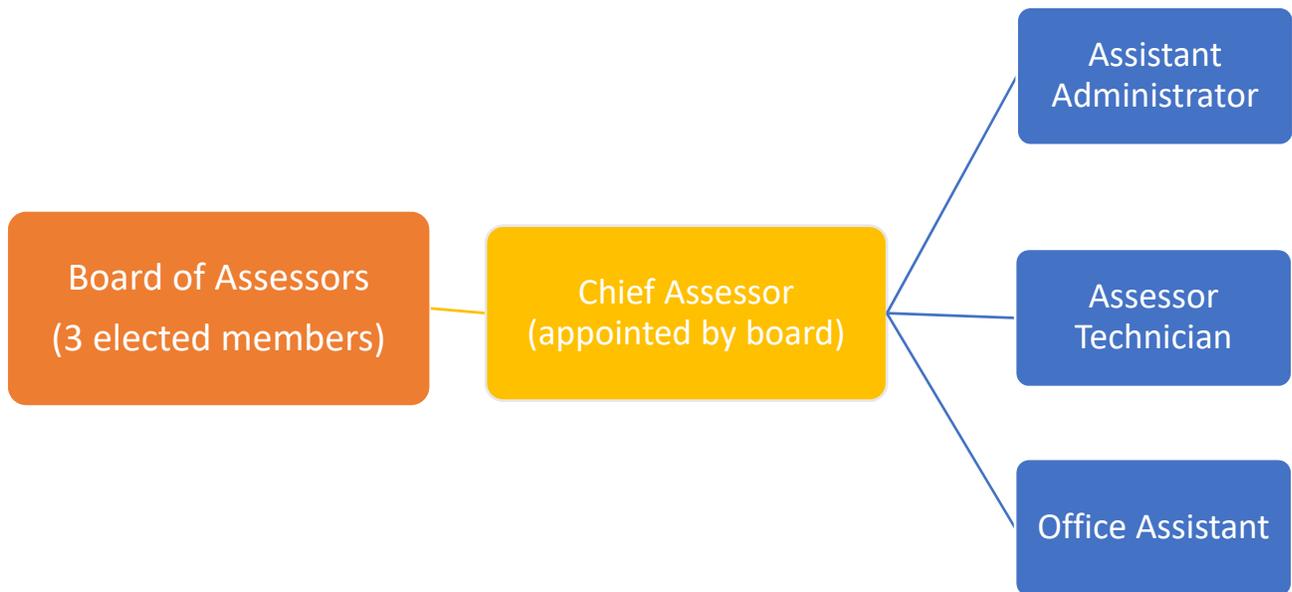
Town Clerk FY21 Operating Budget Request									
Org	Object	Account # 01-161 Account Title	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request	\$ Variance FY20-21	% Variance FY20-21
PERSONAL SERVICES									
01161100	511010	Senior Administrator	\$ 88,212	\$ 92,142	\$ 91,423	\$ 93,969	\$ 95,950	\$ 1,981	2.11%
01161100	511220	Other Professionals	48,034	34,037	49,508	60,584	60,947	\$ 363	0.60%
01161100	511225	Board of Registrars	2,500	2,000	2,600	2,600	3,200	\$ 600	23.07%
01161100	511370	Clerical	70,353	70,845	71,950	80,134	81,370	\$ 1,236	1.54%
01161100	512010	Pages/Poll Workers	43,071	10,980	37,168	32,240	79,040	\$ 46,800	145.16%
01161100	512050	Custodians/Laborers	1,332	880	1,337	1,400	3,750	\$ 2,350	167.86%
01161100	513160	Other Overtime	919	106	1,237	1,500	1,500	\$ -	0.00%
01161100	515050	Longevity	500	600	600	500	600	\$ 100	20.00%
PERSONAL SERVICES SUBTOTAL			254,921	211,591	255,822	272,927	326,357	53,430	19.58%
EXPENSES									
01161200	517020	Medical Checkup	-	-	-	65	65	\$ -	0.00%
01161200	517030	Meal Allowances	2,052	662	1,329	1,750	2,250.00	\$ 500	28.57%
01161200	524030	Equipment Maintenance	8,980	8,160	9,982	10,000	10,000	\$ -	0.00%
01161200	534010	Postage	3,473	5,429	8,859	5,000	8,000	\$ 3,000	60.00%
01161200	534030	Advertising-General	68	17	68	150	150	\$ -	0.00%
01161200	534035	Advertising - Employment	-	-	-	-	-	\$ -	0.00%
01161200	534040	Printing & Mailing Expense	9,908	5,082	9,410	11,000	11,000	\$ -	0.00%
01161200	538020	Book Binding Services-see Obj 55	230	2,735	-	2,750	2,750	\$ -	0.00%
01161200	538050	Deliveries	52	-	-	150	150	\$ -	0.00%
01161200	538090	Other Purchased Services	950	1,100	850	1,550	1,550	\$ -	0.00%
01161200	542010	Office Supplies	2,209	1,942	3,267	3,000	3,300	\$ 300	10.00%
01161200	542040	Paper & Stationary	702	260	330	750	500	\$ (250)	-33.33%
01161200	542090	Other Supplies - Dog Tags	922	1,011	1,922	1,000	1,000	\$ -	0.00%
01161200	571010	Travel-Mileage	247	156	232	250	250	\$ -	0.00%
01161200	571110	Conf/Meetings-Administrators	178	90	482	750	750	\$ -	0.00%
01161200	572110	Conf/Meetings-Administrators	-	-	-	-	-	\$ -	0.00%
01161200	573010	Dues-Administrators	150	150	175	150	175	\$ 25	16.67%
01161200	574120	Public Employee Bond	100	100	100	100	100	\$ -	0.00%
01161200	578010	Approved Special Dept Expense	-	-	-	-	-	\$ -	0.00%
01161200	583053	Equipment Replacement	-	-	1,577	-	-	\$ -	0.00%
01161200	527090	Other Rentals/Leases	-	-	-	1,400	1,400	\$ -	-
01161200	578090	Unclassified Expenses	Account inactive			-	-	\$ -	0.00%
EXPENSE SUBTOTAL			30,221	26,894	38,583	39,815	43,390	3,575	8.98%
	570000	Other Charges & Expenses			-			\$ -	0.00%
DEPARTMENT TOTAL			\$ 285,142	\$ 238,486	\$ 294,405	\$ 312,742	\$ 369,747	57,005	18.23%



