

RECOMMENDATIONS TO IMPROVE BELMONT'S FINANCES AND OPERATIONS

*Report from the
Structural Change Impact Group
to the Select Board*



Final Version: March 31, 2022

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EXECUTIVE SUMMARY

After a period of serious systemic budget deficits jeopardizing Belmont’s financial stability, the Select Board formed the Structural Change Impact Group (SCIG) to recommend both short- and long-term opportunities to put Belmont on a more sustainable financial footing.

The SCIG was charged with investigating and recommending changes which may impact the Town’s economic condition, structural deficit challenges, or operational approach to delivering services to the community. After collecting and analyzing numerous ideas spanning a range of topics, SCIG identified several themes and through-lines in the ideas and in our ensuing recommendations.

Some ideas seem to be intended purely for financial impact. However, most ideas targeted improvements to the Town’s operational approach in some way, usually producing financial benefits downstream.

The most impactful ideas can be grouped into three broad categories: (1) economic development and revenue maximization, (2) governance structure and style, and (3) best practices for modern municipal services. There are finer themes within each of these broad categories, as discussed in the following recommendations.

Throughout this report, the use of the word “Town” refers to both town departments and the school department, where applicable.

Economic Development and Revenue Maximization

New Revenue Opportunities

SCIG recommends that the Town adopt a real estate transfer fee program. There is currently legislation pending at the state level. If it passes, Belmont can simply adopt it. If it does not pass, Belmont can join with several other nearby communities that have designed local programs and are seeking home rule approval by the state. [Idea #275]

SCIG recommends that the Town implement prorated tax assessments on qualifying new construction and improvements. To do this, the Assessors’ Office should identify current projects that qualify under the parameters defined by state law and devise a streamlined process to identify qualifying new projects in the future. [Idea #378]

SCIG recommends that the Town establish a Payment In Lieu Of Taxes (PILOT) oversight committee. This committee would be charged with producing and administering a local PILOT program. In addition, the financial impact of Chapter 61B tax exemptions (e.g., golf courses) should be evaluated, along with the potential for changing this state law. [Idea #101]

SCIG recommends that the Town pursue outside funding resource through grants and naming rights through sponsorship donations. When the Town does receive grant funding or sponsorships, the public should be made aware of these successes. Additionally, the costs and benefits of hiring a grant-writer should be further evaluated, whether insourced or outsourced. [Idea #23; Idea #34]

Zoning and Land Use

SCIG recommends that the Town evaluate town-owned parcels for their best use. The Town could create new revenue streams and reduce maintenance costs by selling or leasing land or buildings, or otherwise using town-owned real estate most efficiently. The Select Board should work with a group of qualified individuals to evaluate this on a property-by-property basis. [Idea #36]

SCIG recommends that the Town evaluate rezoning opportunities and create a new comprehensive master plan. In this way, the Town can promote redevelopment in line with community goals and ensure compliance with zoning requirements in state law. Grants could help fund assistance from the Metropolitan Area Planning Council (MAPC). [Idea #107]

SCIG recommends that the Town establish zoning for lodging establishments and adopt a room occupancy tax. Zoning bylaws can define limits on the scale, type, and location of such establishments. A room occupancy tax would apply to rentals of 90 days or less, and an additional community impact fee could apply to certain rentals of 31 days or less. [Idea #391]

SCIG recommends that the Town adopt short-term rental community impact fees and an accessory dwelling unit (ADU) bylaw. Adoption of these community impact fees depends on adoption of a room occupancy tax. Presuming that a short-term rental market creates pressure on the long-term rental market, an ADU bylaw would mitigate this effect. [Idea #271]

Governance Structure and Processes

Centralization/Standardization

SCIG recommends that the Town centralize the organizational structure of its government. Belmont's current structure is highly decentralized. The lack of centralized authority and clear reporting lines weakens decision-making and accountability. Centralized management is key to accomplishing Town goals and reducing costs. [Idea #216]

SCIG recommends that the Town establish a Charter Review committee. A 2011 report from the Massachusetts Division of Local Services highlighted the decentralization of government in Belmont. The SCIG reaffirms the DLS conclusion that the Town should appoint a charter review committee charged with evaluating the merits of a new town charter. [Idea #413]

SCIG recommends that the Town adopt priority-based budget guidelines. A top-down, revenue-driven approach to budgeting is necessary to narrow the structural deficit. Belmont is at a unique point in time to begin this process, and the successes of many other communities can help inform our adoption. Further, the Select Board and School Committee should update budget documents to produce information that is useful and understandable to stakeholders. [Idea #39]

SCIG recommends that the Town implement a tool and process for evaluating insourced versus outsourced staffing. This decision support tool would assess whether a given function is better fulfilled by hiring an employee or by outsourcing through a contracted vendor. It should be developed in an iterative manner for ongoing use, not just a one-time audit, to optimize Town staffing costs and efficacy. [Idea #16]

SCIG recommends that the Town create a purchasing agent position. Belmont already saves money by participating in some multi-municipality purchasing programs, which should continue.

Having a dedicated position would help maximize potential savings and find new opportunities for collaboration, while ensuring compliance with complex state purchasing law. [Idea #2; Idea #26]

SCIG recommends that the Town consolidate operations of the Higginbottom and Underwood pools. External access to the Higginbottom should be possible after construction is complete, allowing easier public access. A complementary recommendation is to set up an enterprise fund for the Recreation Department, including both pools. [Idea #79]

Regionalization

SCIG recommends that the Town establish a working group of Town Administrators. Belmont's Town Administrator should take the lead in moving forward with the execution of this idea. Collaborating with nearby communities that are comparable to Belmont will enable the sharing of innovative ideas and solutions to common challenges. [Idea #108]

SCIG recommends that the Town maximize savings in its next solid waste contract. Significant cost savings are likely through regionalization and flexibility. A temporary Solid Waste and Recycling Committee was recently formed to assist in procuring the next contract. [Idea #250]

SCIG recommends that the Town evaluate opportunities to regionalize public services. Some specific services may be good candidates to regionalize immediately, such as waste collection, tree warden, and animal control. The Town should implement a process to regularly evaluate regionalization and connect with nearby communities on the topic. [Idea #330]

SCIG recommends that the Town evaluate regionalization of public safety services. Potential regionalization of 911 dispatch and Advanced Life Support services would require additional research through conversations with communities that currently participate in such arrangements, as well as the regional dispatch centers/districts themselves. [Idea #112]

Operational Efficiency/Best Practices

SCIG recommends that the Town continue to pursue withdrawal from Civil Service. Prior to a Town Meeting vote on withdrawal, the Town should develop an alternative system and conduct a cost/savings analysis for each affected department. The financial impact of withdrawal should be balanced against the non-financial benefits and costs. [Idea #33]

SCIG recommends that the Town continue to use Collins Center resources. By signing a Community Compact, Belmont has been able to access grant funding for assistance from the Edward J. Collins, Jr. Center for Public Management at UMass-Boston. They are a valuable resource that help local governments in Massachusetts on a variety of topics. [Idea #346]

SCIG recommends that the Town continue its transition to electric vehicles. The Energy Committee is writing a policy to specifically guide the transition of Belmont's fleet to electric vehicles. Along with financial savings, implementing this idea helps the Town achieve the Climate Action Roadmap adopted by Town Meeting. [Idea #321]

SCIG recommends that the Town act on 2011 DLS recommendations to improve its payroll system. This includes converting from paper to electronic paystubs, printing accrued leave on the electronic paystubs, initiating electronic submission of payroll by departments, changing the

submission and approval date for timesheets to Friday, and converting all weekly payroll to bi-weekly. [Idea #341]

SCIG recommends that the Town improve its financial modeling and budget forecasting system. A MUNIS module or other MUNIS-integrated software solution would eliminate error-prone manual data entry and report generation. This decision can be informed by reaching out to other towns to inquire about their financial software. [Idea #340]

SCIG recommends that the Town improve its fleet management system. The Town should develop and keep up to date a spreadsheet holding all key data attributes for each vehicle held by the town. The Town should write, deploy, and enforce a policy and procedures manual to guide use of town-owned vehicles. SCIG recommends that the town conduct a pilot utilizing a third-party software to report on key metrics using data gathered on each vehicle. This data will provide informed decision making to right sizing Belmont's fleet, understand total cost of ownership, and forecast replacement vehicles for capital budgeting purposes. [Idea #54]

SCIG recommends that the Town improve its student information system. Feedback should be solicited from all stakeholders including parents/caregivers, with the goal of making the system as user-friendly as possible. This recommendation can be informed by reaching out to other school districts to inquire about their student information systems. [Idea #86]

SCIG recommends that the Town implement an employee recognition program. This should incentivize department heads to look for improved efficiency and financial savings opportunities. The goal is to achieve cost savings, without compromising on quality, by leveraging the knowledge of those closest to the service delivery. [Idea #336]

Employee Compensation/Benefits

SCIG recommends that the Town consider several actions regarding employee compensation and benefits. Ideas include job reclassification [Idea #60], health care premium cost sharing [Idea #337], and the specific recommendations below. Not all ideas have been fully evaluated in this report but, given that employment costs are approximately 75% of the Town's operating budget, all ideas need to be further explored.

SCIG recommends that the Town take a more assertive role with the Retirement Board to review and make recommendations for improving investment returns and reduce administrative costs. The SCIG further recommends that retirement costs are taken under consideration with respect to both collective bargaining terms and hiring practices to contain overall growth and pension and OPEB liabilities. This involves extensive review and full transparency of many factors, including the details bargained with eligible participants, several actuarial assumptions, the returns generated by investment management versus alternatives, and associated administrative costs. [Idea #268]

SCIG recommends that the Town participate in the Group Insurance Commission (GIC) for health insurance. GIC is a state-wide plan that Belmont can join to replace its self-insurance plan. It is reasonable to expect, based on prior GIC plan design, that GIC FY24 will result in cost savings through economies of scale, while providing employees with quality benefits. [Idea #269]

SCIG recommends that the Town evaluate its vacation policy. Upon separation from employment, employees must be compensated for vacation time earned and accrued. However,

employers may adopt policies to cap the amount of vacation time that an employee may accrue, thereby limiting non-forecasted and potentially sizeable financial liability. [Idea #53]

Town Cost Mitigation

SCIG recommends that the Town reduce streetlight brightness. Its new LED streetlights are centrally controlled via software, and cost savings could be significant by reducing lumen brightness below 100%. A complementary recommendation is to upgrade other exterior lighting to LED and programming them with lower output and on/off schedules. [Idea #318]

Best Practices for Modern Municipal Services

Technological Efficiency

SCIG recommends that the Town accelerate the implementation of a new Town website. A quality website is critical to increasing transparency, enabling the implementation of several other ideas in this report, and providing improved functionality for residents and employees. The Website Renewal Committee should prepare their recommendations as soon as possible, and the Town should proceed to contract and implement the redesign. [Idea #412]

SCIG recommends that the Town implement a 311 system. This would give residents the ability to report issues through the Town website and a mobile app. The system vendor should be considered in the broader ecosystem of software solutions deployed in relevant Town departments, to help them to keep an organized workflow. [Idea #221]

Transparency

SCIG recommends that the Town implement a Visual Budget website. Such a website would provide dynamic data visualizations for residents to see the Town's budget, expenses, and fund balances. This could be accomplished through low-cost provider VisGov or as an open-source WordPress plugin. [Idea #38]

Recommendation for a Structural Change Implementation Team

We recommend that the Select Board create a Structural Change Implementation Team to prioritize and guide the implementation of recommendations in this report. This team should:

- Consist of 5 to 7 members, with a priority on appointing members who previously served on SCIG. These individuals would be the most familiar with the recommendations and that continuity should help the efficiency of the team.
- Review the recommendations in this report and make decisions on which to prioritize, in consultation with Belmont departments, boards, and committees.
- Monitor progress being made on the implementation of these ideas and report progress to the Select Board at least twice per year.
- Devise a web-based presentation of the matrix of ideas researched by SCIG, so this information is easily searchable by Belmont leaders and residents.
- Consider how to make the practice of soliciting and researching ideas on potential structural changes a permanent part of Belmont governance, perhaps through a 311 system or, in the very least, an online form similar to what SCIG used.

BACKGROUND

Charge and Membership

The charge of the Structural Change Impact Group (SCIG) was approved in September 2020, and updated or amended in October 2020, November 2020, and April 2021.

Its purpose was: *“to investigate and recommend a list of key structural changes for the Town of Belmont, which may impact its economic condition, the structural deficit challenges the Town faces, on the Town operational approach to delivering services to the community.”*

The committee initially consisted of ten members selected among the following roles: Select Board (1), School Committee (1), Warrant Committee (2), Energy Committee (1), Vision 21 Implementation Committee (1) and Town Residents at Large (4). Committee members were appointed in December 2020 and the first meeting was held in January 2021. The number of Town Residents was increased to five in April 2021 (thereby increasing total committee membership from ten to eleven). Three of the committee positions turned over during its term.

Member	Representation
Vicki Amalfitano	Resident
Brian Antonellis	Resident
Joe Bernard, Clerk	Resident
Travis Franck, Chair	Energy Committee
Matthew Gasbarro	Resident
Anne Helgen	Warrant Committee
Norma Massarotti	Resident
Meghan Moriarty	School Committee
Mark Paolillo, Vice Chair	Select Board
Aaron Pikcilingis	Vision 21 Committee
Paul Rickter	Warrant Committee
Adam Dash	Select Board (until April 2021)
Amy Checkoway	School Committee (until June 2021)
Patricia Groves	Resident (until January 2021)

Gathering of Ideas

The committee gathered ideas to research from a variety of sources, including:

- A March 2010 summary of ideas for potential structural changes in Belmont

- The 2015 report of the Financial Task Force
- A list of structural changes compiled by the Select Board in July 2020
- A public meeting in March 2021, where members of the public suggested ideas
- The 2021 report of the Financial Task Force II
- An online form for gathering ideas from the public and Town staff, which was available from March 2021 until February 2022

In these ways, more than 400 ideas were gathered. This set of ideas became the core of the committee's work.

Design/Approach

To research and report on the ideas gathered, the committee organized itself into three sub-committees: Consolidation, Regionalization, and Outsourcing; Personnel, Compensation, Benefits, and Retirement; and Town Services, Budget, and Revenue. Subcommittees elected chairs and then evaluated ideas assigned to them by the full committee, consolidating similar ideas to simplify the research of these ideas and the writing of recommendations. In some cases, this consolidation involved abstracting away details to evaluate a theme more broadly. For example, reviewing the current and potential uses of all town-owned buildings rather than just those that happened to be included among the suggestions.

To provide fair evaluations, the team developed a rubric and scoring system that was applied to every idea gathered through the above processes. This system asked the evaluators to score each consolidated idea across multiple measures – financial impact, operational impact, relative ease of implementation, and time to implementation – and compiled them into a weighted composite score. These weighted composites and their component scores are included in each individual evaluation.

To research ideas, committee members performed desk research and met with Belmont Town and School department staff, other committee chairs, as well as department representatives from other towns to gather input in the evaluation of the ideas submitted. This research informed the scores assigned to each idea, often resulting in updated and improved scores when new details about implementation, potential cost savings, or other pertinent details emerged.

Learning

The team found the work meaningful and rewarding. The approach to evaluate all ideas presented a challenge given the time required to evaluate, research, and write recommendations. Evaluating and writing up ideas that had either already been implemented or that were clearly unfeasible or illegal took time away from evaluating and discussing the ideas for consideration. The team was well led, dedicated, and worked diligently but began encountering meeting time conflicts as the holidays approached and as the committee duration began exceeding its original expected end date.

Implementing change that is feasible requires the leadership of an organization to understand, support and embrace the change. Next steps lie with the Select Board, Town Administrator, School Committee, School Superintendent, Fire and Police Chiefs, Department Managers, town committees and boards, and union leaders who will use this output as a foundation in their

ongoing, respective work plans to deliver superior services and education to the Town of Belmont's residents, employees, and students at a lower cost.

SCORING RUBIC

Financial Impact		An estimate of how much total revenue/savings this idea will create, using a ten-year planning horizon. (If recurring, estimate the total impact over the first 10 years. If the duration is shorter than 10 years, estimate the total impact.)
0	No impact or negative impact	Costs/Loses Money
1	Very Small Impact	\$0 - \$100k
2	Little impact	\$100k - \$250k
3	Some impact	\$250k - \$1m
4	Medium impact	\$1m - \$5m
5	Big impact	\$5m - \$10m
6	Very Big Impact	>\$10m
Operational Impact		An estimate of this idea's potential to impact efficiency, quality, or progress on town goals (e.g. equity, transparency, etc.)
0	No impact or negative impact	Replaces one system with another of equal or worse quality
2	Little impact	Modest improvement to efficiency or quality
4	Some impact	Moderate improvement to efficiency or quality
6	Medium impact	Significant improvement to efficiency <u>OR</u> quality
9	Big impact	Significant improvement to efficiency <u>AND</u> quality
Ease of implementation		An estimate of how easy or difficult this idea will be to implement. Below or are examples to help estimate, but these are not hard rules.
0	Impossible	Ideas that are prohibited by state or federal laws
1	Very difficult	Complicated by local laws AND contracts; has complicated prerequisites; requires TMM and town wide approval;
2	Difficult	Complicated by local laws OR contracts; requires TMM 2/3 vote OR requires TMM vote AND town-wide vote
3	Medium	Requires political will; has up-front capital requirements; requires a TMM or town-wide vote
4	Easy	Leg-work, Select Board vote
5	Very easy	Simple paperwork
Time Scale		An estimate of how long it will take for impacts to be delivered, after the decision is made to pursue it.
0	VERY Long	5 or more years
1	Long	3 to 5 years to complete
2	Medium	1 to 3 years to complete
3	Short	6 months to 1 year to complete
4	Immediate	Less than 6 months to complete
Scoring & Weighting of Categories		
Financial Impact		40%
Operational Impact		30%
Implementation		15%
Timeline		15%

$$\text{Weighted Final Score} = (((\text{Financial Impact})/6*0.4) + ((\text{Operational Impact})/9*0.3) + ((\text{Ease of Implementation})/5*0.15) + ((\text{Time Scale})/4*0.15)) * 100$$

INDEX OF IDEAS BY THEME

Idea Report Title	Financial Impact (≥4)	Operational Impact (≥4)	Quick to Implement (≥3)	Easy to Implement (≥4)	Score	Next Step Owner
Best Practices for Modern Municipal Services Count						
Community Benefit						
Idea #410 - Rebuild the Library		✓			41	Library Board of Trustees, Select Board
Idea #279 - Leonard Street Summer Use			✓	✓	40	Select Board
Idea #313 - Community Engagement Committee			✓	✓	40	Select Board
Idea #35 - Office Hours for Town Administrator's Office			✓	✓	30	Town Administration
Idea #384 - Bikeways to School					23	Belmont Transportation Advisory Committee
Idea #196 - Final Plan for Incinerator Site					0	Community Development
Resident Cost Reduction						
Idea #268 - Pension Liabilities/Retirement Board Savings	✓	✓			57	Retirement Board, Select Board
Idea #337 - Health Care Cost Ratios	✓				47	Select Board Human Resources
Idea #89 - School Busing			✓	✓	43	School Committee, School Department
Idea #338 - Fire Department Overtime	✓				43	Fire Department, Town Administration
Idea #293 - Adjustments to Enrollment			✓		40	School Committee
Idea #67 - Eliminate School Resource Officers			✓	✓	34	School Committee
Idea #263 - Reevaluate Large Town Salaries					27	Library Board of Trustees, School Committee, Select Board
Idea #164 - Tax Relief for Seniors					23	Select Board
Idea #303 - Residential Tax Exemption					23	Assessors Board
Idea #88 - Reduce Administrative Costs Associated with the METCO Program				✓	20	None
Idea #220 - Property Tax Refunds					14	None
Idea #236 - Move School Department Union Negotiations to a Neutral Party					0	None
Idea #364 - CORI Checks					0	None
Technological Efficiency						
Idea #188 - Build a Zero Net Energy High/Middle School	✓	✓			57	School Committee
Idea #383 - Town Rental Sites Posted on Website		✓	✓	✓	57	Town Administration
Idea #321 - New Vehicle Purchasing Policy Move to Electric Vehicles		✓		✓	56	Capital Budget Committee, Energy Committee, Select Board
Idea #412 - Modernize Town Website		✓			43	Select Board, Town Administration, Website Renewal Committee
Idea #45 - Online Payments			✓	✓	37	Select Board
Idea #85 - Offer Virtual/Hybrid Classes			✓	✓	37	School Committee, School Department
Idea #86 - Enhance Web Efficiencies			✓	✓	37	School Committee, School Department
Idea #221 - Implement 311 System for Non-Emergency Requests		✓	✓		34	Town Administration, Website Renewal Committee
Idea #38 - Public Visual Budget		✓		✓	33	Select Board, Town Administration, Website Renewal Committee
Idea #196 - Final Plan for Incinerator Site					0	Community Development
Transparency						
Idea #54 - Fleet Management					40	Select Board, Town Administration
Idea #415 - Contact Information for Belmont Boards and Committees			✓	✓	37	Information Technology, Town Administration, Town Clerk
Idea #38 - Public Visual Budget		✓		✓	33	Select Board, Town Administration, Website Renewal Committee
Idea #35 - Office Hours for Town Administrator's Office			✓	✓	30	Town Administration
Idea #327 - Hold Open Union Negotiations		✓			30	School Committee
Idea #236 - Move School Department Union Negotiations to a Neutral Party					0	None

Idea Report Title	Financial Impact (24)	Operational Impact (24)	Quick to Implement (23)	Easy to Implement (24)	Score	Next Step Owner
Economic Development and Revenue Maximization						
Business Improvement						
Idea #107 - Reevaluate Town Zoning with Master Plan	✓				51	Master Plan Refresh Committee, Select Board
Idea #391 - Allow Hotels and B&Bs in Bylaws					43	Planning Board
Idea #279 - Leonard Street Summer Use			✓	✓	40	Select Board
New Revenue Opportunity						
Idea #23 - Increase Revenues from Grants	✓	✓	✓	✓	63	Select Board
Idea #275 - Real Estate Transfer Fees	✓				57	Select Board
Idea #346 - Get More Collins Center Help		✓	✓	✓	57	Town Administration
Idea #358 - Build a Soccer Bubble	✓				57	Recreation Commission, Town Administration
Idea #378 - Supplemental Tax Assessment on New Construction	✓		✓	✓	57	Assessors
Idea #383 - Town Rental Sites Posted on Website		✓	✓	✓	57	Town Administration
Idea #201 - Open Marijuana Retail Dispensaries	✓				54	None
Idea #34 - Naming Rights			✓	✓	50	Select Board
Idea #101 - "Payments In Lieu Of Taxes" for Non-Profits and Private Schools	✓				47	Select Board
Idea #271 - Tax Revenue from Short-term Rentals			✓		47	Select Board
Idea #32 - Overnight Parking Fees			✓	✓	43	Select Board
Idea #89 - School Busing			✓	✓	43	School Committee, School Department
Idea #391 - Allow Hotels and B&Bs in Bylaws					43	Planning Board
Idea #99 - Eliminate Unfunded State Mandates	✓				40	None
Idea #29 - Fees and Fines			✓	✓	37	Town Administration
Idea #286 - Increase Parking Fee Revenue					37	Select Board
Idea #366 - Selling Advertising on Town-Owned Billboards					37	Library Board of Trustees, School Committee, Select Board
Idea #42 - Cemetery Charges Should Cover Operating Costs	✓				30	Cemetery Commissioners
Idea #304 - Town Run Liquor Store	✓				30	None
Idea #241 - Issue Speeding Tickets Through Traffic Cameras					17	None
Idea #393 - Reduce Costs to the School District of Providing Meals to Students					4	School Committee
Idea #395 - Open House of Belmont High School					3	None
Idea #272 - Charge Congestion Pricing					0	Transportation Advisory Committee
Idea #363 - Charge International Students Tuition to attend Belmont Schools					0	None
Idea #224 - Municipal Broadband Internet					-1	Belmont Municipal Light Board
Idea #240 - Investment and Financial Advisors					-1	None
Idea #262 - New Growth from Condo Conversion					-1	None

Idea Report Title	Financial Impact (≥4)	Operational Impact (≥4)	Quick to Implement (≥3)	Easy to Implement (≥4)	Score	Next Step Owner
Zoning and Land Use						
Idea #358 - Build a Soccer Bubble	✓				57	Recreation Commission, Town Administration
Idea #36 - Review Town Owned/Used Property for Best Use	✓				53	Master Plan Refresh Committee, Planning Board, Town Administration
Idea #107 - Reevaluate Town Zoning with Master Plan	✓				51	Master Plan Refresh Committee, Select Board
Idea #271 - Tax Revenue from Short-term Rentals			✓		47	Select Board
Idea #391 - Allow Hotels and B&Bs in Bylaws					43	Planning Board
Idea #84 - Reduce Library Hours/Use Benton Library					37	Select Board
Idea #381 - Cancel 7-8 portion of 7-12 school					0	None
Idea #154 - South Pleasant Street Development					-1	None
Idea #174 - Adopt A Housing Production Plan					-1	None
Idea #176 - Development At Acorn Park					-1	None
Governance Structure and Processes						
Centralization/Standardization						
Idea #216 - Appoint All Positions (except Select Board/Moderator)		✓			57	Select Board
Idea #403 - Long-Term Capital Financial Analysis		✓	✓		57	Capital Budget Committee
Idea #183 - Maintenance Manuals		✓		✓	46	Select Board, Town Administration
Idea #382 - Data-Guided Decision Making		✓	✓	✓	46	School Committee, Select Board
Idea #409 - Youth Coordinator Position		✓	✓	✓	46	Select Board, Town Administration
Idea #79 - Combine Higginbottom and Underwood Pool Operations			✓		44	Select Board, School Committee
Idea #2 - Group Purchasing					43	Town Administration
Idea #14 - Merge Town and School Departments					43	Information Technology Advisory Committee, School Department, Town Administration
Idea #16 - Outsource Services					43	Town Administration, School Committee, School Department
Idea #46 - Work Order Systems to Guide Efficiencies		✓			43	Select Board
Idea #141 - Permanent Building Advisory Committee Manual			✓	✓	43	Permanent Building Committee
Idea #54 - Fleet Management					40	Select Board, Town Administration
Idea #316 - Road Signs and Tree Selection			✓	✓	40	Department of Public Works
Idea #353 - Eliminate All Unnecessary Departments	✓				40	Select Board, Vision 21 Implementation Committee
Idea #344 - Improve Capital Projects					37	Town Moderator
Idea #385 - Explore Regionalizing/Consolidating Library Services					37	Library Board of Trustees, School Committee
Idea #22 - Merge Council on Aging, Recreation, and Veterans Services					27	None
Idea #41 - Evaluate Costs of Independent Boards		✓			20	Town Administration
Idea #360 - Consolidation of Town Polling Locations					14	Town Clerk
Idea #212 - Eliminate Citizen Building Committees					-1	None
Idea #252 - Evaluate Town Structure					-1	Select Board
Idea #413 - DLS Recommendations on Form of Government					-1	Select Board

Idea Report Title	Financial Impact (≥4)	Operational Impact (≥4)	Quick to Implement (≥3)	Easy to Implement (≥4)	Score	Next Step Owner
Employee Compensation/Benefits						
Idea #268 - Pension Liabilities/Retirement Board Savings	✓	✓			57	Retirement Board, Select Board
Idea #269 - Transfer Health Care Insurance to the GIC	✓				54	School Department, Select Board, Town Administration
Idea #337 - Health Care Cost Ratios	✓				47	Select Board Human Resources
Idea #53 - Vacation Accrual	✓				44	Human Resources, Select Board, Town Administration
Idea #338 - Fire Department Overtime	✓				43	Fire Department, Town Administration
Idea #60 - Initiate Job and Wage Classification Study					31	School Committee, Town Administration
Idea #263 - Reevaluate Large Town Salaries					27	Library Board of Trustees, School Committee, Select Board
Idea #61 - Eliminate Life Insurance Benefits					20	None
Governance						
Idea #39 - Establish Budget Guidelines	✓	✓	✓		67	Select Board
Idea #216 - Appoint All Positions (except Select Board/Moderator)		✓			57	Select Board
Idea #403 - Long-Term Capital Financial Analysis		✓	✓		57	Capital Budget Committee
Idea #40 - Evaluate Town Services and New Master Plan		✓		✓	40	Select Board
Idea #416 - Appoint Member to Board of Assessors		✓			27	Select Board
Idea #24 - Property Assessment Process			✓	✓	23	Assessors Board
Idea #217 - Have Newly Elected Officials take office on July 1					17	Select Board
Idea #213 - Fewer Select Board Meetings and Eliminate Their Pay					13	None
Idea #218 - Have Fewer Elections					7	None
Operational Efficiency/Best Practice						
Idea #33 - Civil Service	✓	✓			70	Select Board
Idea #39 - Establish Budget Guidelines	✓	✓	✓		67	Select Board
Idea #341 - Electronic Pay Stubs and Other Payroll Ideas		✓	✓	✓	63	Accounting, Treasurer and Tax Collector, Town Administration
Idea #37 - Implement Performance-based Budgeting		✓			57	Select Board
Idea #346 - Get More Collins Center Help		✓	✓	✓	57	Town Administration
Idea #336 - Employee Incentive/Bonus/Employee Programs	✓	✓			54	Human Resources, Select Board
Idea #340 - Budgeting/Accounting Forecasting Software		✓			53	School Department, Town Administration
Idea #26 - Centralize Supplies Across Town and Schools		✓		✓	46	Select Board
Idea #382 - Data-Guided Decision Making		✓	✓	✓	46	School Committee, Select Board
Idea #16 - Outsource Services					43	Town Administration, School Committee, School Department
Idea #46 - Work Order Systems to Guide Efficiencies		✓			43	Select Board
Idea #89 - School Busing			✓	✓	43	School Committee, School Department
Idea #250 - Revisit Solid Waste Contract	✓				43	Department of Public Works, Select Board, Solid Waste and Recycling Committee, Town Administration
Idea #338 - Fire Department Overtime	✓				43	Fire Department, Town Administration
Idea #54 - Fleet Management					40	Select Board, Town Administration
Idea #189 - Reorganize Accounting Department			✓	✓	40	Accounting
Idea #227 - Allow Work From Home for Town Employees			✓	✓	40	Town Administration

Idea Report Title	Financial Impact (≥4)	Operational Impact (≥4)	Quick to Implement (≥3)	Easy to Implement (≥4)	Score	Next Step Owner
Idea #227 - Allow Work From Home for Town Employees			✓	✓	40	Town Administration
Idea #316 - Road Signs and Tree Selection			✓	✓	40	Department of Public Works
Idea #72 - Less Frequent Lawn Care			✓	✓	37	Select Board, Town Administration
Idea #344 - Improve Capital Projects					37	Town Moderator
Idea #400 - Residency Checks for Students			✓	✓	37	School Committee
Idea #221 - Implement 311 System for Non-Emergency Requests		✓	✓		34	Town Administration, Website Renewal Committee
Idea #28 - Insurance Bids			✓	✓	33	None
Idea #404 - Rent or Share Equipment Instead of Purchasing				✓	33	Capital Budget Committee
Idea #92 - Make Council on Aging Self-Supporting			✓		31	Council on Aging
Idea #21 - Monitor Employee Internet Use to Increase Productivity			✓	✓	30	Human Resources
Idea #42 - Cemetery Charges Should Cover Operating Costs	✓				30	Cemetery Commissioners
Idea #373 - Explore Continuing, Technical and Continuing Education Options		✓			27	School Committee, School Department
Idea #309 - Road Salt vs Sand			✓	✓	26	None
Idea #41 - Evaluate Costs of Independent Boards		✓			20	Town Administration
Idea #88 - Reduce Administrative Costs Associated with the METCO Program				✓	20	None
Idea #95 - Evaluate Council on Aging Transportation Services					17	None
Idea #215 - Change Town Clerk Staffing					17	None
Idea #81 - Restructure Library Staff					14	None
Idea #360 - Consolidation of Town Polling Locations					14	Town Clerk
Idea #219 - Change Open Meeting Law					10	None
Idea #311 - Police Details					7	None
Idea #334 - Reduce Services to Town Committees					7	None
Idea #197 - Improve the DPW Facility					0	Long Term Capital Planning Committee
Idea #411 - Credit Card Fees					0	None
Idea #162 - Belmont Light Initiatives					-1	None
Idea #168 - Restrict Liquor License Transfers					-1	None
Idea #212 - Eliminate Citizen Building Committees					-1	None
Idea #252 - Evaluate Town Structure					-1	Select Board
Idea #326 - Contractor Accountability					-1	None
Idea #413 - DLS Recommendations on Form of Government					-1	Select Board

Idea Report Title	Financial Impact (≥4)	Operational Impact (≥4)	Quick to Implement (≥3)	Easy to Implement (≥4)	Score	Next Step Owner
Outsource/Insource						
Idea #250 - Revisit Solid Waste Contract	✓				43	Department of Public Works, Select Board, Solid Waste and Recycling Committee, Town Administration
Idea #54 - Fleet Management					40	Select Board, Town Administration
Idea #240 - Investment and Financial Advisors					-1	None
Regionalization						
Idea #108 - Establish a Working Group of Town Administrators/Managers		✓		✓	53	Town Administration
Idea #250 - Revisit Solid Waste Contract	✓				43	Department of Public Works, Select Board, Solid Waste and Recycling Committee, Town Administration
Idea #330 - Regionalize Public Services	✓				40	School Department, Select Board
Idea #385 - Explore Regionalizing/Consolidating Library Services					37	Library Board of Trustees, School Committee
Idea #404 - Rent or Share Equipment Instead of Purchasing				✓	33	Capital Budget Committee
Idea #373 - Explore Continuing, Technical and Continuing Education Options		✓			27	School Committee, School Department
Idea #112 - Regionalize Public Safety					-1	Fire Department, Police Department, Select Board
Idea #131 - Provide Regionalized Special Education					-1	None
Idea #177 - Withdraw From the Minuteman District					-1	None
Idea #178 - Shared Public Health Nurse					-1	Select Board
Idea #179 - Shared inspectors with Watertown					-1	Community Development
Town Cost Mitigation						
Idea #33 - Civil Service	✓	✓			70	Select Board
Idea #188 - Build a Zero Net Energy High/Middle School	✓	✓			57	School Committee
Idea #318 - Reduce Streetlight and Outdoor Lighting Brightness			✓	✓	54	Belmont Municipal Light Board
Idea #254 - Maximize CPA Funding for Belmont Studies			✓	✓	50	Community Preservation Committee
Idea #52 - Use Social Security instead of COBRA					0	None
Idea #312 - New Tennis Courts: Limit to One					0	None
Idea #138 - Construct a new Substation for Belmont Light					-1	None

IDEA EVALUATIONS

IDEA #2 – GROUP PURCHASING

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Determine whether there are additional group purchasing opportunities such as State and regional supply contracts that can provide additional cost savings.

Other ideas included in this report

- 4 - Seek insurance discounts by bidding with other towns
- 13 - Centralize supplies (school, office, janitorial, etc.), monitor usage, and control "backdoor" losses
- 18 - Put insurance out to bid. Have schools pay for their share of insurance and defend their own claims
- 134 - Legal - Due to increased use of insurance to cover legal fees reduce budget item. Implement existing plan to put legal services out to bid. Seek discount for purchasing services with other towns.
- 180 - Partner with other towns to lower costs through large purchases of commodities (heating oil, salt, sand, etc.)
- 181 - Hazardous waste disposal consortium with Lexington and other towns
- 365 - Insurance - Put out to bid. Seek discount for purchasing with other towns.
- 367 - Purchasing Cards for Gasoline with agreements with local suppliers, in place of fuel tanks
- 374 - Explore opportunities to expand our regional purchasing with other municipalities

Idea intent

This idea and the other ideas included in this report all revolve around the central idea of striving for ways to save money by purchasing items at the lowest possible cost. Often the strategy for achieving lower costs involves purchasing items in bulk in coordination with other municipalities or by participating in state or regional purchasing programs. By joining with others there is a good chance for getting the best price possible on needed purchases.

Weighted Final Score: 43

(Financial Impact: 3, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

Belmont already saves money by participating in some multi-municipality purchasing programs. These programs include:

- Purchasing gas and diesel fuel in bulk with 11 other municipalities in a program coordinated by the Town of Brookline
- Purchasing road salt in bulk with 10 other municipalities in a program coordinated by the City of Newton
- Participating with 13 to 15 other municipalities in regionalized household hazardous waste events in a program coordinated by the Town of Lexington
- Participating in the Metropolitan Area Planning Council's (MAPC) collective purchasing programs for purchasing heavy equipment, such as fire apparatus, at prices negotiated by the MAPC.
- Participating in the Minuteman Library Network by the Belmont Public Library, which gives the library access to Sierra software. This software manages most aspects of day-to-day library operations, including acquisition, cataloging, circulation, and serials management.

Massachusetts state law sets requirements for how high price purchasing by municipalities is done. For example, for any purchase between \$10,000 and \$50,000, three quotes must be obtained. Over \$50,000, a process involving sealed bids is required.

Because of the complexity of purchasing law and to pursue savings in purchasing of goods and services, several comparable municipalities in our area, including Lexington, Arlington, and Watertown, have dedicated purchasing agents or departments.

Recommendations

- All Town departments should continue pursuing all available opportunities for purchasing items in bulk to realize budget savings.
- All Town departments should pursue additional opportunities for purchasing items jointly with other towns as they appear. The Town Administrator should follow the recommendation of Idea #108 to discover new opportunities.
- Town Administration should strongly consider creating a purchasing agent position. This position would ensure that we are realizing all possible savings and making purchases in accordance with State law. Currently, the town staff member with the best knowledge about purchasing law is the Assistant Town Accountant, but having a dedicated purchasing agent should have financial advantages that exceed the salary and benefits of the new staff position. This purchasing agent could also network with other purchasing agents in neighboring communities, helping to uncover ways to save money by purchasing items collectively.

Further Reading

- Metropolitan Area Planning Council Collective Purchasing Program: <https://www.mapc.org/public-works-collective-purchasing-program/>
- Find a Statewide Contract User Guide: <https://www.mass.gov/service-details/find-a-statewide-contract-user-guide>

- Arlington Purchasing Department: <https://www.arlingtonma.gov/departments/finance/purchasing>
- Massachusetts Association of Public Purchasing Officials: <https://www.mappo.org/>
- Minuteman Library Network: <https://www.minlib.net/about>

IDEA #14 – MERGE TOWN AND SCHOOL DEPARTMENTS

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Merge service departments between school and town and reduce headcount (HR, accounting, IT, etc.)

Other ideas included in this report

- 3 - Combine bidding and winning of maintenance contracts
- 15 - Consolidate labor counsel between town and schools
- 76 - Merge schools with recreation department
- 113 - HR Merging (Town and Schools)
- 120 - Consolidate all administrative town/school functions
- 139 - Consolidated town and schools facilities department
- 182 - Consolidate all town/school administrative functions

Idea intent

This idea and its child ideas focus on the possibility of consolidating similar departments that exist in both the town and schools.

Weighted Final Score: 43

(Financial Impact: 3, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

Our schools and the town currently have the following common services:

Information Technology - Consolidation of IT between the town and schools is an opportunity that may result in a modest savings for ongoing costs such as staffing and may result in a somewhat more efficient operation. The biggest opportunity such a consolidation would represent is in the quality of the service, particularly when it comes to ensuring the security of information stored. This consolidation would only really work and attain these benefits as part of a broader consolidation and centralization of IT services throughout all Town departments.

Human Resources - Though they share a title, the functions of the town and school HR departments are quite different, so combining them would not enable much improvement in efficiency or quality of service. There isn't enough overlap between staff or tasks that a combined department could be smaller or reduce the total workload.

Facilities & Building Services - The school and town facilities departments merged into a single department in FY17, with good results. Of all the service departments common to both the schools and the town, the services offered, expertise required of the two facilities service departments were similar enough to make consolidation feasible and worthwhile. This process

began with a non-binding citizens' petition, adopted at Town Meeting in 2010, continued to develop with the hiring of a combined manager position across all facilities, and concluded when the separate departments we officially merged into a combined Facilities department in FY17.

Finance & Purchasing - The tasks of these departments, like HR above, require expertise and involve tasks such that a combined department wouldn't realize much decrease in cost or improvement of efficiency. That said, it's possible a key function of these departments might be streamlined through a town-wide change to a centralized purchasing process, perhaps through a Purchasing Manager role, an Employee Service Center, or both. (see Idea #26 for supplies and purchasing efficiency)

Outside Labor Counsel - The needs of the school and the town are quite different in terms of legal services, generally, and for legal services relating to labor issues specifically. Given that we do not employ in-house counsel in either the town or the school department and the negligible overlap in required expertise, no meaningful savings would be likely to result from a consolidation of those services into a single bid or contract, and there's a good chance that a decrease in specialization resulting from a consolidated contract would lead to poorer and perhaps less efficient service.

Recommendations

- Based on our research, we recommend the town pursue consolidation of IT services in all town departments, going beyond just merging between the town and schools. This would include, for instance, integrated web services and consolidated IT purchasing and inventory control across town departments. There do not seem to be worthwhile opportunities to consolidate other areas between town and schools, but the town should plan to revisit the possibility as practices change.

Next Steps

- **The Select Board, School Committee, and related school and town personnel** should work together with the Information Technology Advisory Council (ITAC) to develop and execute a plan to merge IT services into a centralized service department that supports all programs, offices, and staff throughout the town. As part of this broader effort, the IT departments in the school and town should be managed under a single, centralized office, likely preserving teams dedicated to the schools or town.
- The Select Board should consider the creation of a new centralized purchasing management position or creation of a centralized employee service center.

