

REPORT
OF THE
HOLLISTON GOVERNMENT STUDY COMMITTEE
TO THE
HOLLISTON BOARD OF SELECTMEN
NOVEMBER 7, 1994

On Monday, November 1, 1993, the Board of Selectmen appointed Walter McClennen, Patrick Shea, Susan Temper, Patricia Thatcher and Samuel Tyler to the Government Study Committee (GSC) with Mr. Tyler designated as Chairman and charged the Committee to review the current town government organization and operations and to recommend changes to improve the efficiency and effectiveness of the delivery of town services in Holliston. Following a four and one-half month study of the organization and operations of the Town of Holliston, the Government Study Committee identified eleven different areas of concern from which one predominate issue emerged.

From our study, it was clear that the primary need of the Town of Holliston was to strengthen its management, financial and personnel administrative capacity, on a day-to-day basis, to meet the challenges and needs of providing general government services in the 1990s. The Town's planning capacity also needed to be strengthened. Local government is becoming increasingly complex due to state and federal policies, regulations and mandates, limited resources and less local discretionary funds with limits on property taxes and the earmarking of state local aid increases for specific purposes. These changes require the Town to strengthen its management capacity and administrative effectiveness if it is to maintain control over its operations. For that reason, the GSC, at this time, makes a single recommendation for the Town of Holliston to establish a position of Town Administrator. This position would have greater daily administrative authority than the current position of Executive Secretary, but would not in any way limit the policy responsibilities of the Board of Selectmen. The additional administrative authority granted to the Town Administrator would be exercised subject to final approval by the Board of Selectmen, keeping elected officials accountable for town policy. For example, the Selectmen's weekly review and approval of the warrant of all payrolls and bills payable are not changed by this act.

In developing our recommendation, the GSC tried to balance the Town's history of volunteer-citizen involvement with the employment and social changes in our society and the increased complexity and demands of government services and has recommended the creation of a Town Administrator position with limited appointment powers. Much of our discussion centered on trying to balance what we felt the Town required with the degree that change would be accepted. One of the GSC's most difficult tasks in preparing this proposal was to work with existing special acts creating selectmen-administrator forms of government in other towns and revising the language to reduce the authority granted the administrator. The new administrative responsibilities recommended for the Town Administrator actually are not extensive. The changes recommended, in large part, codify services and duties currently

being performed by the Executive Secretary. The new responsibilities proposed for the Town Administrator should be considered the minimum of what the Town of Holliston requires at this time to adequately provide basic services efficiently within its limited resources .

Approaches To Change

The GSC investigated the reform approaches to both legislative acts and charter commissions. Through the series of 20 meetings with town officials and discussions with former officials and interested citizens, the GSC discerned a strong level of respect for the "gradualist" approach to change in town government operations. The history of government change in Holliston is one of appointed committees which had recommended managerial and structural changes over the last 15 years. Town Meeting articles traditionally have served as the democratic foundation for recommending improvements in Holliston. Most participants noted that at the present time the need for administrative and managerial change was clear. However, they also believed that the government structure was not "broken" so a major charter commission overhaul would be either necessary or desirable at this time. It was pointed out that the total acceptance or rejection procedure of a major restructuring which can come out of a charter commission had significant disadvantages as a way to proceed in Holliston.

After reviewing the procedures for a charter commission and hearing no recommendation from any of those interviewed that a major re-arrangement of Holliston's government structure was either necessary or desirable, the GSC decided not to push for a charter commission approach to change. Rather, the GSC decided that more modest structural improvements through a special act and By-Law changes approved in the Annual Town Meeting would be more appropriate. [open town meeting most democratic and fincom report gets recommendations to each household and voters have chance to fully discuss issue before vote.]