Town of *Wellesley*
FY2021 Budget Request
Assessor's Department: Mission, Services & Priorities

Mission

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



Major Areas of Responsibility

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

- Annual valuation of all real property using the Town's mass appraisal system and analysis of market conditions. (8,510 parcels)

- Annual discovery and valuation of all business personal property accounts. Inform all business owners of their requirement to complete the state Form of List. (1,000 business accounts)
- Issue motor vehicle excise billing and adjustments due to changes in ownership. (24,200 bills)
- Collect objective and subjective property data as a result of building permits, sales transfers, and cyclical inspections. (1,500 field inspections)
- Measure and sketch to scale the footprint of all buildings in town. Calculate total square footage of buildings. (1,500 properties annually)
- Process deed transfers for real estate market analysis and accurate mailing of tax bills. (1,000 deeds)
- Review building permits and subdivision plans to measure the impact on property values and make all necessary changes to the valuation database.
- Perform annual statistical testing as required by the Massachusetts Department of Revenue to ensure horizontal and vertical equity amongst all taxpayers.
- Promote statutory personal tax exemptions, assist seniors in completing forms, and verification of taxpayer's income and assets for decision on application. (175 annual applications)
- Assist seniors in understanding and completing the application for the tax deferral program. Process applications by verification of income restrictions, assist in gaining approval from banks when a mortgage is held on the property, and record liens to protect the town's interest in repayment of the deferred taxes. (40 applicants)
- Process all local appeals of property assessments, review applicant's issues, gather market evidence and documentation supporting assessments, review with Board of Assessors and process their decisions on appeals. (200 applications)
- Prepare and testify on appeals before the State Appellate Tax Board, verify jurisdictional compliance. (20 cases)
- Prepare the Town's recapitulation sheet (recap sheet) and provide documentation for setting of the Town's annual tax rate and compliance with the provisions of Proposition 2 ½.
- Maintain the comprehensive property database containing legal ownership data, detailed building information, sketches, and photographs on all properties. This database is an asset used as the platform for several other departments.
- Conduct annual compliance review and valuation of chapter land discounts and filing of liens on the properties. (14 properties)

