



Town of *Wellesley*  
FY2023 Budget Request  
Office of the Town Clerk: Mission, Services & Priorities

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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

Elections

The Town Clerk's Office conducted 5 elections in FY 2021.

Election	Date	% Turn-out of Active Voters	# Voters	Early By Mail or In-Person
State Primary	9/1/2020	54%	9,091	77%
Board of Selectmen Town Special	9/1/2020	46%	7,680	74%
Presidential	11/3/2020	91%	16,494	83%
Wellesley Middle School Town Special	12/1/2020	23%	4,231	91%
Annual Town Election	3/2/2021	27%	4,789	74%

To mitigate risk at elections, the Secretary of the Commonwealth issued regulations that permitted Vote By Mail Early Voting, a reduction of staffing at polling places, and allowed changes in polling locations.

Due to COVID, all polling places were moved out of schools and precincts were consolidated. Precincts A, B and C voted at the Municipal Light Plant. Precincts D and E voted at the Warren Building. Precinct F voted at the Wellesley Village Church. Precinct G voted at the Wellesley Free Library. Precinct H voted at the Council on Aging Tolles Parson Center.

In the Annual Town Election, there were contested races for the offices of Select Board, Board of Public Works, and Housing Authority which contributed to the turnout. The Annual Town Election also included a non-binding referendum question which passed:

Should the Board of Selectmen, with the understanding that since 1977 Indigenous people of our country have requested Indigenous Peoples Day as a recognition of their humanity, culture and history and further, that our country was built on Native lands, proclaim the second Monday of October henceforth be commemorated as Indigenous Peoples' Day and cease to recognize Columbus Day in Wellesley in recognition of the position of Indigenous Peoples as native to these lands, and the suffering they faced during and after the European conquest? This question is not binding.

The administration of elections requires the assistance of over 100 poll workers and the cooperation of the Department of Public Works, the Municipal Light Plant, the Police Department, and IT department. The elections also included support from the Health and Recreation Departments. Without the support of these departments and citizens we would not be able to fulfill our mandate.

The Board of Registrars of Voters is charged with the responsibility of certifying the validity of voter signatures on registrations, absentee ballots, nomination papers and petitions. As of the June 2021, the Town of Wellesley had 17,227 Active registered voters. The members of the Board of Registrars for FY 2021 were: Jane Kettendorf, and George P. D. Porter, Republicans, and Mary (Toby) Sullivan, Democrat, and KC Kato, Town Clerk, Unenrolled.



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#### Town Meetings

The Town Clerk is responsible for keeping and publishing the minutes of Town Meeting. There were Special Town Meetings on October 26, 2020 through October 28, 2020 to address many warrant articles deferred from the prior Annual Town Meeting. Wellesley Town Meeting members met for 3 sessions. Due to the continuing pandemic, legislation was extended to allow Virtual Town Meetings. Special Town Meeting 1 and Special Town Meeting 2 were held virtually via Zoom Videoconferencing.

The Annual Town Meeting was conducted on April 26<sup>th</sup> and 27<sup>th</sup> and continued on May 3<sup>rd</sup> and 4<sup>th</sup>. The meeting was held virtually via Zoom Videoconferencing.

#### Vital Records and Miscellaneous

During the period July 1, 2020 to June 30, 2021 the office processed:

- 186 Birth records
- 89 Marriage Intentions
- 204 Death Records
- 121 Business Certificates
- 3,498 Dog Licenses

The office maintained a variety of other public records and conducted other miscellaneous activities:

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

#### FY23 Budget Priorities

The FY23 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. Due to the COVID Pandemic, Town Meeting was virtual via Zoom in FY20, FY21, and FY22 and used a polling system in the Zoom Platform. If Town Meeting in person, there will be a capital expenditure of \$16,000 to purchase the devices in FY23 and an operating expenditure of personnel to support the devices.

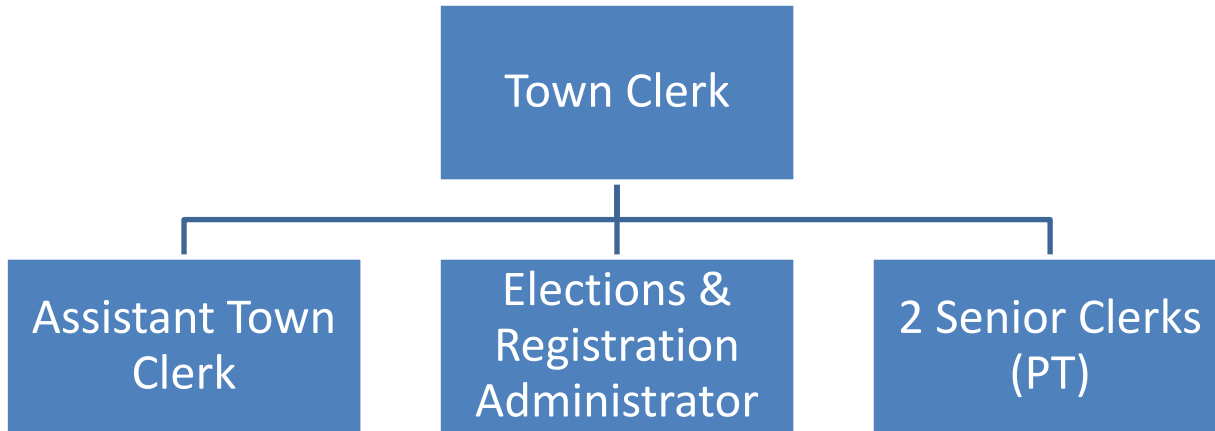
The FY23 Operating Budget includes the following variances from FY22.