Chronology of Town Government Structural Change

- 1970 In 1970 the Holliston Jaycees prepared a comprehensive Town Management Study. The study recommended the creation of a Charter Commission with the expectation that it would recommend a new management structure for Holliston and the employment of professional management.
- 1973 Charter Commission vote in Town Election defeated

Yes	818	43.3%	48.1%
No	881	46.6	<u>51.9</u>
Blks	<u>192</u>	<u>10.1</u>	100.0%
	1,891	100.0%	
- 1980 Finance Committee contracted with Massachusetts Municipal Association to undertake a Management Capacity Study. Report recommended the creation of a full-time Administrative Assistant position for the Board of Selectmen.
- 1982 Special Town Meeting on November 4, 1982, approved Article 2 which created the position of Administrative Assistant to Board of Selectmen.

- 1987 Board of Selectmen voted on May 11, 1987 to change title of Administrative Assistant position to Executive Secretary with no change in responsibilities and to enter into an employment agreement with the Executive Secretary.
- 1987 Annual Town Meeting in May, 1987 (Article 24) directed Board of Selectmen to appoint a Government Study Committee to study current government structure of Town and recommend alternatives. Committee submitted recommendations to expand responsibilities of Executive Secretary and create appointed positions of Treasurer and Accountant in report on March 14, 1988.
- 1987 Board of Selectmen, at request of Government Study Committee, requested the Commonwealth's Department of Revenue, Division of Local Services to analyze Holliston's financial management structure and recommend improvements. Report was presented in February, 1988 which recommended that the financial management responsibilities of the Executive Secretary be broadened.
- 1988 Annual Town Meeting on May 9, 1988 approved Articles 26 & 27 to strengthen administrative, operating and capital budget and coordinating responsibilities of the Executive Secretary's position and to establish appointed Treasurer and appointed Accountant positions. Legislation to implement both Articles was enacted as Chapter 99 of the Acts of 1988 on July 5, 1988.
- 1993 Board of Selectmen appointed Government Study Committee to analyze government structure and recommend improvements on October 1, 1993. GSC presented to the Board of Selectmen its recommendation to create a town administrator-selectmen form of government on April 4, 1994.
- 1994 Annual Town Meeting approved Article 10 authorizing a special act establishing the position of Town Administrator on May 9, 1994. Special Act (H5008) was enacted as Chapter 94 of the Acts of 1994 on August 16, 1994.

Holliston Government Structure

The first step taken by the GSC was to understand the overall town governmental structure and the relationship and responsibilities of the various town officials and boards. The review showed that Holliston places primary responsibility for the development of town policy and the supervision of the administration of town operations on a large number of part-time elected boards and offices. Coordination of policy and administration of town services is decentralized and occurs only through the personal cooperation of those equally independent boards and offices.

Town of Holliston places primary responsibility for development of town policy and supervision of town operations, excluding schools, on twelve (12) elected boards and offices, each of which is independent of the other by right of being elected by the voters.

The dispersion of general government management authority among twelve (12) different elected boards and offices creates problems of coordination of policy and administration and impedes public accountability.

Forty-three (43) elected officials, excluding the School Committee, serve on the 12 boards and offices. Each elected position is a part-time position, with the exception of the Town Clerk.

1.	Board of Selectmen	3
2.	Town Clerk	1
3.	Board of Assessors	3
4.	Water Commission	3
5.	Board of Health	3
6.	Library Trustees	6
7.	Park Commission	5
8.	Planning Board	5
9.	Tree Warden	1
10.	Housing Authority	5
11.	Moderator	1
12.	Finance Committee	7
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		43

The Board of Selectmen appoint forty-one (41) Appointed Boards and Offices

To understand the Town's current government structure, the GSC reviewed the "Table of Organization" produced by the 1987 Government Study Committee in its final report. The current GSC wanted to define clearly the elected, appointed and administrative relationships among the many town boards, authorities, commissions and committees. To this end, an organizational flow chart was developed which includes the relationship of the registered voters and the Town Meeting to the executive and legislative functions of the Town. (See Appendix A.)

This schematic was developed to clarify for the citizens the complexity of Holliston's town government. Due to the major budgetary and payroll impact of the School Department, the GSC chose to set apart the School Committee and administration as a separate area of town government. This flow chart clearly demonstrates the administrative inefficiency of the current government structure. This, in turn, helped steer the GSC in the direction of recommending the creation of the Town Administrator position with expanded daily administrative, management and coordinating authority.