- Collect data on new taxable property for both real estate and personal property and the calculation of annual New Growth added to Town's tax levy limit. (1,500 properties)
- Calculate and bill Payment in Lieu of Taxes (PILOT) for exempt properties. (Beginning in fiscal 2012 only Babson College - about \$1,500 annual payment)
- Meet with taxpayers and motor vehicle owners to explain and instill confidence in the consistent application of Massachusetts tax laws.
- Produce and distribute documentation on property tax valuation models and tax levy.
- Produce customized reports from our extensive database as requested by other departments and the general public.
- Assist with the assigning of house numbers.
- Assist taxpayers. Taxes are never popular and assessment procedures are technical and difficult to understand.
- Prepare Tax Classification report and present to the Board of Selectmen for annual public hearing on dual tax rate option.
- Submit compliance reports to the Department of Revenue on their on-line Gateway system including end-of-year Tax Rate Recapitulation Sheet reports and supporting documentation prior to approval of tax rate.

FY21

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

Department Priorities

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

PERMANENT STAFFING (FTEs)	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request
Position Titles:					
Chief Assessor	1.0	1.0	1.0	1.0	1.0
Assistant Administrator	1.0	1.0	1.0	1.0	1.0
Assessor Technician	1.0	1.0	1.0	1.0	1.0
Secretary/Technical Assistant	1.0	1.0	1.0	1.0	1.0
Part-time (Temporary & clerk)	0.3	0.3	0.3	0.3	0.3
Total Number of Positions	4.3	4.3	4.3	4.3	4.3

Assessor Department FY21 Operating Budget Request									
Org	Object	Account # 01-141 Account Title	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request	\$ Variance FY20-21	% Variance FY20-21
PERSONAL SERVICES									
01141100	511010	Senior Administrator	\$ 103,082	\$ 104,741	\$ 106,836	\$ 109,811	\$ 109,392	\$ (419)	-0.38%
01141100	511220	Other Professionals	55,346	56,237	57,362	58,960	58,734	\$ (226)	-0.38%
01141100	511370	Support Staff	99,083	103,881	108,110	111,092	118,053	\$ 6,961	6.27%
01141100	512290	Part-time / Temporary / Seasonal Help	4,141	3,532	3,788	5,689	5,667	\$ (22)	-0.38%
01141100	513120	Scheduled Overtime	-	-	-	4,020	5,000	\$ 980	24.38%
			261,653	268,392	276,097	289,572	296,847	\$ 7,274	2.51%
EXPENSES									
01141200	530130	Legal Services-Special Counsel	-	-	-	-	-	\$ -	0.00%
01141200	530500	Training & Development	565	500	1,075	1,500	1,500	\$ -	0.00%
01141200	530600	Appraisals and Surveys	48,650	43,500	53,000	76,500	52,500	\$ (24,000)	-31.37%
01141200	530600	Appraisals and Surveys	10,000	-	-	5,000	10,000	\$ 5,000	100.00%
01141200	530800	Computer Software Services	6,000	6,000	7,000	7,000	7,000	\$ -	0.00%
01141200	534010	Postage	1,196	1,100	1,304	2,000	2,200	\$ 200	10.00%
01141200	534030	Advertising	-	42	-	-	-	\$ -	0.00%
01141200	534040	Printing & Mailing Expense	7	109	82	150	2,000	\$ 1,850	1233.33%
01141200	538010	Deed/Abstract Copies	76	732	304	400	500	\$ 100	25.00%
01141200	542010	Office Supplies	1,115	1,062	1,310	1,200	1,500	\$ 300	25.00%
01141200	553060	Computer Supplies	7,586	1,370	1,387	2,000	2,000	\$ -	0.00%
01141200	571010	Travel-Mileage	1,264	1,660	2,444	2,750	3,000	\$ 250	9.09%
01141200	571110	Conf/Meetings-Administrators	1,057	490	559	1,500	1,500	\$ -	0.00%
01141200	573010	Dues-Administrators	1,549	1,675	1,675	1,800	1,800	\$ -	0.00%
			79,064	58,240	70,140	101,800	85,500	(16,300)	-16.01%
	570000	Other Charges & Expenses	-	-	-	-	-	\$ -	0.00%
			\$ 340,717	\$ 326,632	\$ 346,237	\$ 391,372	\$ 382,347	\$ (9,026)	-2.31%