- Due to COVID-19 and special legislation, the State allowed the use of Early Voting by Mail. This new method of voting resulted in a significant increase in voter turn-out, postage and personnel. Wellesley saw an increase in Vote by Mail from 1300 ballots mailed in 2016 (Absentee) to 13,000 ballots mailed in 2020 (Early Voting by Mail). Voting by Mail is expected to extend through FY22. The budget reflects additional postage and personnel expenses to support Voting by Mail.
- We expect to have 4 elections in FY23 versus 2 in FY22.



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<b>PERMANENT STAFFING (FTEs)</b>	<b>FY19 Actual</b>	<b>FY20 Actual</b>	<b>FY21 Actual</b>	<b>FY22 Budget</b>	<b>FY23 Request</b>
Position Titles:					
Town Clerk	1	1	1	1	1
Assistant Town Clerk	1	1	1	1	1
Elections & Reg. Administrator	1	1	1	1	1
Clerk/Voter Registration	0	0	0	0.5	0.5
Clerk	<u>0.45</u>	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>	<u>0.5</u>
<b>Total Number of Positions</b>	<b>3.5</b>	<b>3.5</b>	<b>3.5</b>	<b>4.0</b>	<b>4.0</b>



Town of *Wellesley*

FY2023 Budget Request

Office of the Town Clerk: Mission, Services & Priorities

Town Clerk FY23 Operating Budget Request									
Org	Object	Account # 01-161 Account Title	FY19 Actual	FY20 Actual	FY21 Actual	FY22 Budget	FY23 Request	\$ Variance FY22-23	% Variance FY22-23
<b>PERSONAL SERVICES</b>									
01161100	511010	Senior Administrator	\$ 91,423	\$ 93,968	\$ 95,950	\$ 102,392	\$ 102,392	\$ 0	0.00%
01161100	511220	Other Professionals	49,508	55,155	59,732	58,464	58,464	\$ -	0.00%
01161100	511225	Board of Registrars	2,600	2,300	2,600	2,300	2,900	\$ 600	26.08%
01161100	511370	Clerical	71,950	74,922	71,566	106,722	122,628	\$ 15,906	14.90%
01161100	512010	Pages/Poll Workers	37,168	21,524	34,872	35,100	72,420	\$ 37,320	106.32%
01161100	512050	Custodians/Laborers	1,337	7,164	9,340	5,000	10,000	\$ 5,000	100.00%
01161100	513160	Other Overtime	1,237	1,371	12,516	3,000	6,000	\$ 3,000	100.00%
01161100	515050	Longevity	600	600	600	600	600	\$ -	0.00%
<b>PERSONAL SERVICES SUBTOTAL</b>			<b>255,822</b>	<b>257,004</b>	<b>287,176</b>	<b>313,578</b>	<b>375,405</b>	<b>61,827</b>	<b>19.72%</b>
<b>EXPENSES</b>									
01161200	517020	Medical Checkup	-	-	-	65	65	\$ -	0.00%
01161200	517030	Meal Allowances	1,329	756	847	2,250	2,250	\$ -	0.00%
01161200	524030	Equipment Maintenance	9,982	8,032	13,141	12,400	18,700	\$ 6,300	50.81%
01161200	534010	Postage	8,859	11,706	6,365	17,750	26,500	\$ 8,750	49.30%
01161200	534030	Advertising-General	68	58	136	150	150	\$ -	0.00%
01161200	534040	Printing & Mailing Expense	9,410	15,239	15,303	20,700	26,000	\$ 5,300	25.60%
01161200	538020	Book Binding Services-see Obj 5	-	1,269	-	2,750	2,750	\$ -	0.00%
01161200	538050	Deliveries	-	-	-	150	150	\$ -	0.00%
01161200	538090	Other Purchased Services	850	2,252	590	1,550	1,550	\$ -	0.00%
01161200	542010	Office Supplies	3,267	643	3,578	3,300	3,500	\$ 200	6.06%
01161200	542040	Paper & Stationary	330	419	503	500	500	\$ -	0.00%
01161200	542090	Other Supplies - Dog Tags	1,922	1,203	1,175	1,200	1,200	\$ -	0.00%
01161200	571010	Travel-Mileage	232	80	-	250	250	\$ -	0.00%
01161200	571110	Conf/Meetings-Administrators	482	413	40	750	750	\$ -	0.00%
01161200	573010	Dues-Administrators	175	150	150	175	175	\$ -	0.00%
01161200	574120	Public Employee Bond	100	100	100	100	100	\$ -	0.00%
01161200	583053	Equipment Replacement	1,577	-	953	-	-	\$ -	0.00%
01161200	527090	Other Rentals/Leases	-	-	-	15,000	-	\$ (15,000)	-100.00%
<b>EXPENSE SUBTOTAL</b>			<b>38,583</b>	<b>42,320</b>	<b>42,880</b>	<b>79,040</b>	<b>84,590</b>	<b>5,550</b>	<b>7.02%</b>
	570000	Other Charges & Expenses	-	2,219				\$ -	0.00%
<b>DEPARTMENT TOTAL</b>			<b>\$ 294,405</b>	<b>\$ 299,325</b>	<b>\$ 330,057</b>	<b>\$ 392,618</b>	<b>\$ 459,995</b>	<b>67,377</b>	<b>17.16%</b>