Further Reading

- ITAC
<https://www.belmont-ma.gov/information-technology-advisory-committee>
- Belmont School IT
<https://www.belmont-ma.gov/information-technology-advisory-committee/links/school-it-department>

- Belmont Town IT
<https://www.belmont-ma.gov/information-technology-advisory-committee/links/town-it-department>
- Facilities Department
<https://www.belmont-ma.gov/facilities-department>
- Article outlining the new combined Facilities Manager position
<https://patch.com/massachusetts/belmont/belmont-names-new-combined-facilities-manager>

IDEA #16 – OUTSOURCE SERVICES

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Outsource non-value added services

Other ideas included in this report

- 17 - Outsource specific town services
- 27 - Outsource specific town services
- 70 - Outsource mechanics work in DPW
- 71 - Hire licensed tradestaff rather than contract services
- 229 - Outsource IT departments
- 235 - Outsource facilities work
- 238 - Outsource contractors rather than use town employees
- 239 - Evaluate need for facilities system employees
- 242 - Outsource cafeteria programs
- 253 - Train town staff instead of using expensive consultant services
- 345 - Consider hiring in-house counsel

Idea intent

This report abstracts a large collection of specific suggestions to either insource or outsource specific positions or functions in town. Rather than rely on the specific list of suggested ideas, we chose to examine many functions and positions in the town to both evaluate what we currently do, but also develop a process for evaluating any given function or position in the future to help determine if it should be outsourced, insourced, etc.

Weighted Final Score: 43

(Financial Impact: 3, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

The town currently uses a mix of contracted (outsourced) services and town employees (insourced) to deliver services. While some of the ideas suggested a seemingly simple means of determining what should fall into what category, each situation has many factors to consider when determining whether it would be preferable to insource/outsourced.

The following examples illustrate this need for nuance:

The town currently outsources all plumbing services for town-owned facilities. We have a contract with a plumbing provider who takes care of our facilities. The problem with this arrangement is that we have to call them in for all plumbing issues, even simple fixes like a leaking toilet or regular maintenance. In this situation, the town would likely see an improvement

in service and an increase in routine maintenance by hiring a plumber directly, insourcing at least some of the repairs and much of the routine maintenance.

Conversely, the town currently performs in-house maintenance on out fleet of vehicles, a task that might be better achieved through a mix of in-house repair and contracted services. (Additional thoughts about fleet management are written in Idea #54.)

Recommendations

The town should develop and adopt a process to guide the evaluation of insourcing/outsourcing as options when:

- We are beginning a new or renewing an old service contract
- We are planning to hire a town employee

The development of this process should include an analysis of performance and costs, expected short- and long-term costs, and an estimate of the value added by having a town employee, if any (for example, DPW employees know our roads, property, equipment). We also suggest that this be developed in an iterative manner, improving the process as we learn by using it, and that it be designed for ongoing use, not just a one-time audit of all positions and functions, to maximize the benefit over time.

For example, many businesses require requests for new hires to provide a business justification, and in a similar process here we could include an evaluation of the prospects of insourcing versus outsourcing the position or function.

Next Steps

- The Town Administration and School Committee/Superintendent should devise decision support processes and an implementation plan to be used in an ongoing manner by Departments to efficiently and effectively assess whether a given position or function is better-suited to hiring an employee or outsourcing through a contracted vendor.
- The Select Board could delegate the development of the decision support tool to the Vision 21 Implementation Committee or another committee they see fit.

Further Reading

- *A Practitioner's Guide to Outsourcing*; Pioneer Institute; 2011
<https://pioneerinstitute.org/download/a-practitioners-guide-to-outsourcing/>

IDEA #21 – MONITOR EMPLOYEE INTERNET USE TO INCREASE PRODUCTIVITY

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Increase productivity by more closely monitoring employee conducting personal business during work time

Other ideas included in this report

- None

Weighted Final Score: 30

(Financial Impact: 0, Operational Impact: 1, Time Scale: 4, Ease of Implementation: 4)

Background Information

Some organizations monitor employee internet use and restrict or limit access to:

- Inappropriate websites
- Video Streaming
- Social Media
- On-Line shopping

Input was sought from the Town and School to understand if restrictions were in place for internet access in Belmont.

The Belmont School Department Director of Technology advised that software is installed to protect against malware which could be assessed, if decided upon, to restrict internet access.

Some roles require employees to work long hours, where employees will find it necessary to conduct personal tasks online at work, such as on-line banking or e-shopping. With more demanding work schedules and evening meetings for some employees, certain employees will have a need for non-work-related web use thus flexibility needs to be considered in any implementation of any employee internet monitoring (EIM) software. The latest EIM software solutions help achieve this balance and if correctly implemented can avoid both employee backlash or discontent and web misuse.

Recommendations

Town and School administrations should own any decision making regarding whether any policies and guidelines are required regarding employee internet use. If needed, Information Technology can then assess what software solutions are available to support the management and enforcing of those policies. Currently both the Town Administration and School Department have some content filtering and monitoring implemented.

Next Steps

- None

IDEA #22 – MERGE COUNCIL ON AGING, RECREATION, AND VETERANS SERVICES

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Consider possibility to merge Council on Aging, Recreation, and Veterans into one department under one Director.

Other ideas included in this report

- None

Idea Intent

Cost savings by reducing the cost of managing these departments through consolidation.

Weighted Final Score: 27

(Financial Impact: 2, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

I. Council on Aging

- The total budget for the Council on Aging (COA) in F/Y 2022 was approximately \$405,000. This amount represents 0.25% of the overall Town Budget in F/Y 2022, which was approximately \$159,144,000.*
- The COA's mission is to enrich the lives of Seniors and to enable them to live safe, independent, meaningful, and healthy lives.
- The COA has eight Program Responsibilities:
 1. Transportation
 2. Social Services
 3. Nutrition
 4. Health & Wellness
 5. Socialization, Adult Education, and Arts
 6. Volunteer Services
 7. Senior Trips
 8. Rental of after-hours use of the COA Building.

II. Recreation

- The total budget for the Recreation Department in FY 2022 was \$1,066,647. This amount represents approximately 0.67% of the overall Town Budget.
- The Recreation Department has 15.15 FTEs:
 1. Assistant Recreation Director (1.0 FTE)

2. Program Coordinator (2.0 FTEs)
 3. Administrative Assistant (0.45 FTE)
 4. Seasonal Employee – Winter programs (2.4 FTEs)
 5. Seasonal Employees – Skating Rink (1.4 FTEs)
 6. Seasonal Employee – Special Needs Program (0.4 FTE)
 7. Seasonal Employees – Summer Sports Programs (3.6 PTEs)
 8. Seasonal Employees – Summer Pool Programs (3.9 PTEs)
- The Recreation Department has five Program Responsibilities:
 1. Summer Recreation Programs
 2. School Year Recreation Programs
 3. Skip Vigliolo Rink Recreation Programs
 4. Underwood Pool Recreation Programs
 5. The Belmont Special Programs Organized for Recreation Time (S.P.O.R.T.), which is a year-round program for individuals with development disabilities.

III. Veterans Services

- Veterans Services are provided through the Social Services Division of the Health Department. The Social Services division consists of three programs: Youth and Family Services, Veterans Services, and the Youth Commission. Veterans Services are provided by a Veterans Services Officer (VSO), which is a 0.5 FTE position with a salary cost of approximately \$44,000. This amount represents 0.03% of the overall Town Budget. The VSO assists and provides services to qualifying veterans and their dependents in accordance with State of Massachusetts Department of Veterans Services requirements. The VSO helps to identify the needs of veterans, links them to available services, and is included in the coordination, collaboration, and participation of ceremonies and parades honoring veterans.

Recommendations

There is not sufficient overlap in services and activities provided by the COA, Recreation, and Veterans Services, that consolidating these teams would allow for a meaningful reduction in headcount or workload. Additionally, all three department budgets comprise approximately 0.95% of the overall Town Budget. Therefore, it does not make sense to merge these Departments together under one Director. Any potential cost savings may be insignificant in comparison to the Town's overall budget.

Next Steps

- No further action is warranted.

Further Reading

- [Town of Belmont, Fiscal Year 2022 Budget Book](https://www.belmont-)
https://www.belmont-

ma.gov/sites/g/files/vyhlf6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf

- [*Does Consolidating Local Governments Work, November 2020, Government Finance Officers Association \(GFOA\)*](#)

<https://www.gfoa.org/materials/does-consolidating-local-governments-work>

IDEA #23 – INCREASE REVENUES FROM GRANTS

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Pursue State, Federal and other Grants. Determine whether additional support is needed to increase grant funds. The town has just scratched the surface in potential additional energy savings. If the town committed \$10K towards a grant writer's fee in 2021, she would bring in \$250K in grants covering her full \$20K fee for 2021. Each subsequent year she would do the same as she has done in 6 other nearby towns for many years. As a consultant, she doesn't add to the town employee head count. See attached for details.

Other ideas included in this report

- #90 – Pursue private and corporate grant funding for public education; Make list of previous grants easily accessible and centralized

Idea intent

Increase new revenue from grants through adding grant writing resources.

Weighted Final Score: 63

(Financial Impact: 4, Operational Impact: 4, Time Scale: 3, Ease of Implementation: 4)

Background Information

Belmont has multiple sources of grant funds from state and federal government entities and other sources for all Town and School programs. Individual departments and offices currently are responsible for sourcing and applying for grants in their specific areas, and the Town Administrator's Office has also brought in grant funding from a variety of sources. Revenues from government and other grants are listed in the Town budget, though it is not easy to locate this information given the breadth of this document.

In discussing developing grant funding with Belmont's Town Administrator and Arlington's Town Manager, they shared the following perspective: department heads routinely are communicated with by outside entities about grant availability and, as subject matter experts and leaders, are best able to write grant proposals for their functional areas; it generally is ill-advised in town government to submit grant proposals that include time-limited staff as there is no assurance that these FTE's can be sustained after funding has ceased; and, neither Town has felt that a grant writer was an urgent need. Both Belmont and Arlington have used consultants for very specific technical needs. Broader use of consultants may be advisable in some cases.

An issue raised by both the Belmont TA and Arlington TM was being careful not to bring in grants where the town does not have the staff to run the grant. Based on these conversations, grant funding will not address the structural deficit, as these are not permanent funding streams.

Rather, then can offset some operational needs, such as a recent grant to fund body cameras for Belmont police. Also, there is no accurate way to forecast new revenues from grants.

Recommendations

Belmont should continue to aggressively pursue available, feasible grant funding, which has been growing for several years. It seems the public may not be aware of these successes, and improved communications are called for. An even part-time grant-writer to assist with this work is competing with many other staffing needs at this time. Use of employed and consultant grant writers by towns similar to Belmont should be evaluated, in light of total grant revenues by town and cost-benefit of these resources.

Next Steps

- The Select Board should request that the Town Administrator's Office oversee and work with the Schools and Library on the collection of the past 5 years of grants received, to provide an accessible report to Belmont residents on the sources, types and amounts of grants.
- New grants should be announced on the various website and social media platforms.
- In addition, the Town should reach out to additional municipalities like Belmont about best practices in staffing and grants acquisition. Examining these in light of comparative revenues from grants and cost-benefit of added resources is a good next step.

Further Reading

- None

IDEA #24 – PROPERTY ASSESSMENT PROCESS

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Review assessments of properties to address citizen’s concerns of fairness in assessments

Other ideas included in this report

- #257 - Look into assessment values of commercial spaces as a result of public works improvements (Belmont Center beautification, Trapelo Rd project)
- #258 - Evaluate assessment increases in values in lower vs higher assessed houses
- #289 [shortened] - Belmont has an uncharacteristically low property tax rate. Most comparable towns are 1.5%. If Belmont had a comparable rate, it would generate maybe \$30 million more a year.
- #349 - Change the way you assess the properties. It can’t be that the properties with less square footage of both house and land and assessed as close as houses that are 2x of that. I understand that it cannot be linear to the square footage, but what you have now is a disgrace. Not fair that the current assessment policy is favoring riches over poor.

Idea intent

Ensure that Belmont’s assessment process is comprehensive so that there is no bias based on property type. Ensure that Belmont’s assessment process is objective so that there is no bias based on property value.

Weighted Final Score: 23

(Financial Impact: 0, Operational Impact: 0, Time Scale: 3, Ease of Implementation: 4)

Background Information

Assessment values are an important factor in determining the amount of property tax payable by each individual property owner. The Town’s **property tax levy** is defined as the revenue it can raise through real and personal property taxes, and it is the largest source of revenue. State law—in particular, Proposition 2½—prescribes the way that a **property tax levy limit** is calculated.

Once this calculation has been done and the Town has decided its levy amount—at or below the levy limit—for the year, property assessment values are used to split the total property tax levy between individual properties. The mechanism to calculate that split is the property tax rate, which is mathematically the same as using individual property assessment value as a percentage of total property assessment value. Therefore, it is clear why it is important for property assessment values to be unbiased.

State law requires that all property be assessed annually as of January 1 (known as the “assessment date”), using approved mass appraisal techniques, at 100% of full and fair cash value. Fair cash value is defined as fair market value, which is the price a willing seller ought to receive from a willing buyer. Approved mass appraisal techniques are standardized procedures for valuing a group of properties as of a given date, using common data, and conducting statistical tests to ensure uniformity and equity in the valuations.

To determine market value, assessors must evaluate several factors, including sales of the same type of property in the area, location of the property, and supply and demand. Therefore, individual assessments will change based on actual market activities, and it is not unusual for properties in different neighborhoods to change at different percentages in any given year.

To approve mass appraisal techniques, the Massachusetts Department of Revenue (DOR) certifies the Town’s statistical analyses on an annual basis. The statistical analyses include a Price-Related Differential (PRD) calculation, which assesses the uniformity of valuation-to-sale price ratios by calculating the average ratio divided by the weighted average ratio. A high result indicates low-value properties are relatively over-assessed and a low result indicates low-value properties are relatively under-assessed. To be certified, PRD must be between 0.98 and 1.03, an indication that there is negligible bias one way or the other.

Further, DOR conducts a comprehensive analysis of the Town’s mass appraisal process every five years, and reviews property values in detail to ensure that assessment practices derive “full and fair” market values. DOR most recently conducted this comprehensive analysis for Belmont in 2019.

To clarify the assessment date, its purpose is to fix the basis for the tax liability for the entire fiscal year; it is not affected by later changes in property ownership or other factors. However, there is a time lag in that the assessment date is January 1 and the fiscal year begins on July 1. Property taxes for the fiscal year are assessed as of the January 1 before the fiscal year begins.

There is another time lag in that the comparable sales used to determine market value as of January 1 are the sales from the prior calendar year. This means that changes that can be observed in the market in real time will not affect assessed values until January 1, for the fiscal year beginning July 1.

For example, a real estate transaction on March 3, 2022, will be part of the evaluation to determine assessed value as of January 1, 2023, which will fix the basis for the tax liability for the fiscal year July 1, 2023, through June 30, 2024.

Further, since the Town implemented the quarterly tax billing system in 2004, the first two bills of each fiscal year are preliminary tax bills, which are estimates based on the prior year’s tax bill. These preliminary bills—due on August 1 and November 1—are issued for cash flow purposes but do not contain updated assessment values or the updated tax rate. The third and fourth quarter bills—due on February 1 and May 1—are actual bills; these will show the tax rate for the current fiscal year and the assessed value for the current fiscal year.

Continuing the earlier example, the assessed value as of January 1, 2023, will first appear on the real estate tax bill mailed the last week of December 2023, to be paid by February 1, 2024.

In response to the question about assessment values of commercial spaces as a result of public works improvements, the Chair of the Board of Assessors advised that the income approach is used for the valuation of commercial properties. This means that if commercial rents increase,

their assessment values increase. Therefore, to the extent that public works improvements increase desirability for the commercial space, thereby increasing commercial rents, they do indirectly increase commercial assessment values.

Recommendations

- There are existing mechanisms at the local level and state level to ensure that Belmont’s assessments are comprehensive and objective. Therefore, SCIG is not recommending any changes to the calculation process or the review process.
- However, SCIG does recommend that the Board of Assessors and/or other public bodies (e.g., Select Board, Warrant Committee) with a thorough understanding of the assessment process continue to find frequent opportunities for public awareness and education on this topic. Although the assessment calculation itself neither increases nor decreases the Town’s revenue, it is a critical factor in determining the amount paid by each individual taxpayer.
- Refer to Idea #303—Residential Tax Exemption—for a relevant recommendation to include more information, such as common assessment terminology and layman’s terms of regulations, in the annual Tax Classification Hearing letter from the Board of Assessors to the Select Board. Since this document is presented in a public meeting, it may serve as another good opportunity to disseminate or promote educational material.

Next Steps

- Board of Assessors (or other qualified board or committee) to develop a “Frequently Asked Questions” or other easy-to-understand guide for taxpayers to reference.

Further Reading

- M.G.L. Chapter 59: Assessment of Local Taxes
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIX/Chapter59/Section2A>
- Mass.gov Introduction to Assessment Administration: Law, Procedures and Valuation
<https://www.mass.gov/service-details/course-101>
- Belmont Tax Bills & Collections
<https://www.belmont-ma.gov/treasurer-and-tax-collector/pages/tax-bills-collections>

IDEA #26 – CENTRALIZE SUPPLIES ACROSS TOWN AND SCHOOLS

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Centralize supplies (school, office, janitorial, etc.), monitor usage, and control "backdoor" losses

Other ideas included in this report

- 125 – If MWRA water is safe and good enough for our residents to drink, we should eliminate ALL bottled water coolers and delivery of bottled water throughout all Town and school buildings.

Idea intent

Centralize the procurement, distribution and overall management of supplies and the supply chain process across all Town and School Departments.

Weighted Final Score: 46

(Financial Impact: 2, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 4)

Background Information

In Belmont, each Town Department is responsible for procuring and purchasing its own supplies. Town Departments use the Commonwealth of Massachusetts procurement system, COMMBUYS when applicable. Each Department is also responsible for bidding out its own contracts

The Bidding on supplies and services for the schools is done centrally by the School Department Business Office. The Business Office conducts the bids for supplies and services for all the Belmont Public Schools programs.

The School Department also participates in collaborative, multi-district bids for general and instructional supplies and materials through The Education Collaborative (TEC). For Special Education transportation, Belmont participates with a group of six other school districts through LABBB Collaborative.

In addition, the School Department purchases many items (e.g., general supplies, instructional supplies, equipment, copiers, and technology devices) from a State Contract.

Bidding for school facilities (buildings and ground supplies and services) is done through the Town's Facilities Department, which is a consolidated department overseeing the maintenance and upkeep of the Town and School buildings.

Many other towns in Massachusetts have centralized procurement departments, often for all town and school purchasing and bidding processes. Examples include Arlington, Lexington, Andover, Cambridge, Topsfield, Reading, West Springfield, Saugus, Plymouth, Brookline,

Watertown, Methuen, Franklin, Stoneham. The rationale for these departments, per the websites included under “Further Reading” is to provide one process in their towns to obtain high quality supplies and services at the lowest possible cost, and to ensure that all contracts and purchases are in compliance with state statutes and local ordinances, promoting fairness and integrity.

The staffing and job titles for these departments varies. Some have a single purchasing manager or agent. Others have a senior staff with multiple responsibilities in addition to procurement, with a dedicated purchasing assistant. The Massachusetts Association of Public Purchasing Officials, a professional association for an organization dedicated to the education, professional development, and promotion of public procurement professionals across the Commonwealth, recognizes that members may perform under various titles and at different levels of responsibility. Its mission is similar to that stated by the towns cited - to be sure cities, towns and agencies conduct legal and competitive procurements while maintaining the highest standard of ethics, quality, and savings for our communities.

Belmont’s Town Administrator has indicated that she is examining a move to a centralized system for purchasing and contracting, has requested the development of a job description for a staff position (most likely 0.5 FTE), and is considering this for the FY23 budget. This would apply to Town departments.

Recommendations

- The Select Board should support the work of the Town Administrator in determining the best path forward in centralizing supplies purchasing and management, as well as the bidding and contracting processes.
- Outstanding Questions to Address: Is it more efficient and effective to centralize supply chain management? If so, can the Town reorganize staff responsibilities to staff this without additional FTEs? Can the Town and School Department coordinate? Do the cost benefits of centralization outweigh the cost of incremental staffing?

Next Steps

- The Select Board and School Committee should contact the School Superintendent about opportunities for cost savings and overall efficiencies in developing one supply chain management process for Town and School departments.
- The Select Board and School Committee should evaluate the cost/benefits of centralizing the procurement and supply chain management processes and the optimal process for implementation.

Further Reading

- COMMBUYS
<https://www.commbuys.com/bsa/>
- Massachusetts Association of Public Purchasing Officials
<https://www.mappo.org/>
- Arlington
<https://www.arlingtonma.gov/departments/finance/purchasing>

- Lexington
<https://www.lexingtonma.gov/purchasing>
- Andover Central Purchasing
<https://andoverma.gov/601/Central-Purchasing>
- Cambridge Purchasing
<https://www.cambridgema.gov/departments/purchasing>
- Topsfield
<https://www.topsfield-ma.gov/purchasing>
- Reading
<https://www.readingma.gov/operations/procurement-office>
- West Springfield
<https://www.townofwestspringfield.org/government/departments/finance/procurement-bids>
- Saugus
<https://www.saugus-ma.gov/purchasing-department>
- Walpole
<https://www.walpole-ma.gov/purchasing>
- Watertown
<https://www.watertown-ma.gov/136/Purchasing>

IDEA #28 – INSURANCE BIDS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Insurance - Put out to bid. Have schools pay for their share of insurance and defend their own claims

Other ideas included in this report

- #14 (Consolidation and Outsourcing Group)

Idea intent

Potential savings can be generated by competitive bidding for town and school insurance contracts.

Weighted Final Score: 33

(Financial Impact: 1, Operational Impact: 0, Time Scale: 3, Ease of Implementation: 5)

Background Information

Through membership in the Massachusetts Municipal Association (MMA), the Town has access to the Massachusetts Municipal Interlocal Insurance Association (MIIA), a nonprofit corporation created by the MMA in 1982 which provides workers' compensation as well as property, casualty and health insurance to more than 400 Massachusetts communities and other public entities at the lowest possible cost. The MMA is a private, nonpartisan, nonprofit organization of cities and towns.

For certain services, such as labor counsel, the Town does use a bidding process. In general, this has resulted in better service, not identifiable cost savings. The School Committee, which by MA law negotiates school collective bargaining contracts, uses separate labor counsel with relevant expertise in education.

Recommendations

Continue to use the MMA system to seek other opportunities to reduce insurance costs and improve services.

Next Steps

- None

Further Reading

- <https://www.mma.org/about-mma/mma-history-and-mission/>

IDEA #29 – FEES AND FINES

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Increase fees and fines for services across all departments, including licenses and permits

Other ideas included in this report

- #30 Review all fees for potential adjustments (Building, Parking Fees, etc.)
- #31 Review all fees for potential adjustments (Building, Parking Fees, etc.)

Idea intent

Generate additional revenue through fees and fines

Weighted Final Score: 37

(Financial Impact: 1, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 5)

Background Information

The SCIG received several suggestions to increase fees and fines across the departments. This represents a consolidation of those individual suggestions.

Municipalities are not authorized to assess taxes unless specifically authorized to do so by statute. Therefore, to generate additional revenue, municipal governments can collect fees for services they provide. User fees allow a community to set charges to partially or fully-fund particular a service. Towns can periodically reassess those charges to assure an adequate revenue stream to support the services.

By law, a fee may be imposed when a local government provides a particular service (such as a police detail), issues a permit or license, or offers a benefit, like a recreational program.

Municipalities can establish fees as long as they meet the three-prong test set out in *Emerson College v. Boston*, 391 Mass. 415 (1984):

1. A fee must be charged for a particular service that benefits the party paying the fee in a manner not shared by other members of society. In other words, a fee may not be charged for general services that are mandatory or supplied to the public at large, such as core education and police protection.
2. A fee must be paid by choice. That is, the person paying the fee must have the option of not using the service and thereby avoiding the charge. It follows that a service can be withheld from individuals who refuse to pay.
3. A fee must be collected not to raise revenues, per se, but to compensate the governmental entity for its expenses in providing the service. This has been interpreted to mean that a fee cannot exceed the cost to provide the service.

User fees are one of a range of local receipt categories, which also include excises, charges, and other revenues sources. Some local receipts are dictated by statute (e.g., motor vehicle excise, hunting licenses, and firearms permits), while others may be negotiated (e.g., in-lieu-of-tax payments). Still others are established through the adoption of local ordinances or bylaws.

Fines are another means by which municipalities can recover the costs associated with services rendered. Fines are imposed for non-compliance with rules and regulations under local and/or state statutes, bylaws, and ordinances.

All fees and fines are subject to the review and approval of the Select Board and, in some cases, are subject to Town Meeting approval.

Source: MA Department of Revenue User Fees Memorandum

Recommendations

- Immediately instruct all departments to review fees, fines and penalties to determine if the cost of providing a particular (i.e., not general) service is covered by the fees, where relevant; and that fines and penalties are in line with neighboring towns.
- Initiate a program by which fees, fines and penalties are reviewed annually or bi-annually, if such program does not exist. As a recommended practice (per the MA Department of Revenue (DOR)), communities should adopt written policies for setting charges and fees. The policy should identify the factors taken into account when pricing services or benefits. A community should review its fee policy and existing fee structure periodically to ensure it is current and should communicate with the public clearly and openly.
- To price a service or benefit, the MA DOR highly recommends that a community conduct a costing study. A costing study identifies and measures the direct, indirect, capital, and debt service costs to provide a service or benefit over a given period.
- Finally, the DOR recommends that municipalities maintain a log of all municipal fees. In addition to fee name and description, useful information might include the fee amount, date of last review, and collecting department. This data might also be incorporated into a more encompassing revenue manual.

Next Steps

- The Select Board and Town Administrator should instruct all departments to review fees, fines and penalties to determine if the cost of providing a particular (i.e., not general) service is covered by the fees, where relevant; and that fines and penalties are in line with neighboring towns.
- Select Board should instruct the Town Administrator to consider the capability to implement DOR's recommendations regarding a municipal fee policy, costing studies, and municipal fee log.

Further Reading

- MA Department of Revenue User Fees memorandum:
<https://www.mass.gov/doc/user-fees-0/download>

- Summary of Penalties prescribed by the Town of Belmont Bylaws (Chapter A200)
<https://ecode360.com/27111988>

IDEA #32 – OVERNIGHT PARKING FEES

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Charge fees for overnight parking in town and school lots.

Other ideas included in this report

- None

Idea intent

Generate additional revenue (in excess of additional costs) by implementing a system to collect fees for overnight parking, to the extent that the town and school parking lots are not in use for town and school purposes.

Weighted Final Score: 43

(Financial Impact: 1, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 5)

Background Information

Overnight parking is prohibited on all of Belmont’s public and private ways. Belmont General By-Laws Article 21.2(g) states, “Parking for over one hour between the hours of 1 AM and 7 AM is prohibited.” Violation of this by-law results in a \$15 fine. The Traffic Division of the Belmont Police Department is responsible for the enforcement of parking.

During the day, the Municipal Parking Lots located in Waverley Square, Cushing Square, and Claflin Street (Belmont Center) charge for parking at the rate of \$1 per hour. The Claflin Street lot also provides an “all day” option for a \$5 fee. These municipal lots, plus lots at the Town Hall Complex and Senior Center (Beech Street), may be used for overnight parking at no charge, provided vehicles are removed before 7 AM. Parking lots for the Belmont Public Schools are also available for overnight parking, but vehicles must be removed from these lots before 7 AM.

Seasonality will need to be factored into the feasibility of implementing overnight parking fees, since vehicles may be towed if they obstruct snow plowing or snow and ice removal in the town’s public or school parking lots. Belmont General By-Laws Article 21.2(f) states, “No vehicle will be parked so that it interferes with the removal or plowing of snow or the removal of ice.”

Total Parking Meter Receipts for the last three fiscal years were: FY20 \$76,280, FY19 \$109,207, and FY18 \$119,727.

Recommendations

- Implement overnight parking fees, to the extent that additional revenue from overnight parking fees would exceed the costs of implementing and maintaining a system of fee collection and enforcement.

Next Steps

- Select Board to discuss the topic of overnight parking fees with the Town Treasurer, Floyd Carman, who has been delegated the responsibility of Parking Clerk for the town.
- Track revenue generated by overnight parking fees.

Further Reading

- <https://www.belmont-ma.gov/parking/pages/parking-rules-regulations>
- <https://www.belmontpd.org/traffic/faq/what-rule-overnight-parking>

IDEA #33 – CIVIL SERVICE

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Determine financial impact of leaving Civil Service

Other ideas included in this report

- None

Idea intent

Use data to help make decision on Civil Service

Weighted Final Score: 70

(Financial Impact: 4, Operational Impact: 9, Time Scale: 2, Ease of Implementation: 2)

Background Information

The Massachusetts Civil Service Act was established in 1884 to take turn-of-the-century political patronage out of the hiring process by replacing political appointees with staffing based on merit, as determined through Civil Service exams. The Civil Service Unit is a subdivision of the Massachusetts Human Resources Division, enabled by Massachusetts General Laws, Part I, Title IV, Chapter 311. Currently, Belmont police and fire department employees are hired, promoted, disciplined, and terminated according to Civil Service Law.

The Civil Service Unit provides both entry level testing and promotional testing and produces a Civil Service eligibility “list” based on exam scores, adjusted for candidates that have preferred status, such as residents (applicants who resided in the community for 12 months prior to the exam), veterans and disabled veterans, children of public safety employees killed or severely injured in the line of duty, and anyone who was laid off state-wide. These are absolute preference categories and require anyone within these groups who score a passing grade to be placed at the top of the list. Civil Service communities must hire candidates in the order provided by the “list” published by Civil Service, even if a lower listed candidate is more qualified. The exam is a multiple-choice general knowledge test given every two years and the minimum requirement for applicants is a high school diploma (or GED) and a driver’s license. (Note: As of October 2021, Civil Service exams for Police Officers and Firefighters will be administered annually.) Results are returned in about six months. When the list is posted, candidates have a limited time (seven days or so) to notify communities of their intent to apply.

Once hired, Civil Service mandates the process for hiring, promotion, discipline, termination, and lay-offs of employees. It provides a predictable and easy way to understand the set of criteria

¹ <https://www.mass.gov/orgs/civil-service>

for advancement (“career ladder”), rewards longevity with seniority, and takes the local administration out of decisions around promotions and job descriptions. In addition to the hiring and promotional process, Civil Service created the Civil Service Commission to provide an extra layer of protection for Civil Service employees. The Commission hears and decides appeals filed by Civil Service employees and candidates relating to discipline (note: the MA Police Reform bill of 2020² has removed this as an avenue for police officers to appeal discipline), layoffs, termination, bypass of promotion, and classifications and is authorized to overrule the appointing authority’s decision. This protection under Civil Service laws is intended to ensure that employment decisions are based on Civil Service parameters and that all individuals receive fair and impartial treatment as dictated by Civil Service rules. The Civil Service Commission appeals process is additional to other avenues of recourse such as union collective bargaining contract progressive discipline and grant grievance and arbitration provisions, the Labor Relations Commission, the MCAD, the EEOC, and the courts.

For Belmont, as well as many other small Massachusetts communities, filling vacancies under Civil Service rules has proven increasingly difficult, particularly for the Police Department. The number of Civil Service-eligible candidates applying for Belmont police officer positions has dropped precipitously, to the point where the number of vacancies can equal or be higher than the total number of applicants for those jobs in any year. This is less true of the Fire Department, however, there are fewer candidates—which can impact the number of quality candidates—than in the past. This reflects both the fact that the number of resident Belmont applicants choosing public safety as a career has declined over time, as well national trends which show overall declines in police officer and firefighter applicants, due in part to earlier retirements at younger ages and a retirement “bubble” of those hired in the 1990s.

Illustrative of this problem is the Belmont Police Department’s recent attempt to fill four vacancies. The Civil Service list posted in late October of 2020 included five candidates who signed up to work in Belmont. One was outside age criteria; Belmont made four conditional offers. One withdrew and the remaining three did not pass standards set by the Civil Service, including two who failed multiple attempts at the Civil Service Physical Ability Test (PAT)—the last of which was administered in August 2021. After 10 months, the Police Department had zero hires to fill vacant positions—and is starting over again with this year’s list. The protracted vacancies generate overtime and other costs for the department and also can affect the morale of the force as well as the quality of service.

Another costly aspect of Civil Service for smaller towns is the provision that allows for lateral transfers from the hiring department after one year of service. This means that non-residents can choose to apply to a town with limited resident applications (such as Belmont), obtain employment within Civil Service, go through the training process and transfer when eligible to be closer to their home or to join a larger or more “desirable” department. This results in significant lost investment in expenditures such as academy and in-house field training, custom-fitted uniforms and turn-out gear, and time and effort for the department that initiated the Civil Service hire. Such turnover adds vacancies and overtime costs and contributes to lowering the

² *An Act Relative to Justice, Equity and Accountability in Law Enforcement in the Commonwealth, Bill, Chapter 253 of the Acts of 2020.*

overall experience level of the department. While not all transfers are a result of this dynamic, Belmont's Fire Department has experienced this kind of turnover, and, to a lesser degree, the Police Department has as well.

Vacancies in the Fire Department create higher overtime expenditures than in the Police Department. This is because the Fire Department is required by collective bargaining contract to maintain a minimum staff of 11 firefighters for each of four shifts (44). The Department budgets and staffs 12 per shift (48) so that overtime is not incurred for vacations, personal leave, injuries, etc. For each vacancy beyond one per shift, the Department is required to fill the vacancy with another firefighter at overtime pay. A vacancy that lasts one year represents 2,200 hundred hours of overtime per year, not including additional overtime needed to cover vacations, personal leave, injuries. The Police Department has more flexibility to manage overtime during vacancies. Belmont's Public Safety overtime costs in FY22 are expected to be in significantly in excess of budgeted overtime due in part to the high number of vacancies in the Fire Departments and Police Departments. A breakout of overtime by type (injuries, vacancies, etc.) has been requested of the Chiefs.

In response to pressure from municipalities frustrated with the current process, the Massachusetts Legislature established the Special Legislative Commission to Study and Examine the Civil Service Law (under the Acts of 2020, Chapter 253 (Section 107)) to address widespread dissatisfaction with the current Civil Service processes and make recommendations for improvements. In May 2021, the Commission began meeting to study the employment, promotions, performance evaluation and disciplinary procedures for Civil Service employees as well as for municipalities not subject to the Civil Service law³. The commission is charged with making recommendations for changes to the Civil Service law to improve diversity, transparency, and representation of the community in recruitment, hiring and training of Civil Service employees, merit preference status, eligible lists, and appointment from eligible lists by hiring authorities. The commission will also make recommendations around these issues for municipalities not subject to the Civil Service law (and for the State Police). To date, the Commission and its Subcommittees have heard from municipalities operating with and without Civil Service, Police and Fire Chief Associations, Police, Firefighter and other law enforcement unions, veterans and disabled veterans' associations, the Massachusetts Municipal Association, the ACLU, the NAACP, and the Human Resources Division.

Pros and Cons

Proponents of Civil Service highlight the objective standards by which public safety officers are hired and promoted, the value of the Civil Service Commission process for appealing promotion bypasses, discipline, layoffs, and termination that is removed from local influence, and the benefits of consistent standards for public safety officers across the Commonwealth. Public safety unions point out that local departmental control over hiring and firing can be subjective, based on local pressures and personalities rather than objective standards. Civil Service also protects department chiefs and administrators from pressure by residents who favor a particular candidate.

³ <https://malegislature.gov/Events/Hearings/Detail/3987>

In recent testimony submitted to the legislature on behalf of the Massachusetts Coalition of Police⁴, attorney John Becker states that “police officers should be evaluated on merit alone” and that Civil Service “ensures that the legal standards are adhered to” when a municipality seeks to appoint or promote a public safety officer. He points out that the Commonwealth has developed standardized tests for physical fitness as well as standardized exams and that returning control of the system to municipalities would only increase the opportunities for local officials to use non-objective criteria—such as favoritism, personal preference and other, irrelevant criteria—in the decision-making process for hiring and promotional decisions. Eliminating Civil Service, per this testimonial letter, will fragment the system “into a hodgepodge of municipal hiring and promotional policies” that will duplicate costs and result in inconsistent standards across the state.

Critics of the system point out that the original merit-based intent of Civil Service has been undermined by numerous modifications over the years. As stated in a 2004 Pioneer Institute publication⁵, “for public safety employees...the concept of merit has been supplanted by a system of political preferences. The result is that for new hires, the test score has little or no bearing on where his or her name will appear on the hiring list.” The hiring process is also criticized for the length of time it takes to score and produce the Civil Service list (up to six months, in an era in which SAT scores are available immediately), which often results in loss of recruits to other job sectors. A 2021 Worcester study of Civil Service features a candidate who was not hired until two years after he passed the exam because of Civil Service protocol delays—and, by then, he had moved into the private sector⁶. The Civil Service Commission is also faulted for its slow process and backlog of cases. In 2020, the Commission reports that it took in 178 new appeals and ended the year with 156 pending appeals, 76 of which were more than 12 months old⁷. The average appeal cycle took more than 8 months—before any further appeals.

Critics also point to the rise and robustness of collective bargaining contracts during the 20th-century which replaced most, if not all, of the benefits of Civil Service, including the “career ladder” criteria for advancement, salary steps, procedures for lay-offs and discipline, and avenues for grievances and/or arbitration. Additionally, there is a growing sense among many departments that Civil Service rules and regulations often clash with a growing public service movement—and community expectations—calling for productivity, service orientation, and accountability, and away from rigid parameters⁸. Such critics believe that Civil Service creates disincentive rather than incentive for job improvement, a lack of accountability, and rewards longevity, not performance in the job.

⁴ <https://sandulligrace.com/?s=civil+service+testimony>

⁵ <http://bgc.pioneerinstitute.org/fixing-civil-service-in-massachusetts/>

⁶ <http://www.worcesterma.gov/agendas-minutes/boards-commissions/diversity-inclusion-advisory-committee/2021/20210614.pdf>;

⁷ <https://www.mass.gov/doc/2020-calendar-year-statistics/download>

⁸ *Departing Civil Service, presentation to Massachusetts Municipal Association by Police Chief Cunningham (Wellesley) and Police Chief Brooks (Norwood)*

A study of the pros and cons of Civil Service conducted by the Municipal Technical Advisory Service at the UTennessee Institute for Public Service⁹ states that, while Civil Service can professionalize the workforce in a politically driven form of government (weak or strong-mayor forms), civil service systems are probably least needed, and are thus the greatest hindrance to effective management, in cities with either the Council-Manager or Council-Administrator forms of government (or other professionally-based forms).” This is because no one elected person on the council or board can hire or fire employees alone and because the town administrator/manager is an appointed, not elected, position and has no “patronage” to appease. (As noted earlier, elimination of Civil Service can increase citizen pressure on department fire and police chiefs, who now have control over hiring decisions.) The study noted “that the rigidity of many civil service testing and advancement procedures have given rise to numerous criticisms, many of which point to the absence of other important hiring or advancement criteria (such as performance).”

Opting Out of Massachusetts Public Safety Civil Service

As of November 2021, there were 149 communities using Civil Service for public safety employment out of 351 cities and towns in Massachusetts. Thirty-nine communities withdrew from the Civil Service fire and/or police recruitment process within the past ten years, including, but not limited to, peer communities such as Acton, Burlington, Lexington, Norwood, Reading, Sudbury, Walpole, Wayland, Wellesley, and Westwood. In the past year, Swampscott and Mansfield voted to withdraw both fire and police from Civil Service, Franklin voted to withdraw fire from Civil Service (having already withdrawn police), and Falmouth, Foxborough, Framingham, Gardner, Hudson, Rockport, and Webster have withdrawn police from Civil Service. In March 2021, the Newton Police Reform Task Force, recommended leaving Civil Service in part to meet objectives for increasing diversity as well as to overcome barriers to effective recruitment.¹⁰ Other communities, such as Concord and Weston, do not hire through Civil Service.

Towns who have opted to leave Civil Service cite many reasons. In a June 2020 report conducted by Municipal Resources, Inc. (MRI) for the Town of Abington¹¹, towns withdrawing from the process cited “irregular testing intervals, rigid recruitment and selection parameters, residential and military preference requirements, and a cumbersome and antiquated discipline and termination hearing process, which often reduces or reverses personnel action at the local level, thereby restoring officers to their positions who have committed maleficence or wrongdoing.” Framingham cites the ability to “expand our ability to recruit, attract a larger pool of candidates, with the goal of creating a workforce that is reflective of the community we serve”¹². A report prepared by the Swampscott Civil Service study committee characterized civil service as a one-

⁹ *Civil Service: Some Pros and Cons and Suggestions for Reform*, Municipal Technical Advisory Service Institute for Public Service publication <https://www.mtas.tennessee.edu/knowledgebase/civil-service-some-pros-cons-and-suggestions-reform>

¹⁰ *Newton Police Reform Task Force Recommendations, March 2021*

¹¹ https://www.abingtonma.gov/sites/g/files/vyhlij236/f/uploads/final_mri_report_redacted_7.10.20.pdf

¹² <https://www.metrowestdailynews.com/story/news/2020/12/24/framingham-police-dept-officially-leaving-civil-service/4043325001/>

size-fits-all, rigid, time-consuming, and cumbersome operation. The state agency does not, committee members argued, account for an individual community's needs and "the limitations imposed by the civil service system results in less diverse candidates to consider upon initial appointment and limits management discretion in the promotion of ranking officers"¹³. In a presentation to Massachusetts Municipal Association (MMA), the Wellesley and Norwood Police chiefs state "(t)he civil service system in Massachusetts is no longer up to the important task of helping government recruit and hire the most talented personnel"¹⁴.