Town of *Wellesley*
FY2021 Budget Request
Planning Board: Mission, Services & Priorities

Mission

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

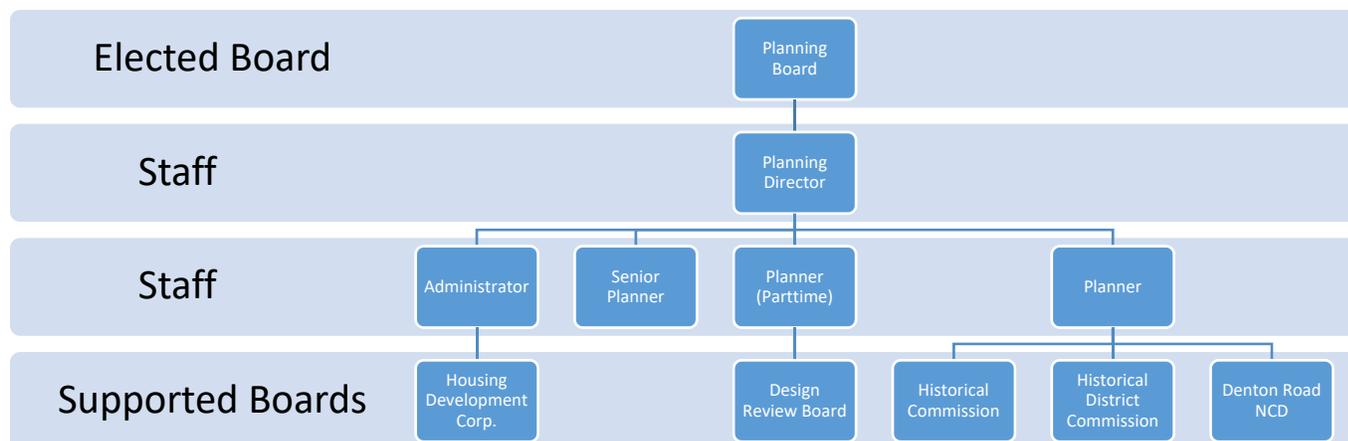
The role of the Planning Board is to make short and long term decisions related to land use in the Town of Wellesley. The Planning Board seeks to realize the vision of Wellesley residents for their community through the judicious use of municipal planning and project review. As a result the Planning Board is responsible for the maintenance and update of the Town's Zoning Bylaws and Zoning Map, divisions of land, and the review of large-scale projects with Town-wide impacts.

The Planning Board carries out the Large House Review process under Section 16D of the Zoning Bylaw. It also issues special permits for Projects of Significant Impact under Section 16A of the Zoning Bylaw; Inclusionary Zoning under Section 16B of the Zoning Bylaw, and Residential Incentive Overlay (RIO) projects under Section 14F of the Zoning Bylaw.

Planning Department

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

The Department serves as professional staff to the Historical Commission, Historic District Commission, Design Review Board, and the Denton Road Neighborhood Conservation District Commission. It provides supplemental assistance to the Zoning Board of Appeals as needed, particularly for projects in the Residential Overlay District (RIO) and Comprehensive Permits under MGL ch. 40B. The Department has frequent interaction with the Building Department and the Zoning Enforcement Officer on questions about the Zoning Bylaws.



The Planning Department has five staff members: the Planning Director, the Senior Planner, one full time Planner and one part-time Planner, and one part-time Department Administrator. In calendar year 2019, all staff members, other than the Department Administrator, resigned, each resignation coming at different times for different reasons. The Planning Board has hired a new Planning Director and Planners, but the position of Senior Planner remains vacant.

Planning Director

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

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

Senior Planner

The Senior Planner supports the Planning Director in carrying out municipal planning, zoning, and subdivision programs under the provisions of state law and Town bylaws. They perform a variety

of complex technical and professional work in the current and long range planning of the Town, including the development and implementation of land use policies and regulations; providing staff support for the Planning Board and other serviced boards; assisting the Director in staff and consultant supervision; and serving as Department Head in the Director's absence.

Planners

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

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

Department Administrator

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

The Department Administrator also administers affordable housing project applications.

Budget Overview

The Planning Department's budget reflects an overall year on year increase of 3.38% reflecting increased salary levels and almost flat expenses.