## Town of *Wellesley*

### FY2023 Budget Request

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

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#### DEPARTMENT MISSION:

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

#### MAJOR AREAS OF RESPONSIBILITY:

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

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



## Town of *Wellesley*

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

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



## Town of *Wellesley*

### FY2023 Budget Request

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

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

#### PROGRAM OBJECTIVES:

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

#### DEPARTMENT PRIORITIES:

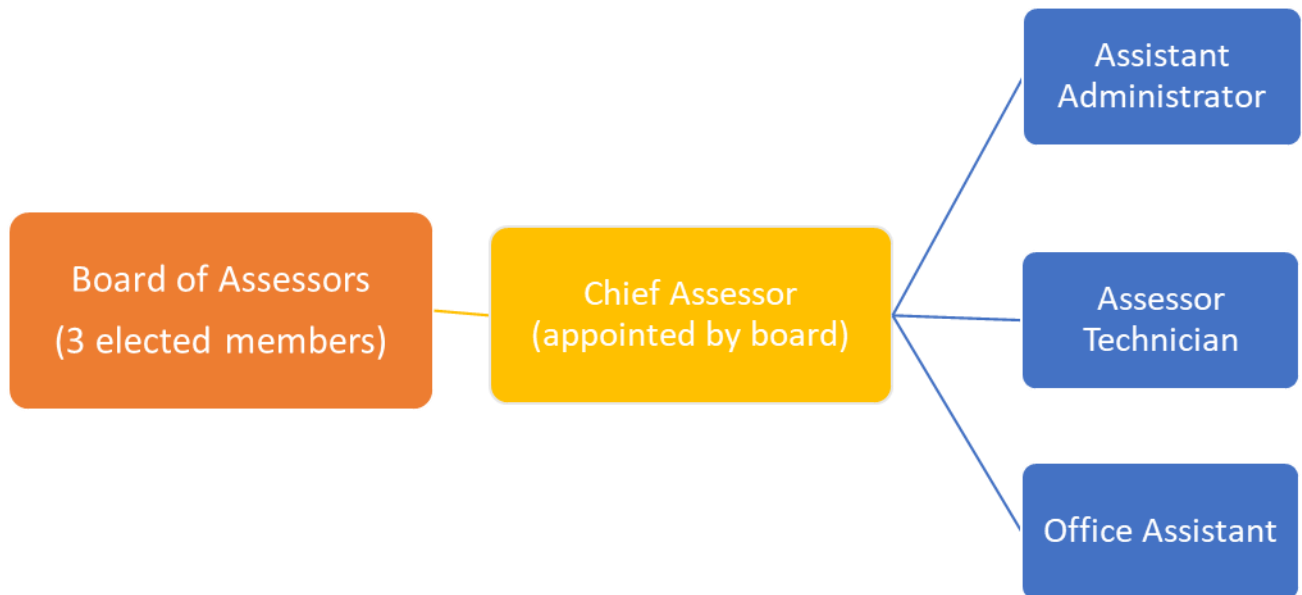
Our priority has always been to produce fair and equitably assessed values for timely tax bills and to instill taxpayer confidence. Failure to comply with Massachusetts’s property tax laws or to issue tax bills by the statutory deadlines may jeopardize the town’s cash flow and possible bond rating.



Town of *Wellesley*

FY2023 Budget Request

Board of Assessors Operating Request: Mission, Services & Priorities



PERMANENT STAFFING (FTEs)	<u>FY19 Actual</u>	<u>FY20 Actual</u>	<u>FY21 Actual</u>	<u>FY22 Budget</u>	<u>FY23 Request</u>
Position Titles:					
Chief Assessor	1.0	1.0	1.0	1.0	1.0
Assistant Administrator	1.0	1.0	1.0	1.0	1.0
Principal Assessor	1.0	1.0	1.0	1.0	1.0
Secretary/Technical Assistant	1.0	1.0	1.0	1.0	1.0
Part-time (Temporary & clerk)	0.3	0.3	0.3	0.3	0.3
<b>Total Number of Positions</b>	<b>4.3</b>	<b>4.3</b>	<b>4.3</b>	<b>4.3</b>	<b>4.3</b>