In preparation for withdrawal from Civil Service, comprehensive personnel procedures need to be developed for hiring and promoting public safety employees. This includes identifying and setting standards for education requirements, diversity in gender or race, residency, language proficiency, EMS or other skill-based requirements, and developing tests to assess qualities and skill sets desired by the community. For promotional requirements, communities factor in attributes beyond test scores, such as work product, contribution to the community, performance evaluations, and attendance records as well as disciplinary records. The burden is on the town, in conjunction with the unions, to create legal, efficient, and comprehensive personnel procedures, including testing and a process for grievances that avoid any appearances of patronage. All of these require collective bargaining with the relevant unions to ensure that the replacement process is fair and objective. Towns also work with unions to review reduction-in-force language, arbitration rules and other collective bargaining topics to make sure union concerns are met. Most towns retain current Civil Service employees under Civil Service rules (including recourse to the Commission) while hiring new employees under non-Civil Service parameters. Other hiring protocols remain the same, such as background checks, drug testing, psychological evaluations, and physical ability tests. New recruits are trained through the same training academies and with the same level of local training.

Many non-Civil Service municipalities collaborate on the development of entry level testing and use a third-party vendor to administer and score the tests to spread out the cost of this component and create a fair and impartial process. Towns such as Lexington, North Reading, and Wellesley have developed mechanisms to objectively evaluate candidates for appointment that do not rely exclusively on test scores, residency, or set preferences categories and have created best-practice promotional processes that rely upon judgment, discretion, and other essential supervisory factors. A huge benefit is that, once these protocols are established, the towns can administer the exams when necessary, instead of waiting a year or more for the Civil Service exam and up to a year from exam to hiring.

Non-Civil Service communities report that the hiring process is more productive and faster than under Civil Service protocols. As an example, the Mashpee Police Chief is quoted as saying "we can promote an exam, get 50-60 takers and can start the background checks, and be interviewing candidates within the month."¹⁵ Grafton Police Chief Crepeau states, "when we gave our test, the

¹³ https://www.swampscottma.gov/sites/g/files/vvhlif1296/f/uploads/north_reading_-_civil_service_background_info.pdf

¹⁴ *Departing Civil Service, presentation to Massachusetts Municipal Association by Police Chief Cunningham (Wellesley) and Police Chief Brooks (Norwood)*

¹⁵ <https://www.metrowestdailynews.com/story/news/2020/12/24/framingham-police-dept-officially-leaving-civil-service/4043325001/>;

scores were out within a week. So we can move a lot faster, and that’s a big thing, especially with small departments.” He suggests that many police departments leave Civil Service because “doing so yields greater flexibility in hiring a lateral transfer, or seasoned officer from another police department” or from colleges and universities, or out-of-state departments. All of these efforts reduce costs by increasing the yield of hires as a percent of applicants, eliminating long delays and competition for training academies, and reducing the length of department vacancies.

Further Analysis

A review of the pros and cons of remaining with Civil Service compared to leaving Civil Service is provided below:

Pros and Cons of Civil Service (from employee’s point of view)

Pros	Cons
Elimination of politics/patronage in hiring and promotions. Cannot be terminated without Civil Service process.	Continued high vacancies create pressure on existing staff.
Additional recourse through appeal to Civil Service Commission for bypassed promotions, discipline, and terminations, etc.	Drawn out process can create lower morale in the department.
Set criteria for advancement and seniority.	Does not reward performance; can be a demotivator for others in department.

Pros and Cons for adopting Non-Civil Service hiring rules (from Town’s point of view):

Pros	Cons
Attracts a larger pool of potential candidates (especially for Police), which can result in more targeted hiring, more qualified recruits, and higher ratio of applicants to the number of successful hires, saving upfront costs	Requires renegotiation of collective bargaining contracts, which may increase public safety expenditures
Local control over hiring, discipline and firing decisions	Potential for political/other influence on hiring, discipline and firing decisions
Improves entrance and promotional standards; not one size fits all; removes entry criteria that are barriers to diversity	

Other Sources: Belmont Police Chief, Belmont Fire Chief

Reduces time required between recruiting, exams, and hiring which lowers overtime costs associated with vacancies	Mixed department of Civil Service and Non-Civil Service can create departmental tensions
Examinations held as often as needed	Time and cost required to recruit and test candidates throughout the year vs. from Civil Service List
Can tailor recruitment to needs of department and hire skill sets to reflect town needs	May create significant initial turnover of employees who wish to stay in Civil Service departments
More flexibility to address discipline and termination issues; shorter time frame for resolution	More burden on administrators to create legal, efficient, and comprehensive personnel procedures, including testing and process for grievances, and to avoid any appearances of patronage
Ability to hire experienced candidates faster which saves training academy costs; lessens time from hiring to contributing member	
Candidates who choose to apply non-Civil Service to Belmont likely to stay longer; less vacancies, more experienced force	
Can structure promotional standards that enhance accountability and productivity	
Provides management flexibility - eliminates convoluted system/detailed job descriptions that tie management's hands	Risk of defending appropriateness of examinations and promotions against allegations of discrimination

Associated Costs/Savings:

Keep Civil Service		Adopt Non-Civil Service	
Outcome	Costs	Outcome	Costs
No changes to collective bargaining	No additional costs needed to be negotiated	Collective bargaining negotiations	One-time and/or Recurring cost needed to be negotiated
Difficulty and cost of hiring public safety personnel	Recurring higher overtime costs Loss of significant upfront investment in personnel	Shorter term for vacancies -Town can recruit more frequently, initiate hiring at any time	Recurring lower overtime costs

Continued turnover, vacancies	Recurring higher overtime costs Decline in level of experience- “soft” cost	Experienced candidates	Training cost savings
Loss of service to the community with sustained vacancies	Decline in level of service-soft “cost”	Expenditures related to the development of exams, hiring practices, promotional standards, etc.	One-time up-front costs
		Possible longer average career in Belmont	Reduction in turnover costs such as uniforms, equipment, etc.
		Loss of personnel unhappy with non-civil service	One-time turnover and vacancy costs

Estimated Costs of Hiring Public Safety Officers

This idea asked for a determination of the financial aspect of leaving Civil Service. However, a complete cost/benefit evaluation requires collective bargaining with the four public safety unions, as well as estimates of the legal and procedural costs necessary to undertake candidate evaluations, etc. The numbers below provide insight into the overall costs of hiring public safety employees and of losing employees due to turnover.

The cost of evaluating any individual candidate for the Fire Department and the Police Department is the same whether or not the Town participates in Civil Service. However, based on comments from non-civil service departments (see above), it is logical to assume that the “yield percentage”, or the number of successful employment contracts divided into the number of candidates interviewed, will be significantly higher, resulting in lower overall hiring expenditures. Higher yields are the likely product of a broader pool of applicants, especially if the candidate is specifically interested in employment in Belmont beyond as a springboard for transfer. In the Police Department example cited above, the Department incurred evaluation costs for the four available Civil Service candidates, with a yield of zero. To the extent that the average tenure of non-civil service hires is higher, the department benefits from a more experienced unit and the upfront investments in training and equipment will be spread over more years, as opposed to lost when recently trained employees leave the department.

Of note, Watertown’s 2016-19 firefighter collective bargaining contract includes a clause that requires firefighters to repay a portion of training costs on a prorated basis if the firefighter leaves within five years to accept a public safety job in another town.

A cost that is not included here is the cost of recruitment. Civil Service departments do not incur costs because the recruitment is done on a state-wide basis and the list of candidates are provided to the Town. As a non-civil service community, the Town will be responsible for all outreach and recruiting costs.

Public Safety Hiring Process Costs

	Fire Department	Police Department
Task	Estimated \$ Cost/Candidate	Estimated \$ Cost/Candidate
Admin Time	\$75	\$75
Pre-Employment Administrative Time	\$150	\$150
Background Check	\$1,000	\$1500
Oral Interview	\$254	\$600
Physical and Psychological Exams, Medical and Drug Screening	\$835	\$1,315
Sub Total-Evaluation Only	\$2,060	\$3,640
Uniforms/Turn Out Gear	\$8,000	\$200
Training (Academy, In house, etc.)	\$9,760	\$3,800
Orientation	\$90	
In-house Training	\$1,670	
Recruits Salary and Benefits at Academy*	\$10,000	\$24,000
Total Cost	\$31,580	\$31,640
Other		See below

Sources: Belmont Police Chief, Belmont Fire Department Chief

*Based on salary of approximately \$1,000 per week during training.

Other police compensation during training: use of cruiser, 10 weeks compensation of Field Training officers with time

Academy costs: use of cruiser for one week, ammunition

Recommendations

- After an evaluation of the benefits and risks to the Town, the SCIG recommends that the Town continue to pursue withdrawal from Civil Service.
 - This is more urgent issue for the Police Department, which has had four vacancies that it has been unable to fill through Civil Service since 2020. This

in turn impacts overtime costs as well as overall delivery of police department services.

- Filling vacancies is less problematic for the Fire Department, however, the period from Civil Service exams to hiring and training to in-service firefighter can be up to a year, which can have a direct and significant impact on overtime. The Fire Department had six vacancies at the end of FY21 and has filled five, three of which will not be available for service until March and two of which will not be in service until April. Under Civil Service rules, firefighters can transfer after one year's employment, which results in a loss of more than \$30,000 in the Town's upfront investment in training and customized gear. The primary reason given for leaving the Department is to move to a department closer to home.
- While the SCIG recommends withdrawing for both the Police and Fire Department, the implementation of the recommendation requires negotiating separate collective bargaining contracts and it may be more practical to withdraw the Police Department independent from the Fire Department, as other communities have done.
- The SCIG recommends that, prior to an annual town meeting vote on withdrawal from Civil Service, the Town conduct a cost/savings analysis for each of the departments to fully understand the impact on the General Fund Budget. Such analysis would include:
 - Collective bargaining terms to be negotiated. Union support is preferred for successful withdrawal.
 - Estimated overtime costs/savings from Civil Service vacancies over time
 - Initial impact of expected turnover among personnel who wish to remain in Civil Service.
 - Estimated cost of recruiting candidates and administering an alternative program as stand-alone town.

The financial impact of leaving Civil Service should also be balanced against the non-financial benefits and costs. Non-financial benefits include the ability to tailor hiring to meet the Town's needs and required skill sets, an increase in overall quality and diversity of candidates, possible improvements in quality of service, and management flexibility/ local control of decisions. Non-financial costs include potential tensions that can arise in "mixed" civil service/non-civil service departments, additional burden on Department administrators to avoid the appearance of favoritism, and possible difficulty attracting candidates interested in working in this region to a town surrounded by Civil Service towns (Arlington, Cambridge, Waltham and Watertown).

Next Steps

Select Board and Town Administrator to:

- Continue discussions with unions with the goal of withdrawing from Civil Service with union support. Priority should be given to renegotiating the Police Department contract.
- As part of negotiations, continue the discussion of terms and conditions for an alternate system for hiring in Police Department and Fire Department.
- Forecast savings and costs to determine the net benefit/loss for the Town.
- Present formal withdrawal article to Town Meeting with union support.

- Leverage existing work done in non-civil service communities to develop exams, and other necessary guidelines.

Further Reading

- See footnotes

IDEA #34 – NAMING RIGHTS

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Explore joint support for Town and School Department naming rights. Seek out corporate sponsorship in exchange for advertising/naming consideration to procure/maintain school labs & equipment, other town capital equipment, or public areas (adopt-a-park similar to adopt-a-highway).

Other ideas included in this report

- None

Idea intent

New revenue sources through corporate sponsorships and donations for naming town facilities.

Weighted Final Score: 50

(Financial Impact: 3, Operational Impact: 2, Time Scale: 3, Ease of Implementation: 4)

Background Information

Businesses and individuals can be solicited for corporate sponsorship fees and individual donations in exchange for naming town buildings, meeting rooms, athletic facilities, including fields, or other assets after the business or donor.

The Belmont Select Board in 2018 adopted a Naming Policy for Town Assets in order “to establish a systematic, consistent and transparent approach for naming public assets in the Town”. The policy delineates the criteria that the Select Board will use in evaluating and approving naming proposals for town assets.

There is not a policy or mechanism for soliciting sponsorship or donor funds on the part of Town Departments, according to the Town Administrator, who also indicated soliciting corporate sponsorships might be categorized as a contract and under Massachusetts General Law must go out to bid, where it would be won by the lowest bidder, unless a trust or foundation (similar to the Belmont Library Foundation or Foundation for Belmont Education) was formed.

Belmont Public Library has developed its own naming policy and tangible gifts policy for use by the Friends of the Library and the Belmont Library Foundation. The former raises funds in general for library programs and services. The latter is charged by the Library Board with raising significant funds for the town’s replacement library. The Trustees have formed a “Table Group” with representatives of the Board of Trustees, the Friends, and the Foundation to align fundraising with Library needs.

The finance office for Belmont Schools indicated they do not solicit sponsorships or donor funds. The Foundation for Belmont Education does work with residents and businesses in the Town of

Belmont to raise private funds that are used to enrich the education provided by the Belmont Public Schools.

That said, examples of Belmont assets that have been named after private fundraising initiatives are Joey's Park (The Joey Fund and other donations, both financial and in-kind) and the Brendan Grant Memorial Field at the Belmont High School, which was renovated with funds(\$250K) from the Brendon Grant Foundation in 2007.

School systems in eastern Massachusetts and their City or Town educational foundations have grappled with the issues of gifts/donations and going out to bid. Some examples are below.

Naming Rights in Other Massachusetts Communities

- Brookline: Named an athletic facility with a private donation from the Kraft family (\$400,000). That donation went through the Town's Park & Recreation Department, and was matched by the NFL (\$200,000). The name is "The Kraft Family Athletic Facility at Harry Downes Field." The \$600,000 went to make improvements to the facility.
- Gloucester: Naming right for the Stadium went out to bid and New Balance was the highest bidder at \$500,000 over a 10-year period. The name is "The New Balance Track & Field at Newell Stadium." The \$500,000 went to make improvements to the stadium.
- Shrewsbury: In exchange for Susan J. Adams's and family sponsorship donation of \$250,000, the Shrewsbury High School Stadium Field was renamed the "David J. Adams Memorial Field".
- Newton: Back in 2012 a group of Aldermen raised the issue of selling naming rights for school assets by contracting with the Newton Schools Foundation, prompting the Mayor to "request authorization to establish a revolving account with an annual expenditure limit of \$2,000,000 for the purpose of receiving funds collected by the Newton Schools Foundation in connection with the sale of naming rights for Newton Public School buildings and facilities and to be distributed for the sole purpose of public school education technology and curriculum purposes". It does not seem to have gone anywhere.

Recommendations

- This is a feasible idea for the Town and Belmont Schools and is well underway for the Library.
- Other than the Library (with the Friends and Foundation), Town and Schools do not have the formal infrastructure for soliciting donations or securing corporate sponsorship and should work on a structure and process for this.
- This structure and process can dovetail with Idea #23 on increasing revenue from grants, as the skill set is the same.
- Currently in Belmont, funds need to be raised for two major projects: a replacement library and ice rink. There are likely identical corporations that are prospects for both projects (e.g., banks, car dealerships, supermarkets, etc.). Those bodies charged with fundraising should coordinate such requests for major donations and sponsorships.

Next Steps

- The Select Board should direct the Town Administrator to work with the School Superintendent and School committee, and the Library Director and Library Board on an evaluation of estimated revenue from naming rights, as well as structure and process, including the staff needed to solicit and manage sponsorships.
- The Select Board, the Library Board and the School Committee should develop a mechanism to coordinate how major donations or sponsorships are sourced and requested of prospects that cut across Town, School and Library.
- Part of the evaluation should include integrating the naming rights assessment and next steps with those to increase revenues through increased grant writing, as the staff needed for these areas have a similar skill set.

Further Reading

- Town of Belmont Naming Policy
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/naming_policy_-_final_11-05-2018_0.pdf#:~:text=Property%20may%20be%20named%20after,%2C%20law%20enforcement%2C%20public%20office.
- Belmont Public Library Naming Policy
<https://belmontpubliclibrary.net/about/policies/belmont-public-library-naming-rights-policy-november-2018/>
- Belmont Public Library Collection Policy for Tangible Gifts
<https://belmontpubliclibrary.net/about/policies/collection-policy-for-tangible-gifts/>
- City of Newton
<https://www.newtonma.gov/home/showpublisheddocument/15973/637238166449370000>
- Shrewsbury High School Field Naming Rights
<https://campussuite-storage.s3.amazonaws.com/prod/11162/b2004386-1ca3-11e6-b537-22000bd8490f/1726841/525bd3c0-3e4f-11e8-bb90-126a128cadd6/file/MOUAdamsRevised.pdf>

IDEA #35 – OFFICE HOURS FOR TOWN ADMINISTRATOR’S OFFICE

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Institute office hours for public access to TA and Dept heads; increases efficiency.

Other ideas included in this report

- None

Idea intent

Instituting office hours has the benefit of freeing up some consistent time for employees to accomplish tasks without interruption. This idea may also increase transparency and resident satisfaction.

Weighted Final Score: 30

(Financial Impact: 0, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 5)

Background Information

In Belmont, executive authority is vested in an elected Select Board. As allowed by Mass General Laws Chapter 41 Section 23A, the Select Board appoints a Town Administrator to run day-to-day operations and assist with long-term projects. Among other responsibilities, the Town Administrator’s Office is responsible for responding to questions and concerns of residents.

Residents are encouraged to contact the Town Administrator’s Office to ask a general question about Town government, schedule time to speak with a member of the Select Board, inquire about the Select Board’s meeting schedule and agendas, ask which department to contact for town services or general information, report a problem when they don’t know which department is most appropriate, sign up to volunteer to serve on a Town Committee, request to close off their street to hold a neighborhood block party, request permission to place a temporary sign on a public median, rent space in a Town building in order to hold a private function, request a one-day liquor license to sell alcohol for an event, or address a legal matter or insurance claim that involves the Town of Belmont.

Town Offices are open Monday through Thursday from 8 AM to 4 PM and Friday from 8 AM to 12 PM, except for legal holidays.

Recommendations

- Pilot the idea of instituting office hours for public access to Town Administrator’s Office. (Implemented in second half of 2021)

- After implementation, assess the value of the Town Administrator's office hours and decide whether to implement office hours for any department heads as well.

Next Steps

- Select Board should assess the value of the Town Administrator's office hours and decide whether to implement office hours for any department heads as well.

Further Reading

- <https://www.belmont-ma.gov/town-administration>
- <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section23A>

IDEA #36 – REVIEW TOWN OWNED/USED PROPERTY FOR BEST USE

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

Sell town-owned parcels for residential development or define a public purpose, Includes Belmont Municipal Light building, School Department administration building, etc. SCI-21 Sell or lease the town-owned parking lots in Belmont Center and Waverley Square for mixed-use commercial and residential development. This would increase short-term revenue through the sale or lease and through permitting fees and could increase long-term revenue through new property taxes. It could add affordable housing and might also spur additional development of these areas. The buildings themselves could be built over the parking lots.

Other ideas included in this report

- # 20, #68, #77, #80, #204, #207, #208, #209, #210, #211, #225, #246, #248, #273, #284, #292, #315, #333, #342, #376, #379

Idea intent

Review town owned/used Property for best use.

Weighted Final Score: 53

(Financial Impact: 5, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 1)

Background Information

Currently the town owns what is considered three types of property:

- Vacant land – These are unimproved lots which do not appear to have an identified use but are small and usually buffers between residential properties
- Parks and parking lots
- Municipal buildings

Belmont needs a master plan, currently the master plan is out of date and does not consider the current market or needs of the town. (See Idea #40.)

[General Law - Part I, Title VII, Chapter 41, Section 81D](https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section81D)

<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section81D>

Recommendations

- Create a comprehensive town master plan (see Idea #40)
 - This plan should include a municipal space use study to identify where office space can be consolidated or used more efficiently to help create leasable space for the private sector which will drive increased revenues to the town

- Evaluate town owned parcels, their use and whether the town can create revenue streams/layoff maintenance costs by selling or leasing land, or utilizing the building space for its best purpose (see below for town owned parcels)
 - Evaluate the vacant parcels
- Prepare a market study for office leases. Currently Belmont has demand for office tenants who are being pushed out of the Fresh Pond/Cambridge market as office space there is being redeveloped into lab space. COVID has put downward pressure on the office market which needs to be evaluated.

Next Steps

- Work with Select Board and an appointed group of qualified individuals to Identify parcels that could be sold and/or land leased for development.
 - Once identified, go through an RFP process to see who and what is the best use and value for the property. For example, we should be studying what is really needed in the Belmont light building, what it would take to decommission that building and then run an RFP process asking for creative uses for the building. This should include hotel developers, residential developers and groups who rehab historical buildings.
- Commence the master plan process and municipal space use study immediately.

Further Reading

- See the Idea Matrix (XLS file) for an interactive table of the property data below, titled “Idea 36 Town Owned Parcels”
- Idea #84 is a discussion about the Benton Library
- [Designing Dedham 2030 – MAPC](https://www.mapc.org/resource-library/dedham-master-plan/)
https://www.mapc.org/resource-library/dedham-master-plan/
- [Final-Winchester-Master-Plan-Report-Pages](https://www.winchester.us/DocumentCenter/View/4615/Final-Winchester-Master-Plan-Report-Pages)
<https://www.winchester.us/DocumentCenter/View/4615/Final-Winchester-Master-Plan-Report-Pages>

Description	Address	Land	Building	Other	Total	Lost Tax	Debt Payoff	Year
Beech Street Center	266 Beech St	\$ 1,201,000	\$ 6,508,000	\$ -	\$ 7,709,000	\$ 84,799	\$ 715,000	2020
Town Yard	37 C St	\$ 14,761,000	\$ 6,534,000	\$ -	\$ 21,295,000	\$ 234,245	\$ 3,160,000	2020
Belmont High School	221 Concord Ave	\$ 20,923,000	\$ 31,586,000	\$ -	\$ 52,509,000	\$ 577,599	\$182,725,000	2020
White Field House	291 Concord Ave	\$ 9,042,000	\$ 1,793,000	\$ -	\$ 10,835,000	\$ 119,185		2020
Underwood Pool	320 Concord Ave	\$ 3,434,000	\$ 287,000	\$ 1,000	\$ 3,722,000	\$ 40,942	\$ 1,480,000	2020
Belmont Public Library	336 Concord Ave	\$ 10,006,000	\$ 5,638,000	\$ -	\$ 15,644,000	\$ 172,084		2020
Vigliolo Skating Rink	345 Concord Ave	\$ 8,714,000	\$ 7,572,000	\$ -	\$ 16,286,000	\$ 179,146		2020
Former BLMD	450 Concord Ave	\$ 869,000	\$ 1,807,000	\$ -	\$ 2,676,000	\$ 29,436		2020
Town Hall	455 Concord Ave	\$ 2,361,000	\$ 9,776,000	\$ -	\$ 12,137,000	\$ 133,507	\$ 1,425,000	2020
Police Department	460 Concord Ave	\$ 414,000	\$ 1,895,000	\$ -	\$ 2,309,000	\$ 25,399	\$ 6,605,000	2020
Hittinger Substation	70 Hittinger St	\$ -	\$ 645,000	\$ -	\$ 645,000	\$ 7,095		2020
Fire Station Substation	99 Leonard St	\$ 363,000	\$ 3,611,000	\$ -	\$ 3,974,000	\$ 43,714		2020
Benton Library	75 Oakley Rd	\$ 634,000	\$ 573,000	\$ -	\$ 1,207,000	\$ 13,277		2020
Oakley Substation	182 Oakley Rd	\$ -	\$ 624,000	\$ -	\$ 624,000	\$ 6,864		2020
Wellington School	121 Orchard St	\$ 10,855,000	\$ 10,416,000	\$ -	\$ 21,271,000	\$ 233,981	\$ 15,750,000	2020
Burbank Elementary	266 School St	\$ 11,784,000	\$ 18,318,000	\$ -	\$ 30,102,000	\$ 331,122		2020
Fire Station HQ	299 Trapelo Rd	\$ 2,312,000	\$ 5,931,000	\$ -	\$ 8,243,000	\$ 90,673	\$ 379,900	2020
Chenery Middle School	95 Washington St	\$ 10,849,000	\$ 14,250,000	\$ -	\$ 25,099,000	\$ 276,089		2020
Winn Brook Elementary	97 Waterhouse Rd	\$ 18,890,000	\$ 29,348,000	\$ -	\$ 48,238,000	\$ 530,618		2020
Butler Elementary	90 White St	\$ 2,548,000	\$ 8,741,000	\$ -	\$ 11,289,000	\$ 124,179		2020
Belmont Water Dept	35 Woodland St	\$ 2,675,000	\$ 1,272,000	\$ 11,000	\$ 3,958,000	\$ 43,538		2020
Municipal Owned Buildings	13 Parcels	\$ 76,374,000	\$ 94,192,000	\$ 11,000	\$170,577,000	\$1,876,347	\$ -	
Municipal Debted Buildings	8 Parcels	\$ 56,261,000	\$ 72,933,000	\$ 1,000	\$129,195,000	\$1,421,145	\$212,239,900	
All Municipal Buildings	21 Parcels	\$132,635,000	\$167,125,000	\$ 12,000	\$299,772,000	\$3,297,492	\$212,239,900	

Vacant Land	19 B St	\$ 96,000	\$ -	\$ -	\$ 96,000	\$ 1,056		2020
Vacant Land	203A Belmont St	\$ 499,000	\$ -	\$ -	\$ 499,000	\$ 5,489		2020
Beaver Brook	103R Brookside Ave	\$ 95,000	\$ -	\$ -	\$ 95,000	\$ 1,045		2020
Beaver Brook	109R Brookside Ave	\$ 62,000	\$ -	\$ -	\$ 62,000	\$ 682		2020
Beaver Brook	115R Brookside Ave	\$ 57,000	\$ -	\$ -	\$ 57,000	\$ 627		2020
Beaver Brook	121R Brookside Ave	\$ 57,000	\$ -	\$ -	\$ 57,000	\$ 627		2020
Beaver Brook	127R Brookside Ave	\$ 56,000	\$ -	\$ -	\$ 56,000	\$ 616		2020
Beaver Brook	133R Brookside Ave	\$ 83,000	\$ -	\$ -	\$ 83,000	\$ 913		2020
Beaver Brook	139R Brookside Ave	\$ 82,000	\$ -	\$ -	\$ 82,000	\$ 902		2020
Beaver Brook	145A Brookside Ave	\$ 111,000	\$ -	\$ -	\$ 111,000	\$ 1,221		2020
Beaver Brook	145B Brookside Ave	\$ 69,000	\$ -	\$ -	\$ 69,000	\$ 759		2020
Beaver Brook	157R Brookside Ave	\$ 138,000	\$ -	\$ -	\$ 138,000	\$ 1,518		2020
Clark St Housing	104 Clark St	\$ 693,000	\$ 523,000	\$ -	\$ 1,216,000	\$ 13,376		2020
DPW	301-303 Concord Ave	\$ 915,000	\$ -	\$ -	\$ 915,000	\$ 10,065		2020
DPW	309-311 Concord Ave	\$ 805,000	\$ -	\$ 11,000	\$ 816,000	\$ 8,976		2020
Vacant Land	386 Concord Ave	\$ 329,000	\$ -	\$ -	\$ 329,000	\$ 3,619		2020
Vacant Land	434 Concord Ave	\$ 104,000	\$ -	\$ -	\$ 104,000	\$ 1,144		2020
Vacant Land	436 Concord Ave	\$ 84,000	\$ -	\$ -	\$ 84,000	\$ 924		2020
Vacant Land	438 Concord Ave	\$ 78,000	\$ -	\$ -	\$ 78,000	\$ 858		2020
Vacant Land	440 Concord Ave	\$ 79,000	\$ -	\$ -	\$ 79,000	\$ 869		2020
Vacant Land	130 Orchard St	\$ 905,000	\$ -	\$ -	\$ 905,000	\$ 9,955		2020
Vacant Land	751 Pleasant St	\$ 3,922,000	\$ -	\$ -	\$ 3,922,000	\$ 43,142		2020
Vacant Land	1012 Pleasant St	\$ 79,000	\$ -	\$ -	\$ 79,000	\$ 869		2020
Vacant Land	25 Royal Rd	\$ 2,429,000	\$ -	\$ -	\$ 2,429,000	\$ 26,719		2020
Vacant Land	5 Selwyn Rd	\$ 15,000	\$ -	\$ -	\$ 15,000	\$ 165		2020
Vacant Land	524 Trapelo Rd	\$ 72,000	\$ -	\$ -	\$ 72,000	\$ 792		2020
Vacant Land	160A White St	\$ 277,000	\$ -	\$ -	\$ 277,000	\$ 3,047		2020
Municipal Vacant Land	27 Parcels	\$ 12,191,000	\$ 523,000	\$ 11,000	\$ 12,725,000	\$ 139,975	\$ -	

Town Field Playground	288 Beech St	\$ 7,030,000	\$ -	\$ -	\$ 7,030,000	\$ 77,330		2020
Belmont Center Parking Lot	10 Claflin St	\$ 1,350,000	\$ -	\$ -	\$ 1,350,000	\$ 14,850		2020
Common St Park	2 Common St	\$ 1,165,000	\$ -	\$ -	\$ 1,165,000	\$ 12,815		2020
Highland Cemetery	700 Concord Ave	\$ 2,077,000	\$ -	\$ -	\$ 2,077,000	\$ 22,847		2020
Radio/Cell Tower	780 Concord Ave	\$ 119,000	\$ -	\$ -	\$ 119,000	\$ 1,309		2020
Lone Tree Hill	800 Concord Ave	\$ 52,675,000	\$ -	\$ -	\$ 52,675,000	\$ 579,425		2020
Rock Meadow Park	1034 Concord Ave	\$ 68,015,000	\$ -	\$ -	\$ 68,015,000	\$ 748,165		2020
Beaver Brook Park	1100 Concord Ave	\$ 7,201,000	\$ -	\$ -	\$ 7,201,000	\$ 79,211		2020
Belmont Cemetery	121 Grove St	\$ 39,310,000	\$ 589,000	\$ -	\$ 39,899,000	\$ 438,889		2020
Grove Street Playground	180 Grove St	\$ 21,986,000	\$ -	\$ -	\$ 21,986,000	\$ 241,846		2020
Lone Tree Hill	248 Mill St	\$ 4,429,000	\$ -	\$ -	\$ 4,429,000	\$ 48,719		2020
Payson Park	288 Payson Rd	\$ 1,631,000	\$ -	\$ -	\$ 1,631,000	\$ 17,941		2020
Pequossette Park	310 Trapelo Rd	\$ 14,359,000	\$ -	\$ -	\$ 14,359,000	\$ 157,949		2020
Waverly Sq Parking Lot	518 Trapelo Rd	\$ 703,000	\$ -	\$ -	\$ 703,000	\$ 7,733		2020
Municipal Parks & Lots	14 Parcels	\$222,050,000	\$ 589,000	\$ -	\$222,639,000	\$2,449,029	\$ -	
All Municipal Owned	54 Parcels	\$310,615,000	\$ 95,304,000	\$ 22,000	\$405,941,000	\$4,465,351	\$ -	
All Municipal Debted	8 Parcels	\$ 56,261,000	\$ 72,933,000	\$ 1,000	\$129,195,000	\$1,421,145	#####	
All Municipal Properties	62 Parcels	\$366,876,000	\$168,237,000	\$ 23,000	\$535,136,000	\$5,886,496	#####	

IDEA #37 – IMPLEMENT PERFORMANCE-BASED BUDGETING

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Implement programmatic approach to developing budgets for town and schools; measure output and ROI of programs.

Other Related Ideas

- Idea 39 – Adopt budget guidelines to inform budget process every year
- Idea 340 – The Town and School Department should investigate purchasing a budgeting/accounting and forecasting software solution. All the current work is done in Excel and it is very cumbersome and takes significant effort to update as well as generate tables and graphics. On the Town side, the Excel 5-year financial model takes a significant time to update because of all the formulas and links and is prone to error when updating. On the Schools side, the Excel budget book is also difficult to update and prone to error but also does not allow for the easy creation of tables and other visuals. There would be upfront costs but that would be paid back in significant time savings as well as the ability to provide much more transparency with an easy-to-use reporting and visitation tool. Finally, a software solution would allow for more sophisticated budgeting and forecasting such as being able to exactly and easily report the turnover costs of existing staff and in turn produce more accurate budgeting.

Idea intent

Implement performance-based budgets which use financial and performance data to allocate resources, provide rigor and process structure, align with town goals, and measure and report performance – across the Town and School budgets.

Weighted Final Score: 57

(Financial Impact: 3, Operational Impact: 6, Time Scale: 2, Ease of Implementation: 3)

Background Information

Programmatic Budgeting is more commonly referred to as Performance Based Budgeting (PBB). At its simplest, PBB goes beyond traditional line-item budgeting by tying proposed expenditures to actual accomplishments.

Performance-based budgeting is also known as outcome-based budgeting, results-based budgeting, or priority-based budgeting. All these terms indicate a focus on increasing the use of data and evidence to improve the allocation of resources and achieve programmatic and community goals.

Historically, most government entities have adopted line-item budgets, which specify spending on inputs such as personnel and supplies. In preparing these budgets, governments often assume that funding for existing programs will continue at about the same level as in the past, with adjustments for inflation and the anticipated number of program beneficiaries (i.e., incremental budgeting). Critics have claimed that line-item budgets do not allow decision makers to determine the extent to which agencies are accomplishing their missions.

Performance-based budgeting involves a multi-step process to address this criticism. In this approach, government entities (e.g., cities, towns, individual departments, or programs) are encouraged to develop strategic plans of what they intend to accomplish, including specific objectives. Based on these plans, government entities develop measures of how well they are meeting their objectives. For example, a health agency could use infant mortality rates as an indicator of how well it is promoting maternal health. The measures can consider the agency's activities (e.g., the number of patients seen in a clinic), its efficiency (e.g., the cost per inoculation per child), and outcomes (e.g., the incidence rate of a particular disease). The agency's budget is then tied to the resources it needs to meet its objectives as measured by these indicators and its past performance. The performance measures can also be used for administrative purposes, such as staff allocation.

According to the Centers for Civic Impact at Johns Hopkins University, performance-based budgeting uses evidence to maximize the allocation of funds toward programs that work and away from those that don't. Performance-based budgeting is not intended to punish or reward departments or agencies, but instead to focus on progress toward measurable goals during the budget process. This approach allows cities to make and justify budgetary changes that meet community needs and advance city-wide priorities, instead of defaulting to the status quo.

Performance-based budgeting allows cities to strengthen the budgetary process in light of competing claims for resources by using objective criteria to:

- determine resource allocation;
- ensure accountability among those responsible for management;
- shift the budget focus to municipal priorities rather than department- or agency-specific goals;
- make the budget process more transparent; and
- engage the community in the budgeting process.

Especially in times of fiscal constraint, performance-based budgeting helps cities focus on funding programs that advance progress on the determined goals and priorities, vs. the traditional approach of across-the-board incrementalism when there are increased available funds or across the board cuts during periods of reduced funds.

One local example of PPB is the City of Everett MA, whose Budget Division, according to its website “develops a performance-based budget which contains quantifiable performance measures and concise statements of services. This includes reviews with city departments to develop new performance measures and goals, as well as tables and charts to reflect work measures.”

Belmont's Structural Change Impact Group's Subcommittee on Revenue, Budget and Town Services met with Arlington's Town Manager, who indicated that Arlington uses PBB for certain town functions, where PBB is most applicable, but not across the board.

PBB can be difficult to administer as it requires a substantial amount of information and analysis. The principal PBB implementation challenge is the time and resources necessary to initiate and sustain the process. Equally important is an effective strategic process so that short-term priorities are aligned with long-term goals before any reallocation effort takes place.

The Subcommittee's research found a "plug and play" software platform for PBB in municipalities. The Center for Priority-Based Budgeting (CPBB) (rebranded recently as ResourceX) works with 30 local governments to implement PBB by 2010, 70 by 2014, and now it boasts "over 200 cities, counties, school districts, special districts, and nonprofit organizations in the US and Canada"

Recommendations

- PBB is feasible for Belmont only when preceded by the implementation of the related ideas stated above – budget guidelines that state town and department goals, and the development of integrated financial information systems that facilitate analyses and projections – are in place.
- Once the Town has implemented budget guidelines and has improved its financial management software, it will have the strategy and infrastructure to address Performance Based Budgeting.
- Even with these in place, PBB is challenging for municipalities the size of Belmont, as staff as well as systems are required for full implementation and staff realignment and/or use of consultants may well be needed.
- In addition, some of the difficulties in general in town governments are the services and service levels that are statutory or set at the state level, multiple union contracts (12 in Belmont – 7 Town and 5 School), and these will need to be factored into Belmont's PBB implementation approach.
- Belmont should explore in detail the approaches Arlington and Everett have taken, as PBB provides the opportunity to align the budget process with Town priorities and greater fiscal transparency.

Next Steps

- We recommend that the Select Board request that the Town Administrator, Treasurer, Warrant Committee and Financial Task Force lead the development of Budget Guidelines for next year's budget, as a first step in determining fiscal priorities.
- The Select Board should support the work the Town Administrator is conducting with the Collins Group via a Compact Grant to improve the Town's IS structure, especially the financial systems, and hold itself and Town administration to implementation of recommendations.
- The Select Board should then direct the Town Administrator, Treasurer, Warrant Committee and Financial Task Force to develop an implementation plan for Performance Based Budgeting. This may require consultant resources to determine the readiness, resources, and project plan (scope and cadence).

Further Reading

- Arlington Budget Process Information
<https://www.arlingtonma.gov/departments/finance/financial-budget-information>
- “*Performance-Based Budgeting Takes Off in States*”
<https://www.governing.com/news/headlines/performance-based-budgeting-fad-takes-off-in-states.html>
- City of Everett MA uses Performance Based Budgeting
<https://cityofeverett.com/city-hall/departments/finance-department/budget/>
- Hopkins Centers for Civic Impact, *Performance-Based Budgeting and Steps for Implementation*
<https://govex.jhu.edu/wiki/performance-based-budgeting-2/>
- PBB Software Vendor for Municipalities
<https://www.resourcex.net/>

IDEA #38 – PUBLIC VISUAL BUDGET

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Increase transparency in budgeting process and reporting; create a visual budget/visual software program similar to Arlington and other towns. Put more public data online to improve town employee efficiency other than responding to in person requests.

Other ideas included in this report

- None

Idea intent

The idea is to increase transparency on Town budgeting, revenue projection, and expenses by providing a website to visualize such data.

Weighted Final Score: 33

(Financial Impact: 0, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 4)

Background Information

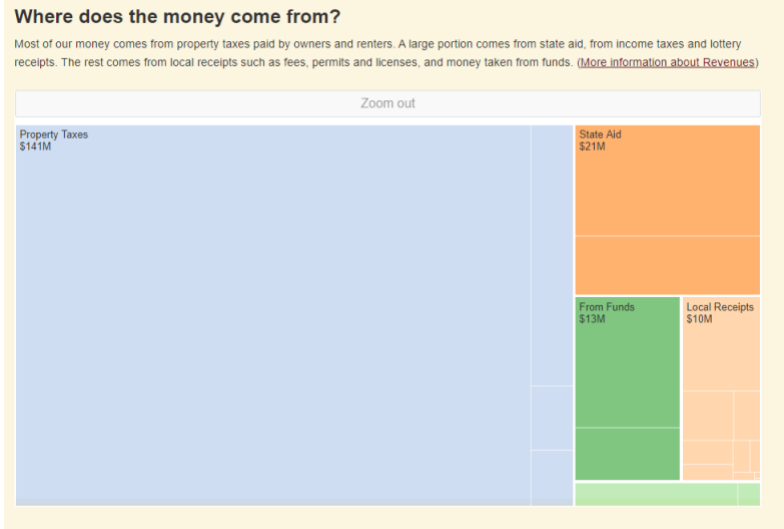
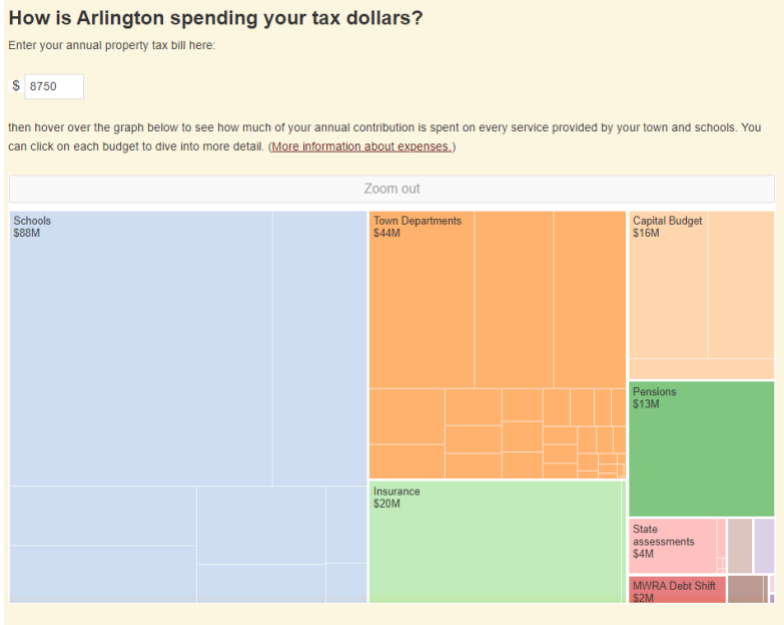
The Town of Arlington implemented a visual [budget website](#) at to offer its residents visual navigation of the town’s budget, expenses, and funds. The Visual Budget software then became templated by [VisGov](#) for use by other municipalities. It is an open-source software (free) offered that towns can deploy on their websites as a WordPress plugin if supported. Town websites that do not support it, such as Belmont’s vendor CivicPlus, deploy the Visual Budget software on a separate website that is linked from the main town website.

MA towns using Visual Budget
Arlington
Ashland
Bedford
Bourne
Cohasset
Essex
Harwich
Mansfield
Melrose
Middleborough

Northampton
Sharon

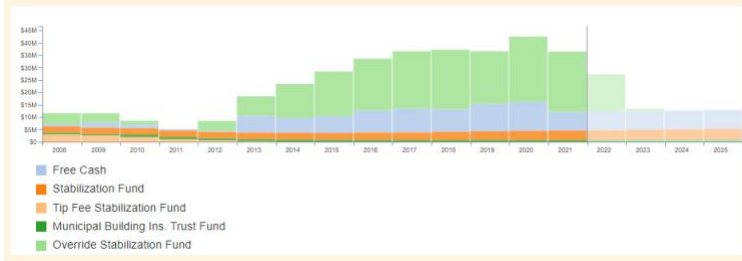
The software imports Excel or CSV formatted data sets into its software. It does not (yet) directly connect with MUNIS or DLS Municipal Databank.