Staffing levels remain the same but salary levels for the Planner positions have increased 3% and 12% respectively over FY20 to reflect actual wage levels for the newly hired planners. The Senior Planner position is projected at a 15% increase to reach the midpoint for the job classification level. There is also a projected 11% increase for the Department Administrator to reflect increased duties and responsibilities. These increases are partially offset by a 7% decrease for the Planning Director position.

Expenses increase by 0.7% or \$300. The increase is attributable to increasing attendance for Board members and staff at conferences. Other expenses have been adjusted (i.e. postage increase, office supply decrease) based on actual expenditures in FY20 and prior years.

PERMANENT STAFFING (FTEs)	FY16 Actual	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request
Position Titles:						
Director	1.0	1.0	1.0	1.0	1.0	1.0
Senior Planner	1.0	1.0	1.0	1.0	1.0	1.0
Planner	1.0	1.0	1.5	1.5	1.5	1.5
Secretary/Technical Assistant	0.6	0.6	0.6	0.6	0.6	0.6
Total Number of Positions	3.6	3.6	4.1	4.1	4.1	4.1

Planning Department FY21 Operating Budget Request									
Org	Object	Account # 01-175 Account Title	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request	\$ Variance FY20-21	% Variance FY20-21
PERSONAL SERVICES									
01175100	511010	Senior Administrator	\$ 87,931	\$ 96,286	\$ 86,562	\$100,079	\$ 92,759	\$ (7,320)	-7.31%
01175100	511220	Other Professionals	108,484	100,829	117,087	129,204	140,488	\$ 11,284	8.73%
01175100	511420	Other Professionals	-	22,065	29,172	27,793	31,489	\$ 3,696	13.30%
01175100	511370	Support Staff	26,314	26,535	23,217	28,170	31,320	\$ 3,150	11.18%
01175100	512290	Other Support Staff	-	-	1,127	-	-	\$ -	0.00%
PERSONAL SERVICES SUBTOTAL			222,729	245,715	257,165	285,246	296,056	\$ 10,810	3.79%
EXPENSES									
01175200	517010	Medical Expenses	-	-	-	-	-	\$ -	0.00%
01175200	517040	Tuition Reimbursement	-	-	-	-	-	\$ -	0.00%
01175200	530900	Other Professional Services ¹	7,942	8,679	3,731	25,000	25,000	\$ -	0.00%
01175200	534010	Postage	1,641	3,057	2,924	2,825	3,300	\$ 475	16.81%
01175200	534030	Advertising - General	1,032	2,632	1,283	2,225	2,250	\$ 25	1.12%
01175200	534060	Photocopying ²	-	-	-	-	-	\$ -	0.00%
01175200	542010	General Office Supplies	2,132	2,397	1,799	2,850	2,250	\$ (600)	-21.05%
01175200	571010	Travel - Mileage	226	529	57	800	500	\$ (300)	-37.50%
01175200	571110	Conf. Meetings-Administrators ³	513	1,214	955	1,900	2,500	\$ 600	31.58%
01175200	573010	Dues and Publications ⁴	1,796	6,714	6,092	7,400	7,500	\$ 100	1.35%
01175200	578090	Unclassified Expenses	-	-	-	-	-	\$ -	0.00%
EXPENSE SUBTOTAL			15,284	25,222	16,841	43,000	43,300	\$ 300	0.70%
Other Charges & Expenses			163	8,082	700	-	-	\$ -	0.00%
DEPARTMENT TOTAL			\$ 238,175	\$ 279,019	\$ 274,705	\$ 328,246	\$ 339,356	\$ 11,110	3.38%

¹ This account is used for consultant services associated with special projects/studies, and to respond to needs beyond the expertise or time available of Staff. As an example, in FY16 \$20,000 of these funds were used for Phase 1 of the Route 9 Enhancement Study & Plan

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

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

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



Town of *Wellesley*
FY2021 Budget Request
Human Resources Board: Mission, Services & Priorities