Town of *Wellesley*

FY2023 Budget Request

Board of Assessors Operating Request: Mission, Services & Priorities

Assessor Department FY23 Operating Budget Request									
Org	Object	Account # 01-141 Account Title	FY19 Actual	FY20 Actual	FY21 Actual	FY22 Budget	FY23 Request	\$ Variance FY22-23	% Variance FY22-23
<b>PERSONAL SERVICES</b>									
01141100	511010	Senior Administrator	\$ 106,836	\$ 109,811	\$ 111,580	\$ 113,533	113,532	\$ (0)	0.00%
01141100	511220	Other Professionals	57,362	58,959	60,202	132,277	133,691	\$ 1,414	1.07%
01141100	511370	Support Staff	108,110	114,778	125,834	61,644	61,893	\$ 249	0.40%
01141100	512290	Part-time / Temporary / Seasonal Help	3,788	2,075	3,728	5,725	5,725	\$ -	0.00%
01141100	513120	Longevity	-	-	-	-	-	\$ -	0.00%
			<b>276,097</b>	<b>285,623</b>	<b>301,344</b>	<b>313,178</b>	<b>314,841</b>	<b>\$ 1,662</b>	<b>0.53%</b>
<b>EXPENSES</b>									
01141200	524030	Equipment Maint.	-	198	152	\$ 200	200	\$ -	0.00%
01141200	530130	Legal Services-Special Counsel	-	-	-	\$ -	-	\$ -	0.00%
01141200	530500	Training & Development	1,075	410	1,285	\$ 1,500	1,500	\$ -	0.00%
01141200	530600	Appraisals and Surveys	53,000	75,300	69,500	\$ 55,125	61,000	\$ 5,875	10.66%
01141200	530600	Appraisals and Surveys	-	-	-	\$ 6,500	6,500	\$ -	0.00%
01141200	530800	Computer Software Services	7,000	6,000	7,500	\$ 7,000	7,000	\$ -	0.00%
01141200	534010	Postage	1,304	1,042	1,042	\$ 2,200	2,200	\$ -	0.00%
01141200	534030	Advertising	-	-	51	\$ -	-	\$ -	0.00%
01141200	534040	Printing & Mailing Expense	82	92	301	\$ 2,000	2,000	\$ -	0.00%
01141200	534060	Photocopying	-	1,211	-	\$ -	-	\$ -	0.00%
01141200	538010	Deed/Abstract Copies	304	228	640	\$ 700	700	\$ -	0.00%
01141200	542010	Office Supplies	1,310	1,619	1,326	\$ 1,500	1,500	\$ -	0.00%
01141200	553060	Computer Supplies	1,387	443	204	\$ 2,000	2,000	\$ -	0.00%
01141200	571010	Travel-Mileage	2,444	1,594	1,549	\$ 3,000	3,000	\$ -	0.00%
01141200	571110	Conf/Meetings-Administrators	559	1,339	210	\$ 1,500	1,500	\$ -	0.00%
01141200	573010	Dues-Administrators	1,675	1,790	1,555	\$ 1,800	1,800	\$ -	0.00%
			<b>70,140</b>	<b>91,265</b>	<b>85,314</b>	<b>85,025</b>	<b>90,900</b>	<b>5,875</b>	<b>6.91%</b>
	570000	Other Charges & Expenses	-	154	-	-	-	-	0.00%
			<b>\$ 346,237</b>	<b>\$ 376,888</b>	<b>\$ 386,658</b>	<b>\$ 398,203</b>	<b>\$ 405,741</b>	<b>\$ 7,537</b>	<b>1.89%</b>



## Town of *Wellesley*

### FY2023 Budget Request

### Planning Board Operating Narrative: Mission, Services & Priorities

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#### MISSION AND DUTIES

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

The role of the Planning Board is to make short- and long-term decisions related to land use in the Town of Wellesley. The Planning Board seeks to realize the vision of Wellesley residents for their community through the judicious use of municipal planning and project review. Planning is proposing 11 articles for consideration at the 2022 Annual Town Meeting.

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

The activities and duties of the Planning Board reflect the size and complexity of the Town of Wellesley. Wellesley is a desirable community in part because of the planning, both by private parties and the Town, that has shaped the Town. The latest assessed value of properties in the Town is over \$13,000,000,000. Providing for the continued use and redevelopment of this property base is essential to the Town and the quality of life for its residents. At the same time, the Town is built-out, so all new development requires further attention in shaping the bylaws and issuing permits for projects.

#### CLIMATE ACTION

Planning considers protection of the environment and promotion of sustainable development one of its key responsibilities. In October 2020 Planning proposed and Town Meeting approved significant amendments to the Zoning Bylaw regarding Tree Protection, Natural Resource Protection, and Drainage. The articles for the Annual Town Meeting include additional articles to incorporate sustainable construction and reductions in energy use into the Zoning Bylaw for consideration in FY22. Preservation of structures and landscapes and preventing adverse impacts such as increased runoff are major factors in its permitting activities, including Large House Review and its

support of the Historical Commission and the Historic District Commission. Planning works extensively with all Town departments, boards, and commissions in developing and pursuing these actions.