Arlington Visual Budget website <https://arlingtonvisualbudget.org/>



How much do we have?

The town maintains a number of reserve, stabilization and "rainy-day" funds to help smooth out year-to-year expenses and provide funds for emergencies. ([More information about reserves and funds](#))



Recommendations

- In keeping with the Town of Belmont's goal for offering greater transparency to its residents and fostering civic engagement, implement the minimal cost Visual Budget by VisGov either through:
 - Two-year full-service cost of \$3,000 Visual Budget Starter Kit through VisGov includes:
 - Registration of belmont.visgov.com domain
 - Deployment of a Belmont branded visual budget site
 - 8 hours of assistance preparing data for import into Visual Budget
 - Hosting for two years on their servers
 - Updates and maintenance for two years
 - After two years, \$325/year for domain registration and hosting
 - Deploy [Visual Budget open-source WordPress plugin](#) on WordPress compatible hosted website
 - [WordPress Business Plan](#): \$300/year with one-year free domain registration
- Monitor and track website analytics to evaluate utilization.

Next Steps

- Select Board identify the responsible department or committee to maintain and update the visual budget website with new financial data
- Consult with Website Renewal Committee for possible inclusion on new town website
- Consult with Information Technology Advisory Committee on deployment

Further Reading

- <https://visgov.com/>
- <https://arlingtonvisualbudget.org/>

IDEA #39 – ESTABLISH BUDGET GUIDELINES

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Adopt budget guidelines to inform budget process each year

Other ideas included in this report

- None

Idea intent

Bring discipline and transparency to Town and School budgets

Weighted Final Score: 67

(Financial Impact: 4, Operational Impact: 6, Time Scale: 3, Ease of Implementation: 3)

Background Information

The following are excerpts from “Achieving a Structurally Balanced Budget”, Government Finance Officers Association (GFOA), Best Practices Bulletin, adopted February 2012:

“Most state and local governments are subject to a requirement to pass a balanced budget. However, a budget that may fit the statutory definition of a “balanced budget” may not, in fact, be financially sustainable. For example, a budget that is balanced by such standards could include the use of non-recurring resources, such as asset sales or reserves, to fund ongoing expenditures, and thus the future. A government needs to make sure that it is aware of the distinction between satisfying the statutory definition and achieving a true structurally balanced budget.

For a variety of reasons, true structural balance may not be possible for a government at a given time. In such a case, using reserves to balance the budget may be considered but only in the context of a plan to return to structural balance, replenish fund balance, and ultimately remediate the negative impacts of any other short-term balancing actions that may be taken. Further, the plan should be clear about the time period over which returning to structural balance, replenishing reserves, and remediating the negative impacts of balancing actions are to occur.”¹⁶

Every fall, the Town Administrator (TA) provides a forecast of estimated revenues for the upcoming budget year which is presented to the Select Board, School Committee, and Warrant

¹⁶ <https://www.gfoa.org/materials/achieving-a-structurally-balanced-budget>

Committee. Based on those initial forecasts and ongoing conversations between the TA and the Superintendent, two budget processes begin.

The Town Administrator prepares the budget documents for approval by the Select Board. This budget includes all Town departments, including the enterprise funds and also includes fixed costs such as debt service, pension obligations, and shared costs such as health insurance, school and town retirement and OPEB costs, school and town facilities and utilities expenditures, vocational school costs, and other items. The School Committee is, by law, responsible for the preparation and approval of the School Department budget. This budget includes school department salaries and benefits, special education (SPED) and other mandated costs, school health insurance, non-salary costs and transportation costs. Public budget discussions are held independently for each budget in late fall through January. A combined budget is presented at a joint meeting of the Select Board, School Committee, Capital Budget Committee and Warrant Committee in mid-February. This budget, subject to minor alterations, is the budget voted on for appropriation at Annual Town Meeting. By law, the Select board has the sole responsibility for forwarding the budget to annual town meeting.

Both the Town and School budgets typically focus on year-to-year changes in expenditures. The school department applies percentage increases to salaries and wages, non-salary expenditures, SPED and contractual expenditures and adds need-based additional expenditures. The Town budgets department by department, inputs pension obligations received from the Retirement Board, develops the percentage increase for health and workers' compensation to be added to each budget and determines the amount available for discretionary capital to be spent on school and town facilities. The Town Administrator is also responsible for determining non-property tax funding sources to support the budget.

In spite of a robust budget process in Belmont that includes multiple public meetings on projected revenue and expenditures, the determination of allocating Belmont's scarce resources between town, schools and capital needs is often unclear to residents. The public is shown deluged with information—budget requests, spreadsheets, and percentage and dollar increases—sometimes in pieces, for two separately constructed budgets, all of which tally to one “balanced” budget by the time annual town meeting occurs. In addition, revenue dollars estimated in the fall often change once the Massachusetts legislature adopts the state budget, usually in the late winter or spring. This can create last minute tension between stakeholders, administrators and the relevant boards regarding allocation of incremental funds. This is not unique to Belmont.¹⁷

Many communities have developed a budget guideline framework to formalize the allocation of scarce resources and bring more transparency to the budget, including peer communities such as Arlington, Brookline, Burlington, Canton, Lexington, Newton, Wayland, and Wellesley.¹⁸ The process for arriving at budget guidelines varies by community, both in terms of who determines

¹⁷ “The process is “often cloaked in mystery because no one is quite sure what happens between the time budget requests are submitted in the late fall and the point at which a draft budget is presented for review”, National League of Cities, <https://www.nlc.org/article/2019/09/11/making-sense-of-municipal-budgets/>

¹⁸ *Massachusetts Municipal Association (MMA), January 24, 2020 Town/School Split Handout*, https://41g41s33vxd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_SchoolFinance_TownSchoolSplit.pdf

the guidelines (Select Board, Finance Committee or Joint Committee) and what methodology is used. A “best practices” joint approach, used by Lexington in particular, is outlined below.¹⁹

Budget Guidelines

Formalized budget guidelines are a tool used by municipalities to allocate marginal surpluses and deficits and bring discipline and visibility to the annual budget building process. A methodology is established to produce a framework for annual budget decisions and to codify how the marginal dollars will be spent between town, schools and capital and other priorities. The methodology is applied each year to formulate operating budgets for the coming fiscal period. The process begins early in the fall and sets expectations for budget changes early in the process among all stakeholders, including the public. The formalized guidelines also help provide year-to-year stability for Town finances and support facilitation of long-range planning.

The annual joint process brings together representatives from the Select Board, School Committee, Finance or Warrant Committee, Town Administrator’s office, Superintendents’ office, Capital Budget Committee, and others involved in the budget development to agree on the revenue forecast and funding, understand fixed and shared costs, and agree on a town/school split for the operating budgets. This process begins early in the fall and promotes engagement of the public from the earliest stages in the budget process through progression to appropriation at annual town meeting.

The base for analysis starts with the prior year’s revenue and expenditures. Base year actual revenues are compared to forecasted revenues and the difference is the amount that the Town has to spend for town and school services.

Changes in fixed costs and shared costs are deducted from the year-to-year change in revenues to determine the net operating budget. Fixed costs include debt service, pension obligations, and state charges. Shared costs include such line items as health insurance, facilities/utilities, cash capital and other agreed-upon expenditures, such as appropriation to reserve accounts. The increase in net operating budget is then split between the school and town based on actual spending in the prior year and carried forward into the budget year. [Exhibit I shows a simplified outline of a formula.]

The formula for establishing guidelines varies from town to town based on town finances and town priorities.²⁰ Adjustments to both revenues and expenditures can be tailored to address specific accounts, priorities or needs. Lexington includes allocations to a capital stabilization fund in shared expenditures.²¹ Canton deducts changes in Chapter 70 aid, ambulance receipts,

¹⁹ See *Lexington Financial Summit II, FY23 Revenue and Revenue Allocations*, p. 6: https://www.lexingtonma.gov/sites/g/files/vyhli7101/f/uploads/fy2023_summit_ii_meeting_materials.pdf, also, Canton detail in MMA Town/School Split handout, MMA presentations in Further Reading.

²⁰ Massachusetts Municipal Association (MMA), January 24, 2020 Town/School Split Handout, https://41g41s33v added2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_SchoolFinance_TownSchoolSplit.pdf; “New Perspectives on School Finance and Budgeting, MMA presentation by Brookline Select Board member Heather Hamilton. https://41g41s33v added2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_NewPerspectivesSchoolFinance_Brookline.pdf

²¹ https://www.lexingtonma.gov/sites/g/files/vyhli7101/f/uploads/fy2023_summit_ii_meeting_materials.pdf, p.6.

and other specified receipts from revenues.²² These amounts are added back to the relevant school and town operating budgets accordingly after the split. Expenditures such as SPED tuitions, vocational school tuitions and OPEB allocations are sometimes included in shared costs or treated separately. The formula also includes a process for adjustments to be made based on needs such as enrollment increases, recycling/waste cost contract costs, etc. Major changes between early fall and adoption of the budget—such as that experienced in FY20 and FY21—are evaluated within the framework established.

The annual process for setting guidelines begins in early fall, after the Select Board sets goals and priorities for the coming budget year. In early to mid-September, a financial “summit” is held for stakeholders to review prior year results, financial indicators and identify budget drivers for the coming year. Once revenues are estimated, the agreed upon formula for setting operating budgets is applied and discussed in additional public meetings, and the budget amounts are finalized by late November or early December. The town and schools then determine how the amount allocated will be spent.

In simple terms, this methodology produces a framework for decisions and a guideline for annual budgeting. It is an annual exercise that should reflect town and school priorities as they change and accommodate increased needs when they arise. As such, the allocations and increases may vary year to year, and in some years, exceed the guidelines.

Many of the considerations included in the budget guideline methodology may initially appear similar to Belmont’s current budget process, however, the budget process differs significantly in the following ways:

Priority based allocations

- The changes in shared costs, which are deducted from changes in revenues, can include allocations to meet priorities, such as appropriations to general or specified stabilization funds, reserves, capital projects, or other priority expenditures. These ensure that priorities are funded before operating funds are allocated. Brookline’s Finance Advisory Committee, opining on the Town/School Partnership formula, writes “this Incorporates into the current incremental budget process a way to intermittently and more effectively reprioritize town operating and capital objectives”.²³
- Can prioritize fiscal goals identified in the Town’s recently adopted financial policies.

Mutually agreed framework for decision-making

- Provides a formula for the town/school split and reduces last minute conflicts over allocations of funds.

²² Massachusetts Municipal Association (MMA), January 24, 2020 Town/School Split Handout

[https://41g41s33vxd2vc05w415s1e-wpengine.netdna-ssl.com/wp-](https://41g41s33vxd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_SchoolFinance_TownSchoolSplit.pdf)

[content/uploads/2020/02/AM20_SchoolFinance_TownSchoolSplit.pdf](https://41g41s33vxd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_SchoolFinance_TownSchoolSplit.pdf)

<https://www.brooklinema.gov/DocumentCenter/View/22965/Combined-Reports-November-17-2020-Special-Town-Meeting-with-supplements>

²³ Brookline, MA Finance Advisory Committee, Article 33:

<https://www.brooklinema.gov/DocumentCenter/View/22965/Combined-Reports-November-17-2020-Special-Town-Meeting-with-supplements>

- Additions to revenues sources and expenditures, changes to aid or cost structures, etc. can be evaluated through the framework.
- Town expenditures that are made on behalf of the schools are made visible to the public. This is particularly important for residents to understand when budget cuts are under discussion.

Clarifies spending

- The process uses prior year’s actual spending to inform the current budget period, a significant change from current budgeting practices. Automatic percentage increases in expenditure categories from budget to budget can often obfuscate the purpose for such increases, especially as changes in services or actual costs occur over time. As noted by the Finance Committee in the Weston’s FY22 Budget, “typically, department heads are told to budget for “level service,” which too often means level staffing plus additional requests. This naturally results in budget increases beyond negotiated salary and benefits, resulting in increases well beyond inflation, which are not sustainable over time”.²⁴ GFOA research suggests that “school district budget processes are typically “incremental,” where last year’s budget becomes the basis for the next year’s budget, with incremental changes made around the margin. However, past patterns of spending may no longer be affordable or even relevant given changing needs of the community and student body. Hence, the budget process should encourage review of past spending decisions and critically change, where necessary”.²⁵
- Provides enhanced visibility on spending increases, such as facilities, staff additions, support for increased demand in services, etc. At the same time, the framework is flexible and can be adjusted for vacancies or to allocate funds for unanticipated intra-year needs.

Visibility on use of non-recurring funds

- The use of free cash and other non-recurring funds is determined and agreed upon early in process. This allows the public to understand the use of these funds from year to year and engage in public discussion of such use before budgets are developed.

Engages the public earlier in the annual process

- Enhances residents’ understanding of how the budget is built and funded.

Reduces the “surprise” factor for future override discussions.

- Provides stability for town finances and facilitates long range planning by establishing a formula that can be incorporated into forecasts.

Shifting the first question asked in the budget process from “How much to you need?” to “How much to we have?” might be viewed as subtle but time after time, we’ve seen this change the approach to developing the budget. Starting off with a clear understanding of how much revenue is available to spend for the upcoming budget year sets realistic expectations from the get-go as to whether there is more money available, the same amount as last year or, as all of us often experienced, less money than we had before. Since revenues, not expenditures, are the real

²⁴ *Weston, MA FY22 Budget, Finance Committee Report*

²⁵ https://gfoaorg.cdn.prismic.io/gfoaorg/91f5a529-52b1-4810-9455-5916a28f25f7_Best+Practices+in+School+Budgeting.pdf

drivers of the budget, focusing on understanding where the money is coming from is extremely critical to the budget process. Ensuring that everyone understands the base from which next year's budget is to be built is extremely important before kicking off budget development. Sometimes it can be unclear whether the starting point is the current year's budget, last year's budget, last year's actuals or current year expenditure estimates. A shared understanding of the base from which you are building the budget is vital to the process.²⁶

Recommendations

Fiscal discipline and budgetary transparency are two critical elements required to address Town's structural deficit. Whether it is with this model or an alternative model, the Select Board needs to adopt a more top-down process for determining the amount of funds available to spend and how those funds are allocated. Although the School Committee has lawful authority over the school budget, the Select Board is responsible for the financial health of the Town, for setting the priorities and for developing policies to achieve overall goals and objectives, and for submitting the total budget to Town Meeting for approval.

The SCIG recommends that the Select Board take a proactive role to adopt a priority-based, revenue driven model for budgeting for FY24, and that the Select Board, Town Administrator, School Committee, Warrant Committee and Capital Budget committee work together to adopt budget guidelines to inform the process within the next six months.

This may seem like an impossible task given the size of non-recurring revenues used to support recurring operating expenditures in the FY22 and projected FY23 budget. In many ways, however, it is exactly the right time to bring a new framework to building annual budgets, renewing trust in the budgeting process and improving stability in town finances:

- **Belmont is at a unique point in time to begin this process.** Over the past two years, the Town experienced significant changes in Town revenues as well as school and town cost structures. As new recurring revenues are realized from marijuana receipts, development, and other sources, the framework allows the town to be more thoughtful about deploying these new sources of funds. At the same time, there is an opportunity to align town and school expenditures with projected revenue increases. Over the next several years, the overall rate of growth in the School Department budget should be lower than experienced prior to FY19, when budget increases were primarily spent on support for unrelenting year-to-year enrollment increases. Due to lower pandemic enrollment, the School Department has achieved lower class sizes earlier than was projected pre-pandemic, an important reset for ongoing school needs.
- **The current level of non-recurring funds used in the FY21, FY22 and FY23 budgets is not sustainable.** Budget guidelines will not solve this problem in the next two or three years, but the framework can be used to bring rigor and discipline to goal of reducing the amount of free cash and other funds used from year to year.
- **Setting budget expectations can be critical to seeking future overrides.** The guidelines provide a foundation for fiscal discipline, and the process engages the community well before any override request. Establishing an agreed upon framework for budget increases will help reduce the public distrust of administrators and governance that currently is

²⁶ <https://www.nlc.org/article/2019/09/11/making-sense-of-municipal-budgets/>

present in town. Of note, both Arlington and Norwood, both of which had successful 2019 overrides, included budget guideline expectations in an override pledge made to the community that laid out how resources from the tax increase would be used.²⁷

- The SCIG is not under the illusion that changing the budget allocation process will be a simple task. Establishing budget guidelines agreeable to all parties--the Town, the Schools, the Warrant Committee, the Capital Budget committee and residents-- will require time and effort to establish a fair and equitable methodology acceptable to all stakeholders. The effort will require a lot of discussion and detailed modeling to determine the appropriate formula that can meet the needs of the Town and School Department and that can accommodate variable expenditures and other unanticipated needs or changes. Belmont's formula will likely look different from many other towns using similar frameworks. Nonetheless, the challenges inherent in change of this nature have been faced in many other communities with great success. The experience of Lexington, in particular, could be helpful to understanding and codifying the process.

Secondly, **the Select Board and School Committee should initiate an update of Town and School budget documents to align with current best practices recommended by the GFOA and other associations.** Although the current budget documents contain hundreds of pages, relevant information can be buried in the detail and not readily available to the reader. The goal is to produce budget information in a way that is useful and understandable to stakeholders²⁸. Based on a review of peer community budgets, the Education Subcommittee of the Warrant Committee submitted suggestions to the School Committee Finance Subcommittee in 2020 to align budget drivers with simplified budget information and help "tell the story" in an more effective manner.

Next Steps

- Select Board to initiate process for budget development and allocation process as a priority in Spring of 2022.
- Select Board, School Committee, Warrant Committee, and Capital Budget Committee to meet jointly in early summer to and set a timeline for developing an agreed upon formula that can be used for the FY24 budget process. Jointly identify individuals to be accountable for meeting the timeline.
- Town Administrator and Superintendent (or appointees) to develop formula, test prior years and model various scenarios in coordination with the FTF II model. If possible, utilize financial structure grant to assist in this process.
- Should the timetable for joint agreement slide, the Select Board and Town Administrator should use formulaic approach to inform the budgeting process for FY24

²⁷ Arlington, MA 2019 override pledge: <https://www.arlingtonma.gov/home/showdocument?id=46519>

Norwood, MA 2019 override pledges: <http://cms5.revize.com/revize/norwoodma/FY20%20Override%20packet.pdf>, page 11.

²⁸ <https://www.gfoa.org/materials/making-the-budget-document-easier-to-understand/>; GFOA School budgeting: https://gfoaorg.cdn.prismic.io/gfoaorg/91f5a529-52b1-4810-9455-5916a28f25f7_Best+Practices+in+School+Budgeting.pdf

- Warrant Committee to schedule a joint Financial Summit with Select Board, School Committee, and Capital Budget Committee for September 2022 to review updated financial indicators and engage public earlier in budget development.
- Use a formalized budget guideline methodology to inform FY24 town and school budgets and beyond.
- Select Board and School Committee develop a timetable to overhaul budget documents with the goal of creating a more relevant and understandable presentation to residents.

Further Reading

- Please refer to footnoted documents.
- Brookline Town/School Partnership Memorandum of Understanding, May 1995
<https://www.brooklinema.gov/ArchiveCenter/ViewFile/Item/705> (ed. Note: the MOU is under revision, in part to address the outdated split.)
- Brookline Financial Guidelines: MMA presentation, January 24, 2020 “New Perspectives on School Finance and Budgeting, MMA presentation by Brookline Select Board member Heather Hamilton.
https://41g41s33vxdd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_NewPerspectivesSchoolFinance_Brookline.pdf
- MMA January 24, 2020 handout summarizing budget guideline processes for 12 towns
https://41g41s33vxdd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2020/02/AM20_SchoolFinance_TownSchoolSplit.pdf
- **Lexington Financial Summit Materials:**
- Financial Summit I, Financial Indicators
https://www.lexingtonma.gov/sites/g/files/vyhlif7101/f/uploads/fy2023_summit_i_meeting_materials.pdf
- Financial Summit II FY23 Revenue Projections and Revenue Allocations
https://www.lexingtonma.gov/sites/g/files/vyhlif7101/f/uploads/fy2023_summit_ii_meeting_materials.pdf

EXHIBIT I

Revenues

Change in Revenues

Taxes
State Aid
Local Receipts
Other--e.g., changes in free cash/reserves

Less: Changes in Chapter 70, ambulance, parking receipts, other specified receipts

Less: Change in Fixed Costs

Debt Service
Pension Obligations
State Charges
Abatements and Exemptions
Other

Less: Changes Shared Costs

Facilities/Utilities
Health Insurance
OPEB
Worker's Compensation/Unemployment/Other Insurance
Other Priorities: *Stabilization funds, reserves, street improvements, building envelopes, etc.*
Other e.g., some towns include vocational costs some do

not

Equals: Changes in Net Operating Budget

Expenditures

Changes in Net Operating Budget multiplied by prior year's actual expenditure split between Town and Schools

Plus: Changes in Chapter 70, ambulance, parking receipts, other specified receipts (to the extent deducted from changes in revenues)

Equals Town and School base line budgeted amounts; determines percentage increase for budgets

IDEA #40 – EVALUATE TOWN SERVICES AND NEW MASTER PLAN

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Create a “master plan” for the town: This plan would be a continually evolving long-term plan, and the schools would be only one part of that plan.

Determine important services required by residents (those required by statute and all others); have public meetings with residents.

Evaluate town services residents would like and which ones are the most important.

Idea intent

The Town’s comprehensive master plan should be updated, should be informed by resident input, and should be used to evaluate the Town’s priorities and take further action.

Weighted Final Score: 40

(Financial Impact: 1, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 4)

Background Information

On April 23, 2001, Belmont Town Meeting unanimously adopted *A Working Vision for Belmont’s Future*, a one-page statement containing three principles and nine goals organized within the framework of ensuring: Quality of Life, Character of Our Town, and Sense of Community. Subsequently, the Select Board established the Vision 21 Implementation Committee to facilitate, enable, and help the Town achieve the Working Vision for the Town. It is a permanent committee comprised of nine voting members, each with three-year terms, appointed by the Select Board.

As charged by the Select Board, one of the responsibilities of the Vision 21 Implementation Committee is to periodically identify Townspeople’s priorities, using a survey and/or other methods. In 2014-2015, they conducted a town-wide survey and reported their findings to the Select Board in a 200-page report titled *A Working Vision for Belmont’s Future: Priorities and Progress*, which is publicly available on the Vision 21 Implementation Committee’s page of the Town’s website.

Separately, Massachusetts state law requires that the Planning Board maintain a master plan that includes the following nine elements: goals and policies statement, land use plan, housing opportunities, economic development, natural and cultural resources, open space and recreation, services and facilities, circulation and transportation, and specific implementation actions.

In 2010, the Planning Board and Office of Community Development presented the 300-page *Town of Belmont Comprehensive Plan 2010-2020* which incorporated all nine elements required by state law. This report was developed over a two-year effort by the Planning Board,

Comprehensive Planning Committee, residents, business owners, community leaders, and a team of consultants. It is publicly available on the Planning Board's page of the Town's website.

In 2019, recognizing that the Comprehensive Plan was going to expire in 2020, the Vision 21 Implementation Committee undertook efforts to begin the process of preparing an updated master plan. Their goal was to create a single anchor document that residents can reference to understand the Town's priorities and utilize as a basis for decision-making on a wide range of issues.

The Town submitted a grant application to Metropolitan Area Planning Council (MAPC) in 2019. The plan was for the Select Board to form a Master Plan Refresh Steering Committee led by MAPC and the Planning Board. However, the COVID-19 pandemic interrupted this process, grant funding was not received from MAPC, and work on this effort did not continue as intended. More recently, on January 31, 2022, the Town reapplied to MAPC to support this effort.

Recommendations

- As a shorter-term deliverable, to address the idea's intention for the Town to evaluate town services via resident input, the Vision 21 Implementation Committee should conduct a town-wide survey similar in substance to the survey conducted in 2014.
- As a longer-term deliverable, to address the need for an updated comprehensive master plan, the Select Board should resurrect the Master Plan Refresh Steering Committee, with support from the Vision 21 Implementation Committee if necessary. The goal is to create a single anchor document that residents can reference to understand the Town's priorities and utilize as a basis for decision-making.

Next Steps

- Select Board to discuss these recommendations with the Vision 21 Implementation Committee, who would own the shorter-term deliverable to evaluate town services, and who have a deep understanding of the longer-term deliverable, as shown in the Belmont Master Plan Refresh Project Overview document (linked below)
- Select Board to check in with the 2020 Master Plan Refresh Steering Committee and ensure that they are set up for progress

Further Reading

- A Working Vision for Belmont's Future
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/file/file/a_working_vision_for_belmont.pdf
- Charge of the Vision 21 Implementation Committee
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/file/file/charge_2.pdf
- A Working Vision for Belmont's Future: Priorities and Progress
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/file/file/vic_priorities_and_progress_final_0_0.pdf

- **Massachusetts General Laws Chapter 41, Section 81 D: Master plan; economic development supplement**
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section81D>
- **Town of Belmont Comprehensive Plan 2010-2020**
<https://www.belmont-ma.gov/planning-board/files/comprehensive-plan-2010-2020-a-vision-for-belmont>
- **Town of Belmont Comprehensive Plan 2010-2020 Appendices and Supporting Materials**
<https://www.belmont-ma.gov/planning-board/files/comprehensive-plan-2010-2020-a-vision-for-belmont-appendices>
- **Belmont Master Plan Refresh Project Overview**
https://www.belmont.k12.ma.us/bps/Portals/0/docs/scpublicdocuments/2019-20/Vision_21_Implementation_Committee_Update_Exhibit_B_1.pdf?ver=2019-12-12-115009-973

IDEA #41 – EVALUATE COSTS OF INDEPENDENT BOARDS

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Evaluate cost structure of Belmont’s independent boards and how they compare to similar towns

Other ideas included in this report

- None

Idea intent

The intent of this idea is that we should review the costs to the town incurred by independent boards, with a goal of finding cost savings, especially if we find that independent boards in comparable municipalities have less costs.

Weighted Final Score: 20

(Financial Impact: 1, Operational Impact: 4, Time Scale: 0, Ease of Implementation: 0)

Background Information

The Town of Belmont has about 60 boards, committees, and commissions. About 90% of these bodies are fully or partially appointed by either the Select Board or the Moderator, and thus are accountable to the appointing authority. Vacancies are filled and committee charges are approved by the appointing authority.

The following Belmont boards and commissions are made up of members who are either elected by Belmont voters or are otherwise independent in composition:

- Assessors - all three members elected by voters
- Board of Health - all three members elected by voters
- Cemetery Commissioners - all three members elected by voters
- Housing Authority - four members elected by voters, one member appointed by the state
- Library Trustees - all six members elected by voters
- Municipal Light Board - (until April 2022) comprised of the three current members of the Select Board, (starting April 2022) all five members elected by voters
- Retirement Board - two members elected by retired and active Belmont employees, one member appointed by Select Board, the Town Accountant, and one member elected by the other four members
- School Committee - all six members elected by voters
- Select Board - all three members elected by voters

Seven of these nine bodies are independent in organization, but oversee budgets that are approved by Belmont Town Meeting, which is elected by the voters of Belmont. That fact means that these seven otherwise independent bodies cannot be said to be truly financially independent.

Some of these bodies oversee enterprise funds, which are used to ensure that the actual costs of these distinct operations are reflected in the town budget.

The two remaining bodies, the Housing Authority and the Retirement Board, have budgets that are separate from the Town operating budget and are therefore financially independent.

The Housing Authority operates and maintains several hundred units of state-owned housing for low-income households in Belmont. The majority of their budget revenue is provided by the state and the town of Belmont does not provide funding for their operating budget. The Housing Authority has benefited by several grants from the Community Preservation Act, which were approved by Town Meeting after being vetted by the Community Preservation Committee. But the financial cost to the town of this body is minimal and under the control of Town Meeting.

The Retirement Board manages the pension benefits of retired Belmont employees (with the exception of retired public school teachers who are enrolled in a separate retirement program managed by the state) and appears to be the main focus of concern of this idea. The Belmont Retirement System (BRS) was created in 1938 under Massachusetts General Laws Chapter 32 and is overseen by the Retirement Board, a five-member board consisting of the members described above.

Recommendations and Next Steps

- The Town Administrator should review the amounts currently being charged back to enterprise funds for town services to make sure the actual costs to the town are accurate.

Further Reading

- Belmont Retirement Board
<https://www.belmontretirementsystem.com/>
- Warrant Committee 2015 Pension Report
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/pension_report_final_10-15-15.pdf
- Warrant Committee FY22 Report (see pages 59-62 for summary of concerns and recommendations)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/2021_wc_report_final.pdf
- Retirement Board's August 30, 2021 response to Warrant Committee Report
<https://storage.googleapis.com/wzukusers/user-30899340/documents/f3f6fed5b24b45ee9f6f47e402ffbf0/Response%20to%20WC%20Scanned.pdf>
- Massachusetts Pension Reserves Investment Management Board
<https://www.mapension.com/>

IDEA #42 – CEMETERY CHARGES SHOULD COVER OPERATING COSTS

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Cemetery charges should cover full operating costs

Other ideas included in this report

- 74 - Privatize Cemetery

Idea intent

Find ways to make cemetery revenues/funding more closely align with costs

Weighted Final Score: 30

(Financial Impact: 4, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 1)

Background Information

- Current cemetery budget: **Total \$509,132** (FY22 est.)
 - Salary: \$404,372
 - Expense: \$86,555
 - Capital: \$18,205
 - See page ~34 of proposed [FY22 budget](#) for more details
- Current cemetery revenue: **\$102,010** (FY22 est.)
 - [Plots: \\$1,300k-8k at Highland Meadow](#)
 - [Fees](#) are designed to cover costs for the associated services (e.g. the cost of interment is higher on weekends and holidays, reflecting the higher cost of staffing those days)
 - There are additional programs that help offset a small portion of the ongoing maintenance costs: and [annual planting program](#)
- The town also maintains a state-mandated Cemetery Perpetual Care Fund which sets aside a portion of each plot sale and uses the future dividends/earnings (not the principal) to ongoing maintenance costs
 - \$15,000 to \$35,000 in recent years is drawn from the current Perpetual Care fund to cover some of this shortfall

- FY21 Actual: \$25,000 transfer from Perpetual Care Fund
- FY22 Estimated \$27,193 transfer from Perpetual Care Fund

Potential Opportunity

- **Annual Gap of \$407,132** (FY22 est., not inclusive of Perpetual Care Fund transfers to operating budget)
 - Closing this gap – either by raising revenues or reducing expenses, could be a significant savings, but there are no clear mechanisms to do either.
 - Grove Street Cemetery has no more plots to sell (with the exception of a few Veterans’ plots) & offers few remaining revenue streams, *but* operating/maintenance costs will remain and likely grow (we still need to mow the lawns, maintain the pathways, etc.)
 - Highland Meadow cemetery is currently using about 1/3 of [the 14 acres of McLean land set aside](#) for burials, so there are still many more plots that can be sold there
 - The plots at Highland do not allow headstones and are more densely spaced, which simplifies maintenance and allows for more efficient use of space
 - State law prohibits running for-profit cemeteries or privatizing cemeteries except possibly to an association.
 - [“Section 43A.](#) No cemetery established on or after July first, nineteen hundred and thirty-six, shall be owned, maintained or operated except by a municipality or other political subdivision of the commonwealth, a church, a religious or charitable society, or by a cemetery association incorporated as provided in section one, nor shall such a cemetery be maintained or operated for the purpose of private profit or gain, directly or indirectly, to any director, officer or member of the cemetery association or other agency owning, maintaining and operating the same. A cemetery lawfully established prior to said date may continue to be owned, maintained and operated under the form of organization adopted therefor.”
 - [MGL also requires municipalities to have and maintain a cemetery](#)
 - “Section 10. Each town shall provide one or more suitable places for the interment of persons dying within its limits.”

Potential Solutions

- **Reduce Costs**
 - Could we stop having a cemetery where we inter bodies?

- Such a service is going to cost *increasingly* more than we take in, and the gap will increase
 - Eventually, we'll run out of space
 - What are alternatives?
 - Cremation
 - Resomation (not currently permitted in MA)
 - Lease space rather than sell it?
 - [MGL prohibits re-use of occupied graves](#)
 - Reduce maintenance costs
 - Belmont's Highland Meadow cemetery already takes more proactive approaches to lower costs, maintaining more of an open meadow without headstones – using marker instead – to lower maintenance costs
- **Raise Revenue**
 - Raise the cost of plots OR services (e.g., internments) to cover the maintenance costs
 - Plot prices currently range from \$1300 to \$8000 per plot
 - These are similar to plot prices in other nearby public cemeteries
 - Could we provide cemetery-related services to other towns?
 - Cremation - Do we have the facilities for this?
 - Resomation - Is MA likely to permit this (it does not as of 6/2021), and could a municipality offer it as a regional service? *There are currently no indications that Massachusetts plans to allow resomation in the near future.*
 - Could we form a regional solution?
 - Could a group of towns co-own and -operate a cremation/resomation facility? *The state currently requires each municipality to maintain its own place for burials.*
 - Could a group of towns co-own and -operate a more compact or temporary solution for the temporary storage of cremated/resomated remains? *Not under current state law.*

Recommendations

- The Board of Cemetery Commissioners should explore ways to increase the funds in our existing Perpetual Care Fund to shorten the time before it will cover the full costs of meeting existing agreements with plot owners.
- Recognizing that, under current practice, cemetery spaces will *eventually* become a problem, the town could begin now to advocate at the state level to allow more flexibility in the future, potentially one day ending the practice of permanently interring intact bodies as has happened elsewhere in the world.

Next Steps

- The Cemetery Commissioners should continue to monitor trends and attitudes toward practices like cremation and make proactive plans to accommodate, and perhaps encourage, different ways of using and experiencing memorial spaces like public cemeteries.

Further Reading

- [“The world is running out of burial space”](#) - BBC, 2015
- [Background on Alkaline Hydrolysis](#) (“Resomation”) - Cremation Association of North America
- [“Funeral Traditions in Crete and Greece”](#) - LivingInCrete.net, 2017
- [“How American Cemeteries Promise to Keep Your Grave Forever”](#) - NPR, 2018
- Highland Meadow Cemetery brochure:
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/hmc_marketing_brochure-6-2015_update-2.pdf
- Belmont Cemetery Commission
<https://www.belmont-ma.gov/cemetery-commissioners>
- DPW Parks & Cemetery Division
<https://www.belmont-ma.gov/dpw-parks-cemetery-division>

IDEA #45 – ONLINE PAYMENTS

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Evaluate whether there are additional payments that can be made online, including fees and fines. Create paperless billing payment portal. Determine whether the town and enterprise funds mandate direct deposit for employees.

Other ideas included in this report

- 121 - Move property tax, personal property tax, and excise tax billing and collections to online, paperless billing portal.
- 122 - Move utility payments to online, paperless utility billing and payment
- 123 - Consolidate billing for utility services
- 402 - I get that that it's the State law that I License my dog at the Town Clerk but why do I then have to go to Recreation to get an off-leash permit and the Health dept animal control is also involved. Consolidate this please.

Idea intent

The homepage on the Town of Belmont website contains an [Online Payments](https://www.belmont-ma.gov/pay-bills) (<https://www.belmont-ma.gov/pay-bills>) link that lists all the payments that can be made online. Currently there are 6 categories of service containing 7 unique links to the appropriate website for making payments. This idea is to create a single online payment portal to pay any Belmont bill, permit, fine, fee or service. For mandating direct deposit, see Idea 341 – Electronic Paystubs.

Weighted Final Score: 37

(Financial Impact: 1, Operational Impact: 2, Time Scale: 3, Ease of Implementation: 4)

Background Information

Online payment systems have a customer facing front-end to process resident transactions and a back-end infrastructure for account owners (Town departments) to reconcile the transactions listed on statements from the payment vendor with the transactions listed on statements from the bank account registered with the vendor.

In 2019 Belmont Light deployed [SmartHub](#), a web and mobile application specifically designed for utility providers to offer usage reports and monitoring. It is a product of [National Information Solutions Cooperative, Inc.](#), an information technology company that develops software and hardware solutions for its member-owners - utility providers and telecommunications companies. Since SmartHub offers integrated online payments, Belmont Light migrated to it from [InvoiceCloud](#).

The School Department [announced in Fall 2021](#) a transition from MCC to [MySchoolBucks](#), a vendor who focuses specifically on school online payment needs. The Recreation department uses [MyRec](#), a recreation management application that also integrates its own payment processing system. The Council of Aging department is in the process of adopting MyRec as well.

The Town Clerk and Community Development use People GIS (MapsOnline) for their customer facing platform while Invoice Cloud performs the backend payment processing to send the payment data to the correct parties. The Treasurer Office uses MCC (Metropolitan Communications, LLC) for real estate and excise tax payments. In early 2022, they will transition to Invoice Cloud which acquired MCC in 2016. According to the Treasurer Office, once the Town Treasure and Town Clerk departments migrate online payments to Invoice Cloud, other departments can utilize it as well.

While residents are only exposed to the front-end payment processing, there are backend procedures that are required before the transactions are entered into the Town ledger. The Treasurer Office sends each departments the bank statements registered to their payment vendor. It is the requirement of Town departments to reconcile between the statements of the payment vendor and its registered bank account; the ease and frequency of which can vary among payment vendors. If the vendor does not include detailed enough information that can easily match up with a transaction listed in the bank statement, reconciliation then requires time-consuming work to ensure balances are as expected and all transactions are accounted for including returns. Only then does the payment vendor's export file of transactions get sent to the Treasurer Office to be imported into MUNIS for official ledger record keeping. The current cadence for the Town Clerk, Community Development and School Department is monthly reconciliation and import into MUNIS, whereas the Recreation Department sends a daily export file to the Treasurer Office for import into MUNIS. However, the latter is being phased out as there are numerous non verified transactions and reconciliation is difficult.

According to the Treasurer Office, MCC has an accommodating process in handling ACH payments as they would hold back the payments until funds would clear. This guaranteed that the export file would always match up with the transactions listed on the bank statement. Some vendors instead choose to get the payments entered in the system expeditiously and may even lump payments together as batches which can make reconciliation difficult.

Services transitioning to Invoice Cloud will have an automatic nightly upload into MUNIS for all the previous' days transactions. The Treasurer Office will be able to review the pending transactions for approval to be submitted into the Town ledger. Also Invoice Cloud will be able to update the customer account if a resident uses a non-online payment method such as ACH check or walk-up cash payment. This will allow residents to see these transactions in their online account and reduce inquiries to Town employees come tax season when residents want to know how much they paid in total the previous year.

A requirement of a payment vendor is proper handling of credit card fees. According to MA General Law [Ch. 140d Section 28A](#), when a payment is made using a credit card and there is a transaction fee, that fee must be sent directly to the credit card company. The fee cannot be collected by the Town for reimbursement to the credit card company. If the Town received the fee in its bank account, the Town is then considered a seller per the same MA General Law. The fee would then become part of the Town's general fund which can be difficult to reverse.

Customer support is also a factor in choosing an online payment vendor. It is burdensome for Town employees to respond to technical support cases from residents on their payment. Ideally the payment vendor would offer technical support so that residents contact them directly. This will be the case with Invoice Cloud who will handle technical support for online payment inquiries once the Treasurer Office's payment system has switched from MCC.

The requirements of Town departments regarding features and capabilities for an online service, the need for detailed transaction reporting for easy reconciliation by the Treasurer Office, offering customer support, and proper handling of credit card fees, all combine to form a dilemma in choosing software solutions that also incorporate online payments. That is, how to balance the functional and feature requirements of the software with the front-end resident experience and back-end reconciliation for payment processing?

Tyler Tech, the vendor of MUNIS, offers a vast array of software solutions across various Town needs (recreation, school ERP, permitting, parking management, facilities management, work order systems etc.) and, presumably, would offer tight integration with MUNIS for payment processing. However, having all departments adopt one suite of products for cleaner integration and reconciliation with payment processing may be more expensive or may not meet the needs of the department. Balancing the needs of the Town department versus payment integrations with MUNIS and the Town ledger is an issue for a central Town authority to address.

List of Payment Vendors per Belmont Department

Department	Service	Front-End Vendor	Back-End Vendor
Town Treasurer	Tax Collection	MCC/Invoice Cloud	MCC/Invoice Cloud
Town Clerk	Pet License	MapsOnline Town Payments	MCC/Invoice Cloud
Town Clerk	Business License	MapsOnline Business License	MCC/Invoice Cloud
Parking	Fines	ParkingTicketPayment.com	passportinc.com
Community Development	Permits	MapsOnline Permits	MCC/Invoice Cloud
BLMD	Utilities	SmartHub	SmartHub
Water Dept	Utilities	SmartHub	SmartHub
Recreation	Programs	MyRec.com	MyRec.com
Council On Aging	Programs	MyRec.com	MyRec.com
School	Activities, Programs	MySchoolBucks	MySchoolBucks

Recommendations

- As recommended in Idea #46 - Work Order Systems to Guide Efficiencies, it is recommended for Belmont to devise a centralized software procurement process. A criterion in selecting a software solution that offers online payments is to evaluate both its front-end and backend payment processing with added consideration to the Treasurer Office for reconciliation of transactions and import into MUINS.

Next Steps

- Select Board ask Town Administrator Office to devise a Town-wide centralized software procurement process whereby existing deployed solutions are examined for reuse, and new solutions are coordinated across all Town departments for possible shared procurement if the software meets a current or expected need. Software procurement requests should factor in setup or customization needs as well as training requirements for users of the system.