Mission

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

Human Resources Board and Department

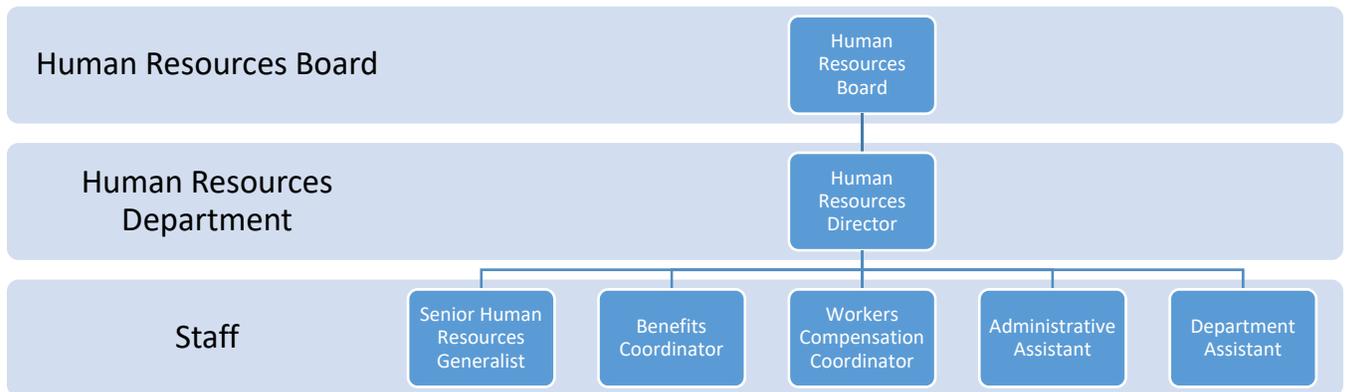
The Human Resources Board is comprised of five members appointed by the Moderator to three-year terms. The Department of Human Resources is staffed by six professionals, led by the Director of Human Resources. The staff includes the Senior Human Resources Generalist who is primarily responsible for providing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

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

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

The Human Resources Department assists Town departments in the assignment of work tasks by formulating job descriptions and ranking these descriptions based on several factors, including

level of responsibility, education and know-how, thereby establishing and maintaining a job classification system for the Town. The Department also coordinates the various annual performance evaluations for individual employees. The Department also collects and reviews outside employment and market data to recommend wage and benefit package changes to the Town's compensation plans.



FY21 Goals

The goals for FY21 are expected to continue to focus on improving the employee experience, updating policies and procedures, promoting professional development, and ensuring that the Town's salary structure remains competitive:

Improved Employee Benefits

- Continue to improve the employee experience for benefit enrollment and improve efficiency in the administration of the Town's health, life, dental, vision, long-term disability, accident, hospital, and critical illness insurance plans.

Professional Development

- Develop new discrimination and sexual harassment prevention trainings for employees and introduce diversity education.

Classification and Salary Updates

- Explore ways to update and improve the administration of the salary and classification plans.

Update Policies and Procedures

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

Operating Budget Summary

The Human Resource Department's budget is considered to be at a base level and is below the recommended guideline with an **overall year-to-year increase of 3.07%**. There are no additional positions or new line items included this year. The increase includes an assumed salary increase of 2.5% for all staff. One difference from FY21 from FY20 is the transfer of funding sources for the Workers Compensation Coordinator and Department Assistant positions from external sources into the Human Resource Department's budget. **This is not an increase in salary or number of positions.** These positions were previously funded from the Workers' Compensation and Health Insurance budgets. Moving forward, the funding will be itemized in the Human Resource Department's personnel costs.

PERMANENT STAFFING (FTEs)	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request
Position Titles:					
Director	1.0	1.0	1.0	1.0	1.0
Senior HR Generalist	1.0	1.0	1.0	1.0	1.0
HR Generalist	1.0	1.0	1.0	1.0	1.0
Administrative Assistant	1.0	1.0	1.0	1.0	1.0
Workers Comp Coordinator*	0.5	0.5	0.5	1.0	1.0
Department Assistant**	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>
Total Number of Positions	5.0	5.0	5.0	5.5	5.5

* Benefit Eligible effective FY2020
 ** Shared with Retirement System. Benefits paid by Retirement