## PLANNING DEPARTMENT

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

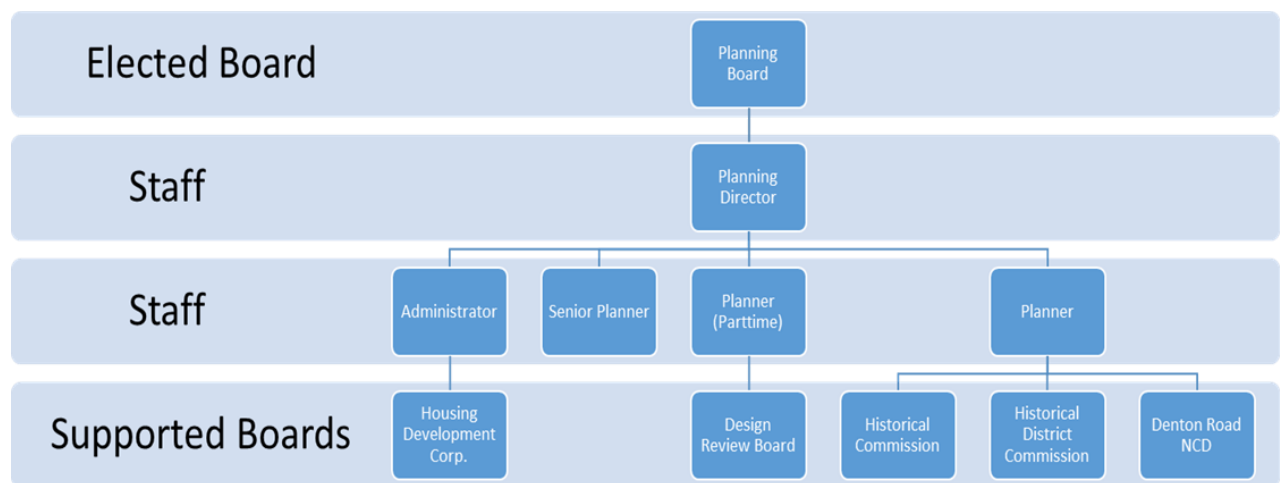
The Planning Department currently is budgeted five staff members: the Planning Director, the Senior Planner, one full-time Planner, one part-time Planner, and a part-time Department Administrator. As described below, the FY23 Budget seeks to increase these staffing levels.

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 Comprehensive Permits under MGL c. 40B issued by the ZBA. The Department has frequent interaction with the Building Department and the Zoning Enforcement Officer on questions about the Zoning Bylaws.

The Planning Board is also involved with the review of many projects of all sizes throughout the Town. During FY21, the Planning Department staff prepared for and attended a total of eighty - five (85) meetings of the Planning Board, Design Review Board, Historical Commission, Historic District Commission, and Denton Road Neighborhood Conservation District Commission. Additionally, staff attended sessions of Town Meeting, Special Town Meeting, meetings of the Board of Selectmen and Zoning Board of Appeals, and meetings associated with special projects, such as the Mobility Committee and the Housing Committee, Design Review Board Guidelines and Historic Preservation Design Guidelines.

During the same period, the Planning Department staff processed eighty-seven (87) new applications for the Planning Board, Design Review Board, and Historic District Commission, Denton Road Neighborhood Conservation District, and applications for over 100 properties under the Town's Historical Preservation Demolition Review Bylaw. In addition, the Planning Board reviewed and made recommendations to the Zoning Board of Appeals for Planning Board for over 100 applications made to the Zoning Board of Appeals. During FY22 the Planning Board and the Planning Department have continued to work at these levels and expect to continue at the same or increased levels during FY23.

With the volume of matters coming before the Planning Board and other supported boards, the increased complexity of these matters, preparing for and following up on many evening meetings, and on-going staffing issues, the Planning Department has been challenged, and occasionally has failed, to provide timely service to residents and businesses and to pursue the objectives of the Unified Plan despite providing many more hours of service than required by their positions. The Planning Board feels the staffing and outside support increases in the budget are essential to being able to provide expected levels of service, achieve the objectives of the Unified Plan, and respond to ever-rapidly evolving issues affecting residents and businesses in the Town. Over the next year, the Planning Board will also be evaluating whether further increases in Department Staff are necessary.



## PLANNING DIRECTOR

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

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

## SENIOR PLANNER

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

## PLANNERS

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

The Planners provide staff support to the Design Review Board, the Historic District Commission, the Historical Commission, and the Denton Road Neighborhood Conservation District Commission.

## 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.

The Planning Department also engages the services of an independent contractor to prepare minutes of the meetings of the Planning Board, the Design Review Board, the Historic District Commission, and the Historical Commission.

## BUDGET OVERVIEW

The Planning Department's operating budget reflects an overall year on year increase of 28.07% consisting of an increase in Personal Service costs of \$74,373 or 23.52% and an increase in Expenses of \$27,900 or 58.0%.

The Personal Services cost increases are driven by an increase in staffing levels of .5 FTE by changing an existing half-time Planner to a full-time position. The budget includes an additional \$33,744.50 for salary and \$20,000 for benefit costs for this change to a full-time position.