Further Reading

- None

IDEA #46 – WORK ORDER SYSTEMS TO GUIDE EFFICIENCIES

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Seek out technological changes that can increase efficiency of departments internally and externally, e.g., digitize and track all maintenance needs and requests, track public requests for information/permitting/records requests/inspections/etc. Identify the 25 most common interactions / processes between residents and Town employees, assess for efficiency, and identify opportunities for making these transactions self-service through automated systems. Put more public data online to improve town employee efficiency other than responding to in person requests.

Other ideas included in this report

- 87 - Communication and work order systems: Continue the use of an electronic work order system for maintenance requests: The current helpdesk system allows individual teachers, themselves, to submit work orders directly from their desktops, rather than having to route requests through Building Principals or Custodians as an additional step.
- 386 - (Assuming nothing exists already...) Create system to record "rudimentary" allocation of work time in major categories (emergency, repairs, maintenance, and operations, say. This log of parsed hours (or fractional workdays) allows management to monitor balance between emergency vs maintenance for instance (are staff members spending excessive time on emergencies and repairs, vs. the "ISO" or standard allocation to preventative maintenance?)

If the Town is spending woefully higher % of time repairing, it cannot achieve proper maintenance. Or, we "waste" assets b/c of inappropriate attention to preventative maintenance.

This system would also create a "dashboard" which is seen by several managers, the Administrator and Finance people, if not a secondary alert where excessive time spent tips that related budgets potentially might become "overdrawn" b/c of those emergencies or unseen problems.

With this data, Town will also build an historical record for year-to-year comparison, as well as to determine longer-term focus investment in improvements. This would apply to seemingly all depts, especially any with significant physical plant or equipment, in addition to the depts. responsible for collecting/reporting/analyzing/monitoring this data.

[NB: This is a "crude" suggestion; uninformed by what exists/is done presently...]

Idea intent

This idea recommends a work order software system deployed across all departments to track requests and tasks originating from both within the Town as well as residents or other external parties. The work order system should have the capability to categorize and data mine the

requests so that a summary or analysis could identify common or frequently made requests and reveal other opportunities for Town departmental efficiencies.

Weighted Final Score: 43

(Financial Impact: 1, Operational Impact: 6, Time Scale: 2, Ease of Implementation: 3)

Background Information

Work order systems allow the Town and its departments to initiate and track tasks related to facility management, maintenance needs, desktop support, Town service requests, or any other digital or physical request. Using a software system designed for workflow and request management facilitates the request flow process from automatically assigning the ticket to the responsible Town employee, notifications to followers of the tickets when updates occur, alerts or nudges when tasks are dormant, and other features. Additionally, dashboards can be created to display key metrics and create an analysis on a subset of tasks such as by category, asset, or asset type, etc. This proves invaluable for efficient asset management to maintain the underlying asset or formulate preventive maintenance planning. Additionally, it can be used to track people hours on frequently requested tasks so that the task can be automated or offloaded for future efficiencies. These analyses can be generated into reports for public consumption and serve as supportive evidence when making capital or maintenance requests to Belmont’s [Capital Budget Committee](#) and [Long Term Capital Planning Committee](#), or in warrant articles for Town Meeting when advocating for funding requests.

Deployed Belmont Work Order Solutions

Department	Work Order Solution
Accounting	BOSSDesk
DPW	Microsoft Excel
Facilities	Web HelpDesk by SolarWinds
Information Technology	BOSS
School Department	Web HelpDesk by SolarWinds

In 2014 IT completed migration of previous work order system by TrackIT to the current work order system [BOSS](#) which was selected by the Information Technology director David Petto after investigating several vendors and finding it the cheapest at \$5,000/year for unlimited users. BOSS identifies the public sector as a targeted industry and offers [special pricing for government agencies](#). A stated opportunity in the [Town Administration’s Fiscal Year 2015 Budget Recommendation](#) for the Information Technology department was to “Create a work order ticket system for multiple departments utilizing the BOSS system currently in use by the IT department. This would have no additional costs associated as the system has unlimited expansion capabilities.”

One of the obstacles for deploying a unified work order system is the custom setup needed per department. It can be time consuming work to tailor the system to its needs or require additional

funding for the vendor to implement the necessary customization. Furthermore, training is needed to educate the work force for proper usage. The only department that implemented BOSS as a work order system was the Accounting department.

The Facilities department explored adopting BOSS but found the customization required of the software to be an impediment and instead adopted [Web HelpDesk by SolarWinds](#) which has been in use by the School Department since 2009 after migrating from SchoolDude. Web Help Desk does not offer education discounts so the software can be utilized beyond the School Department. It is licensed per the number of tech/admin users with unlimited end users. The Facilities and School departments collectively own 38 tech/admin licenses at approximately \$110 per license annually. It is procured with a single purchase order and the cost allocated to each department on a per tech license basis. Other departments could similarly use Web Help Desk by procuring the necessary additional tech/admin licenses.

The Department of Public Works does not use a work order system. Instead, a Microsoft Excel workbook is used to track requests.

Cost, feature set, customizability, ease of use and training requirements are all factors in selecting not only a work order solution but any other software solution. Instituting a centralized software procurement process can evaluate these criteria not only for the department requesting a new software solution, but also to examine the solution for use across all Town departments so that software deployments are not bifurcated.

Recommendations

- The SCIG recommends that the Department of Public Works procure a work order system to track its planned maintenance tasks as well as requests for service. The currently deployed BOSS and Web Help Desk software solutions can be evaluated for adoption by DPW, but also consider compatibility for a 311 citizen-request system, as recommended by the Belmont Website Renewal Committee and Idea #221 - 311 System.
- Ensure each department uses a dedicated work order software system to record, track and analyze their internal, cross-departmental, and external requests so that departmental reviews can identify efficiency opportunities.

Next Steps

- Select Board ask Town Administrator Office to devise a Town-wide centralized software procurement process whereby existing deployed solutions are examined for reuse, and new solutions are coordinated across all Town departments for possible shared procurement if the software meets a current or expected need. Software procurement requests should factor in setup or customization needs as well as training requirements for users of the system.
- Select Board ask Information Technology Advisory Committee (ITAC) to review the work order systems and recommend a path toward convergence of the existing systems.

Further Reading

- See Idea #221 - 311 System, which discusses a citizen request system

IDEA #52 – USE SOCIAL SECURITY INSTEAD OF COBRA

Report Status: Fully Reviewed

Researched by: Travis Franck

Original Idea as Submitted

Adopt cheaper social security instead of COBRA for employees not in the retirement system

Other ideas included in this report

- None

Idea intent

Lower the cost of health insurance for former employees.

Weighted Final Score: 0 (required by federal law)

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information:

The SCIG understanding of the Consolidated Omnibus Budget Reconciliation Act (COBRA) health insurance is that it is for former employees that choose to continue purchasing health insurance through the town. The costs of the insurance are borne by the former employee and do not impact the town budget in any meaningful manner.

Recommendations

- This idea is ruled out because we understand COBRA to be federal law (required to offer coverage)

Next Steps

- N/A

Further Reading

- More information about COBRA can be found here
<https://www.dol.gov/general/topic/health-plans/cobra>

IDEA #53 – VACATION ACCRUAL

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Eliminate vacation buyback policy; limit number of days' rollover and implement use-it-or-lose-it policy

Other ideas included in this report

- None

Weighted Final Score: 44

(Financial Impact: 4, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 1)

Background Information

Most Town employees fall under the vacation policy below:

Majority Of Employees Fall Under the Following Guidelines for Vacation in weeks			
Non-Mgt Years of Service	Annual Vacation		Max Accrual
0-5	2		4
5-12	3		6
12-25	4		8
>25	5		10
Mgt Years of Service	Annual Vacation		Max Accrual
0-5	3		6
5-12	4		8
12-25	5		10
>25	5		10
Unused Vacation is paid out at retirement, resignation, etc..			

Taking vacation is important to an employee's wellness and also helps to increase productivity.

Employers who provide paid vacation to their employees must treat those payments like any other wages. Upon separation from employment, employees must be compensated by their employers for vacation time earned. An employer may cap the amount of vacation time that an

employee may accrue or earn. The Town of Belmont’s maximum cap is two times the annual vacation accrual amount.

Many organizations limit vacation carry-over to few days and have a “use or lose it” policy in place to limit their financial liability as it is a substantial and often non-forecasted payout.

Many organizations also have a standard vacation policy that is not different for management vs. non-management.

Recommendations and Next Steps

The Select Board, Human Resources, and the Town Administrator should obtain and review the average payout for vacation accruals that was paid annually to employees whose service ended for use in determining how to proceed.

Any recommendations to changes in the Town’s vacation policies should not be made in insolation of any changes being made to other compensation practices. These changes for union employees would need to be included in the next contract negotiations.

Further Reading

- <https://hbr.org/2020/08/thinking-of-skipping-vacation-dont>
- <https://www.forbes.com/sites/carolinecastrillon/2021/05/23/why-taking-vacation-time-could-save-your-life/?sh=2ae5c93f24de>
- <https://www.mass.gov/doc/attorney-generals-advisory-on-vacation-policies/download>

IDEA #54 – FLEET MANAGEMENT

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Evaluate town vehicle fleet management; potentially eliminate all town-owned passenger vehicles and the travel allowance benefit of compensating employees for travel to and from their homes.

Other ideas included in this report

- None

Idea intent

Evaluate town fleet management policies/practices and recommend changes that make fleet management more cost efficient for the Town of Belmont.

Weighted Final Score: 40

(Financial Impact: 3, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 2)

Background Information

The Town of Belmont's fleet comprises approximately 211 vehicles. Its value has not been estimated though is a multi-million-dollar asset base/investment for our Town. Total cost of ownership is not understood. Departments manage their respective fleet, and no centralized/standard data repository exists that is maintained with key and important data attributes. Additionally, there doesn't appear to be a manual holding policies and procedures pertaining to managing these vehicles from declaration of need, purchase vs. lease, vehicle use, vehicle documentation, driver log and mileage reporting, idle hours, vehicle accidents, fueling of vehicles, maintenance plan by vehicle, misuse of vehicles, resale, etc.

Evaluation of the idea and the basis of the recommendation were made through:

- a review of an excel file of Town owned vehicles supplied by the Town which included some of the key data attributes for each vehicle where available (data was incomplete)
- a review of written policies that guide the management of fleet (no written policies were provided)
- a review of any reporting of key metrics pertaining to the management of this asset (no formal reporting takes place)
- information gathering meetings with Town of Belmont DPW, Town of Newton DPW, the State of MA OVM, the State of MA OVM fleet management company, Chevin, and the City of Cambridge DPW fleet management company, Fleetio.

Recommendations

SCIG recommends that Belmont utilize the services of Chevin (State of Massachusetts fleet management company) to conduct a two-year pilot with its FleetWave product to gain some learning and actual experience on the benefits of outsourcing some aspects of fleet management. FleetWave contains a broad set of offerings and features which can be purchased a la carte to enable a trial to get some learning. This menu type offering also allows for a phased approach roll-out to not overwhelm new users. The City of Cambridge uses Fleetio, a similar priced product to Fleetwave. The Town of Belmont could invite both companies to conduct a session with key stakeholders to see a demo and ask questions.

FleetWave's estimated cost for the data repository only product is \$5/vehicle/month x 211 vehicles or \$12,660 per year. The tool would provide data to guide decision making and learning and will require users to submit data. Data submission can be automated for vehicles equipped with telematics devices or via a centralized excel spreadsheet. The tool provides data for Right Sizing through the reporting of key performance indicators (KPI's) and reports to capture utilization rates over a period to assist in determining whether the Town has the correct number of a particular asset type. Total Cost of Ownership can be better estimated through collecting every expense incurred by the Town to operate a specific asset (loan or lease payments if applicable, fuel, maintenance and repairs, fines, telematics subscriptions if applicable, titling and registration fees, insurance, etc.). An Efficient Replacement Schedule can be better developed using the data collected and the replacement criteria for each asset type that is determined by the Town. As the data is collected in the platform tool, the system will display how a particular asset is tracking against the established criteria. Additionally, FleetWave will provide forecasting for the assets that are nearing the end of their lifecycle in a customizable fashion (i.e., 12-months, 24-months, etc..).

SCIG also recommends that Belmont improve its fleet management through the writing, implementation, and enforcement of policies/procedures that guide its management from purchase, use, maintenance/repair, and resale/retirement. These policies/procedures should be contained in a manual and adopted to ensure that the Town of Belmont's vehicles are managed in an efficient, economical, and safe fashion, consistent with policy. The State of Massachusetts' policy manual can be a starting point for Belmont to draft and write its policies and procedures. Additionally, policies for example those guided by the Energy Commission relating to the purchase of vehicles, should also reside in the manual.

Eliminating all town-owned passenger vehicles and travel allowances is not in scope of this recommendation. SCIG is recommending that through the writing of policies regarding Fleet Management, the passenger vehicles and travel allowances policies are written, aligned, and approved. For example, policies would be written that stipulate what positions are allowed Take Home vehicles and why, and written to guide vehicle use, etc. Travel allowances (stipends) are included in some employment contracts and though not in scope within Fleet Management, SCIG recommends that the Select Board and School Committee, respectively, review all its contracts that include travel allowances to confirm that travel allowances are justified, reasonable, and treated correctly from a tax standpoint. Additionally, it is recommended that for new contracts the Town of Belmont move away from including travel allowances in contracts and move towards reimbursement for business travel actually incurred.

Next Steps

Task	Owner/Lead
Determine who will lead overall project	Select Board with input from Town Administrator DPW Fire Chief Police Chief School Committee
Finalize and align an excel template of the key data attributes to be collected for all town owned vehicles with each department lead providing data for its vehicles (year, make, model, VIN#, purchase price, odometer reading, take home (Y/N), insurance premium cost, primary driver, equipped with telematics (Y/N), etc.	Town Fleet Manager
Populate the template for all town owned vehicles. Data providers should conduct some self-training on excel through many on-line and free options. Template will reside in a drop box.	Town Fleet Manager with each Department head
Review State of MA Office of Fleet Management Policies and write, align, implement a policy manual for the Town of Belmont which adopts similar policies as the State of MA. This effort can be implemented in phases with policies added as they become available (e.g., 2 x per year)	Town Administrator Fire Chief Police Chief School Committee
Host working session with Chevin and Fleetio to review their products with Town of Belmont and key stakeholders	TBD
As guided by State bidding laws, run an up-to-two-year pilot using a fleet management company to collect and report data on Belmont’s vehicles to help drive efficiencies, enforce policies, and to gain some learning on the value of potentially utilizing a fleet management company for expanded services.	Town Fleet Manager
Report KPI’s monthly and review pilot results to Select Board at a minimum of 1 x per year	Town Fleet Manager
Review current contracts which include travel allowance per recommendation	Select Board and School Committee
Move away from travel allowances in future contracts towards reimbursement for business travel	Select Board and School Committee

Further Reading

- <https://www.mass.gov/doc/ovm-policy-and-procedures-manual>
- <https://www.chevinfleet.com/en-us/>
- <https://www.fleetio.com/>

Preliminary Summary of Town of Belmont Fleet

(using data supplied by respective department heads in 4Q21 collected by DPW)

Count of VEHICLE#		
DEPARTMENT	ENGINE	Total
☐ BUILDING SERVICES	D	1
	E	1
	G	6
BUILDING SERVICES Total		8
☐ CEMETERY DIVISION	D	3
	G	1
	(blank)	1
CEMETERY DIVISION Total		5
☐ COUNCIL ON AGING	D	1
	G	2
COUNCIL ON AGING Total		3
☐ FIRE DEPARTMENT	D	10
	G	6
FIRE DEPARTMENT Total		16
☐ HIGHWAY DIVISION	D	41
	G	21
	H	6
	p	1
	(blank)	14
HIGHWAY DIVISION Total		83
☐ HOUSING AUTHORITY	D	1
	G	4
	(blank)	2
HOUSING AUTHORITY Total		7
☐ LIGHT DEPARTMENT	D	8
	E	1
	G	13
	H	2
LIGHT DEPARTMENT Total		24
☐ PARKS & FACILITIES	D	4
	G	7
	p	1
	(blank)	4
PARKS & FACILITIES Total		16
☐ RECREATION	G	1
RECREATION Total		1
☐ WATER DIVISION	D	6
	G	7
WATER DIVISION Total		13
☐ Health Department	E	1
	G	1
Health Department Total		2
☐ POLICE DEPARTMENT	(blank)	33
POLICE DEPARTMENT Total		33
Grand Total		211

(Engine legend: D=diesel; E=electric; G=gas; H=hybrid; P=propane)

IDEA #60 – INITIATE JOB AND WAGE CLASSIFICATION STUDY

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Regrade/Reclassify salary ranges for jobs

Other ideas included in this report

- None

Idea intent

Determine whether Belmont's job classifications and pay scales are in line with similar communities.

Weighted Final Score: 31

(Financial Impact: 2, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 1)

Background Information

Salaries and wages are by far the largest portion of the Town and School expenditures; total salaries plus benefits constitute almost 80% of the general fund net operating expenditures (excluding enterprise funds). The Town's most recent job and wage classification study for non-union positions was done in 2014, and for union employees was completed over 10 years ago. In December 2021, the Financial Task Force II (FTF II) recommended that the Town update the 2014 wage study for all non-union employees, which the Town Administrator expects to get underway for town employees in FY22. In addition, the FTF II recommended that the Town begin negotiation with the unions regarding conducting similar studies for union employees. (A breakdown of union and non-union employees and a list of the Town's 13 unions as of November 2021 is included below.) It is anticipated that such negotiations would be complex, due to the range of grades and classifications. For the Town, such studies will address community questions and concerns on how compensation is determined in the hiring process, benchmark Belmont's compensation with peer communities and establish market driven salary ranges.

Recommendations:

The SCIG concurs with the Financial Task Force II recommendations, as job and wage classifications change over time. Over 85% of the town's employees are in unions, which will require collective bargaining.

This recommendation will not generate immediate structural savings however, such a study will provide insight into Belmont's pay scales relative to similar communities-a critical component of hiring and retaining employees -and provide insight into future compensation costs.

Next Steps

- Town Administrator and School Committee to initiate negotiation of new job and wage classifications.

Further Reading:

- See Appendix C – Compensation Plan for Non-Union Positions for the document: 2014 Town Non-Union Job and Wage Classification Study: Non-Compensation Services Non-Union Positions for the Town of Belmont, March 17, 2014, Human Resources Services, Inc. –

Collective Bargaining

Employees as of Nov. 2021	Town	Schools	Total	% of Total Employees
Union	201	565	762	85.5%
Non-Union	68	61	129	14.5%
Total	269	626	891	100%

Note: The numbers include all full-time and part-time individual employees that meet the contract terms and will differ from Full-Time Equivalents (FTEs), a unit that measures employee hours equivalent to full-time workers.

Collective Bargaining Units	Representing	Current Contract Dates
International Brotherhood of Electrical Workers (IBEW)	Belmont Municipal Light Department (BMLD) employees	January 1, 2021-December 31, 2023
Belmont Librarian's Association	Library professional employees, excluding the Library Director	July 1, 2020-June 30, 2022
American Federation of State, County and Municipal Employees (AFSCME)	Full-time employees of the Highway Division, Recreation, Parks and Cemetery Division, Library custodians, Town custodians in Building Services, Council on Aging drivers.	July 1, 2017-June 30, 2020
Belmont Police Patrolman's Association	Full-time Police Department patrol officers, excluding the Police Chief, Assistant Chief, Captains, Lieutenants, Sergeants	July 1, 2017-June 30, 2020
Belmont Police Superior Officers Association	Police Department captains, lieutenants, sergeants, excluding the Police Chief, Assistant Police Chief	July 1, 2017-June 30, 2020
International Association of Fire Fighters (IAFF)	Fire Department firefighters, excluding the Fire Chief and Assistant Chief	July 1, 2017-June 30, 2020
Joint Public Safety Dispatchers Association (JAPSA)	Full-time emergency communications officers, excluding the Operations Manager and Supervisor of Joint Dispatch	July 1, 2017-June 30, 2020
Service Employees International Union (SEIU)	Full-time clerical and secretarial personnel employed more than 25 hours/week including library personnel assistants who perform clerical and non-professional library duties	July 1, 2017-June 30, 2020
American Federation of State, County and Municipal Employees (AFSCME)	Cafeteria, Maintenance, and Custodial Workers	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit A	Teachers and instructional personnel (including long term subs), nurses, physical and occupational therapists, etc.	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit B	Directors, Assistant Directors and Assistant Principals	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit C	Secretaries and clerical aides	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit D	Professional Aides, Classroom Assistants, Tutors and Campus Monitors	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021

As of Fall 2021. Unless otherwise noted, collective bargaining units exclude managerial and executive positions.

Sources: Mike McAllister, School Department Director of Human Capital, Shawna Healy, Town Human Resources Director, School and Town human resources web pages.

IDEA #61 – ELIMINATE LIFE INSURANCE BENEFITS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Eliminate life-insurance benefits for employees

Other ideas included in this report

- None

Idea intent

Reduce expenditures by eliminating the town portion of employee life insurance benefit premiums.

Weighted Final Score: 20

(Financial Impact: 1, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

The Town offers a life insurance policy with a \$2,000 death benefit to all employees; the policy cost is split 50-50 with the employee. The Town’s cost per policy is \$2.37 per month, and a total cost to the Town of less than \$1,000 per month. According to the Town Administrator, the number of employees taking advantage of this has declined over time due to the minimal payout.

A “market” survey of employee benefits shows that surrounding towns include basic life insurance as a benefit, with premiums shared between employee and town:

<i>Basic Life and Accidental Death and Dismemberment Insurance Benefit-Benchmarks</i>				
	Basic Life and AD & D Benefit	Upon Retirement	Employee Cost	Cost shared with Town?
Belmont	\$ 2,000	\$ 2,000	\$2.37/mo	yes
Arlington	\$ 10,000	\$ 5,000	n/a	yes
Lexington	\$ 5,000	\$ 2,000	\$4.20/mo	yes
Winchester	\$ 4,000	n/a	\$3.04/mo	yes
<i>Sources: Town Websites, Human Resources, Employee Benefits</i>				

Recommendations

None. The cost of offering life insurance is de minimis at less than \$12,000 per year to the Town and enrollment is in decline.

Next Steps

- None

Further Reading

- None

IDEA #67 – ELIMINATE SCHOOL RESOURCE OFFICERS

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Eliminate the School Resource Officers

Other ideas included in this report

- None

Idea intent

Eliminate positions to reduce the cost of employing designated School Resource Officers.

Weighted Final Score: 34

(Financial Impact: 1, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 4)

Background Information

Currently, Belmont has two full-time School Resource Officers (SROs), one who is assigned to the High School and one who is assigned to the Chenery and the Elementary schools. Additionally, the SRO who is assigned to the High School is a member of the NEMLEC STARS Team, a regional consortium of police departments in Middlesex and Essex Counties that coordinates the sharing of personnel and resources for its member agencies. Belmont's SROs also participate in the Waltham Summer Youth Police Academy, a two-week program held at Waltham High School.

Prior to 2007, Belmont had just one SRO and the salary was split between the school budget and the Town budget. Due to budget cuts in 2007, the SRO position was eliminated; the officer was returned to patrol duty. In response to Sandy Hook in 2014, the State passed legislation stating that every chief of police, in consultation with the superintendent and subject to appropriation, shall assign at least one SRO to serve the school district. This law included a provision that allowed school departments, in consultation with the chief of police, to apply for a waiver of the requirement. At that time, Belmont assigned Officer Melissa O'Connor to the SRO position. In 2018, the Select Board voted to reallocate staffing/resources in the budget to assign an additional SRO to the Chenery, full-time. Officer Michael Horan, who had been implementing the DARE program in Belmont schools, was assigned to the Chenery.

Both Officer Horan and Officer O'Connor currently report directly to Lieutenant Kristin Daley. Their salaries are included in the Public Safety section of the Town's operating budget. In 2020, Officer O'Connor's salary was \$93,059.58 and Officer Horan's salary was \$124,947.81.

In response to calls for police reform in 2020, the State passed legislation changing the language of the law regulating SROs from "in consultation with the superintendent and subject to appropriation" to "at the request of the superintendent and subject to appropriation". This language change was deliberately to change the decision-maker from the chief of police to the

superintendent of schools. Further, the law now requires that the superintendent annually report to DESE and publicly present to the School Committee the cost to the school district of assigning a school resource officer, as well as a description of the proposed budget for mental, social, or emotional health support personnel for the school and the number of school-based arrests, citations, and court referrals.

When asked what the benefits of having SROs are for the Town and the Schools, Chief MacIsaac stated that without SROs assigned to the high school and Chenery, the Belmont Police Officer on dayshift duty would likely be deployed to either/both schools to deal with any/all calls. In 2019, the high school placed 260 calls for police service and they were all handled by the SRO. In the same year, the Chenery placed 123 calls for police service and these were also handled by the SRO. Without the SROs, all of those calls (thefts, hit and runs, sounding alarms, medical emergencies, vehicle break-ins) would require that the dayshift officer be deployed to these schools. It is not clear whether there is a cost savings or an efficiency savings to having the SROs cover these calls as opposed to an officer on daytime duty unless there is an incident in Town at the same time as an incident at either the high school or the Chenery.

Chief MacIsaac also noted that the SROs have become familiar faces at the high school and the Chenery, which has a positive impact on the students. They also attend dances, events, and sport competitions, which would otherwise need to be staffed by any officer on duty at the time. Additionally, Chief MacIsaac believes the SROs serve as effective liaisons between the School Department (staff and administration) and the Police Department, which did not always have a positive working relationship prior to the SROs.

Next Steps

- Determine whether the calls from the High School and Chenery can be absorbed by the daytime officer on duty and whether there is any cost/efficiency savings to the Town by consolidating these positions.
- Consider consolidating these positions when the MS/HS Building is completed in 2023. Determine whether two SROs are still needed, versus one SRO for the single MS/HS Building.
- School Committee to ensure the Superintendent is prepared to report and present the information required by state law effective December 31, 2020.

Further Reading

- Massachusetts General Laws – School resource officers
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXII/Chapter71/Section37P>
- Belmont PD School Resource Officers
<https://www.belmontpd.org/community-services/pages/school-resource-officers>
- Northeastern Massachusetts Law Enforcement Council (NEMLEC)
<http://www.nemlec.com/>
- An Act relative to the reduction of gun violence (2014)
<https://malegislature.gov/laws/sessionlaws/acts/2014/chapter284>
- An Act relative to criminal justice reform (2018)
<https://malegislature.gov/Laws/SessionLaws/Acts/2018/Chapter69>

- An Act relative to justice, equity and accountability in law enforcement in the commonwealth (2020)
<https://malegislature.gov/Laws/SessionLaws/Acts/2020/Chapter253>
- Will Brownsberger on School Resource Officers legislation (2020)
<https://willbrownsberger.com/police-in-schools/>

IDEA #72 – LESS FREQUENT LAWN CARE

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Less frequent yard and lawn care

Other ideas included in this report

- None

Idea intent

We interpret this idea to imply that we do more than necessary landscaping work on town-owned properties.

Weighted Final Score: 37

(Financial Impact: 1, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 5)

Background Information

The programs for grounds maintenance currently include:

- DPW
 - Cemetery
 - Deltas (i.e., grass areas near roads)
 - Parks
- Facilities & School Department (custodial staff)
 - School grounds
 - School fields

These programs are designed to maintain public spaces in Belmont to keep them safe for use and attractive. Currently, the DPW parks and cemetery department has reduced the frequency of a number of services due to increased demand for other service and the addition of new services to their list of responsibilities without a commensurate increase in funding or staffing support.

There is additional complexity in the individual instances. For example, adjacent to Chenery's school-managed grounds is the Washington Street playground, which is used daily by Chenery during recess and after-care and members of the surrounding community, but its grounds are managed by the DPW. Another example of complexity is the area around Claypit pond, some of which is managed by the DPW and some by the school department.

It's understandable that different departments might manage parcels under their control, but a lack of centralized coordination leads to poorer service and inefficiency.

An example of this is, again, at Chenery, where trash is collected by DPW Parks & Cemetery staff from the cans in the playground, but not from the school-owned cans a few hundred feet away. This inefficiency isn't someone's fault – the personnel are doing what they have been asked – but is the result of a lack of coordination across those two departments.

Recommendations

It is unlikely that the Town will realize much benefit from a reduction in the maintenance and groundskeeping programs as they are already quite lean, operating at a lower level and frequency of service than in the past. That said, there is a clear opportunity to improve the quality and efficiency of our groundskeeping services through centralized coordination across town departments.

Next Steps

The Select Board & Town Administration should identify a structure to add centralized coordination to groundskeeping across departments, specifically seeking opportunities to reduce inefficient use of staff and equipment.

Further Reading

- For more detail on ongoing cemetery maintenance, see SCIG Evaluation Report: Idea 42 - Cemetery Charges Should Cover Costs.
- Belmont Facilities Department
<https://www.belmont-ma.gov/facilities-department>
- DPW Parks & Cemeteries Division
<https://www.belmont-ma.gov/dpw-parks-cemetery-division>

IDEA #79 – COMBINE HIGGINBOTTOM AND UNDERWOOD POOL OPERATIONS

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Combine the operation of the Higginbottom and new Underwood pools to maximize revenues

Other ideas included in this report

- None

Idea intent

This idea appears to be intended to achieve efficiencies by combining the outdoor Underwood Pool (operated by the Recreation Department) and the indoor Higginbottom Pool at Belmont High School (operated by the Belmont Public Schools) under the Recreation Department.

Weighted Final Score: 44

(Financial Impact: 2, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 3)

Background Information

The Town of Belmont currently owns two municipal pools. The Underwood pool is an outdoor pool located at Concord Ave and Cottage Street. The Higginbottom pool is an indoor pool located in Belmont High School. Both pools have been renovated in the past several years.

The Underwood pool is operated during the summer months by the Recreation Department and is open to the public for a fee. The costs of opening and operating the pool are generally covered by the fees collected.

The Higginbottom pool is operated by the School Department and is used by students mostly during weekday afternoons. At other times, the pool is open to the public for a fee. Public access is limited to times when school is not in session, because the pool is currently only accessible through the main school entrance. However, when further work on the Middle and High School project is complete, external access to the pool should be possible. This would allow the pool to be used by the public more frequently, such as during times when school is in session and students aren't using it.

Recommendations

- The Town Administrator and the Superintendent should consider consolidating operations of the two pools under the Recreation Department, with an agreement to provide access to the School Department at specific times. Consolidating operations under one department will likely be more efficient and less costly. For the Higginbottom pool, this arrangement

would be comparable to the ice rink that is on School Department land but is operated by the Recreation Department.

- The department put in charge should:
 - promote the Higginbottom pool as a resource that is open to the public, particularly once external access is complete.
 - research the fees charged at comparable indoor public pools in the area to ensure that Belmont is maximizing available revenues.
- The Town should consider setting up an enterprise fund for the Recreation Department and including the two pools in that fund. Doing this would allow for a transparent accounting of all expenses and revenues and ensure that the costs of operating the two pools is covered by the revenues raised by fees.

Further Reading

- Information on Enterprise Funds (Mass Division of Local Services)
<https://www.mass.gov/doc/enterprise-fund-manual/download>
- Westwood Pool Information & Schedule
<https://www.townhall.westwood.ma.us/departments/recreation/pool-information-schedule>
- Dedham Pool information
<https://www.dedham-ma.gov/Home/Components/FacilityDirectory/FacilityDirectory/67/813>

IDEA #81 – RESTRUCTURE LIBRARY STAFF

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Evaluate mix of full time and part time library staff, compare to other Towns. Decrease number of senior positions by making one head of children's, one head of Reference, etc. May not save staff but will reduce level of positions and save money.

Other ideas included in this report

- #82 – Decrease number of senior positions by making one head of Children's services then just staff in other building - same with Reference, Young Adult. May not save staff but will reduce level of positions and save money

Idea intent

Fewer senior level positions and more part-time positions will result in lower salary and benefit expenditures.

Weighted Final Score: 14

(Financial Impact: 0, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

These two ideas date from 2010. Since that time, the Belmont Public Library has aligned head librarians with each major category, i.e., Reference, Technology, Children's, etc. The attached chart shows that the Belmont Library full-time/part-time employee mix compares favorably to selected towns with similar population and circulation. As of September 30, 2021, the Library employed 50 individuals: 20 full-time benefits eligible employees, 29 part-time non-eligible employees and one part-time benefits eligible employee. All but one of the full-time employees are members of collective bargaining units.

Recommendations

- Board of Library Trustees and the Select Board should continue to evaluate staffing needs and models to identify needs and potential efficiencies.

Next Steps

- None

Further Reading

- See following chart, *2018 Staffing for Selected MA Libraries, Sorted by Total Non-Custodial FTEs, Highest to Lowest*

2018 Staffing for Selected MA Libraries, Sorted by Total Non-Custodial FTEs, Highest to Lowest

Please Note: 2018 is the Most Recently Available Year

Location	Library Population Groupings	Library Total Circulation	Total Hours Per Week - Director	Total # of Hours Worked per Week by All Staff	# staff working 35 hours or more per week	# staff working fewer than 35 hours per week	Total number of hours worked per week by professionals	Total Full-time & Part-time Staff	Full Time Equiv (FTEs)	Non-Custodial FTEs
Lexington - Cary Memorial Library	25,000-49,999	955,448	35.0	1,333.0	28	29	537.0	57	38	38
Wellesley - Wellesley Free Library	25,000-49,999	899,078	35.0	1,268.5	24	36	476.0	60	36	36
Natick - Morse Institute Library	25,000-49,999	524,739	40.0	1,246.5	16	39	431.0	55	36	36
Arlington - Robbins Library	25,000-49,999	795,435	35.0	1,207.0	23	16	518.0	39	34	34
Watertown - Watertown Free Public Library	25,000-49,999	708,219	37.5	1,224.5	25	11	477.0	36	35	31
Concord - Concord Free Public Library	15,000-24,999	469,262	40.0	1,095.5	17	22	461.5	39	31	30
Needham - Needham Free Public Library	25,000-49,999	553,413	37.5	922.7	14	39	429.6	53	26	26
Belmont - Belmont Public Library	25,000-49,999	595,286	40.0	928.0	19	33	433.0	52	27	25
Winchester - Winchester Public Library	15,000-24,999	508,867	35.0	873.0	12	31	393.0	43	25	23
Acton - Acton Memorial Library	15,000-24,999	538,864	40.0	659.5	8	28	328.5	36	19	19
Melrose - Melrose Public Library	25,000-49,999	320,712	35.0	581.0	12	22	191.0	34	17	17
Natick - Bacon Free Library	10,000-14,999	43,969	36.0	115.0	1	5	36.0	6	3	3
Acton - West Acton Citizens' Library	0-1,999	11,120	28.0	43.0	0	7	28.0	7	1	1

*Includes Library Director, Assistant Director, and Librarians, all of whom hold a Masters in Library Science (MLS)

Source: MA Library Board of Commissioners, Programs and Support, Library Statistics, 2018

IDEA #84 – REDUCE LIBRARY HOURS/USE BENTON LIBRARY

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Consider a reduction in hours for the library. Explore closing the library on certain days (e.g., Monday and Tuesday) or change library hours to open late two days a week (noon on T & Th, for instance)

Other ideas included in this report

- #83 – Move Children's Room to the Benton to allow growth at the Main Branch

Idea intent

Operating expenditures such as salaries and utilities could be reduced if the library reduced the number of days it was open. Use of the Benton Library could free up needed space in the main Library.

Weighted Final Score: 37 (Benton Library)

(Financial Impact: 3, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 3)

Background Information

1) The idea of reducing hours dates from 2010. Currently, the Belmont Public Library is currently closed all day Sundays and until 11 am on Thursdays.

Massachusetts public libraries are required to remain open for a minimum number of hours to maintain accreditation by the Massachusetts Board of Library Commissioners (MBLC). The Belmont Public Library is required to have accreditation to participate as a member library in the Minuteman Library network, through which the library annually accesses thousands of books, periodicals and other resource material for residents that would otherwise not be feasible to purchase or keep on hand. In addition, the library is also able to purchase materials at a cheaper rate through bulk purchases made by network libraries. Loss of certification would eliminate these services, limit access by Belmont residents and jeopardize state funding.

To be a certified Library by the Massachusetts Board of Library Commissioners, a library must meet the minimum standards of free public library service:

1. Meet Municipal Appropriation Requirement – (MAR). Under Massachusetts law (MCL c78, s19a) state that a municipality must appropriate a figure of at least 2.5% of the average of the last three years municipal appropriations in order to be certified for MLBC state aid. (Capital appropriations are not included in these calculations.) Annual state aid for Belmont's library ranges from \$25,000 to \$35,000 annually.

2. Remain open a minimum number of hours per week and a minimum number of days per week, based on population. For Belmont, the minimum hours required are 59 hours per week and the minimum days are six. Currently, the Library is open 62 hours per week, spread over six days.
3. Allow non-resident borrowing
4. Expend a specific percentage (based on population) of the municipal appropriation on materials. Currently, the Library is required to spend 13% of its appropriation on materials.
5. Have a Director with a Master's Degree in Library Science.

If these requirements are not met, participation in the state program, as well as Minuteman, would be in jeopardy. This includes access to many state databases, advocacy, and the state aid funding. In instances of hardship, waivers may be granted for continued access to these programs. Waivers are granted only to the extent that remedies are put in place to address the circumstances that have resulted in not meeting state standards.

2) The Everett C. Benton Library is housed in an historic building on property owned by the Town and licensed through December 2022 to the Friends of Benton Library, a 501c (3) organization which runs the library as an independent branch. It is open approximately from 9-16 hours per week based on availability of volunteers. The arrangement was initiated by the Friends group and put in place in 2010, after the town evaluated closing the branch as a cost saving measure in the wake of the 2008-2009 economic downturn. The Friends group is fully responsible for the costs of operating the library, including utilities, building and landscape maintenance, and insurance. No town or state funds are used to support the operations or maintenance of the building, except through grant programs. The Belmont Public Library works with the independent branch but does not oversee its operation. There is no dedicated parking for the building.

The library operates with 60 volunteers and approximately 150 donors. Per Elizabeth Gibson of the Friends group, annual operating costs are \$10,000, including heat and utilities, maintenance, book purchases and supplies. The Friends group has also financed improvements such as a new furnace, a new bathroom and painting of the building.

Per the Library Director and Library Trustees, the Benton Library building is not large enough to serve as the Children's room. The number of children's programs and volume of materials would prohibit cost-efficient use of the building, and any partial use would require additional staff.

Recommendations

- **Belmont Public Library hours:** No recommendation. Belmont's library has the 10th largest circulation in the state and is heavily used by residents. The library's hours are close to the minimum set by the state for a town of Belmont's size.
- **The Benton Library property:** The SCIG is tasked with identifying opportunities to reduce the structural deficit by identifying new recurring revenue sources and expenditure reductions. While this beloved branch is cost neutral to the General Fund Budget, the property is underutilized and services a limited population.

The SCIG has identified **potential recurring revenue and expenditure opportunities** to consider, including:

Revenue-producing uses of the building:

- Fee-based recreational, adult, pre-school and after-school, day care, or other programs.
- Long term rental to a third party, such as a school, small office, or specialized entity (e.g., language or math schools, small foundation, etc.).
- Short term event rental or other uses, either in conjunction with the existing use as library branch or the above uses.
- Sale of the property as a one-time source of funds, with potential recurring tax revenue.

Possibilities to reduce ongoing town costs:

- Utilization of the building to alleviate town department space concerns.
- Utilization of the property to eliminate rental costs currently incurred by town departments or other entities for space (an example might be Retirement Board offices).

Next Steps

1. Recommendations regarding the use of the Benton Library property should be consolidated with the real estate review and recommendations provided by the SCIG Consolidation, Regionalization and Outsourcing working group.
2. The SCIG recommends that the Select Board and/or Town Administrator
 - Conduct a building inspection to determine the condition of the building and any upgrades needed for alternate potential uses
 - Hire a consultant or use a short-term task force to assess the status of the Benton property. Such analysis would identify possibilities to increase utilization of the Benton Library property to generate new sources of recurring revenues or reduce town costs.
 - Determine what recurring costs would be assumed by the town, as well as the initial costs to adapt the building for such uses.
 - Use this information to determine the cost/benefit of maintaining the property as an independently operated branch library.
3. The SCIG recommends that the Select Board engage the neighborhood and community to solicit public input throughout this process.

Further Reading

- Massachusetts Board of Library Commissioners (MLBC) website, Regulations and Standards
<https://mblc.state.ma.us/programs-and-support/state-aid-and-arls/regs-standards.php>
- Everett C. Benton Library website
<https://ecbentonlibrary.org>
- 2010 agreement and most recent amendment between the Town of Belmont and the Friends of Benton Library, Inc.
[SCIG-RBS-Benton 2010 Library License and 2019 Amendment.pdf](#)

IDEA #85 – OFFER VIRTUAL/HYBRID CLASSES

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Move non-core high school courses on-line. Explore additional ways to safely leverage web tools.

Other ideas included in this report

- 230: Offer virtual/hybrid curriculum for high school students to alleviate classroom size on teachers. Utilize free online courseware to expand course offerings. Teachers would serve as coach/guide. Find opportunities to use IT to reduce burden on teachers, See FL online course systems as example
- 234: Shorten school days to allow students to use virtual courses at home, reduces usage expenses at the schools, shortens teacher day
- 291: Form/join a regional virtual school district to offer virtual education that augments/complements the existing course offerings at BHS.

Idea intent

Explore different ways of online learning that may improve the availability of learning opportunities and save money for the School District. Can moving paper-based work online save money/time? If online courses are less expensive than FTEs, the district could save money in the general fund (teacher salaries).

Weighted Final Score: 37

(Financial Impact: 2, Operational Impact: 0, Time Scale: 3, Ease of Implementation: 4)

Background Information

Technology is helping teachers expand their reach and improve their effectiveness in classrooms whether those classrooms are in-person, hybrid, concurrent, or remote. The more teachers become familiar with new technologies, the more impact teachers will have on their students and the more they can provide individualized support that is learner-driven and evidence-informed.