Human Resources Department FY21 Operating Budget Request									
Org	Object	Account # 01-152 Account Title	FY17 Actual	FY18 Actual	FY19 Actual	FY20 Budget	FY21 Request	\$ Variance FY20-21	% Variance FY20-21
PERSONAL SERVICES									
01152100	511010	Senior Administrator	\$112,775	\$119,709	\$122,103	\$125,503	\$125,024	\$ (479)	-0.38%
01152100	511220	Other Professionals	128,044	130,104	138,059	141,903	141,362	\$ (541)	-0.38%
01152100	511370	Clerical	53,209	52,964	54,021	55,526	56,705	\$ 1,179	2.12%
01152100	512590	Recognition Award Payment			1,253				
01152100	513120	Scheduled Overtime	-					\$ -	0.00%
21912000	511370	Workers Comp	14,443	30,277	34,128	42,652	43,551	\$ 899	2.11%
21914100	511370	Health Insurance	12,492	14,085	14,803	16,900	16,300	\$ (600)	-3.55%
PERSONAL SERVICES SUBTOTAL			320,962	347,139	364,367	382,484	382,942	\$ 458	0.12%
EXPENSES									
01152200	517020	Medical Check-up	7,414	7,934	9,160	7,150	9,650	\$ 2,500	34.97%
01152200	530500	Training and Development	300	5,616	1,084	3,250	3,250	\$ -	0.00%
01152200	534010	Postage	720	697	713	1,500	1,500	\$ -	0.00%
01152200	534035	Advertising-Employment	12,380	12,222	15,025	14,200	17,500	\$ 3,300	23.24%
01152200	542010	Office Supplies	1,617	401	1,140	2,000	2,000	\$ -	0.00%
01152200	542090	Other General Supplies	1,357	566	488	1,200	1,200	\$ -	0.00%
01152200	543040	Equipment M&R Supplies	332	332	-	1,000	1,000	\$ -	0.00%
01152200	571010	Travel - Mileage	149	24	42	400	400	\$ -	0.00%
01152200	571510	Town Training & Development	2,750	3,676	4,837	6,500	6,500	\$ -	0.00%
01152200	573010	Dues-Administrators and Professional Staff	250	250	250	750	750	\$ -	0.00%
EXPENSE SUBTOTAL			27,269	31,717	32,739	37,950	43,750	\$ 5,800	15.28%
	570000	Other Charges/Expenses	4,965	-	-			\$ -	0.00%
DEPARTMENT TOTAL			\$348,231	\$378,855	\$397,106	\$420,434	\$426,692	\$ 6,258	1.49%



Town of *Wellesley*
 FY2021 Budget Request
 Advisory Committee: Mission, Services & Priorities

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

The **Advisory Committee Reserve Fund** of \$175,000 provides funding for expenses that are extraordinary or that were unforeseen when Annual Town Meeting appropriated the budget for that fiscal year. Use of the Reserve Fund reduces the need to defer critical expenses and/or to call Special Town Meetings to deal with events with limited expense impact. Transfers from the Reserve Fund are made under Motions passed by one of the Town Boards and approved by the Advisory Committee. Thus far in FY20 no funds have been withdrawn from the Advisory Reserve Fund.

Advisory Committee Operating Request									
DEPARTMENT									
EXPENDITURES			FY17	FY18	FY19	FY20	FY21	\$ Variance	% Variance
Org	Obj	Description	<u>Actual</u>	<u>Actual</u>	<u>Actual</u>	<u>Budget</u>	<u>Request</u>	<u>FY20-21</u>	<u>FY20-21</u>
01131100	511370	Clerical	7,000	7,000	7,000	10,000	11,000	1,000	10.00%
		Subtotal, Personal Services	\$ 7,000	\$ 7,000	\$ 7,000	\$ 10,000	\$ 11,000	\$ 1,000	10.00%
01131200	534010	Postage	10,000	10,000	10,000	7,000	7,000	-	0.00%
01131200	534030	Advertising - General	200	200	200	200	200	-	0.00%
01131200	534040	Printing and Mailing	12,000	12,000	12,000	12,000	11,500	(500)	-4.17%
01131200	542010	Office Supplies	2,450	2,450	2,450	2,450	2,450	-	0.00%
01131200	573040	Dues - Committee/Board Members	350	350	350	350	350	-	0.00%
		Subtotal, Expenses	\$ 25,000	\$ 25,000	\$ 25,000	\$ 22,000	\$ 21,500	\$ (500)	-2.27%
		Total	\$ 32,000	\$ 32,000	\$ 32,000	\$ 32,000	\$ 32,500	\$ 500	1.56%
01132200	579000	Advisory Reserve Fund	\$175,000	\$175,000	\$145,000	\$175,000	\$175,000	\$ -	0.00%