The increase in Expenses result from increase of \$25,000 in the budget for outside consulting services. This increase will double this budget item from the current \$25,000 to \$50,000. This expense item has been static for the last ten years, being \$24,000 in FY12 and increased to \$25,000 in FY17. Planning believes that an increase is necessary to provide adequate funds to hire outside consultants to assist Planning in important area studies.

There is also an increase of \$2,900 to cover increased advertising and postage costs resulting from increased activity levels and increased rates.

<b>PERMANENT STAFFING (FTEs)</b>	<b>FY19 Actual</b>	<b>FY20 Actual</b>	<b>FY21 Actual</b>	<b>FY22 Budget</b>	<b>FY23 Request</b>
Position Titles:					
Director	1.0	1.0	1.0	1.0	1.0
Senior Planner	1.0	1.0	1.0	1.0	1.0
Planner	1.5	1.5	1.5	1.5	2.0
Secretary/Technical Assistant	<u>0.6</u>	<u>0.6</u>	<u>0.6</u>	<u>0.6</u>	<u>0.6</u>
<b>Total Number of Positions</b>	<b>4.1</b>	<b>4.1</b>	<b>4.1</b>	<b>4.1</b>	<b>4.6</b>

**Planning Department FY23 Operating Budget Request**

Org	Object	Account # 01-175 Account Title	Explanation	FY19 Actual	FY20 Actual	FY21 Actual	FY22 Budget	FY23 Request	\$ Variance FY22-23	% Variance FY22-23	
<b>PERSONAL SERVICES</b>											
01175100	511010	Senior Administrator	Planning Director	\$ 86,562	\$ 83,947	\$ 94,422	\$ 96,337	\$ 98,746	\$ 2,409	2.50%	
01175100	511220	Other Professionals	Other Professionals	117,087	55,637	67,754	178,458	224,917	\$ 46,459	26.03%	
01175100	511370	Support Staff	Support Staff	23,217	26,611	41,572	33,930	35,235	\$ 1,305	3.85%	
01175100	512290	Other Support Staff	Other Support Staff	1,127	7,015	7,786	7,500	11,700	\$ 4,200	56.00%	
<b>PERSONAL SERVICES SUBTOTAL</b>				<b>PERSONAL SERVICES SUBTOTAL</b>	<b>227,993</b>	<b>173,209</b>	<b>211,534</b>	<b>316,225</b>	<b>370,597</b>	<b>\$ 54,373</b>	<b>17.19%</b>
				Benefits				20,000			
<b>PERSONAL SERVICES SUBTOTAL + BENEFITS</b>				<b>PERSONAL SERVICES SUBTOTAL + BENEFITS</b>	<b>227,993</b>	<b>173,209</b>	<b>211,534</b>	<b>316,225</b>	<b>390,597</b>	<b>\$ 74,373</b>	<b>23.52%</b>
<b>EXPENSES</b>											
01175200	517010	Medical Expenses		-		-			\$ -	0.00%	
01175200	517040	Tuition Reimbursement	For job related academic courses.	-		-	-	-	\$ -	0.00%	
01175200	530900	Other Professional Services <sup>1</sup>	For retaining professional and consultant services	3,731	1,859	-	25,000	50,000	\$ 25,000	100.00%	
01175200	534010	Postage	For all mailing.	2,924	1,617	2,056	3,600	4,000	\$ 400	11.11%	
01175200	534030	Advertising - General	For all newspaper public notice of meetings and public hearings.	1,283	1,037	4,293	2,500	5,000	\$ 2,500	100.00%	
01175200	542010	General Office Supplies + Furniture	For all other office supplies needed by the Planning Department.	1,799	2,705	1,328	2,500	2,500	\$ -	0.00%	
		Technology	Unique Planning Software and staff cell phones			-	4,000	4,000	\$ -	0.00%	
01175200	571010	Travel - Mileage	For mileage reimbursement for use of private vehicles by Planning Department staff for subdivision, site inspections, regional meetings.	57	-	20	500	500	\$ -	0.00%	
01175200	571110	Prof. Development	For attendance at conferences and seminars.	955	864	403	5,000	5,000	\$ -	0.00%	
01175200	573010	Dues and Publications	For professional assoc. membership and Town's dues to MetroWest Regional Collaborative.	6,092	5,305	5,427	5,000	5,000	\$ -	0.00%	
01175200	578090	Unclassified Expenses		-		-			\$ -	0.00%	
01175200	583120	Office Machines Replacement		-	380	-	-	-	\$ -	0.00%	
<b>EXPENSE SUBTOTAL</b>				<b>EXPENSE SUBTOTAL</b>	<b>16,841</b>	<b>13,766</b>	<b>13,527</b>	<b>48,100</b>	<b>76,000</b>	<b>\$ 27,900</b>	<b>58.00%</b>
		Other Charges & Expenses	fiscal year	675	-				\$ -	0.00%	
<b>DEPARTMENT TOTAL</b>				<b>DEPARTMENT TOTAL</b>	<b>\$ 245,508</b>	<b>\$ 186,975</b>	<b>\$ 225,061</b>	<b>\$ 364,325</b>	<b>\$ 466,597</b>	<b>\$ 102,273</b>	<b>28.07%</b>



**Town of *Wellesley***  
**FY2023 Budget Request**  
**Advisory Committee: Mission, Services & Priorities**

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**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 FY22 no funds have been withdrawn from the Advisory Reserve Fund.