During the summer of 2020, Belmont Public Schools offered a new online math course, the Challenger Geometry program. During the school year, students who completed the summer coursework through Khan Academy continued in a hybrid learning model, completing online modules through Edgenuity and meeting with a teacher once a week, remotely. During the presentation to the School Committee, the School Department projected about 50 students would enroll. As of September 2021, 206 students in grades 8 and 9 were enrolled.

Program costs:

- 2 math teachers x \$4,000 stipends = \$8,000.
- Edgenuity licenses at \$100 per student = \$20,600

One goal of offering the Challenger Geometry program was to offer a more inclusive/accessible advanced math course. From the number of students enrolled, it seems the virtual/hybrid course has been more accessible to students compared with the in-person advanced math course that had been offered. However, the increased enrollment equates to greater costs for the licenses.

Shortening school days and teacher days by pivoting to virtual learning would require union contract negotiations as they impact the work hours and role of the teachers and potentially their salaries. The Massachusetts Dept of Education also has minimum requirements for the number of hours that public school districts must provide to all students: elementary students must receive a minimum of 900 hours of structured learning time per school year; secondary school students must receive a minimum of 990 hours of structured learning time per school year (<https://www.doe.mass.edu/lawsregs/603cmr27.html?section=04>).

If the District is to scale up the virtual/hybrid learning offering, it should consider hiring a Technology Director with experience/ability to evaluate the impact and learning outcomes of these courses compared with traditional, in-person courses.

Recommendations

- The School Committee should determine whether the Challenger Geometry program provides high quality learning opportunities for a more diverse population of students compared with the previous in-person advanced math course and whether the program costs are prohibitive. Based on their conclusions, they may consider whether the hybrid learning model makes sense to replace other courses.
- The School Department should consider creating a position for a district-wide Technology Director, or potentially in partnership with other school districts.

IDEA #86 – ENHANCE WEB EFFICIENCIES

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Explore additional ways to safely leverage web tools for non-academic efficiencies

Other ideas included in this report

- 87 – Improve the Student Info System as the central database from which other systems interact.

Idea intent

Improve the delivery of town services by adopting an improved Student Information System that is more user friendly for parents/caregivers of students in BPS.

Weighted Final Score: 37

(Financial Impact: 1, Operational Impact: 2, Time Scale: 3, Ease of Implementation: 4)

Background Information

There have been many complaints that the current Student Information System (SIS) – a system that provides access to student information, fees and bills, and used for activity registration – is not user friendly. For example, parents want a system that allows them to create one profile for a student that follows that student from K-12 rather than having to recreate profiles each time a student moves from one school to another.

Recommendations

- Gather feedback from parents/caregivers regarding the current SIS (to confirm there is a need for change) and what they would like to have in a SIS.
- Assess and improve the current SIS, explore alternatives that have been used successfully in other school districts and implement a new or improved SIS for Belmont Public Schools.

IDEA #88 – REDUCE ADMINISTRATIVE COSTS ASSOCIATED WITH THE METCO PROGRAM

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Make METCO a scholarship only program. No overhead administration.

Other ideas included in this report

- #339 - Make METCO more like an exchange program.

Idea intent

Reduce staffing and costs specific to the METCO program

Weighted Final Score: 20

(Financial Impact: 0, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 4)

Background Information

Metropolitan Council for Educational Opportunity (METCO) is a voluntary state funded program that permits students who live in Boston to attend public schools in suburban districts that choose to participate. School Committees make the decision (vote) to opt their school districts into the METCO program (Mass General Law 76, Section 12A).

Budget impact: State grants cover the costs of educating METCO students in Belmont. Belmont receives per pupil funding from a state line item and Chapter 70 based on the number of METCO spots available. Currently, Belmont enrolls 106 METCO students in grades K-12. In FY21, Belmont received a total of \$834,241 in state grants to help pay for the costs of educating these METCO students.

Staffing/Administration: As a participant in METCO, a public-school district is required to employ a METCO Director, provide transportation (may include a late bus), and generally support any METCO students the same as it supports residents.

To follow the requirements, Belmont employs one METCO Director who was hired in 2018. Her salary, which is part of the school budget, in FY20 was \$104,490.45. In addition, the district chooses to employ one METCO aide to support the numerous elementary level METCO students and their families as they transition into the district. More than 50% of the METCO students in the district are enrolled in the elementary schools. The current aide was hired in 1995 and is a member of the BEA, Unit D. Her salary, which is part of the school budget, in FY20 was \$34,344.54.

METCO is a state program that is not currently designed as an exchange program that would provide opportunities for students to go outside of Belmont's district. To change the program would require state action and could be discussed further by residents.

Recommendations

- Do not reduce the staff to support the METCO program in BPS. The Director position is a requirement and cannot be eliminated. Eliminating the METCO Aid position will not have any significant impact/savings for the district.
- Do not seek out an alternative exchange program. METCO provides cultural and social opportunities for students both residing in and outside of Belmont that can't be created otherwise.
- Review the transportation costs associated with the busing schedule/contract. Determine whether it is the most efficient and cost-effective contract.

IDEA #89 – SCHOOL BUSING

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Charge full cost for bus fees; provide only transportation required by law - no exceptions; Evaluate fees.

Other ideas included in this report

- None

Idea intent

Reduce costs by increasing fees/only providing mandated bus services

Weighted Final Score: 43

(Financial Impact: 3, Operational Impact: 0, Time Scale: 3, Ease of Implementation: 4)

Background Information

In FY22, the School District budgeted \$801,000 for regular daytime transportation, exclusive of OOD SPED transportation costs.

Belmont Public Schools bus students in grades K-6 who live two plus miles from the school without charging fees because it is a legally mandated service. The Belmont Public Schools charge busing fees for all students in grades 7-12 who ride a bus and for students in grades K-6 who live less than two miles from the school. Financial waivers are granted based on household size and income.

A School Committee vote is required to make changes to the busing scenario and all fee structures. During the May 11, 2021, School Committee meeting, Tony DiCologero, Director of Finance, Business and Operations presented the cost of busing students in grades K-12 versus K-8 versus K-6 based on the FY22 fee structure and determined the current bus schedule is the most cost effective.

Recommendations

- The School Committee and School District should continue to consider the finances of different busing scenarios and fees structures as they put together the budgets for FY23, FY24, and FY25.
- Evaluate the efficiency of the bus routes to see if costs could be reduced by changing routes.
- The School Committee should review busing contracts from other school districts and consider how often BPS is putting the busing contract “out to bid.” Are there any savings to be had through new busing companies/contracts if they are put out to bid on a yearly, or

at least more frequent, basis? Are there opportunities for regionalized contracts for school busing?

IDEA #92 – MAKE COUNCIL ON AGING SELF-SUPPORTING

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Require Council on Aging (COA) users to cover full operating costs through fees Charge COA users a membership fee, similar to Recreation Department fees that would cover transportation costs, etc.

Other ideas included in this report

- #93 Require COA users to cover full operating costs through fees
- #94 Eliminate door to door doctor visits from COA; switch to taxi vouchers based on means testing; at the very least limit to within Belmont only

Idea intent

Reduce Council on Aging expenditures charged to the General Fund.

Weighted Final Score: 31

(Financial Impact: 1, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 3)

Background Information

The FY22 COA General Fund budget is \$403,336. Town funding is supplemented by approximately \$450,000 in federal and state funding, grants, revolving funds, cash, and in-kind donations and an estimated \$200,000 in volunteer hours, for a total value of services offered of over \$1,000,000. Senior Center meals are provided by Springwell, a contracted agency, and funded through State and Federal grants. Springwell provides both on-site and home delivered meals. The total value of the contract in FY20 (pre-COVID) was \$231,000 (included above). The Senior Center services 2,100 seniors and is open to anyone over 60 years or disabled. This includes former residents that live elsewhere and the Center maintains an informal reciprocal agreement with other towns for similar situations. Transportation is limited to Belmont residents.

Self-Supporting COA: While almost every community offers senior services of some sort, the SCIG was not able to find any town in Massachusetts that self-funds General Fund or total Council on Aging expenditures. Senior services provide multiple resources that allow seniors to stay active and independent and include offerings that help seniors stay mentally and physically healthy, socially active, and engaged with the community. Many seniors are on fixed incomes and cannot afford the fees that would be necessary to cover all COA expenditures.

For Belmont, all classes are self-funding through the COA revolving account. Seniors who cannot afford the fees are provided with scholarships through funding by the Friends of the COA. The Springwell contract funds all meal preparation and deliver. COA transportation is partially funded by state and local grants and donations. Arlington operates its senior

transportation program as a self-supporting entity in a separate Enterprise Fund. This is possible due to grants, such as the Community Development Block Grant. However, Belmont has a lower proportion of seniors below the poverty line and does not qualify for a similar level of grants.

Transportation

Transportation is a core service of the Belmont COA and represents approximately 30% of the COA’s FY22 General Fund budget. State and local Grant funding pays for part of the salary for one driver and a new ancillary taxi voucher program.

The COA provides transportation to the Senior Center, local grocery stores, pharmacies and drugstores, doctor’s appointments, and hairdressers, Monday through Friday, for seniors who live in Belmont. Transportation is provided to destinations within a prescribed “service area”. For medical appointments, the service area includes neighboring municipalities, and does not include the medical appointments in downtown Boston. Seniors rely on these rides to get to adult day care, dialysis, required medical tests, doctor appointments and other needs. For non-medical appointments, the service area is limited to destinations within Belmont. The client calls to schedule a ride and the driver provides curb to curb service. The passenger is responsible for getting to and from the curb. If the return trip is within the COA’s operating hours, the trip is accommodated. The service is not means tested. The number of discrete users of the transportation service is 546.

Transportation expenditures are partially funded through grants, including a state grant of \$12,942 that pays part on one of the two van drivers, an annual \$3,000 grant from Mt. Auburn Hospital, and user “donations”. Two vans have been funded 80% by the State Department of Transportation and 20% by the Town; the third van was fully donated by the Department of Transportation. (The vans are used on weekends for other town programs, e.g., to transport clients of the Belmont Housing Authority to the food pantry.) The Senior Center does not charge for rides, but suggests a donation of \$2 per ride, which are contributed to the Senior Center’s revolving fund and used to defray transportation costs. The Director estimates donations related to transportation represented approximately \$20,000 of the \$129,000 revolving fund. The donations are in lieu of means-testing, which the Director believes would disqualify many seniors in Belmont who are “house rich, cash poor”, i.e., those where a large proportion of their income is devoted to real estate taxes and other home expenditures.

The SCIG notes that the idea of switching to taxi vouchers and/or ride share apps dates back to 2010 in the SCIG matrix. Both are problematic from the Director’s point of view. Taxi vouchers do not provide access for the disabled that the Center’s van provides. Ride share vehicles also do not have access for the disabled and many seniors have difficulty using the technology required to book a ride share. However, in 2021, the COA received an \$8,000 state Mobility Assistance Program (MAP) Grant for ancillary taxi rides. This has been extremely popular with the senior cohort. The renewal of this program is subject to state funding.

Of note, transportation was listed as a priority in the “Towards an Age Friendly Belmont” (May 2021) and goals to expand it—in part to mitigate traffic in town—are included in the report. The following long-term transportation action plans are included in the report:

1.Explore intra-Belmont transit program.	Partner with other civic and community groups to examine possibilities for internal transportation, including assessing transportation needs of residents and reviewing systems in neighboring towns. Explore funding
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	options, including grants and fees, as well as coordination with shuttles provided by housing developments within the Town. Compile report for Town Administration and residents.
2. Promote ridesharing and volunteer transportation options.	Expand current COA volunteer driver program through increased recruitment and publicity.

Belmont was accepted into the AARP Age Friendly Network in 2018.

Recommendations

The SCIG recommends that the COA, Council on Aging and Age Friendly Advisory Council work together to continue to seek out opportunities to mitigate General Fund expenditures through grants, donations, and data driven analysis of the services offered. Transportation is a critical need for many seniors and a significant portion of the COA budget. To that end, the SCIG recommends that the COA, Council on Aging and Age Friendly Advisory Council:

- Pursue Age Friendly Advisory Council recommended transportation actions to enhance ridership, reduce traffic and reduce transportation expenditures
- Conduct a detailed study to determine if the current transportation offerings can be reconfigured and optimized in a way to bring efficiencies and lower costs while providing the same level of service. This analysis could include the current cost per ride by type (in town and out of town), peak and off-peak demand for transportation, solo v. shared rides by type of rider (disabled, etc.), matched to the type of transport used. To the extent this data is currently tracked, this analysis could be done by a volunteer, student intern or other interested party.
- Contact other towns to compare total and per-ride transportation costs, transportation budgets, identified efficiencies, and “best practice” transportation options.
 - A brief survey of surrounding towns indicates wider use of volunteer drivers and taxi vouchers for various trips (to be researched further)
 - The use of volunteer drivers for medical appointments in surrounding towns – such as used by Arlington and Winchester–could reduce the COA van hours dedicated to this service. If so, the van could be used for more structured trips or shuttle service in town. Belmont initiated this service just prior to the pandemic and has not been able to reinstate it to date.

Next Steps

- Council on Aging to conduct a detailed study, possibly through the high school community service program, of transportation usage.
- Restart the volunteer driver program

Further Reading

- Age Friendly Advisory Council Report 2021:
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/tab_1a_-_age_friendly_action_plan_-_actionplan030321docx_0.pdf
- SCIG Community COA Benchmarks (below)
- Watertown FY22 COA Benchmark Study (below)

Community COA Benchmarks

Peer Community	Belmont	Arlington	Watertown	Winchester
FY22 COA Salaries	\$ 366,761	\$379,599	\$319,564	\$384,971
FY22 COA Total Budget	\$403,336	\$444,399	\$424,447	\$393,783
FTEs	5.6	5.49*	4.90	6.00
Transportation				
Door to Door Errands - In Town Only	M-F, 9-4, COA Van, \$2 donation request per one way -Group grocery trips 2x per week	M-F, 9-4, COA Van \$6 Round Trip Fee		
Door to Door Medical- In Town Only	COA Van, Free, \$2per donation request one way ride	Van or Taxi Free (Grant Funded)		
Services from Home, Limited Availability			Wednesday only: Stop and Shop, CVS, Local Bank, Limit 10; Monthly shopping to other stores, Limit 14	M-W-F only, 9-12:25 to Center; Thursday only 9:30 am trip to Market Basket; Daily Salter Health Care Transport to Center Meals
Medical Transport- Town and Surrounding	COA Van, Free, \$2 donation request per one way ride	Van or Taxi Free (Grant Funded)		
Medical Transport- Greater Boston (See The Ride also)				SCM Wheelchair Accessible Medical Only
Volunteer Drivers	Springwell Medical Escort M-F, 9-5, Free (Suspended during pandemic)	Medical Escort Service		M-F, 9-4

		Free (Grant Funded)		Medical only, Winchester and Adjacent Towns
Cancer Related Transport		Free (Sanborn Foundation Funded)		
Taxi Voucher		\$20 annual fee; \$5 one way per trip	Free (Town and Donation Funded), as funding permits	\$5 per voucher
Ride Share Apps	None	None	None	Yes; sign up Tues 10-1 pm or by mail
MBTA The Ride- Greater Boston	\$4-5 each way; Disability Requirement			6 am-1 am, 365 days Disability Requirement
MBTA Senior Charlie Pass	Hosts Annual Charlie Card Events	Hosts Charlie Card Events		

Notes: Arlington's COA Transportation is self-funding through an Enterprise Fund; this is possible through Community Development Block Grants and other outside funding sources. The Enterprise funds an additional 0.8 FTE. Winchester's senior center is a privately funded non-profit, the Jenks Center, that houses the COA. Some of the transportation options shown here are provided by the Jenks Center. Sources: Belmont COA Director and COA website page; COA website page COA newsletters for Arlington, Watertown and Winchester; Winchester Jenks Center web page.*

Watertown FY22 COA Benchmark

Program/Service Fee Comp FY2022	Watertown	Arlington	Belmont	Canton	Dedham	Melrose	Saugus	Stoneham
Medical Transportation	Contributions Accepted	In town- \$6 donation roundtrip Out of town-Volunteer Medical Escort \$20 roundtrip	Local- \$2 roundtrip Volunteer Driver Program- free	Local \$2 Out of town \$4	\$2 roundtrip	Local \$2 Out of Town \$4 roundtrip	Local \$4 roundtrip Out of Town \$8 round trip	Free- local and out of town
Shopping Bus	\$1.00 Round Trip	Everyday living-Tues & Thursday-2 stops \$6 roundtrip	\$2 roundtrip	Local \$2 Out of Town \$4	\$2 roundtrip	\$2 local and \$4 Out of Town roundtrip	Twice a week \$3- \$5	\$3 roundtrip
Art Class	\$3.00 Drop-in (Jul-Aug)-Free (no instructor)	Varies	Drop in free- others vary, water painting class \$70 for 6 weeks	Every other month \$20	Paint class- free	Independent group free 5 classes \$50	\$10 a class	\$20- 6 week program Subsidized by a grant
Lectures/ Workshops	\$5-\$15- varies for supplies, others Free/ Donation	Free/donation	Various prices for programs- some are free	Meditation- 6 classes, \$3 each Tap Dancing- 6 classes, \$4 each Balance Program- 6 weeks \$42- all other workshops free	Gardening \$5- Lectures free	Learning, health, meditation classes- free	None	Mostly free- may charge up to \$3
Trips (in addition to vendor fee)	Paid to Trip Vendor	Trips through Arlington Senior Association-day trips only	Paid trip to vendor	Depends on trip \$89 and up	\$10 and up depending trips vary	Various prices up to \$100	Friends Group does trips- varies (Foxwoods once per month \$30)	Prices vary
Parties	\$5.00-\$16.00	\$3- \$7 dollars	Varies \$3- \$5	\$5- \$13	Free	All sponsored- free, if charge \$5	Monthly- price varies	Free- Dancers \$5
Computer Classes	Free-Volunteer Instructors	Free	Tutoring on Monday suggested donation \$10- drop in help free	Free	Free	SDM Foundation in Melrose- free	None	Free
Line Dancing	\$3.00	Don't offer	\$48- 6 sessions	\$25	None	\$5 a class	\$5 a class	\$2 per class
Blood Pressure Screening	Free/Donation	Free	Free	Free	Free	Free	Free	Free
Yearly Fund Raiser	Friends' Holiday Boutique/ Friends of COA Membership	Annual 5K race, membership	Craft Fair, Bricks, Friends of COA membership	None	Membership due \$5	Friends membership \$25- \$200 (corporate sponsor)	Friends of COA	Friends of COA raises money
Income Tax Assistance	AARP Free/donations	AARP Free/donations	AARP Free-donations	Free	Free	Information not available	Free	Free

Program	Watertown	Arlington	Belmont	Wilton	Dedham	Melrose	Saugus	Stoughton
Exercise Classes	\$3.00	\$28- 8 week session	Varies on length of class \$27- \$40	\$25 for 12 classes	\$2 drop in class \$15 for year	Varies- some are free, others range from \$1- \$4	Free Weight lifting class \$5	\$2 per class- the Senior Center subsidizes the cost of the instructor
Tai Chi	\$3.00	\$25- 8 week session	Varies on length of program \$28 or \$56	\$25 for 12 classes	\$2 drop in class- \$15 for year	\$5	None	\$2 per class
Yoga/Chair Yoga	\$3.00	Chair yoga only- \$3 per week drop in year round, pay as they come	Varies on length of class \$30- \$36	\$25 for 12 classes	\$2 drop in class- \$15 for year	\$5	None	\$2 per class
Activities-cards, knitting, book club, movies, chair exercise, (no instructor)	Free/donations	Free/donations	Free/donations	Free/donations	Free	Free	Free	Free

Notes: Due to the COVID-19 pandemic, the comparison towns are in a holding pattern, offering many programs for no charge and/or reducing programs. They have required more pre-registration, as walk-ins are not allowed due to building closures. Many have pivoted programs to Zoom and Cable Television. Some provided outdoor activities as space allowed while weather was still comfortable. Thus, this chart was not ammended, as all hope to resume regular business in FY22 as COVID-19 allows.

Source: Watertown MA FY22 Town Budget, COA section.

**Please note some errors in the Watertown Benchmark Study as it pertains to Belmont.*

1. Requested donations for rides are \$2 per one way ride

2. Same \$2 requested donations per one way ride for shopping trips

3. Parties are sponsored by businesses or special donations

4. In addition to fund-raisers listed above there is an annual swing band orchestra concert fund-raiser in the Fall.

5. There are no exercise classes that are run without an instructor

IDEA #95 – EVALUATE COUNCIL ON AGING TRANSPORTATION SERVICES

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Evaluate cost/benefit of Council on Aging (COA) transportation alternatives.

Eliminate door to door doctor visits from COA, switch to taxi vouchers based on means testing; at the very least limit to within Belmont only.

Other ideas included in this report

- 94 – Reduce COA transportation services

Idea Intent

Cost savings by reducing the number of rides we provide to our Seniors in Town. By reducing the number of rides, we may be able to reduce the transportation expense within the COA Budget.

Weighted Final Score: 17

(Financial Impact: 0, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 3)

Background Information

The total budget for the COA in FY 2022 was approximately \$405,000. This amount represents 0.25% of the overall Town Budget in FY 2022, which was approximately \$159,144,000.

The COA has eight Program Responsibilities:

1. Transportation
2. Social Services
3. Nutrition
4. Health & Wellness
5. Socialization, Adult Education, and Arts
6. Volunteer Services
7. Senior Trips
8. Rental of after-hours use of Senior Facilities

Pursuant to its Transportation Program, the COA provides and coordinates transportation services for Town seniors and disabled persons. According to the COA, transportation is critical if Seniors are to remain independent. The service enables seniors to perform instrumental activities of daily living, such as food and medication shopping, banking, etc. The rides also make it possible for seniors to access medical care.

The estimated cost of Transportation Services in FY 2022 was approximately \$129,293, which represents approximately 27% of the total COA Budget for FY 2022.

The breakdown of rides provided to Seniors in FY 2022 was as follows:

Transportation Services – Performance Measures	FY22 Budget
Number of medical appointment rides	2,300
Number of non-medical rides	6,000
Grant Funds for Transportation	3,000
Percent of Transportation Requests Accommodated	98
Number of Rides Requiring Heavy Assistance	2,700

Recommendations

As stated, these transportation services are critical if seniors are to remain independent, which is itself critical to seniors' overall wellbeing. The service enables seniors to perform instrumental activities of daily living, such as food and medication shopping, banking, etc. The rides also make it possible for seniors to access medical care.

Next Steps

- The COA continue to provide transportation services to seniors in town.
- Pursue the Age Friendly Advisory Council recommended transportation actions to enhance ridership, reduce traffic, and reduce transportation expenditures.

Further Reading

- [Town of Belmont, Fiscal Year 2022 Budget Book – page 287
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf](https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf)
- See also Idea #92 about COA Expenditures

IDEA #99 – ELIMINATE UNFUNDED STATE MANDATES

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Legislators must work to limit or eliminate unfunded mandates from the state government.

Other ideas included in this report

- None

Idea intent

We interpret this to mean that the Town and its representatives at the state level should work to reduce or eliminate any mandates from the state that are not fully funded OR work with the state to ensure that they are fully funded.

Weighted Final Score: 40

(Financial Impact: 6, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

The general arrangement between Massachusetts State government and municipalities like Belmont is that the state requires certain things and Municipalities get to decide most of the details. Facilities, staffing, and curricula in schools are good examples where municipalities determine how they will deliver state-mandated services.

Fully-funding all mandated government services would require a shift of all revenue generation to the state level, also requiring a shift in control over revenue policies like taxes, fees as well as the specifics of delivering services.

On the positive side, local control is what enables towns to differ from one another and operate in ways that are preferred by their residents. It enables one school to focus on a particular pedagogy that meets the particular needs of the families they serve. On the negative side, local control can also lead to disparities in quality and access to local services from one municipality to another.

Currently, the state endeavors to balance this dichotomy through mandates that require services meet certain standards for design and results, but leave the details of implementation under local control. The state often makes availability of state financial support contingent on adherence to basic guidelines and meeting basic performance standards.

Recommendations

- Implementing this idea would require a fundamental shift in the relationship of local governments to state government and we therefore deem it to be very difficult and very slow to execute.

- Such a shift in funding would likely also require a shift in control away from local government. It's not clear that this is something most people in local governments, or even most people in Belmont, would like. Belmont would not be able to act alone to enact this kind of change, it would require a shift among a majority of communities across the state.
- In this hypothetical scenario, from a town finance perspective, a much larger share of our operating budget would be funded by the state. However, it's important to note that there is no free lunch: more revenue would need to be raised at the state level to replace local funding for these mandates, meaning there would simply be a shift in the entity to which individual residents pay their taxes, not necessarily resulting in a tax savings.
- There may be a savings realized from standardizing all services across municipalities, simply via the economy of doing things at scale, but this potential advantage doesn't outweigh the considerable implementation challenges.

No action is recommended for this idea.

Next Steps

- None

Further Reading

- None

IDEA #101 – PAYMENTS IN LIEU OF TAXES FOR NON-PROFITS AND PRIVATE SCHOOLS

Report Status: Fully Reviewed

Researched by: Joe Bernard and Brian Antonellis

Original Idea as Submitted

Seek PILOT payments from non-profits and private schools. Define and document direct services provided by the Town for each nonprofit organization.

Other ideas included in this report

- #102: Request from each nonprofit organization a list of services they provide the Town.
- #103: Seek financial support/partnership for upgrades of facilities used by nonprofits.
- #104: Tax Belmont Hill and Belmont Day or pursue a PILOT donation every year.
- #105: Build PILOT program using Northampton analysis to assess municipal costs and assign value to non-cash services provided by non-profit.
- #111: PILOT payments (Payment in Lieu of Taxes)
- #256: Lobby to remove tax exemption state law for golf courses to augment tax revenue. Golf courses are allowed to count the course as open space and pay a lower percentage of taxes than the land would otherwise generate.
- #294 [shortened]: Belmont Hill Club pays significantly reduced taxes for having open space. Since this is private land used for their own endeavors, could that lowered tax burden be re-addressed? Could the Town look at other tax breaks given to private entities and the reasons behind them.
- #305 [shortened]: Go after McLean for PILOT cash and not let them move forward with their school development project until we get it.
- #352: Lobby with legislature for the PILOT program to be mandatory. Impose mandatory tax on all non-profits.

Idea intent

Additional revenue could be raised from tax-exempt property owners in the form of Payments in Lieu of Taxes (PILOT)

Weighted Final Score: 47

(Financial Impact: 4, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 2)

Background Information

The Town of Belmont provides important services to property owners: street maintenance, fire protection, snow removal, etc. Although property taxes are the primary source of funding for local services, the benefits of these services are enjoyed by both taxable and tax-exempt property owners. Certain institutions and organizations qualify for exemption from property taxes; these

exemptions are found in various clauses of Massachusetts General Laws. To ease the tax burden on taxable property owners, PILOT payments can be made by tax-exempt property owners.

Tax-exempt properties in Belmont have many different owners and uses, including municipal buildings and parks, religious institutions, recreation, hospitals, private education, housing, and others. The following chart (Figure 1) categorizes the tax-exempt property in Belmont, reflecting FY21 assessment values.

TAX-EXEMPT PROPERTY VALUE

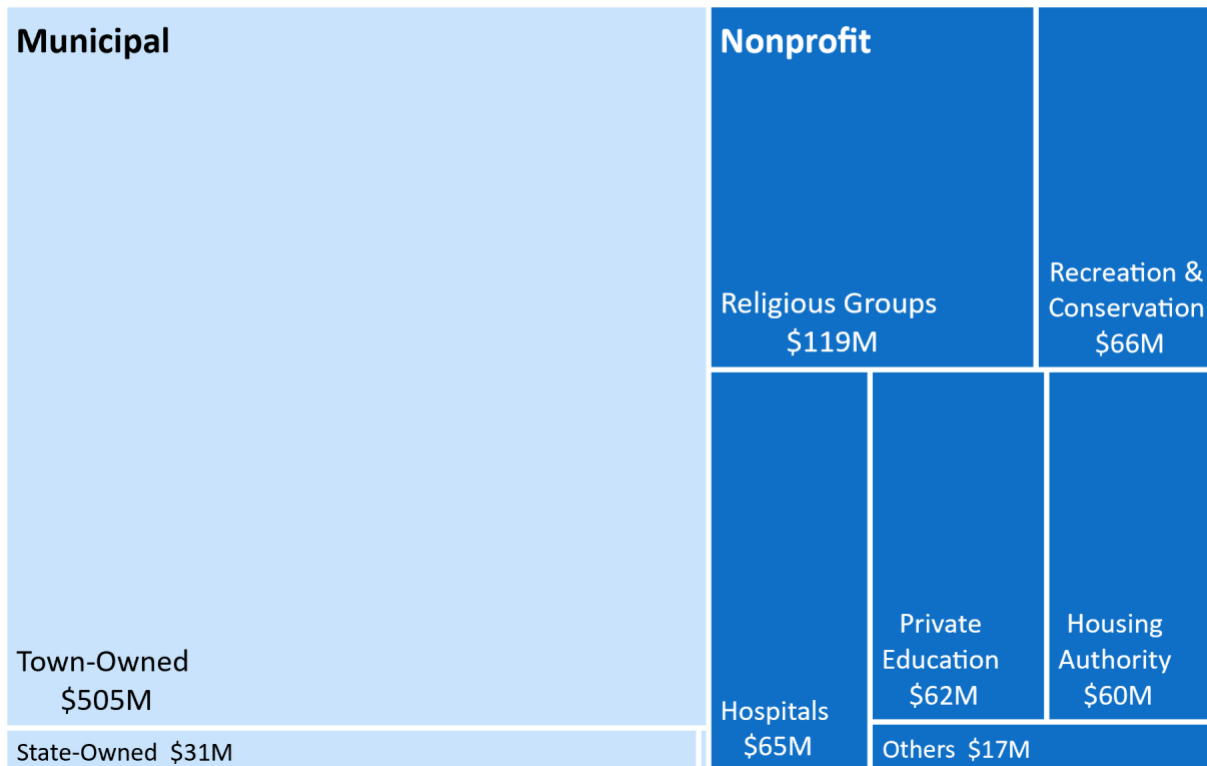


Figure 1: Tax-Exempt Property Value, FY21 amounts from the Belmont Assessors' Real Estate Database

In recent years, property tax revenue has constituted approx. 70% of the Town's operating budget. Tax-exempt property value equals approx. 9% of the Town's total assessed property value, so property tax revenue is raised from the remaining 91%, i.e., taxable property owners. Note that this percentage split can change over time; one factor that can shift value from taxable to tax-exempt is that any additional property acquired by a tax-exempt organization comes off the tax rolls immediately.

One existing source of PILOT payments is Belmont Light, who pays \$650,000 annually. The amount of other PILOT payments received in FY21 was \$35,063 (\$34,063 from Waverley Woods LLC and \$1,000 from Belmont Lions Club). The amounts received in FY20 and FY19 were \$43,913 and \$9,140, respectively.

In 2021, Rep. Erika Uytterhoeven and Sen. Adam Gomez filed a bill for state legislation of PILOT payments—An Act relative to payments in lieu of taxation by organizations exempt from the property tax (H.3080/S.1874). If passed, it will allow municipalities to adopt a bylaw

requiring that certain nonprofits owning total property valued at or above \$15 million pay up to 25% of the amount that would be paid if the property were not tax-exempt. It further allows for agreements between municipalities and organizations that may provide for exemptions from payment or consideration of community benefits as payment.

The proposed legislation would apply to specific types of tax-exempt property owners, as categorized by state law. For example, it would not apply to recreational land, such as golf courses, whose property tax payments are reduced by Chapter 61B. (Further discussion of Chapter 61B is included below.) In Belmont, there are three organizations to whom the law would apply that own property valued above \$15 million: McLean Hospital (\$64.6M), Belmont Hill School (\$46.2M), and Belmont Day School (\$15.4M).

Applying the parameters of this legislation to the applicable tax-exempt properties can inform the maximum incremental revenue the Town could receive if it became law. 25% of the amount that would be paid if their properties were not tax-exempt—using the FY21 tax rate of \$11.54 per \$1,000 of assessed value—equals \$364,067 additional revenue annually. This amount could be decreased by granting exemptions from payment or consideration of community benefits as payment.

As part of researching this idea, members of the Structural Change Impact Group (SCIG) met with Robert Reardon, Chair of Belmont's Board of Assessors. He stated that PILOT payments are requested on an annual basis, but what the Town receives in PILOT payments is almost nothing. However, SCIG subsequently learned that Belmont Hill's Head of School said at a public presentation in December 2021 that they haven't been approached by the Town regarding PILOT payments.

Based on this discrepancy and other discussions, it is clear that the Town needs to make a more concerted effort to engage in dialogue on PILOT payments with our nonprofit organizations. Undoubtedly, the nonprofits that operate here are contributing valuable community benefits, which can be considered as payment, but the Town is lacking transparent accounting/reporting of the value of such community benefits and the value of Town services.

Building relationships with nonprofits will enable this accounting/reporting, and in turn the reporting will strengthen the relationships. Community benefits reporting is mutually beneficial: the Town and taxpayers gain financial transparency, and nonprofit institutions gain public acknowledgement and appreciation of the services that they provide to the community. A recent example of the value of such public/private partnership is Poet's Corner Park, for which Belmont Hill School approached the town of Arlington about funding a renovation project.

To accomplish this, our recommendation is for the Select Board to establish a PILOT oversight committee, charged as detailed in the Recommendations section below. The work of this committee would serve an important purpose whether or not the pending state legislation is passed. If the bill does not pass, Belmont could still establish a local PILOT program with standardized accounting and reporting. If the bill does pass, Belmont would have a head start on the effort required to adopt and administer it.

Regarding Chapter 61B of Massachusetts General Law, this provides for a specific calculation of property taxes for recreational land and uses, which explicitly includes golfing. According to Section 2, the property assessment value of qualifying recreational land shall not exceed 25% of its fair cash value. This reduced assessment value is then multiplied by the town's commercial

property tax rate to determine the property owner's tax liability for the land. Because other properties are assessed at full fair market value, Chapter 61B effectively gives recreational land a 75% tax exemption.

While the SCIG agrees that the Chapter 61B exemption merits further exploration as an opportunity for additional revenue, we did not have time for more extensive research into specific legislation to be lobbied at the state level. We recommend that this question be posed to our representatives in the Senate and House.

Recommendations

- Select Board to establish a PILOT oversight committee:
 - Charged with producing recommendations for a PILOT program, which shall include standards for the accounting and reporting of town services and community benefits
 - May make general recommendations or tailor them to specific institutions or categories of institutions (education, healthcare, cultural institutions, etc.)
 - Thereafter, ongoing responsibility to maintain relationships with nonprofit institutions, monitor compliance with the PILOT program as designed, and ensure community engagement in the valuation of community benefits
 - Identify the point person who will have the authority to speak for the Town in discussions with nonprofit organizations
- In the event Bill H.3080/S.1874 is passed by state legislature, Select Board to present article for Town Meeting to adopt it
- Select Board to ask Belmont's State Senator and State Representative whether there are any changes to Chapter 61B being discussed in state legislature
- Select Board to consider the financial impact of Chapter 61B tax exemptions during the annual tax classification hearing to determine commercial versus residential property tax rates (see Idea #303 for more information on tax classification)

Next Steps

- Select Board to vote approval of the formation of a PILOT oversight committee with the recommended charge, and begin accepting applications

Further Reading

- See the Idea Matrix (XLS file) for an interactive table of tax-exempt parcels data, titled "Idea 101 Non Profit Parcels"
- An Act relative to payments in lieu of taxation by organizations exempt from the property tax: <https://malegislature.gov/Bills/192/H3080>

“Notwithstanding the provisions of section 5 or any other general or special law to the contrary, in a city or town that votes to accept this section pursuant to section 4 of Chapter 4, an organization exempt from taxation under clause third of said section 5 owning total property valued at or above fifteen million shall make payment in lieu of taxation on all real and personal property owned by the organization in the city or town equal to 25 percent of the amount that would be paid if the property were not exempt from taxation. Any city or town that accepts this section shall adopt an ordinance or bylaw to provide for agreements between the municipality and organizations that may provide for exemptions from payment, consideration of community benefits as payment and administration of payments.”

- Arlington explores renovation and expansion of Poet’s Corner park
<https://www.wickedlocal.com/story/arlington-advocate/2022/01/10/arlington-explores-renovation-and-expansion-poets-corner-park/9121002002/>
- State audit of PILOT program funding
<https://www.mass.gov/doc/payment-in-lieu-of-taxes-pilot-june-2001/download>

IDEA #107 – REEVALUATE TOWN ZONING WITH MASTER PLAN

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

Review re-zoning opportunities to increase revenue-generating properties

Other ideas included in this report

- #106, #119-Upon completion of Cushing Village project, review surrounding parking management issues and opportunities.
- #127 – Examine new growth opportunities at South Pleasant Street and recommend the Town re-zone this area to encourage development.
- #130 – McLean/Northland Development
- #154 – Adopt zoning overlays for South Pleasant Street to spur development
- #167 – Create a revised Economic Development Committee to help businesses
- #174 – Create a revised Economic Development Committee to help businesses
- #175 – Cushing Square Development
- #176 – Acorn Park Development
- #202 – Negotiate McLean development
- #231 – Modify zoning restrictions along Trapelo Rd to allow more multifamily housing above the businesses.
- #233 – Offer tax incentives to drive businesses to town
- #245 – Create overlay district along commuter rail line near BHS campus (Hittinger/Brighton St) to allow large commercial developments.
- #247 – Find friendly 40B projects and rezones areas to increase affordable housing to achieve 10% threshold.
- #255 – Examine West Belmont for office development use.
- #270 – Relax the height limit/use limit on all commercial lots in Belmont
- #277 – Develop Trapelo Rd, Pleasant St, and Concord Ave.
- #300 – Increase building permit requests filed by non-residents (developers, etc.)
- #301 – Improve transparency for commercial development,
- #331 – While understanding land/space is limited, I would love to see us take meaningful steps to bring more commercial space and business to Belmont.
- #332 – I just submitted my suggestion about encouraging more business to come to Belmont
- #351 – Build a shopping mall or a casino somewhere on Belmont Hill
- #362 – My thought (if its structurally possible) is what if an RFP went out to develop 2 more stories of office space over the 1 story buildings in downtown
- #380 Create a new Open Space/Conservation Overlay District where commercial, industrial, and residential use is prohibited.

- #418 – SCI-142 Offer property tax incentives for apartment owners to turn their apartments into affordable housing. This would alleviate Belmont's shortage of affordable housing much faster and at much lower cost than building new units. Plus Belmont would still be able to build new affordable housing to accommodate new residents. [snip]
- #419 – SCI-143 The construction of the Community Path along an abandoned railroad line through Belmont (E/W) will mark a major turning point for the town and the most significant piece of new infrastructure affecting Belmont’s neighborhoods and economy since the creation of Route 2 in the early 1970s. The Community Path is 21st century infrastructure that will create a major thoroughfare for pedestrian and bicycle traffic for commuters heading into Cambridge/Boston via Alewife and for pleasure seekers taking advantage of a safe, car free passage out from Cambridge/Boston to points west. It will also draw younger workers interested in “car free” living and commuting to Belmont. Our Town should welcome this change with open arms...but that requires forethought and planning. [snip]

Idea intent

Review Town zoning and redevelopment opportunities to create a strategic vision on how development will happen.

Weighted Final Score: 51

(Financial Impact: 5, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 1)

Background Information

Belmont needs a comprehensive master plan. The current master plan was written in 2010 and does not consider the current market or needs of the town. This plan is required to be updated every ten years by State law.

Metropolitan Area Planning Council (MAPC) is an organization which assists in community outreach and the preparation of municipalities master plans. Master plans are a guidance document that includes a zoning study. The final zoning bylaws based on the master plan guidance need to be approved during a Town Meeting (two-thirds majority vote).

The town has applied to the MAPC's Technical Assistance Program (<https://www.mapc.org/about-mapc/funding-opportunities/>) for funding support (which is usually in the form of in-kind consulting from MAPC staff) to support a master plan.

In January 2021, the Massachusetts Legislature adopted an Economic Development Bond Bill (H5250) that made long-overdue changes to the state’s Zoning Act. The “Housing Choices” sections of the bill made it easier for municipalities to adopt pro-housing zoning changes, discourage meritless anti-housing lawsuits, and require each municipality that is a MBTA community to zone for multifamily housing by right. The new multifamily zoning requirement could be a tremendous opportunity for the region and its municipalities.

The law created a new section—Section 3A—in the Zoning Act and authorized the Executive Office of Economic Development (EOHED) to develop guidelines for implementation of the requirements. Draft guidelines for the program were issued on December 15, 2021; and EOHED is inviting comments on the guidelines until March 31, 2022.

Recommendations

- Create a comprehensive town master plan
 - A committee should work with the town to design a future plan of where we want to drive commercial development and what type of commercial development will create the largest increase in revenue/benefits, but also the lowest burden on the town and its services.
- Meet with MAPC on how they can help and where to leverage their experience in the process.
- There was a "Master Plan Refresh Committee" appointed but it never met. The Vision 21 Implementation Committee is coordinating a restart to this effort, including the funding application noted above, and will support the refresh committee, but the plan is for that committee to take the lead. This should also be a full comprehensive plan not a simple refresh. For more details, see Idea #40.
- The master plan should walk residents through the benefits and risks of rezoning specific areas of the town, and ultimately, why these zoning changes will help protect the town going forward from unwanted development by guiding developers to what residents believe will help the future of our town.
- Zoning should include a developer's perspective to help reduce development risk and barriers to entry. This will subsequently allow for a quicker development process and path to increased real estate values.
- Apply for State and Federal grants related to the funding of a master plan.

Next Steps

- Engage MAPC to create a comprehensive master plan which will include a review of potential rezoning of the town and promote redevelopment in line with the community desires embodied in the final master plan.
- To remain in compliance with the Economic Development Bond Bill (H5250) law (Section 3A of MGL 40A) Belmont must:
 - Hold a briefing of the Select Board on the Draft Compliance Guidance no later than May 2, 2022.
 - Submit the MBTA Community Information Form no later than May 2, 2022.