The GSC developed a second flow chart which focused on the proposal to authorize the Town Administrator to appoint four department heads. See Appendix B, Proposed Administrative Structure) This second chart also incorporates the GSC recommendation that the Town Administrator play a significantly stronger role in the supervision and coordination of the different officers, boards and committees in Holliston.

**TOWN OF HOLLISTON
Proposed Fiscal 1995 Budget**

Selectmen Operations	\$5,127,271	25.6%
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Other General Gov't. Operations	\$1,345,325	6.7%
School Operations Keefe Tech	\$13,336,901 250,521	66.5%
	<u>\$13,587,422</u>	67.7%
Grand Total	<u>\$20,060,018</u>	<u>100.0%</u>

Articles	Selectmen	423,526
	Other	425,487
		<u>\$849,013</u>

Operating Budget	\$20,060,018
Articles	849,013
	<u>\$20,909,031</u>

Interviews With Town Officials

The GSC met with over twenty (20) town officials during a period from November 10, 1993, through the public hearing on March 29, 1994. At these meetings, the GSC heard the perceptions of those officials concerning the current administration and operation of town services and solicited recommendations for improvement. These meetings were helpful in understanding the specific problems town officials face in the day to day operations of town government. The issues raised at these meetings are characterized in eleven areas below.

1. Daily administration, planning and coordination of general government services
2. Personnel management
3. Financial Management Responsibilities

Many of the town employees and officials interviewed by the Government Study Committee commented on the need to further examine the financial management of the Town, especially if the role of Executive Secretary was to be changed. Several of those interviewed expressed

the desire to see better coordination and communication between those departments which are directly involved in the financial activities of the Town. One idea frequently suggested was to network the computer system within Town Hall, especially between the Treasurer, Accountant, Assessors Office and the Executive Secretary. This would allow for less fragmentation and greater access to standardized financial data. Should the Town move to a Town Administrator position with expanded responsibilities, the consensus was that the role of the Accountant would need to be enhanced and eventually changed to a Chief Financial Officer position.

Concern was expressed regarding the current roles of the Treasurer and Accountant and the fact they are sometimes called upon to "cover" for each other. Almost all interviewed agreed that a preferable arrangement was to have the Accountant, under the supervision of the Town Administrator, oversee the Treasurer. In addition, the Accountant should be given additional responsibilities of budget development and fiscal analysis. This information would be shared with the Accountant, Finance Committee and department heads for fiscal control as well as for budget development.

4. Centralized Purchasing

Centralized purchasing within town departments was almost unanimously supported by all those interviewed. Under the direction of the Town Administrator, department heads would identify needs and their purchase would be handled through a centralized process. In addition, non-educational school supplies could also be purchased with town department supplies whenever possible, creating further savings. The Superintendent of Schools reported that possibly some of the town purchasing might be able to be done through the TEC Collaborative, which currently is used by the school system for this purpose.

5. Centralized Cashier

Several of those officials and employees interviewed expressed interest in looking at the possibility of a centralized cashier. Most of the collection of fees is currently coordinated by the Treasurer's office. The Water Department currently still collects its own fees. Inclusion of this role by a centralized cashier might lead to better coordination and better utilization of staff resources.

6. Town Hall computer system

7. Inspectional Services

8. Public Works Department

9. Elected vs. appointed Board of Assessors

10. Elected vs. appointed Finance Committee

11. Frequency of turnover on boards and committees

The Board of Selectmen is the chief executive board of the Town and has general supervision over all matters not assigned by General Laws or town by-laws to other officers, boards, commissions or committees. Because of the importance and complexity of the Board's responsibilities, continuity of service is necessary for the efficient and proper execution of the Board's duties. However, the tenure of Holliston's Selectmen does not reflect that need. In the 16 years from 1978 to 1994, only three (3) of the eleven (11) different individuals who have been elected Selectman or 27% will have served two consecutive three-year terms. This assumes that Peter Barbieri will complete the remaining two years of his second term. Conversely, eight (8) of the eleven (11) or 73% served only one term of three years. Only one (1) of five (5) Selectmen initially elected since 1986 will serve two terms. Carol Dooling is not counted in this analysis since she is in her first term.