<b><u>Advisory Committee Operating Request</u></b>									
<b>DEPARTMENT EXPENDITURES</b>			<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>\$ Variance</b>	<b>% Variance</b>
Org	Obj	Description	<u>Actual</u>	<u>Actual</u>	<u>Actual</u>	<u>Budget</u>	<u>Request</u>	<u>FY22-23</u>	<u>FY22-23</u>
01131100	511370	Clerical	9,131	6,092	7,170	10,000	12,000	2,000	20.00%
		<b>Subtotal, Personal Services</b>	<b>\$ 9,131</b>	<b>\$ 6,092</b>	<b>\$ 7,170</b>	<b>\$ 10,000</b>	<b>\$ 12,000</b>	<b>\$ 2,000</b>	<b>20.00%</b>
01131200	534010	Postage	5,395	4,301	5,456	7,000	7,000	-	0.00%
01131200	534030	Advertising - General	169	189	79	200	200	-	0.00%
01131200	534040	Printing and Mailing	9,720	7,136	6,683	10,500	9,000	(1,500)	-14.29%
01131200	542010	Office Supplies	1,223	395	30	1,450	1,000	(450)	-31.03%
01131200	571140	Conf/Mtgs - Comm/Board Members	180	-	-	-	-	-	0.00%
01131200	573040	Dues - Committee/Board Members	345	345	345	350	350	-	0.00%
		<b>Subtotal, Expenses</b>	<b>\$ 17,033</b>	<b>\$ 12,365</b>	<b>\$ 12,593</b>	<b>\$ 19,500</b>	<b>\$ 17,550</b>	<b>\$ (1,950)</b>	<b>-10.00%</b>
		<b>Total</b>	<b>\$ 26,164</b>	<b>\$ 18,457</b>	<b>\$ 19,764</b>	<b>\$ 29,500</b>	<b>\$ 29,550</b>	<b>\$ 50</b>	<b>0.17%</b>
01132200	579000	Advisory Reserve Fund	<b>\$ 145,000</b>	<b>\$ 175,000</b>	<b>\$ 175,000</b>	<b>\$ 175,000</b>	<b>\$ 175,000</b>	<b>\$ -</b>	<b>0.00%</b>





**Town of *Wellesley***  
**FY2023 Budget Request**  
**Human Resources: Mission, Services & Priorities**

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**MISSION**

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

**HUMAN RESOURCES BOARD AND DEPARTMENT**

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

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

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

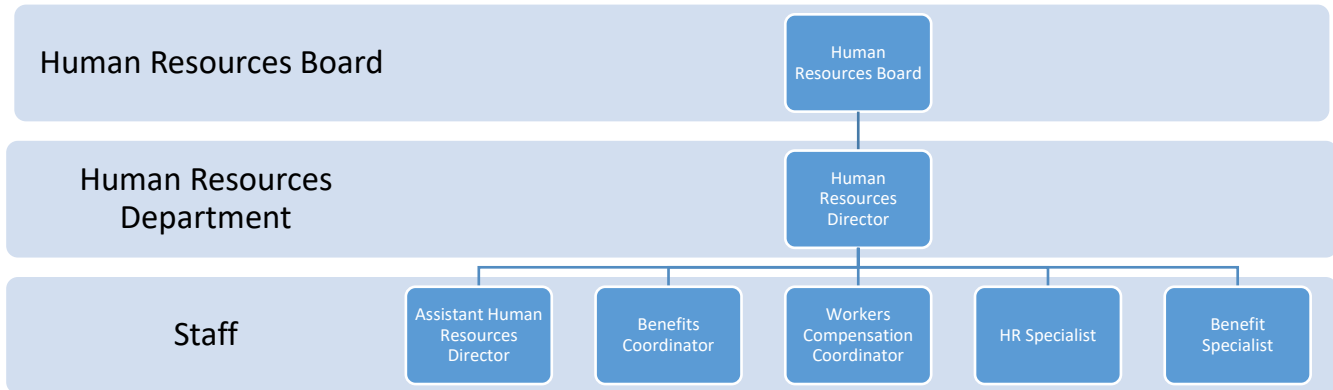
The Human Resources Department assists Town departments in the assignment of work tasks by formulating job descriptions and ranking these descriptions based on several factors, including level of responsibility, education and know-how, thereby establishing and maintaining a job classification system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



Town of *Wellesley*  
FY2023 Budget Request  
Human Resources: Mission, Services & Priorities

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FY23 Goals



The goals for FY23 are expected to continue to focus on improving the employee experience, updating policies and procedures, continue to promote professional development and ensure that the Town's salary structure remains competitive:

*Diversity, Equity and Inclusion*

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

*COVID-19*

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

*Update Policies and Procedures*

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

Operating Budget Summary

The Human Resource Department's budget is considered to be at a base level and is at the recommended guideline with an **overall year-to-year increase of 2.75%**. There are no additional positions or new line items included this



Town of *Wellesley*  
**FY2023 Budget Request**  
**Human Resources: Mission, Services & Priorities**

year. The increase includes an assumed salary increase of 2.5% for 50/60 Series staff and 2.75% for 40 Series staff. Included in the budget is a reclassification of the Administrative Assistant to the HR Specialist and Department Assistant to Benefits Specialist.