Further Reading

- [General Law - Part I, Title VII, Chapter 41, Section 81D \(malegislature.gov\)](https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section81D)
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section81D>
- [Designing Dedham 2030 – MAPC](https://www.mapc.org/resource-library/dedham-master-plan/)
<https://www.mapc.org/resource-library/dedham-master-plan/>
- [Final-Winchester-Master-Plan-Report-Pages](https://www.winchester.us/DocumentCenter/View/4615/Final-Winchester-Master-Plan-Report-Pages)
<https://www.winchester.us/DocumentCenter/View/4615/Final-Winchester-Master-Plan-Report-Pages>
- [Smart Growth and Collaboration in Massachusetts – MAPC](https://www.mapc.org/)
<https://www.mapc.org/>

- [Master Plan Implementation Committee | Town of Arlington \(arlingtonma.gov\)](https://www.arlingtonma.gov/town-governance/boards-and-committees/master-plan-implementation-committee)
<https://www.arlingtonma.gov/town-governance/boards-and-committees/master-plan-implementation-committee>
- [LexingtonNext – Lexington](https://lexingtonnext.org/lexnext/)
<https://lexingtonnext.org/lexnext/>

IDEA #108 – ESTABLISH A WORKING GROUP OF TOWN ADMINISTRATORS/MANAGERS

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Establish a working group of Town Administrators/Managers with comparable communities to enable the sharing of innovative ideas and solutions to the common challenges we face in the delivery of town services, effective management of our increasing costs of infrastructure, and the generation of additional non-property tax revenues.

Other ideas included in this report

- None

Idea Intent

as stated in the Idea Text

Weighted Final Score: 53

(Financial Impact: 3, Operational Impact: 4, Time Scale: 4, Ease of Implementation: 2)

Background Information

This idea was in the Financial Task Force I report, dated January 30, 2015. Financial Task Force I was comprised of 5 working groups:

- Group A – Education
- Group B – Resource opportunities
- Group C – Capital Projects
- Group D – Town Government
- Group E – Financial Projections

This idea was generated by Working Group D, Town Government, which looked at Program requirements and opportunities for structural changes.

The group explored a variety of issues regarding delivery of Town services. Examples of areas that were discussed included regionalization, consolidation, alternative service delivery models, establishment of enterprise funds, staff planning, and review of services that were not currently provided. What became clear throughout the process of examining town government during the Financial Task Force I work was that the Town Departments were stretched extremely thin in terms of resources. Many Departments were operating at staffing levels that were significantly reduced from 10 or 20 years ago with some facilities that were long past their useful life. This had in many cases led to a slow erosion of services. The Working Group believed that innovation in technology, regionalization, collaboration with other comparable towns, identification of

alternative service delivery models, and finding efficiencies in service delivery could stem the tide in the erosion of Town services.

The Town is facing many of these same issues and challenges today, and therefore, moving forward with the execution of this idea is important to prevent further erosion of Town services.

Recommendations and Next Steps

- The Town Administration should take the lead in establishing a Working Group of Town Administrators and Managers with surrounding communities that are comparable in size to Belmont.

Further Reading

- [Final Report of the Financial Task Force, January 30, 2015.](https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/file/file/financial_task_force_final_report.pdf)
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/file/file/financial_task_force_final_report.pdf

IDEA #112 – REGIONALIZE PUBLIC SAFETY

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Regional dispatch

Other ideas included in this report

- 9 - Regionalize fire suppression services
- 132 - NEMLEC
- 133 - Mutual Aid through Mass Metro Fire
- 251 - Examine Police and Fire services
- 368 - Leave NEMLEC

Idea intent

Explore opportunities to regionalize public safety services, including 911 dispatch and advanced life support.

Weighted Final Score: N/A

Background Information

This report is incomplete -- the SCIG did not connect with regional dispatch centers to fully understand the arrangements and experiences of member towns and conversations with neighboring communities are ongoing.

For more information about opportunities to regionalize other town services and SCIG recommendations on how to evaluate and maximize opportunities to regionalize services, see report *Idea #330: Regionalize Public Services*.

Ambulance Services

- Belmont currently offers Advanced Life Support (ALS) on as part of our local ambulance service. Multiple surrounding communities pay private companies to serve as their advanced life support vendor, so there may be an opportunity to form a collaborative agreement of some kind with one or more neighboring community to share services. The difference in service level offered may complicate the arrangement, but it is still worth continuing conversations on this topic as our multiple neighboring communities have expressed disappointment at the level of service they are getting from their contracted ALS vendors.

An apparent example of this type of arrangement exists in Groton, whose ALS is provided by neighbors Townsend and Ayer's fire departments. Though SCIG did not have time to meet with representatives from these towns to confirm the details.

911/Dispatch

- The State of Massachusetts offers support and grant funding to public safety answering points and regional call centers.
- SCIG members had multiple conversations with our public safety leaders about the prospect of a regionalized dispatch, and this is a regular topic of conversation among leaders in nearby communities. There are benefits to local knowledge, potential downsides, no straightforward physical facility, and constraints in our current public safety staffing that would make regionalization difficult, but given a willing partner community and potential funding support from the state for the transition, the prospect merits further exploration.
 - The North Shore Regional 911 Center is a good example of this type of arrangement, serving “...as a wireless 911 answering point for over 70 communities in the greater North Shore area, and as the primary answering point and dispatch center for the police and fire departments of Amesbury, Essex, Middleton, Topsfield, and Wenham.”
 - Another example is the Southeastern Massachusetts Regional 911 District, which serves “...the towns of Easton, Norton, Mansfield and Foxborough as a primary PSAP and operations center known as "SEMRECC." SEMRECC further serves as Bristol County Control, responsible for the mutual aid and major incident coordination for the county.”
 - There are multiple other examples of regional 911 dispatch centers in Massachusetts. See *Further Reading* below for a longer, partial list.
- Purchasing equipment
 - For more details on regionalized group purchases, see *SCIG Evaluation Report: Idea #2 - Group Purchasing*

Recommendations

The town should continue to evaluate opportunities to regionalize our 911 dispatch and Advanced Life Support services. This will require additional primary research with communities that currently participate in similar regionalized service arrangements and the regional dispatch centers/districts themselves and the planning and preparation that will allow Belmont to pursue worthwhile opportunities.

Next Steps

- The Select Board and Fire Chief should connect with representatives from Townsend, Ayer and Groton to learn about the details of Townsend and Ayer providing ALS to Groton.
- The Select Board and Fire Chief should continue conversations with other communities to explore opportunities to regionalize ALS services.
- The Select Board, Fire Chief, and Chief of Police should connect with representatives from North Shore Regional 911 Center, the Southeastern Massachusetts Regional 911 District, or any of the other regional dispatch operations in Massachusetts (many listed in *Further Reading* below) and their member communities to learn more about their arrangement and experiences.

- The Select Board, Fire Chief, and Chief of Police should continue conversations with other communities to explore the possibility of forming a regional 911 dispatch service.

Further Reading

- List of life support services and providers, where applicable, by town in Middlesex County:
https://snewiki.com/wiki/index.php/Middlesex_County_EMS
- State support and grant program for public safety primary answering points and regional call centers:
<https://www.mass.gov/information-for-call-centers>
- North Shore Regional 911 Center:
<https://www.ecrecc.org/>
- Nashoba Valley Regional Dispatch District:
<https://www.nvrecc.us/>
- Regional Old Colony Communications Center:
<https://www.town.duxbury.ma.us/regional-old-colony-communications-center>
- South Shore Regional Emergency Communications Center:
<https://hpd.org/197/Regional-Communications-Center>
- Barnstable County Sheriff's Office Emergency Communications Center:
<http://www.bsheriff.net/about-bcso-2/departments/emergency-communications-center-2/>
- Metacomet Emergency Communications Center:
<https://www.franklinma.gov/metacomet-emergency-communications-center-mecc>

IDEA #131 – PROVIDE REGIONALIZED SPECIAL EDUCATION

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Share Special Education costs with Lexington, Arlington, Bedford, and Burlington – Ongoing collaborative provides high quality services at a lower cost than third party

Other ideas included in this report

- None

Idea intent

This idea seems to suggest something we already do, which is to offer special education services as part of a regional collaborative.

Weighted Final Score: N/A (already implemented)

Background Information

- LABBB was originally formed in Lexington and Arlington and approved by the state in 1974.
- Belmont joined the existing LABB collaborative in 1996, making it the current LABBB (Lexington, Arlington, Burlington, Bedford, Belmont)
- The collaborative offers the combined district more flexibility through different structures and settings, allowing them, collectively, to meet the needs of a wider variety of students
 - Each location is focused on meeting the needs of a particular population of students. For more detail on the focus of each school in the collaborative, see their list of schools: <http://www.labbb.com/main/elementarySchool.aspx>
- LABBB has similar programs to and serves the same population of students as the following a collection of private schools
 - In FY19 LABBB tuitions ranged from \$50,140.00 to \$61,266.
 - Our highest tuition is for students with severe behavior challenges, students on the Autism spectrum, and students with multi-handicaps.
 - It is important to note that all LABBB tuitions include summer programming (198-215 days) and all therapies are included. There are no additional costs.
 - Our lower tuitions and lower transportation costs for transporting LABBB students, proves to be cost effective for our member districts.
- Private equivalent options run from \$64k - \$122k

Recommendations

- We recommend that Belmont continue to participate in the LABBB Collaborative as it is a cost-effective way to provide better services than we would be able to provide as an individual district.

Next Steps

- None

Further Reading

- LABBB Collaborative Agreement:
http://www.labbb.com/documents/2015_New_LABBB_Collaborative_Agreement.pdf
- List of member schools and the focus of each:
<http://www.labbb.com/main/elementarySchool.aspx>
- History of LABBB:
<http://www.labbb.com/main/history.aspx>

IDEA #138 – CONSTRUCT A NEW SUBSTATION FOR BELMONT LIGHT

Report Status: Fully Reviewed

Researched by: Travis Franck

Original Idea as Submitted

New Transfer Station, joint with Nstar

Other ideas included in this report

- None

Idea intent

Complete the construction of a new electricity substation that would save Belmont residents and businesses money on their electricity bills.

Weighted Final Score: N/A (Already implemented)

Background Information

Belmont's electricity distribution system used to be connected to the larger grid through transmission lines that served Belmont exclusively. These transmission lines cost Belmont Light (and, hence, Belmont residents) an annual cost of \$800,000-970,000 per year. (Table 1 below)

Belmont Light completed the construction of a new substation in 2016. The new substation now provides the connection of Belmont's system to the grid and allows Belmont to avoid the annual cost. The costs of the substation were shared with Eversource, lowering the costs and risks to the Town.

The new substation changed structure of Belmont Light's long-term budget projections. Additionally, the related distribution system upgrade project (still underway) will free up the old Belmont Light building in Belmont Center. Also, the substation and distribution system upgrade ensure that Belmont's electricity system can better handle future electricity demand growth, like heat pumps and electric vehicles.

Table 2 (below) shows that for the 20-year term of the bonds used by the town to finance the project, the annual payment is \$1.95 million per year.

The Town also assesses some property taxes on the assets that Eversource owns in the substation. (The tax income was not known by SCIG at the time of writing.)

The net costs to the Town would then be the bond payment minus the transmission cost savings minus the income from the property taxes. At the end of the bond's term (2034), the town will still retain have the energy savings and tax income streams.

**TRANSMISSION EXPENSES:
NSTAR/EVERSOURCE**

YEAR	TOTAL
2010	935,910
2011	909,823
2012	825,688
2013	898,714
2014	966,298
2015	909,698
2016	824,375
2017	585,698
2018	(1,058)
2019	2,554
2020	2,405
2021	2,649

Table 1 – Payments for energy transmission to the town of Belmont for the final transmission line.

Year	Interest	Principal	Total
2015	960,351	990,000	1,950,351
2016	945,375	1,005,000	1,950,375
2017	905,175	1,045,000	1,950,175
2018	873,825	1,080,000	1,953,825
2019	830,625	1,120,000	1,950,625
2020	808,225	1,170,000	1,978,225
2021	739,025	1,215,000	1,954,025
2022	690,425	1,260,000	1,950,425
2023	640,025	1,310,000	1,950,025
2024	587,625	1,365,000	1,952,625
2025	519,375	1,430,000	1,949,375
2026	476,475	1,475,000	1,951,475
2027	435,913	1,520,000	1,955,913
2028	375,113	1,580,000	1,955,113
2029	327,713	1,625,000	1,952,713
2030	262,713	1,685,000	1,947,713
2031	195,313	1,755,000	1,950,313
2032	125,113	1,825,000	1,950,113
2033	65,800	805,000	870,800
2034	33,600	840,000	873,600
Total	10,797,801	26,100,000	36,897,801

Table 2 – Bond Schedule for the substation project

Recommendations

- N/A

Further Reading

- History of Substation:
 - <https://www.belmontlight.com/about/projects/past-projects/>
- Distribution System Upgrade Presentation:
 - <https://www.belmontlight.com/wp-content/uploads/2021/05/05-03-21-Town-Meeting-Presentation-Decommissioning-Project.pdf>

IDEA #141 – PERMANENT BUILDING ADVISORY COMMITTEE MANUAL

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Change structure of appointed building committees so that permanent building committee has detailed manual of procedures and stages of construction; appoint trained professionals, not just good citizens

Other ideas included in this report

- None

Idea intent

The idea is to create a manual or formal guidelines for the individual building committees to follow as they progress through the various stages of design and construction, from design through post construction handoff to the Town.

Weighted Final Score: 43

(Financial Impact: 1, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 5)

Background Information

Per the [Town of Belmont Permanent Building Advisory Committee Bylaw](#), the Permanent Building Advisory Committee (PBAC) is comprised of seven members appointed by the Town Moderator. The charge of PBAC is to “to oversee all projects for the design, construction, reconstruction, alteration or enlargement of any building or other facilities owned by the Town.”. Independent building committees are formed per project as authorized by Town Meeting and always include at least two (but often more) members from PBAC. The remaining committee members are Town residents appointed by the Town Moderator. Representation from PBAC ensures that the independent building committees contain knowledgeable and experience members to lead (but not necessarily chair) the process through the various stages of construction. (See also Idea #212 about Citizen Building Committees.)

Each building committee receives an outline of the project requirements and procedures, the order in which they must be followed, and the documents or forms required throughout the stages of the project. These documents include questions for choosing an Owner's Project Manager and architect, updated MA rules and regulations such as MA General Laws [Ch. 149 \(“Design-Bid-Build”\)](#), [149A \(“Construction Manager at-Risk”\)](#), [30B \(“Uniform Procurement Act”\)](#), Open Meeting Law and Ethics regulations, and so forth. Currently the outline is a hard copy binder but is in the process of being digitized. Beyond this outline, the building committee relies on the guidance from the members representing PBAC to proceed through various stages of design and construction. The PBAC has not developed a formal manual which would need to

include additional information specific for each project type. MA regulations differ depending on the type, size, and cost of the project.

An example of the formal manual a town could produce are the series of guidelines and user manuals found on the website for the [Town of Wellesley Permanent Building Committee](#). Specifically, Wellesley created user manuals for an Owner's Project Manager, Consultant, Contractor, and Proponent (committee member), procedures for selecting a designer (architect) and standard contract forms. Being a fellow MA municipality, the guidelines from the Town of Wellesley could be easily modified in accordance with Belmont's local laws and adopted to serve as the official manual for Belmont's Permanent Building Advisory Committee to provide to its individual building committees.

Recommendations

- The Permanent Building Advisory Committee produce an official electronic series of manuals and guidelines detailing the standard set of procedures, regulations to follow, user manuals, and manager/architect selection criteria required by an individual building committee per project type.

Next Steps

- The Permanent Building Advisory Committee should adopt, modify, and supplement the Town of Wellesley's guidelines and user manuals in accordance with Belmont's zoning regulations and by-laws.

Further Reading

- [Town of Belmont Permanent Building Advisory Committee By Law](https://ecode360.com/27111561%2327111561)
<https://ecode360.com/27111561%2327111561>
- [Town of Wellesley Permanent Building Committee](https://wellesleyma.gov/424/Permanent-Building-Committee)
<https://wellesleyma.gov/424/Permanent-Building-Committee>

IDEA #154 – SOUTH PLEASANT STREET DEVELOPMENT

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Adopt zoning overlays for South Pleasant Street to spur development

Other ideas included in this report

- None

Idea intent

The intent of this idea appears to be that changes in zoning along South Pleasant Street would encourage development in this area, which would benefit the town financially.

Weighted Final Score: N/A (already implemented)

Background Information

Belmont Zoning Bylaws currently provide for a variety of businesses along the eastern side of Pleasant Street between the Clark Street Footbridge and Trapelo Road. This area, commonly referred to as "South Pleasant Street," currently houses a car dealership, a grocery store, a construction company, and several smaller retail, auto repair, and other businesses.

Recently, multiple proposals were created to expand the types of allowed uses in this area of Belmont. One proposal was to allow for an expanded variety of retail, restaurant, office, or residential uses in the South Pleasant Street area, including potentially housing for the elderly, responding to the need for places for older Belmont residents to move to. Another proposal was to allow adult-use marijuana retail establishments in the South Pleasant area, responding to the need for additional revenue for Belmont. These two proposals were approved at a Special Town Meeting in November 2018, which created the South Pleasant Street Overlay District and the Adult Use Marijuana Establishment Overlay District.

In both cases, these overlay districts are responding to the perceived need of promoting the redevelopment of under-utilized properties in the South Pleasant Street area in ways that revitalize the area and allow Belmont to increase revenues. At present, two adult-use marijuana retail establishments have signed host community agreements with the town and are proceeding toward opening stores in the South Pleasant area. If and when these stores open, Belmont expects to receive significant revenue in the form of a percentage of sales.

Recommendations

- This idea is complete. Zoning bylaw changes have been adopted and business opportunities are being pursued.

- Recommend that further policies that encourage development in the South Pleasant Street area be adopted as needed.
- Recommend that Belmont consider further zoning changes to encourage development in other areas of town. See Idea #107.

Next Steps

- None

Further Reading

- **South Pleasant Street Overlay District Zoning Bylaw**
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/section_6g_1.pdf
- **Adult Use Marijuana Establishment Overlay District Zoning Bylaw**
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/section_6f_1.pdf

IDEA #162 – BELMONT LIGHT INITIATIVES

Report Status: Fully Reviewed

Researched by: Travis Franck

Ideas included in this report

- 162 – Internally re-structure Belmont Light; adopt a Purchase Power policy for Belmont Light
- 163 – Adopt a Purchase Power policy for Belmont Light
- 199 – Started strategic planning processes for the town and for Belmont Light
- 200 – Changing Belmont Light governance, potentially increasing efficiency
- 287 – Move to 100% solar, wind, and battery for power supply (paraphrased)

Idea intent

The above ideas pertain to the direction of Belmont Light to be a future-looking utility.

Final Score: N/A (already implemented)

Background Information

Belmont Light is a municipal light plant (MLP) that serves the community. As a community-owned and managed utility, Belmont Light can be responsive to Belmont's concerns to provide reliable power in a climate-friendly manner. Belmont Light has implemented many of the ideas above in some manner already, as some of the ideas were collected from 2020 town documents.

The Municipal Light Board, the governing body of Belmont Light, adopted a Power Supply Policy in 2019. This latest policy aligns Belmont Light's plans with the Town's Climate Action Plan (2009) and the Climate Action Roadmap (2018). The electricity supply of Belmont will be 100% renewable through a combination of contracts and renewable energy credits (RECs).

Spurred by the adoption at Town Meeting of Climate Action Roadmap, Belmont Light has begun a strategic planning process. The Power Supply Policy is a start to the process, but Belmont Light is also 1) planning distribution system upgrades, 2) designing incentives for energy efficiency, electric vehicles, solar, battery storage, and heat pumps, and 3) piloting rate structure changes (i.e., time of use). The process has been supported by some modeling presented at the Light Board meeting on January 24, 2022. Importantly, Belmont Light includes fiscal solvency into its strategic planning process to ensure stability during a transition to a renewable economy.

Belmont Light's governance will change in April 2022, when the Municipal Light Board will become an independently elected board.

The ideas covered in this write up are difficult to score from a town general fund perspective because Belmont Light maintains separate financial books. These separate finances are in accordance to State law. As such, the savings and costs for Belmont Light's activities are borne by the electricity rate payer, not the town's tax base. Overall, Belmont Light's fiscal health can lead to reduced utility bills that save Belmont residents money.

Recommendations

- Ideas stem from older recommendations (2010) and have been or are being implemented.

Next Steps

- None

Further Reading

- Belmont Light Power Supply Policy
<https://www.belmontlight.com/wp-content/uploads/2019/07/BMLD-Power-Supply-Policy-Updated-July-2019.pdf>

IDEA #164 – TAX RELIEF FOR SENIORS

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Increase tax relief for seniors. Increase cap on tax work-off credits. Decrease interest rate on tax deferrals.

Other ideas included in this report

- None

Idea intent

Maximize the use of various mechanisms to ensure property taxes are affordable for seniors.

Weighted Final Score: 23

(Financial Impact: 0, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

There are several existing mechanisms offered by the Town to reduce property tax obligations for qualified taxpayers, including some that are specifically for seniors.

The following chart is provided by the Assessor's Office to show exemptions from real estate tax and CPA surcharge tax. These exemptions are governed by state law, with various qualifications based on age, income, assets, and other criteria.

CL.	BASIC QUALIFICATIONS AS OF JULY 1, 2021	MAXIMUM INCOME ¹	MAXIMUM ASSETS ²	POTENTIAL TAX RELIEF ³
EXEMPTIONS FROM REAL ESTATE TAX:				
ELDERLY				
17D	Age 70 or older	None	\$40,000	\$175 - \$350
41C	Age 70 or older - single	\$24,911	\$40,000	\$1,000 - \$2,000
41C	Age 70 or older - married	\$37,367	\$55,000	\$1,000 - \$2,000
VETERAN				
22	10% Disability or Purple Heart	None	None	\$400 - \$800
22A	Loss of foot, hand or eye	None	None	\$750 - \$1,500
22B	Loss of two limbs or eyes	None	None	\$1,250 - \$2,500
22E	100% Disability/100% Service	None	None	\$1,000 - \$2,000
22(F)	Paraplegic due to war injury	None	None	100%
OTHER				
17D	Surviving spouse or orphaned minor child	None	\$40,000	\$175 - \$350
37A	Legally blind	None	None	\$500 - \$1,000
42	Surviving spouse or orphaned minor of Police Officer or Fire Fighter killed in line of duty	None	None	100%
18	Extreme hardship	None ⁴	None ⁴	Varies
EXEMPTIONS FROM CPA SURCHARGE TAX:				
Low/Moderate Income Seniors (60+)		see chart below	None	100%
Low Income Non-Seniors (<60)		see chart below	None	100%

Household Size	FY2021 Annual Income Limit for the CPA Surcharge Tax Exemption	
	Senior Household Type:	Non-Senior Household Type:
	Property Owned by Senior (60+)	Property Owned by Non-Senior (<60)
1	\$84,560	\$67,648
2	\$96,640	\$77,312
3	\$108,720	\$86,976
4	\$120,800	\$96,640
5	\$130,464	\$104,371
6	\$140,128	\$112,102
7	\$149,792	\$119,834
8	\$159,456	\$127,565

¹Income: Salary, wages, interest, dividends, rental income, IRA distributions, pensions and other retirement benefits.

²Assets: Stocks, bonds, securities, IRAs, bank accounts, and real estate holdings other than primary residence.

³In May 2001, Town Meeting voted to accept Chapter 73 of the Acts of 1986. Chapter 73 allows the Board of Assessors to increase the exemption amounts by up to 100 percent, provided that no taxpayer would pay less than their previous year's taxes.

⁴There are several different qualifications.

In addition, Belmont has established a property tax work-off program as defined in state law to allow municipalities to establish a program giving property owners aged 60 or older the opportunity to volunteer services in exchange for a reduction in property tax. Belmont began its program in 1996, and the Select Board approved increasing the cap in 2018—from \$1,000 to \$1,500 per person per year, the maximum allowable under state law.

Belmont has also adopted a tax deferral program as defined in state law to allow qualifying seniors to delay payment of their property taxes until they sell the property or pass away. This program includes certain conditions, such as the interest that accrues on deferred taxes. In 2018, Belmont Town Meeting voted to reduce this interest rate from 8% (the standard in state law) to 4.5%. However, everyone with any legal interest in the property must approve the tax deferral agreement, including a mortgagee if the owner has a mortgage on the property. Technically speaking, the Assessors would record a lien on the property, which puts the Town in first position to secure payment, above the mortgagee. Practically speaking, because mortgagees will

not agree to that, owners who have a mortgage on their property are unable to participate in the program.

Belmont has not adopted the provisions of state law that allow municipalities to establish a voluntary contribution fund for the purpose of defraying the real estate taxes of elderly and disabled persons of low income. Under these provisions, any amounts donated to the fund, together with interest earned, must be used for this purpose. If adopted, the Town would establish a taxation aid committee to manage the program. Nearby towns such as Arlington and Winchester have adopted such a program for their residents.

Recommendations

- Select Board, Board of Assessors, Council on Aging, and other Town committees should continue to find frequent opportunities for public awareness and education on this topic, especially in advance of the annual April 1st deadline.
- Adopt Mass General Law, Chapter 60 Section 3D to establish a Tax Relief Fund in Belmont, so that voluntary contributions can be made for the purpose of defraying the real estate taxes of elderly and disabled persons of low income.
- Refer to ID #303—Residential Tax Exemption—for a relevant recommendation to investigate adopting a Means-Tested Residential Exemption (MTRE). Creating an MTRE would require the Town to write a home rule petition asking for a Special Act of the state legislature; as of 2019, five towns in Massachusetts—each of which have population/tax base characteristics similar to Belmont—have successfully passed such an exemption: Wayland, Reading, Hopkinton, Sudbury, and Concord. Other towns have already followed suit, with action pending at the state level. Further, there is a bill filed in state legislature to establish an MTRE at the state level (H.3732/S.1916), which would eliminate the need for each town to receive a Special Act.

Next Steps

- Select Board and Treasurer to discuss potential establishment of Tax Relief Fund.

Further Reading

- Exemption Brochures and Applications
<https://www.belmont-ma.gov/assessors-office/pages/real-estate-and-cpa-exemptions>
- Belmont Exemptions Chart (FY22)
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/pages/fy22_exemption_chart_w_cpa_2.pdf
- Belmont Taxpayers Manual (FY20)
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/taxpayer_manual_04292019_fy20_chart_test2.pdf
- Property Tax Deferrals
<https://www.mass.gov/doc/qualifying-persons/download>

- Arlington Elderly and Disabled Tax Relief Fund Application
https://www.arlingtonma.gov/home/showpublisheddocument/57710/63766184984331641_1
- Lexington Study of Residential Property Tax Exemptions
https://www.lexingtonma.gov/sites/g/files/vyh1if7101/f/pages/2019_residential_exemption_report_v1.0.pdf
- An Act authorizing the establishment of a means tested senior citizen property tax exemption (H.3732)
<https://malegislature.gov/Bills/192/H3732>

IDEA #168 – RESTRICT LIQUOR LICENSE TRANSFERS

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Restrict liquor license transfers

Other ideas included in this report

- None

Idea intent

It is our interpretation that this idea, submitted as it was prior to the 2018 amendment to Belmont’s local Alcohol permitting bylaws, asks that the town adopt the exact change that was enacted by the 2018 amendment to that bylaw restricting the transfer of Alcohol licenses.

Weighted Final Score: N/A (already implemented)

Background Information

Currently, alcohol licenses are non-transferrable and are instead returned to Select Board for subsequent approvals. Per a 2017 amendment to our Alcoholic Beverages Policies, Rules and Regulation bylaw:

“No license shall be transferrable, either to a different location or to a different license holder. Any license which the license holder is seeking to so transfer shall revert back to the Town, such that the Town may re-issue said license following the procedures stated herein for the issuance of a new license. Transfers of ownership to trustees in bankruptcy, foreclosures by or transfers to mortgagees having an interest in the license, court appointed receivers or assignees for the benefit of creditors and those taking title or possession of the licensed premises by, through or under them will be deemed to be a prohibited transfer of the license under these Rules and Regulations.”

The 2017 change was made in response to the 2016 sale and transfer of an alcohol permit from one business in Belmont to another business.

The amendment restricting transfers was adopted at the May 3, 2017, Special Town Meeting by a vote of 244-18.

Recommendations

- This idea has been implemented (see above for further information)
- It may be worth considering if there are other opportunities for the Town to increase revenue from liquor licenses or sales.

Next Steps:

- We do not recommend the town take any further action at this time.

Further Reading

- Belmont's liquor licensing bylaw
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/pages/revised_liquor_regs_2-5-18.pdf
- May 3, 2017 Special Town Meeting Warrant
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/stm_2017_mailing_may.pdf
- Belmont liquor license application
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/license_application_information.pdf
- <https://belmont.wickedlocal.com/news/20160927/new-law-would-allow-loading-dock-to-own-multiple-liquor-licenses>
- <https://belmont.wickedlocal.com/news/20160920/loading-dock-owner-trying-to-transfer-license-to-star-market>

IDEA #174 – ADOPT A HOUSING PRODUCTION PLAN

Report Status: Fully Reviewed

Researched by: 8/1/2021 by Paul Rickter

Original Idea as Submitted

Adopt a Housing Production Plan for Affordable Housing

Other ideas included in this report

- None

Idea intent

The intent of this idea appears to be that producing a Housing Production Plan (HPP) for affordable housing would benefit Belmont by allowing us to plan the development of affordable housing in the town. If a municipality has not reached a minimum level of affordable housing inventory, state law provides developers with considerable latitude to create housing developments as long as a portion of the housing is classified as affordable. Developing an HPP and implementing it would provide Belmont with more control over these types of developments.

Weighted Final Score: N/A (already implemented)

Background Information

In 1969, Massachusetts passed Chapter 40B

(<https://malegislature.gov/laws/generallaws/parti/titlevii/chapter40b>) into state law to encourage the development of affordable housing in municipalities in the state. Under 40B, if less than 10% of the housing in a city or town qualifies as affordable under state law, developers are allowed to build more densely than they would otherwise be allowed to under local zoning bylaws, provided that at least 25% of the new housing units will be permanently affordable.

In Belmont, affordable units constitute less than 10% of housing units and that situation is unlikely to change in the next 5 to 10 years. Under Massachusetts law, a municipality like Belmont can enact plans to pursue development of affordable housing by creating an HPP. Having an HPP and being able to demonstrate that it's being used to develop affordable housing provides the municipality with a measure of control over development under Chapter 40B.

In 2018, the Belmont Housing Trust created a Housing Production Plan (https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/hpp_revised_and_approved_3-2018_04_03_18.pdf) and this HPP was subsequently approved by the Planning Board and the Select Board. The HPP outlines a series of strategies for developing affordable housing in Belmont and identifies specific parcels of land that might provide opportunities for affordable housing development. One parcel identified in the HPP, McLean Zone 3, is currently being planned as a development with a mix of affordable and market rate housing.

In April 2021, Belmont Town Meeting appropriated \$250,000 from Community Preservation Act funds to create a Housing Trust Fund. The Housing Trust plans to explore ways to use this fund to help increase affordable housing in Belmont.

Recommendations

- This idea is complete. A Housing Production Plan (HPP) has been adopted by Belmont.
- Work continues to use the HPP to produce more affordable housing, including the McLean project, which is in the detailed planning stage as of this writing.
- Further work on promoting future affordable housing developments will be done by the Belmont Housing Trust. The Housing Trust is a town committee that is appointed by the Select Board to promote affordable housing in Belmont.

Next Steps

- Stay compliant with state law by adopting a new Housing Production Plan in 2023.

Further Reading

- **Chapter 40B Planning and Information**
<https://www.mass.gov/chapter-40-b-planning-and-information>
- **Chapter 40B Housing Production Plan**
<https://www.mass.gov/service-details/chapter-40-b-housing-production-plan>
- **Fact Sheet on Chapter 40B**
<https://www.chapa.org/sites/default/files/40BFactSheetOctober2009.pdf>

IDEA #176 – DEVELOPMENT AT ACORN PARK

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

Acorn Park Development

Other ideas included in this report

- None

Idea intent

Drive revenue through the development at Acorn Park Development

Weighted Final Score: N/A (already implemented)

Background Information

After over 12 years of litigation between developers and environmentalists, a building permit for the new construction of Residences at Acorn Park, a \$70 million, 299-unit apartment complex in the Belmont Uplands on March 6, 2015. A.P. Cambridge Partners, LLC (limited liability company), who built the complex, fulfilled “all requirements under the Zoning Board of Appeals and received a comprehensive permit.

The Belmont ZBA’s most recent stormwater regulations use 2011 rain data, but Belmont Town Counsel has advised that since the Residences at Acorn Park project received a 40B Comprehensive Permit in 2007, it is exempt from the requirements of the local stormwater bylaw. The state’s [Chapter 40B law](#) allows developers to bypass local zoning requirements if a town’s housing stock is less than 10 percent affordable.

Recommendations

No recommendation. This land was developed, and the town is currently receiving real estate tax on an annual basis.

Next Steps

- None

Further Reading

- N/A

IDEA #177 – WITHDRAW FROM THE MINUTEMAN DISTRICT

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Withdraw from the Minuteman regional school district

Other ideas included in this report

- None

Idea intent

Assessing this idea as written – there are other ideas in the list (see #373) about exploring opportunities for and providing vocational education options to residents. This report *does*, however, include brief context and recommendations around addressing a shortage of vocational/technical education “slots” for Belmont students.

Weighted Final Score: N/A (already implemented)

Background Information

Until recently, Belmont was a [member](#) of the [Minuteman Regional Vocational Technical School District](#). Historically, member towns paid a higher cost per student and bore the cost of additional capital expenditures. The main benefit of being a member was priority placement for a finite number of spots for students in the district, but in the school’s history prior to the 2020-2021 academic year, there were [x] years of full enrollment, so this benefit was rarely realized.

Belmont Leaves the Minuteman District: Minuteman was rebuilt and opened in the 2020-21 academic year. Prior to the start of design and construction, the discussion around the appropriate size and scope of the new school resulted in a change to the charter at which time a number of towns left. Seven other member towns left the regional district effective 2017.

Via town referendum of the new Minuteman Regional District construction which Belmont voters rejected, Town Meeting was able to take up an article to leave the district, [which passed at a Special Town Meeting on 10/19/2016](#) by a margin of 172 to 68, meeting the $\frac{2}{3}$ threshold required.

A subsequent reconsideration was also taken up by Town Meeting which failed. As a result of these actions, Belmont officially left the regional district as of July 1, 2020.

If, in the future, Belmont decides to rejoin there will be a cost – “catch up” payments for capital expenditures.

Current State: The 2020-21 academic school year was the first year in which Belmont students who wanted to attend Minuteman were not able to. Of eight students who applied at Minuteman, only 1 was accepted. The schools have also been working with other districts, including the

Medford Vocational Technical School, where five Belmont students are enrolled, and the Cambridge Rindge School of Technical Arts.

For more information about alternative options, see *Idea #373: Explore Career Vocational and Technical Education Options*.

Recommendations

- Implementation of this idea has been completed.

Next Steps

- None

Further Reading

- Minuteman Regional School District
<https://www.minuteman.org/>
- [2015 Presentation on the Minuteman school building project](https://www.belmont-ma.gov/projects-reports-presentations/files/minuteman-regional-vocational-hs-project-presentation-4-21-2015)
<https://www.belmont-ma.gov/projects-reports-presentations/files/minuteman-regional-vocational-hs-project-presentation-4-21-2015>
- [MA state regulations for vocational and technical schools/programs](https://www.doe.mass.edu/lawsregs/603cmr4.html?section=all)
<https://www.doe.mass.edu/lawsregs/603cmr4.html?section=all>
- <https://www.bostonglobe.com/metro/regionals/west/2016/03/04/six-towns-vote-leave-minuteman-high-district/1wljjR5p7sz5VdUE7yxOOI/story.html>
- 2014 Town Meeting article to vote against approving debt exclusion for Minuteman (article 3)
https://www.belmont-ma.gov/sites/g/files/vyhli6831/f/uploads/atm_mailing_1.pdf
- 2016 Annual Town Meeting Warrant to withdraw from the Minuteman Regional District (Article 1)
https://www.belmont-ma.gov/sites/g/files/vyhli6831/f/uploads/2016_stm_october_mailing.pdf
- 2019 Special Town Meeting Warrant article voting to rescind withdrawal from the Minuteman regional district (Article 4)
https://www.belmont-ma.gov/sites/g/files/vyhli6831/f/uploads/mailing_to_tmms.pdf

IDEA #178 – SHARED PUBLIC HEALTH NURSE

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Shared Public Health Nurse with Lexington to provide needed coverage and flexibility for Health Department.

Other ideas included in this report

- None

Idea Intent

Cost savings through a sharing of a nurse resource with the Town of Lexington. The Town has saved on salary and benefits costs through the utilization of a shared service that currently meets the needs of nursing services within the town.

Weighted Final Score: N/A (already implemented)

Background Information

The Health Department's Public Health Nurse is currently an employee of the Town of Lexington, who is shared with the Town of Belmont for 14 hours per week through a professional services contract with the Town of Lexington. The Public Health Nurse is required to attend the Board of Health meetings in Belmont when requested by the Health Department. The standard operating procedures for the Public Health Nurse are consistent with State mandates or mandates established by the Town of Belmont.

Pursuant to the Professional Services Agreement with the Town of Lexington, Belmont is obligated to pay 40% of the shared expenses under the Agreement. Shared expenses include salary, benefits, Medicare tax, workers compensations, RN licensing expenses, liability insurance, and membership in the Massachusetts Association of Public Health Nurses.

The shared expenses paid by the Town of Belmont under this agreement on average have been approximately \$40,000 per year.

Recently, the Town of Belmont has been informed by the Town of Lexington that they intend to establish the Public Health Nurse as a full-time position, and therefore, will not execute a new agreement with the Town of Belmont for the shared Public Nurse position. The Town of Belmont has begun preliminary discussions with the Town of Arlington about a Shared Public Nurse position.

Recommendations and Next Steps

The Town Administrator should continue its discussions with the Town of Arlington, or other communities, to establish a shared Public Health Nurse position that would replace the Agreement we currently have with the Town of Lexington.

Further Reading

- [Town of Belmont, Fiscal Year 2022 Budget Book – page 291](https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf
- [Does Consolidating Local Governments Work, November 2020, Government Finance Officers Association \(GFOA\)](https://www.gfoa.org/materials/does-consolidating-local-governments-work)
<https://www.gfoa.org/materials/does-consolidating-local-governments-work>
- See Idea #330 for more information on regionalizing services

IDEA #179 – SHARED INSPECTORS WITH WATERTOWN

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Shared inspector with Watertown – Provides service needed on [part-time] basis

Other ideas included in this report

- None

Idea intent

This idea suggests a regional agreement in which we share one or more part-time inspectors with Watertown, an existing arrangement that is about to expire.

Weighted Final Score: N/A (already implemented)

Background Information

Belmont currently shares two part-time inspector positions with Watertown – one for electrical inspection and the other for plumbing and gas inspection. The employees are dedicated to the town in which they're working on a given day, and the arrangement has worked well for both communities. It has been a model for how we might regionalize services we need, but perhaps not full-time, with other nearby communities. For example, Massachusetts municipalities are mandated to have a qualified Tree Warden, but our need and budget for this position makes it difficult to justify a full-time employee, making it a good potential option to follow this same model.

Due to increased demand for inspectional services in Watertown amid their ongoing construction boom, Watertown has opted not to renew our regional agreement, which will expire April 15, 2022. At that time, Belmont will need to either identify another community with whom to partner or find another means of securing inspectional services.

Recommendations

- We recommend that the Office of Community Development, together with the Town Administration, seek out other potential partner communities who may be in a similar situation – needing electrical and plumbing/gas inspection services, but perhaps not full-time for each.

Next Steps

- The Office of Community Development should continue its current efforts to identify a partner community to create a new regional agreement.

Further Reading

- For more on regionalizing services in general, see SCIG Evaluation Report: Idea #330 - Regionalizing Town Services.

IDEA #183 – MAINTENANCE MANUALS

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Development of a written maintenance manual for all Town and School buildings is a priority for the Facilities Department beginning in FY14. This manual will define inspections schedules and recommended upgrades to all building systems and components.

Other ideas included in this report

- 184 – Create an “extraordinary maintenance” account in the budget to help address unforeseen repairs: Current operational budgets are adequate for routine maintenance and up keep of school buildings systems and components. However, significant and unexpected repairs of substantial cost can exhaust or exceed particular line items requiring transfer of funds from other sources to maintain resources for continued routine maintenance.
- 185 – Identify maintenance costs by category (painting, carpeting, etc.) and make use of industry standards: These costs will become the basis for identifying resources needed for non-Capital projects; i.e., those defined as “recurring” or those less than \$10,000.
- 186 – Develop a written maintenance manual, complete with schedules: Development of a written maintenance manual for all Town and School buildings is a priority for the Facilities Department beginning in FY14. This manual will define inspections schedules and recommended upgrades to all building systems and components.

Idea intent

Develop Maintenance Manuals to schedule and conduct routine maintenance checks (for warranty purposes) and actual maintenance activities on Town facility systems and infrastructure, to eliminate preventable problems and deferred maintenance.

Weighted Final Score: 46

(Financial Impact: 2, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 4)

Background Information

The Subcommittee met with Town Facilities and Public Works leaders on these ideas. There are several pertinent issues.

- Maintenance Manuals do exist for the new High School, other School buildings and some Town facilities (about 80% of Town properties). The newest versions, like the High School’s, are digital and need trained staff, vs traditional custodial staff.
- The Town hired a new Facilities Director in March 2021. There were staff openings at that time, key promotions and transitions to the new High School, leaves due to injuries

and some departures. Positions have been posted and recruitment to essentially rebuild the department is underway.