Name	First Term	Second Term	Third Term
George DeCristoforo	1976-1979	1982-1985	
Harold Noble	1977-1980	1980-1983	
Sam Carpinetti	1978-1981		
Jerry Adams	1979-1982		
Dan Miley	1981-1983	1983-1986	
Albeno Rossini	1981-1984		
Jenny McGee	1984-1987		
Mark Lipetz	1985-1988	1988-1991	1991*
Mary Greendale	1986-1989		
John Losch	1987-1990		
Walter Todd	1989-1992		
Peter Barbieri	1990-1993	1993-1996	
Bill Mayer	1991-1994**		
Carol Dooling	1992-1995		

* Mark Lipetz was elected to a third term in May, 1991 and died on May 28, 1991.

** Bill Mayer was elected in September, 1991.

Comparison With Other Towns

As part of our review, the GSC conducted a survey of the governing structures of other towns in Massachusetts. With the assistance of the Executive Office of Communities and Development, the GSC analyzed home rule charter provisions of other towns that adopted a selectman-administrator form of government over the past several years. Using the Massachusetts Acts and Resolves, the GSC reviewed special acts enacted over the past eight years that established different forms of government in Massachusetts towns and analyzed

several that created a town administrator. We also studied efforts undertaken by neighboring communities to change their government structure such as the creation of a town administrator by Sherborn in 1986, the establishment of a position of town manager by Ashland in 1988 through a charter commission and also using a charter commission, Bellingham's creation of a town administrator position in 1993. The GSC also noted Medway's effort to create a strong town administrator position in 1991. The GSC held discussions with appointed and elected officials in other towns that operate with town administrators.

From all that we have learned, it appears that in this local government environment, towns that are making changes in their government structure are increasingly establishing strong town administrators or town managers to provide efficient daily management of town operations, thus enabling the Board of Selectmen to focus on town policy matters.

Recommendation

Upon deliberation of these issues as they were raised in the meetings with Holliston town officials, our understanding of the changing environment of town government and our study of the organizational changes made in other towns in Massachusetts, the GSC concluded that the most critical issue facing the Town of Holliston, at this time, is the need to strengthen its general government operational and management capacity. The GSC recommends enhancing the responsibilities of the Executive Secretary and changing its title to Town Administrator. An outline of the recommendations follows. This summary describes the full duties of the Town Administrator and therefore will include those duties that currently are performed by the Executive Secretary. All references to the Town Administrator should be read as applying equally to males and females regardless of the gender or pronoun used.

Summary of Town Administrator Recommendation

Appointment and Qualifications

The Board of Selectmen, by a majority vote, would appoint the Town Administrator for an indefinite term and would fix his salary. The Selectmen could enter into a contract with the Town Administrator and his performance would be evaluated annually. The Town Administrator would not have to be a resident of the Town of Holliston. The Town Administrator would be appointed solely on the basis of executive and administrative qualifications.

Budget Responsibility

The duties proposed for the Town Administrator are consistent with the current authority of the Executive Secretary as established in the by-laws of the Town. Budget compilation responsibilities would enable the Finance Committee to focus on fiscal analysis, budget review and recommendations. The Town Administrator would be responsible for the preparation of the annual operating budget for all town departments under the jurisdiction of the Board of Selectmen. The budget format would be acceptable to the Finance Committee. The Town

Administrator would **compile** the annual operating budget and the annual capital improvements program based on information provided by each department and agency. The role of compiling a budget is a ministerial function to assist the Board of Selectmen and Finance Committee in their respective policy roles.

Appointing Authority

The Town Administrator would be given appointing authority over four permanent positions. In each case, the Board of Selectmen would have an opportunity to have the final decision over the appointment. The Town Administrator would be given authority to appoint the treasurer/collector, accountant, building inspector and senior center director. The treasurer/collector and accountant represent the financial team working with the Town Administrator and should be appointed directly by the Town Administrator. The building inspector and senior center director are the only two other full-time positions appointed by the Town Administrator. Appointment of the senior center director by the Town Administrator is recommended to provide a single supervisory official at Town Hall since the director must also work with a 13-member Council On Aging. Except for these four positions, the Board of Selectmen appoint all other heads of departments under their jurisdiction. The Board of Selectmen, within fifteen days of the appointment by the Town Administrator would have the opportunity to reject an appointment by a majority vote.