PERMANENT STAFFING (FTEs)	FY19 Actual	FY20 Actual	FY21 Actual	FY22 Budget	FY23 Request
Position Titles:					
Director	1.0	1.0	1.0	1.0	
Assistant Human Resources	1.0	1.0	1.0	1.0	
Benefits Coordinator	1.0	1.0	1.0	1.0	
Administrative Assistant	1.0	1.0	1.0	1.0	
Workers Comp Coordinator*	0.5	1.0	1.0	1.0	
Department Assistant**	0.5	0.5	0.5	0.5	
<b>Total Number of Positions</b>	<b>5.0</b>	<b>5.5</b>	<b>5.5</b>	<b>5.5</b>	<b>0.0</b>

\* Benefit Eligible effective FY2020

\*\* Shared with Retirement System. Benefits paid by Retirement

Human Resources Department FY23 Operating Budget Request										
Org	Object	Account # 01-152 Account Title	Explanation	FY19 Actual	FY20 Actual	FY21 Actual	FY22 Budget	FY23 Request	\$ Variance FY22-23	% Variance FY22-23
<b>PERSONAL SERVICES</b>										
01152100	511010	Senior Administrator	Director of Human Resources	\$ 122,103	\$ 125,503	\$ 127,337	\$ 129,884	\$ 129,884	\$ (0)	0.00%
01152100	511220	Other Professionals	FTE) & HR Generalist (1.0 FTE)	138,059	141,903	149,578	152,525	152,525	\$ 0	0.00%
01152100	511370	Clerical	Administrative Assistant	54,021	55,534	56,692	57,826	59,629	\$ 1,803	3.12%
01152100	512590	Recognition Award Payment		1,253					\$ -	0.00%
01152100	513120	Scheduled Overtime							\$ -	0.00%
01152100	511420	Workers Comp		34,128	43,760	41,151	44,683	44,683	\$ (0)	0.00%
01152100	511425	Health Insurance		14,803	16,900	16,302	21,696	26,880	\$ 5,185	23.90%
<b>PERSONAL SERVICES SUBTOTAL</b>				<b>364,367</b>	<b>383,600</b>	<b>391,060</b>	<b>406,613</b>	<b>413,600</b>	<b>\$ 6,987</b>	<b>1.72%</b>
<b>EXPENSES</b>										
01152200	517020	Medical Check-up	New employee, DOT, return to work	9,160	7,488	7,635	\$ 12,750	\$ 12,500	\$ (250)	-1.96%
01152200	530500	Training and Development	Professional development, seminars, classes	1,084	2,832	840	4,000	3,500	\$ 4,000	100.00%
01152200	534010	Postage	Mailings to applicants, active employees and retirees, business correspondence	713	559	406	1,500	1,250	\$ 1,000	66.67%
01152200	534035	Advertising-Employment	Costs for advertisements, verification of previous employment, education, driver	15,025	15,546	5,675	17,500	12,500	\$ (5,000)	-28.57%
01152200	542010	Office Supplies	General office supplies	1,140	458	877	2,500	2,000	\$ 2,000	80.00%
01152200	542090	Other General Supplies	Office improvements, furniture, storage, files, cabinets	488	2,088	737	1,500	1,250	\$ 1,250	83.33%
01152200	543040	Equipment M&R Supplies	Copier, toner and other office machines	-	512	16	1,000	800	\$ 1,000	100.00%
01152200	571010	Travel - Mileage	Reimbursement for department employees' work related travel, mileage, tolls, public	42	381	-	400	400	\$ 400	100.00%
01152200	571510	Town Training & Development	Professional development opportunities for Town employees	4,837	5,639	2,342	6,500	5,000	\$ 5,500	84.62%
01152200	573010	Dues-Administrators and Professional Staff	Professional organizations: Mass. Municipal Personnel Assoc., Soc. for Human	250	275	275	750	750	\$ 750	100.00%
<b>EXPENSE SUBTOTAL</b>				<b>32,739</b>	<b>35,779</b>	<b>18,802</b>	<b>48,400</b>	<b>39,950</b>	<b>\$ (8,450)</b>	<b>-17.46%</b>
	570000	Other Charges/Expenses		455	250				\$ -	0.00%
<b>DEPARTMENT TOTAL</b>				<b>\$ 397,106</b>	<b>\$ 419,379</b>	<b>\$ 409,863</b>	<b>\$ 455,013</b>	<b>\$ 453,550</b>	<b>\$ (1,463)</b>	<b>-0.32%</b>