Heads of Departments under the jurisdiction of the Board of Selectmen would appoint employees and subordinates in their departments subject to approval of the Town Administrator. For all permanent employees, the Board of Selectmen would have the same authority to reject any appointment.

The Town Administrator would be responsible for the initial screening of all applicants and recommend to the Board of Selectmen finalists for the positions of Police Chief, Fire Chief and Highway Supervisor. The Board of Selectmen would have direct responsibility to appoint the three public safety related department heads, assisted in the screening by the Town Administrator.

Other Responsibilities

The description of the other responsibilities of the Town Administrator includes responsibilities that are currently performed by the Executive Secretary. The Town Administrator would be the chief administrative officer of the Town and would be responsible to the Board of Selectmen for the efficient administration, supervision and coordination of all matters that come under the jurisdiction of the Board. The Town Administrator would also coordinate all activities of town departments under the jurisdiction of the Board of Selectmen with the activities of departments under the control of officers, boards or commissions elected directly by the voters of the Town. This section clarifies the administrative role of the Town Administrator and adds a coordinating role to enhance coordination and communication among town departments.

Other duties include:

1. Administer the personnel system of the town, including but not limited to personnel policies and practices, rules and regulations, including provisions for an annual employee performance review, the personnel by-law and prepare the salary "classification plan" by-law amendments for consideration of town meeting if necessary. The personnel board would act as a final board of appeal for personnel decisions rendered by the town administrator. The town administrator would also be the selectmen's agent for collective bargaining.
2. Keep the Board of Selectmen and Finance Committee informed as to the financial condition and needs of the town and make recommendations as deemed necessary.
3. Responsible for the negotiations of all contracts and grants which the Board of Selectmen are authorized to enter into subject to approval and execution by the Board of Selectmen. This section would give the Town Administrator some added administrative responsibilities and allow for more timely action, but final approval for contracts and grants would rest with the Board of Selectmen.
4. Act as chief procurement officer for all departments under the jurisdiction of the Board of Selectmen. This section would give the Town Administrator the ability to improve coordination and cost-effectiveness of the departments' procurement practices.
5. Responsible for the repair and use of all town facilities and equipment and property under the jurisdiction of the Board. Maintain a full inventory of all town owned real and personal property. This responsibility would tie into the Town Administrator's requirement to prepare the annual capital improvement program for approval. The inventory of property has not been a high priority to date.
6. Review all current by-laws, regulations and policies that affect the departments and agencies under the jurisdiction of the Board of Selectmen and make recommendations for changes as he deems necessary. A periodic review would be beneficial and is not now required of the Executive Secretary.
7. With the assistance of the Accountant, keep the Board of Selectmen and Finance Committee informed as to the financial condition and needs of the town and make recommendations to the Board of Selectmen and Finance Committee as he deems necessary or expedient. This service is being provided now.
8. Recommend to the Board of Selectmen as he may deem necessary or expedient, consistent with the General Laws and town by-laws, action to reorganize, consolidate, create and abolish departments, boards or committees under the jurisdiction of the Board of Selectmen. This section allows the Town Administrator to suggest organizational changes to improve service efficiency subject to final authority of the elected Board.

A few sections describe ministerial duties of the Town Administrator that are similar to those performed by the Executive Secretary, such as seeing that laws or orders that require enforcement are executed, records of his office are kept, attending meetings of the Board of Selectmen and sessions of Town Meeting.

The final sections of the special act describe the process by which a vacancy of the Town Administrator is filled and the process for the removal of the Town Administrator.

Respectfully submitted,

Samuel R. Tyler, Chairman
Walter McClennen
Patrick W. Shea
Susan E. Temper
Patricia E. Thatcher