- The new Facilities Director is familiar with Maintenance Manuals from prior positions, where they were used to monitor plant and equipment, send out alerts, and produce reports that inform capital replacement planning as well as operating maintenance costs.
- Integral to maximizing the positive financial impact of Maintenance Manuals once they are developed is the ability to triage issues for cost-effective resolution. The Town does not have employed plumbers or HVAC staff, for example, and outsourcing all repairs is costly. An HVAC analysis indicated that employed staff to do routine repairs could save significant costs over outsourced contractors, using the latter as specialists for more complex problems. Similar analyses should be conducted for other trades. A hurdle will be the competitive Boston area salaries for these trades.

Recommendations

- The Select Board and the Town Administrator should support the Facilities Director in filling current vacancies, which is essential to completing Maintenance Manuals on Town and School facilities where none exist, and in determining the most cost-effective balance of employed staff and outsourced specialists to maintaining buildings and equipment.
- This contract-to-employed staff balance should include reviewing the HVAC Analysis and conducting similar analyses on plumbing, electrical and other trades, and developing action plans based on the results.

Next Steps

- Support the new Facilities Director in rebuilding the department by filling open positions, in analyzing and making recommendations on the best employed-contractor ratios, taking into consideration the transition to digital building management systems.

Further Reading

- None

IDEA #188 – BUILD A ZERO NET ENERGY HIGH/MIDDLE SCHOOLS

Report Status: Fully Reviewed

Researched by: Travis Franck

Original Idea as Submitted

Designed new school for zero net energy (ZNE) – geothermal wells, solar panels, efficient systems, etc. – Contains energy costs, increases efficiency, and reduces climate footprint even though it is a much larger building.

Other ideas included in this report

- None

Idea intent

The new Middle School and High School Project should follow through with the intended design to be zero net energy (ZNE) upon completion.

Weighted Final Score: 57

(Financial Impact: 4, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 3)

Background Information

The new Middle School and High School campus, already in construction, has been designed to be Zero Net Energy (ZNE). To be ZNE, the building needs to be completed with a combination of features including:

- Geothermal wells for HVAC systems
- Solar array on the roof
- Energy efficient lighting
- Energy efficient windows and insulation

Importantly, if during the building process any of the above were to not be completed in a manner similar to the original design then the building would not be ZNE.

Estimates are that a full ZNE design will yield \$170,000 in operating savings per year. These savings would start in the first year and continue through the operation of the buildings. The savings require the solar array being installed during the building phase – without the solar array there will be no on-site energy production and the utility costs to the school district will be higher.

Recommendations

- Complete the construction of the High School and Middle School including the installation of the full solar array by protecting the budget for the array.

Next Steps

- The BHSBC needs to continue to with RFP process for the solar installation.
- Do a follow up analysis to see what the savings of the high school have been because of solar array, geothermal heating vs. gas, and other energy efficiency design choices.

Further Reading

- BHSBC Sustainability page with design documents
<https://www.belmont-ma.gov/documents/presentation-materials/pages/sustainability>
- PV Solar Financial Model (\$170k/year)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/bhs_-_solar_financial_model_2019-09-22_final.pdf

IDEA #189 – REORGANIZE ACCOUNTING DEPARTMENT

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Reorganize Town Accounting department, potentially increasing efficiency

Other ideas included in this report

- None

Idea intent

This idea appears to be to change the structure and/or streamline the processes used by the Belmont Accounting Department to improve efficiency in the department.

Weighted Final Score: 40

(Financial Impact: 2, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 4)

Background Information

The Accounting Department maintains fiscal records and internal controls for all Town departments. The department currently employs a full-time staff of three (Town Accountant, Assistant Town Accountant, and Staff Accountant) plus one 21-hour per week Accounts Payable Clerk. The FY22 budget for the department is \$408,564.

The current Town Accountant has been in his position since October 2020 and has instituted changes to department processes since then. These completed and ongoing changes include:

- Instituting a ticket system to improve communications with Town departments
- Enabling electronic approval of invoices to reduce paper reports
- Adding all invoices to the Munis computer system
- Implementation of the Content Manager module in Munis, which will allow improved access to information related to expenditures
- Using Munis to enter Accounting Department time to eliminate paper time sheets, as a trial of shifting all town departments away from paper time sheets
- Implementation of the Contract Manager module in Munis, which will improve access to information about contracts and purchase orders, including by auditors
- Instituting a formal monthly close process to allow for reconciliation of key balance sheets monthly instead of quarterly or annually
- Working with other departments to resolve older fund balances that are outside of the general fund
- After state approval, destroyed hundreds of boxes of paper records, which were stored in the old Belmont Light building

The Town Accountant continues to explore ideas for introducing efficiency and saving money.

Recommendations

- All current and proposed improvements to Accounting Department procedures are extremely helpful because they allow this and all other departments to work more efficiently.
- It should be noted that the Accounting Department staff and budget are now and have historically been very small. Therefore, the bottom-line impact in the Accounting Department of significant improvements in efficiency is limited. However, because this department interacts with all other town departments, improvements in efficiency could have benefits that go beyond the Accounting Department budget.

Next Steps

- The Accounting Department should continue with its solid work on improving its operations.
- The Accounting Department should work with the Treasurer's Office to reform payroll processing. For more information, see Idea #341.

Further Reading

- Accountant/Auditor Responsibilities (Mass Division of Local Services)
<https://www.mass.gov/doc/accountantauditor-responsibilities/download>

IDEA #196 – FINAL PLAN FOR INCINERATOR SITE

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

Post-closure use of the former Incinerator Site be made as soon as possible.

Other ideas included in this report

- None

Idea intent

Final plan for incinerator site

Weighted Final Score: 0 (because financial impact affects Belmont Light budget)
(*Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0*)

Background Information

Belmont’s former trash incinerator facility occupies 25 acres on Concord Avenue, close to the Lexington town line. About two-thirds of the site was owned by the Commonwealth of Massachusetts until May 2017, when it was conveyed to Belmont. The conveyance represents a windfall for a town often struggling with space constraints. The incinerator site presents a valuable opportunity for the community to either ease municipal space constraints or add to its portfolio of recreational assets, with the potential to further Belmont’s status as a desirable town for current and future residents.

Because the site also served as a landfill for the incinerator ash, the Massachusetts Department of Environmental Protection (MassDEP) required that it be capped, meaning that a barrier had to be constructed over the landfill surface to protect humans and the environment from the harmful contents. Although Belmont did not own the land, the town was responsible for capping the site. This prompted members of town government to approach our state legislators for help in conveying the parcel to Belmont from the Commonwealth. House Bill 2869 in 2014 accomplished that result.

The bill restricts future use of the land to noncommercial applications, such as “recreation, public works, and other municipal uses.”

The Select Board led a participatory process over several months to decide a post-closure use that would be in line with the state requirements. In 2019, the Select Board voted that Belmont Light should use the site for a solar array and battery storage project. Belmont Light has been planning for such use but is waiting for the site to be capped.

The solar and battery storage project would likely be financed by Belmont Light, and the financial impacts would be passed onto the Belmont Light rate payers.

Recommendations

To follow through with the 2019 Select Board vote to allow the incinerator site to be used by Belmont Light for solar array installation and battery storage project.

Next Steps:

- **As of the 2023 budget-**
 - Continued to work with an environmental consultant and DEP to finalize environment analysis to design a cap for closing the site. Completed work on the demolition of the former incinerator building. The bid price was \$274,600, the final contract amount was \$229,600.
 - The former Incinerator Site's ash landfill is under a DEP Consent Order to cap the landfill. The process of deciding on the post-closure use of this site as well as to fund both the construction for capping and post closure use of this site is underway. This is a key step in completing the conveyance of this property from the State to the Town.

Further Reading

- [LFT FRM Presentation-Basic \(belmont-ma.gov\)](https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/u146/public_presentation_-_nov_3_2014_-_updated_final_version_0.pdf)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/u146/public_presentation_-_nov_3_2014_-_updated_final_version_0.pdf

IDEA #197 – IMPROVE THE DPW FACILITY

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

DPW facility should be the next major project to be funded and initiated, which has a location and should move forward with planning.

Other ideas included in this report

- None

Idea intent

Improve DPW facility

Weighted Final Score: 0

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

The Town just recently finished a \$1.3 million partial renovation to the DPW garage. Stated from the beginning as a temporary 10-year fix, the new partial renovation has adequate locker and bathroom facilities for both male and female employees that are ADA compliant. The renovation also addressed adequate offices and training rooms along with a modern kitchen.

The estimated cost for a new DPW facility is around \$39 million dollars. This is based on a 2002 Facilities Audit that determined that most of the major Public Works buildings and facilities are less expensive to replace than upgrade to current standards. The Town commissioned a study in 2005 for a Feasibility and Programming Study for a new Public Works facility to replace the existing scattered group of aging buildings. At that time this facility was estimated to cost about \$20M and would provide a modern, efficient facility as well as allow all of the staff and equipment to work from a single location providing operational efficiency. The Public Works facility was identified in the FTF Report as a project which is ready to move forward.

Recommendations

- The town should review the facility uses and study as part of its Comprehensive master plan. IT should evaluate the current land use at the facility and value as well.

Next Steps

- The Capital Budget Committee should update the audit and then determine next steps to address DPW's facility needs before its current End of Life in 2031.

Further Reading

- None

IDEA #201 – OPEN MARIJUANA RETAIL DISPENSARIES

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Open Marijuana Retail Dispensaries

Other ideas included in this report

- None

Idea intent

The intent of this idea appears to be that opening licensed adult-use marijuana retail stores provides a revenue opportunity for the town that should be pursued.

Weighted Final Score: 54

(Financial Impact: 5, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 2)

Background Information

Massachusetts passed a referendum legalizing adult-use of marijuana in November 2016 and subsequently the state established regulations for municipalities to use in licensing retail stores. Under the law, municipalities were given the option to opt out of hosting marijuana businesses (retailer, cultivator, product manufacture, or testing facility). A municipality where an adult-use marijuana retail store is located is permitted to assess a local 3% tax on sales and for the first five years can charge businesses a "community impact" fee equal to an additional 3% of sales.

In September 2018, Belmont voters approved a referendum that prohibited all marijuana businesses with the exception of retail stores. The number of available adult-use marijuana retail licenses in Belmont was capped at 20% of the total number of available licenses to sell alcohol for off-site consumption (currently six), with any fraction rounded to the next whole number. Under this law, Belmont currently has two available licenses for adult-use marijuana retail stores.

In April 2018, Belmont Town Meeting voted to assess the 3% sales tax at adult-use marijuana stores. In November 2018, Belmont Town Meeting approved an Adult Use Marijuana Establishment Overlay District along Pleasant Street between the Clark Street footbridge and Trapelo Road. Up to two adult-use marijuana retail stores are allowed to apply for a special permit from the Belmont Planning Board to operate in the overlay district.

In November 2020, the Belmont Select Board approved Host Community Agreements for two prospective adult-use marijuana retail stores: Calverde Naturals LLC, 1010 Pleasant Street; and Mint Retail Facilities LLC, 768 Pleasant Street. The agreements with both stores include provisions to collect the community impact fee for the first five years. Both stores have both been granted provisional licenses from the Massachusetts Cannabis Control Commission (CCC)

and their special permits have been granted by the Belmont Planning Board. Both stores will need final approval from the CCC and are expected to be open by the summer of 2022.

Current estimate is that sales tax revenue from both stores will be approximately \$500,000 per year. Revenue generated by the community impact fee must be spent to mitigate community impact, and municipalities are required to maintain public records documenting such costs. A one-time building permit fee of \$12,750 has been paid by Calverde Naturals and the one-time building permit fee for Mint is not known at this time. In addition, building improvements made to both retail locations will likely result in increases in the value of both properties and those increases should result in increased property tax revenue.

Recommendations

- This idea is in the process of being implemented. All decisions needed to complete this idea have been made.

Next Steps

- No further action is needed.

Further Reading

- Guidance for Municipalities (Massachusetts Cannabis Control Commission)
<https://masscannabiscontrol.com/wp-content/uploads/2021/11/Guidance-for-Municipalities.pdf>
- Host Community Agreement between Belmont and Mint Retail Facilities LLC
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/mint_retail_facilities_llc-proposed_belmont_hca_track_changes_version.pdf

IDEA #212 – ELIMINATE CITIZEN BUILDING COMMITTEES

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Eliminate citizen building committees and hire good project managers.

Other ideas included in this report

- None

Idea intent

Since 2010, when this idea was originally suggested, Massachusetts began requiring towns hire an Owner's Project Manager for any project exceeding certain cost, addressing key shortcomings of Citizen Building Committees for larger, more complex projects.

Weighted Final Score: N/A (already implemented)

Background Information

Key underlying issues of citizen building committees included the possibility of the committee lacking appropriate expertise to manage a construction project and the potential capacity limit for members of the committee to oversee the day-to-day operations of a construction project and site.

Massachusetts General Laws now address the above potential limitations by requiring all municipalities to hire an Owner's Project Manager for all building projects costing \$1.5 million or more.

With these issues addressed through the mandated process, the citizen committees are able to contribute in other important ways, including setting the vision, timeline, budgetary needs, and more.

An alternative would be to eliminate the committees and instead have town employees manage projects. This would require more employees with expertise in planning and building as well as a town bylaw change and it's unlikely that we would realize a cost savings, especially considering the added costs for additional employees to cover this need.

The town also has a Building Advisory Committee that oversees all projects over \$50,000 that do not have a dedicated, temporary appointed committee, and can choose to oversee projects that fall under the \$50,000 threshold.

Recommendations

- The state law has addressed a key shortcoming of Citizen Building Committees, allowing them to make important contributions to building projects in Belmont while enjoying the structure, expertise, and daily involvement of OPM's for larger projects.

Next Steps

- No further action recommended.

Further Reading

- Massachusetts General Law requiring Owner's Project Managers
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXXI/Chapter149/Section44A%201~2>
- Local bylaw regarding the permanent Building Advisory Committee
<https://ecode360.com/27111561?highlight=building&searchId=11171755957418485#27111561>

IDEA #213 – FEWER SELECT BOARD MEETINGS AND ELIMINATE THEIR PAY

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Have fewer Board of Selectmen Meetings with no pay to Selectmen

Other ideas included in this report

- None

Idea intent

Savings could be generated by fewer meetings and no pay

Weighted Final Score: 13

(Financial Impact: 1, Operational Impact: 0, Time Scale: 1, Ease of Implementation: 1)

Background Information

None

Recommendations

- Idea #213 is ruled out for the following reasons:
 1. The Select Board is required to by both state law and local bylaws to manage the properties and affairs of the town. Open meeting laws require that all deliberation be conducted in public forums; no two Select Board members can discuss any item outside of a public meeting. The number of meetings required to conduct the business before the Select Board is determined by the Select Board, based on the amount of time needed to solicit public comment, discuss, and vote on all relevant decisions and conduct other business required by law.
 2. The Select Board is currently paid a total of \$14,000 per annum (\$5000 for the Chair and \$4500 for each of the other two members). The savings generated by eliminating this amount was considered de minimis by the Subcommittee. The amount is not representative of the time and effort expended by Select Board members and represents a token amount of compensation for their service to the Town.

Next Steps

- None

Further Reading

- Section 40-200 of the Town of Belmont Bylaws (<https://ecode360.com/27111379>) includes all the duties of the Select Board.

IDEA #215 – CHANGE TOWN CLERK STAFFING

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Have a professionally appointed Town Clerk, and then replace the Assistant Town Clerk with a clerical person.

Other ideas included in this report

- None

Idea intent

The idea implies that an appointed Town Clerk might have stronger qualifications and that reducing the grade of the Assistant Town Clerk would have cost savings.

Weighted Final Score: 17

(Financial Impact: 1, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 1)

Background Information

This idea is similar to an initiative that took place in 2005 to replace the Elected Town Treasurer with a Treasurer appointed by the Board of Selectmen at that time. This was an initiative that was sponsored by the Warrant Committee and supported by Members of Town Government. This initiative resulted in a Town-wide referendum vote to change the Town By-law from an elected Town Treasurer for a three-year term to an appointed Town Treasurer by the Board of Selectmen. A yes vote win would result in the By-law change. The results of the referendum vote were as follows:

No: 1,668 votes 58.63%

Yes: 1,177 votes 41.37%

The residents of the Town in 2005 didn't support the change to an appointed Town Treasurer. The same result might occur if we were to move forward with an initiative to change the Elected Town Clerk position to an Appointed Town Clerk position.

Additionally, the current Town Clerk and the employees within the Town Clerk Office presently serve the residents of our community at a very high level at a cost level that is very reasonable.

Recommendations

- Continue to have the Town Clerk as an elected position.
- Review Idea #216 for additional context and related recommendations.

Next Steps

- Include this topic in the broader review that will be conducted by a Charter Committee for the town.

IDEA #216 – APPOINT ALL POSITIONS (EXCEPT SELECT BOARD/MODERATOR)

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Make all elected offices (with exception of BOS and Moderator) appointed instead.

Other ideas included in this report

- None

Idea intent

Increase efficiencies and reduce costs by having central appointing authority for town positions.

Weighted Final Score: 57

(Financial Impact: 2, Operational Impact: 9, Time Scale: 2, Ease of Implementation: 2)

Background Information

Massachusetts General Laws (MGL) Chapter 41, Section 1, sets forth required elected positions and tenures. Section 1B states that any elected office or board under the provisions of Section 1, except the Select Board and School Committee, may become an appointed position or board by a majority town wide election and a majority vote of the annual or special town meeting, subject to certain provisions. The Town can also seek special legislation or a home rule charter to amend its charter governance.

Belmont has an elected Treasurer/Collector and an elected Town Clerk in addition to the Select Board and School Committee. In addition, the Town elects the Board of Assessors, Board of Health, Board of Cemetery and Board of Trustees of the Public Library, and Housing Authority. With the exception of the Housing Authority, each of these boards retains oversight and appointment authority for town employee(s) related to their charge. (Exhibit I shows the elected and appointed positions in Belmont.)

In 2011, the Department of Revenue (DOR), in a Town of Belmont Financial Management Review, recommended that the Town consolidate appointing authority under the Town Administrator in order to strengthen the leadership, create clear lines of authority and accountability standards, and create a more responsive, effective government.²⁹ The complexity of municipal government has changed over the years and processes such as budgeting, capital planning, debt management and other day-to-day processes benefit from clearly defined roles and reporting, as well as cooperation and communication, as well as a unified purpose. Absent centralized appointing authority, “a combination of elected and appointed positions creates an

²⁹ <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

overall town organization structure that is hindered by divided reporting responsibilities and employees who may not be accountable to the same reporting structure and may have differing goals, objectives, and directives.”³⁰ A decentralized organizational structure is inefficient, time consuming and impedes decision making.

Interestingly, both the Arlington and Lexington Town Managers, in SCIG zoom meetings last fall, independently and unprompted raised the challenges Belmont faces operating with appointees in key positions. After pointing out budget and demographic similarities between Arlington and Belmont, Arlington’s Town Manager stated that one big difference in getting things accomplished was that he only has one employee that he has not hired or appointed. In his opinion, having employees appointed by elected boards make it difficult to accomplish Town objectives and goals, slows down processes and results in less efficiency.³¹ As the Lexington’s Town Manger pointed out—having worked previously in a municipality with independent board-appointed employees—this is especially true when budgets are squeezed, and difficult decisions need to be made.³²

With respect to financial management, the 2011 DOR review recommended that the Town convert the Treasurer/Collector position from elected to appointed, and current DOR recommendations include the assessing position as a key role that should be appointed by the Town Administrator.³³ The functions of these positions require specific skill sets and are not political in nature, but heavily driven by statutory responsibilities. The Treasurer/Collector performs a critical role in managing the cash flow, investments, borrowing and custody of funds, within statutory and professional guidelines. This position requires strong credentials and relevant professional experience that should be properly evaluated and vetted. In an elected system, the choice is limited to the names appearing on the ballot and the qualifications of the candidate are not always examined in depth--if at all-- particularly if there is only one candidate on the ballot. In an appointed system, the town can choose from a broader pool of qualified applicants and conduct in depth assessments of the candidates for this critical position of the 351 cities and towns in Massachusetts, 79% of all Treasurers are appointed.³⁴

Belmont is lucky to currently have a Treasurer/Collector of Taxes who was voted into the position with relevant capabilities and experience, and who has guided the town through economic downturns, financial crises, and numerous debt issuances, including the largest in the Town’s history. However, should the current Treasurer decide to resign or choose not to run for reelection, there is no assurance that a person with the necessary experience or expertise

³⁰ Collins Center Financial Structure (Budget review): <https://www.mass.gov/doc/kingston-financial-management-structure/download>

³¹ Zoom meeting with Adam Chapdelaine, Arlington Town Manager, November 3, 2021

³² Zoom meeting with James Malloy, Lexington Town Manager, January 12, 2022

³³ <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>; , “Transitioning Elected to Appointed” video: <https://www.youtube.com/watch?v=UMpShOS0thA>

³⁴ Collins Center Financial Structure (Budget review): <https://www.mass.gov/doc/kingston-financial-management-structure/download>

commensurate with the importance of this position will seek and win the election. This would put the Town at significant financial risk.

Consolidating the assessing position under a town central appointing authority recognizes the fact that it is the assessor who performs the technical assessment functions while Board gives policy direction, ratifies assessments done by the Assessor, sets the tax rate, and approves abatements.

The Edward J. Collins, Jr. Center for Municipal Management has developed a framework for determining when municipal officials should be appointed vs. elected. This framework is included in Exhibit II.

The 2011 DOR report recommended that the Town pursue a new charter to strengthen the organizational foundation of the Town. Its review concluded that incremental changes to bylaws is insufficient and that “Belmont would benefit from a single, comprehensive look at municipal government with an eye towards strengthening its management capabilities. The exercise of working through a charter process would provide that opportunity”.³⁵ A charter serves as the basic framework for government structure and includes the foundation for accountability, and relationships among officials, boards and commissions. The charter is a companion document to a town’s bylaws: the charter outlines the broad principles, and the details are imbedded in the bylaws.

Communities seeking to make comprehensive change to governance or to make incremental changes, such as change selected boards, commissions and officials to appointed status can elect to do so via home rule charter under MGL 43B, by special legislative action, or by “permissive legislation”.

For a home rule charter, the town, upon petition of fifteen percent of the registered voters, elects a nine-member charter commission to prepare a new charter. The commission considers the options for changing local government structure and seeks participation from residents, publishes a preliminary report, and issues a final report. The final charter proposal must be adopted by a majority of voters at a municipal election. A home rule charter change is a major undertaking, and the time to petition, elect its members adds to the 18-month timeline the commission has to issue its report.

Changes in local government structure may also be made through a “home rule petition” or a “special act charter”, so named because they are submitted to the legislature as “special acts”. The home rule petition must be approved by a majority vote of at town meeting and often requires a town-wide vote to ratify the special act. The petition is then forwarded to the state legislature for approval by the House and Senate. The home rule petition cannot be acted on until it is signed by the Governor. Communities can also use the special act route to make more discrete changes (e.g., changing an elected board or commission to an appointed one, creating a consolidated department, etc.).

Towns may also accomplish some structural, administrative, and organizational changes through adoption of existing state legislation (MGL Ch 41, Ch 40 and Ch 43C) which enables such changes (“permissive legislation”) or bylaws. Permissive legislation requires a vote of town

³⁵ <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

meeting followed by a town-wide ballot vote to change certain elected positions to appointments (including clerk, treasurer, tax collector, assessors, boards of health). Elected officials in office at the time of such vote would complete their terms before the appointment provisions took effect.

The DOR recommended in 2011 that the Town utilize the Special Acts to establish the new government structure. To do so the Select Board would create a government study committee through a Town Meeting warrant article and appoint the committee to draft the charter. This is considered the preferred route relative to home rule charter due to the faster timeline as well as the ability to bring broader representation with the most relevant expertise to the task. Peer communities of like size and profile that have reorganized under the Special Acts include Arlington, Concord, Hingham, Lexington, Needham, Wellesley, Westwood, and Winchester.

It takes strong leadership, clear accountability standards, and an overarching sense of purpose to manage successfully at the municipal level. This is true of meeting regulatory compliance standards and mandates, service delivery, or marshalling limited financial resources and leading staff. Success must be clearly defined and measurable – otherwise it cannot be defined as success. This process begins with the establishment of unified appointment authority that utilizes best practices in recruitment and selection, clearly articulated reporting responsibilities, and a well-defined relationship with other departments and managers—Collins Center.

Recommendations

Belmont’s current organizational structure is highly decentralized, with key positions elected or appointed by independently elected boards. This includes the Treasurer and Clerk, who are elected and the appointees of the Board of Assessors, the Board of Health, and the Board of Trustees of the Public Library. Other Town employees are also appointed by committees or commissions, such as the Youth Coordinator appointed by the Youth Commission. The lack of centralized appointment authority hampers the ability of the Town to make progress on issues large and small and weakens the decision-making process.³⁶ Moreover, electing the Treasurer /Collector limits the Town’s access to a broader pool of qualified applicants and places the Town at financial risk should voters elect a candidate without the necessary experience and skill set for the position.

The SCIG believes that changing Belmont’s current government organization is critical to addressing the town’s structural deficit and bring stability and accountability to governance. To date, changes have been incremental and piecemealed which, as stated in the 2011 DOR review “is an inadequate approach for establishing centralized management in a meaningful way.”³⁷

In concurrence with the 2011 DOR review, the SCIG recommends that the Select Board initiate the process for a changing the current governance through Special Acts legislation. This review should be comprehensive in nature, with the objective of strengthening leadership, consolidating appointment authority, and establishing clear reporting lines and accountability for key positions. The process should be completely transparent and seek resident input throughout to ensure the

³⁶ <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

³⁷ <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

charter reflects community principles and needs. We note that these are organizational changes that exist in many communities of similar size and financial complexity.

Because of the nature of the position, the SCIG believes it is most critical to address conversion of the Treasurer/Collector position from elected to appointed. This should be done in coordination with any plans that the current Treasurer has to retire or otherwise leave the position, as the process can take more than a year. The goal is to have the position convert in time for succession if the current Treasurer decides to leave; due to the requirements for converting this position from elected to appointed, this change may have to precede the completion of the Special Acts charter.

Next Steps

- Select Board to initiate the process of reorganizing governance through a Special Acts charter review within three months:

	Timing
Appoint a charter committee to comprehensively review Belmont’s municipal structure and draft a charter based on recommendations.	Within three months
Set a timetable that includes the warrant article, appointment of committee and expected draft of the new charter, and target date for Annual Town Meeting and town-wide vote	Within six months

- Select Board and Charter Committee to engage community at every step of the process:

Hold a public forum as soon as practical to outline the reasons for pursuing a new charter and outline the process for doing so within six months	Within three months
Additional opportunities for public input	Ongoing

- The Select Board should consult with the current Treasurer on timing for succession and act to minimize financial risk to the Town:

Discuss succession of position with current Treasurer	Within three months
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Further Reading

- Exhibits I and II below
- 2011 MA DOR Town of Belmont Financial Management Review
<https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>
- MA DOR Local Services, “Transitioning Elected to Appointed” video
<https://www.youtube.com/watch?v=UMpSh0SOthA>
- Municipal Advocate, Vol. 22, No. 2, “Several Options for Changing Local Government Structure
https://41g41s33vxdd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2018/07/change_localgov_structure_0.pdf
- MGL re: Appointed Town Officers and Boards
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section1B>
- MGL re: Appointment of Assessors by Select Board
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section25>
- MGL re: Optional Forms of Municipal Administration Act
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter43C>
- MGL re: Authorization of Select Board to Act as or Appoint Other Town Officers
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section21>
- Changing Massachusetts Local Government Structure:
https://41g41s33vxdd2vc05w415s1e-wpengine.netdna-ssl.com/wp-content/uploads/2018/07/changing_localgov_structure_0.pdf
- For more information, refer to Idea #413 DLS Recommendations on Form of Government
- For more information, refer to Idea #416 Appoint Member to Board of Assessors
- For more information, refer to Idea #215 Change Town Clerk Staffing

EXHIBIT I

Summary of Belmont Elected and Appointed Positions Required by Massachusetts Law

All other boards and commissions are appointed

	Mass. General Law (MGL)/				Total	
Mass General Law/ Belmont By-law Required Positions in Belmont	Belmont General Bylaw (BGB)	Stat us	Ballot Cycle	Electi on Cycle		Annual Compensation
<u>Elected Per Mass. General Laws (MGL)</u>						
Select Board	MGL VII, Ch 41, Sec. 1	Electe d	Annually	1 per year	3	Chair: \$5000, Members: \$4500
Town Clerk	MGL VII, Ch 41, Sec 1; MGL Ch 114, 22; BGB Ch. 20	Electe d	Every Three Years	N/A	1	Salary benchmarked to Grade 18
Treasurer/Collecto r	MGL VII, Ch 41, Sec. 1; BGB Ch 20	Electe d	Every Three Years	N/A	1	Salary benchmarked to Grade 18
Collector of Taxes	MGL VII, Ch 41, Sec. 1	N/A	Treas. authorized as Collector	N/A	N/A	Consolidated with Treasurer
Board of Assessors	MGL VII, Ch 41, Sec. 1	Electe d	Annually	1 per year	3	Chair: \$3030, Members \$2200
School Committee	MGL VII, Ch 41, Sec. 1	Electe d	Annually	2 per year	6	None

Board of Health	MGL VII, Ch 41, Sec. 1; MGL Ch. 111	Elected	Annually	1 per year	3	None
Housing Authority	MGL Title XVII, Ch. 121b	Elected	Annually	2 per year	5*	Paid through Commonwealth
<u>Elected Per Belmont Representative Town Meeting Act and MGL</u>						
Moderator	Belmont Representative Town Meeting Act; MGL VII, Ch 39, Sec 14	Elected	Annually	1	1	\$450, voted at Town Meeting
<u>MGL VII, Ch 41 Positions changed from Elected to Appointed per MGL VII, Ch. 41, Sec 1B and Town Vote and Town Meeting</u>						
Assistant Assessing	MGL VII, Ch 41, Sec. 1	Appointed	Appointed by Board of Assessors	N/A	N/A	Salaried position
Town Auditor	MGL VII, Ch 41, Sec. 1; BGB 202-10 Ch 41-55	N/A	Town Acct authorized as Auditor	N/A	1	Town Acct salaried position
Highway Surveyor(s) or Road Commissioner(s)	MGL VII, Ch 41, Sec. 1; MGL VII, Ch 41, Sec 69D	Eliminated	Public Works Consolidation , 2003	N/A	N/A	None
Water Advisory Board	MGL VII, Ch 41; BGB, Sec 40-330	Appointed	Public Works Consolidation , 2003	N/A	N/A	None

Sewer Commissioners	MGL VII, Ch 41, Sec. 1	Eliminated	Public Works Consolidation , 2003	N/A	N/A	None
Tree Warden	MGL VII, Ch 41, Sec. 1; BGB 202-10 Ch 41-106	Appointed	N/A	N/A	1	DPW Dept head; Small stipend
Constables	MGL VII, Ch 41, Sec. 1	Appointed	N/A	N/A	5	None
<u>Elected Per Town By-laws</u>						
Board of Cemetery	MGL Ch. 114, 22-26; BGB 40-215	Elected	Annually	1 per year	3	None
Board of Trustees of the Public Library	BGB 40-225	Elected	Annually	2 per year	6	None
<u>Select Board Designated as Board of these Entities Per Town By-laws</u>						
Belmont Municipal Light Board	BGB 40-200	Select Board	N/A	N/A	3	None
Parks Commissioners	BGB 40-200	Select Board	N/A	N/A	3	None
Board of Survey	BGB 40-200	Select Board	N/A	N/A	3	None
Independent Boards						
Retirement Board**	MGL IV, Ch 32, Sec 20	Independent		**	5	

Note: The Select Board and the School Committee are the only boards that are required by Massachusetts law to be elected by Town wide vote.						
All other positions may be appointed by provision of laws or charter approved by town vote.						
By law, the Select Board is authorized to act as Sewer Commissioners and the Board of Health if other provisions are not made.						
Town vote is required to combine the Treasurer and Collector positions, to authorize the Town Accountant to act as Auditor						
((and abolish the auditor position), to have the road commissioners act as sewer commissioners, to establish assistant assessors,						
and to appoint the tree warden and constables.						
All other town officers shall be appointed by the selectmen unless other provision is made by law or by vote of the town.						
* The Belmont Housing Authority has four elected members, plus one member appointed by the State.						
**The Belmont Retirement Board consists of five members: two members elected by active and retired members of the system, one appointed by the Select Board,						
the Town Accountant, and one elected by the four other members.						
Sources: Massachusetts General Laws, Town of Belmont By-laws, Town Clerk, Town website						
August 2021						

EXHIBIT II

Criteria supporting a position or board being ***ELECTED***	Criteria supporting a position or board being ***APPOINTED***
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1. It has minimal policy-making responsibility.	2. It has significant policy-making responsibility
2. It has few ministerial responsibilities and tasks whose performance is guided almost entirely by statute.	2. It has many ministerial responsibilities and tasks whose performance is guided almost entirely by statute.
3. Someone with little training or expertise in its area of work could quickly and easily become effective in the work.	3. Someone with little training or expertise in its area of work would have significant difficulty in performing the work effectively, potentially creating significant risks for the community.
4. Its role and tasks are easily and widely understood by the public	4. Its role and tasks are complicated and NOT easily and widely understood by the public.
5. The nature of the position or board's role makes it relatively simple for the public to evaluate the performance of its non-policy- making duties (for example, efficient use of resources, etc.).	5. The nature of the position or board's role makes it relatively difficult for the public to evaluate the performance of its non-policy- making duties (for example, efficient use of resources, etc.).
6. The position or board is helpful as a check or balance against another center of power in the community.	6. The position or board is not needed as a check or balance against another center of power in the community.
7. It is not critical to the effective and efficient functioning of the government for this position or board to cooperate regularly with other officials.	7. It is critical to the effective and efficient functioning of the government for this position or board to cooperate regularly with other officials.
8. In the particular community in question, election for the position historically produces a very competitive race between highly- qualified candidates.	8. In the particular community in question, election for the position historically produces little or no competition and few or no highly- qualified candidates.

Source: The Edward J. Collins, Jr. Center for Public Management

IDEA #217 – HAVE NEWLY ELECTED OFFICIALS TAKE OFFICE ON JULY 1

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Have newly elected town officials take office on July 1, would avoid having new officials take reins in final portion of budgeting process

Other ideas included in this report

- None

Idea intent

Tie elections to fiscal years; current April elections take place in the midst of budget/ATM discussions; continuity and efficiency can be lost as newly elected are brought up to speed and/or request changes.

Weighted Final Score: 17

(Financial Impact: 0, Operational Impact: 1, Time Scale: 2, Ease of Implementation: 2)

Background Information

Belmont's town elections are, by Massachusetts General Law and local Bylaws, held the first Tuesday in April, and elected officials take office the following day (see below). Town By-Laws also state that Annual Town Meeting days are scheduled in early May and early June, at which budget appropriations and other matters are voted.

By the time April elections are held, the town and school budgets have been through many iterations and are being prepared to send to Town Meeting Members for appropriation at Segment B of Town Meeting in early June. Newly elected members of the Select Board and the School Committee, along with new members of other Boards and Committees overseeing various departments, have limited time to dig deeply into the budget, suggest changes, and discuss such in open meetings. Furthermore, this requires time and effort of the Town Administrator, School Superintendent and departments during a particularly busy time preparing the warrant and interacting with Town Meeting Members. Open meeting laws can preclude fellow board members from assisting in this effort.

A change to the Town's bylaws and possible state legislative action would be required for the officials elected in April (per Town bylaws) to be sworn into office in late June after annual town meeting. Moving town elections to late June which would likely reduce participation and increase costs due to higher absentee and/or mail-in balloting.

Recommendations

This idea will not significantly impact the structural deficit but makes practical sense and could create efficiencies. Further research is needed to determine whether a delay in the swearing in from election date to after Town Meeting is allowable under Massachusetts General Laws and what steps would be necessary to enact such. The SCIG believes this is an interesting idea to pursue, but as a lower priority compared to other recommendations.

Next Steps

- Select Board to consult with Town Counsel on the legal requirements or implications

Further Reading

Massachusetts General Law (MGL) Ch 41, Section 107:

Section 107. A person who is elected town clerk shall be sworn either by the moderator or by a justice of the peace, and shall enter upon the performance of his duties on the seventh day succeeding his election or as soon thereafter as he is qualified and shall hold office during the term fixed by law, which shall begin on the seventh day succeeding his election, and until another person is qualified in his stead. Every person elected as a moderator of a town or district or to any other town office designated by name in section one, or as an officer of a district, which district includes two or more towns, before entering upon his official duties shall be sworn to the faithful performance thereof either by the town clerk in the case of a moderator, and in all other cases by the moderator, or by the town clerk in the town in which he resides, and, unless other provision is specifically made by law, shall enter upon the performance of his duties on the day after his election, or as soon thereafter as he is qualified, and shall hold office during the term fixed by law, which shall begin on the day after said election, and until another person is qualified in his stead. Every other elected member and every appointed member of every board or commission of a town, and every other elected officer and every appointed officer of a town, shall also, before entering upon his official duties, be sworn to the faithful performance thereof.

IDEA #218 – HAVE FEWER ELECTIONS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Reduce election expenses by having fewer elections.

Other ideas included in this report

- None

Idea intent

Fewer elections will result in a reduction in town expenditures.

Weighted Final Score: 07

(Financial Impact: 1, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

The Town Clerk currently budgets \$37,085 for local elections, \$46,617 for state elections and \$54,209 for State elections with a Presidential ballot. These budgets are based on incremental and often state-mandated costs such as election poll workers, election tabulators, custodians to set up and tear down polling places, staff overtime to prepare, conduct and manage the elections (including mail in and absentee ballots), police detail, ballot printing and coding, and other election expenses. Any budgeted election expenditures not spent are returned to the Town.

The town is required to hold annual town elections for certain positions (see SCIG Evaluation Report for Idea #216) and is required to hold all state and federal primary, congressional, and presidential mandated elections. The State constrains the timing of local elections, which rules out holding November elections for local offices. Off-cycle elections are held only when necessary, such as a) when a town-wide question comes up, requiring action within a certain time period (such as retail marijuana, Minuteman, or other unanticipated and time-sensitive issues arise); b) a Select Board member moves or dies, as State law mandates that this position must be elected and not appointed; c) a referendum is called based on action by Town Meeting or under the Representative Town Meeting Act, which allows 500 registered voters to petition for an election or recall and mandates the timetable for the election, and d) a revision or withdrawal of an override, debt exclusion, CPA acceptance as determined by the Select Board.

A chart detailing elected positions and election cycles for such positions is included under “Further Reading”.

Recommendations

Idea # 218 is ruled out because federal, state and local laws mandate election cycles. Under state law, Belmont is required to hold annual town elections for Select Board members (one per year),

School Committee members (two per year) and other locally required elected positions. Special elections are mandated under certain circumstances.

Next Steps

- None

Further Reading

Summary of Belmont Elected and Appointed Positions Required by Massachusetts Law										
<i>All other boards and commissions are appointed</i>										
Mass General Law/ Belmont By-law Required Positions in Belmont	Mass. General Law (MGL)/	Status	Ballot Cycle	Election Cycle	Total	Annual Compensation				
	Belmont General Bylaw (BGB)									
<u>Elected Per Mass. General Laws (MGL)</u>										
Select Board	MGL VII, Ch 41, Sec. 1	Elected	Annually	1 per year	3	Chair: \$5000, Members: \$4500				
Town Clerk	MGL VII, Ch 41, Sec 1; MGL Ch 114, 22; BGB Ch. 20	Elected	Every Three Years	N/A	1	Salary benchmarked to Grade 18				
Treasurer	MGL VII, Ch 41, Sec. 1; BGB Ch 20	Elected	Every Three Years	N/A	1	Salary benchmarked to Grade 18				
Collector of Taxes	MGL VII, Ch 41, Sec. 1	N/A	Treas. authorized as Collector	N/A	N/A	None				
Board of Assessors	MGL VII, Ch 41, Sec. 1	Elected	Annually	1 per year	3	Chair: \$3030, Members \$2200				
School Committee	MGL VII, Ch 41, Sec. 1	Elected	Annually	2 per year	6	None				
Board of Health	MGL VII, Ch 41, Sec. 1; MGL Ch. 111	Elected	Annually	1 per year	3	None				
Housing Authority	MGL Title XVII, Ch. 121b	Elected	Annually	2 per year	5*	Paid through Commonwealth				
<u>Elected Per MA General Law and Belmont Representative Town Meeting Act</u>										

Moderator	Belmont Representative Town Meeting Act	Elected	Annually	1	1	\$450, voted at Town Meeting	
<u>MGL VII, Ch 41 Positions changed from Elected to Appointed per MGL VII, Ch. 41, Sec 1B and Town Vote and Town Meeting</u>							
Assistant Assessing	MGL VII, Ch 41, Sec. 1	Appointed	Appointed by Board of Assessors	N/A	N/A	Salaried position	
Town Auditor	MGL VII, Ch 41, Sec. 1; BGB 202-10 Ch 41-55	N/A	Town Acct authorized as Auditor	N/A	1	Town Acct salaried position	
Highway Surveyor(s) or Road Commissioner(s)	MGL VII, Ch 41, Sec. 1; MGL VII, Ch 41, Sec 69D	Eliminated	Public Works Consolidation, 2003	N/A	N/A	None	
Water Advisory Board	MGL VII, Ch 41; BGB, Sec 40-330	Appointed	Public Works Consolidation, 2003	N/A	N/A	None	
Sewer Commissioners	MGL VII, Ch 41, Sec. 1	Eliminated	Public Works Consolidation, 2003	N/A	N/A	None	
Tree Warden	MGL VII, Ch 41, Sec. 1; BGB 202-10 Ch 41-106	Appointed	N/A	N/A	1	DPW Dept head; Small stipend	
Constables	MGL VII, Ch 41, Sec. 1	Appointed	N/A	N/A	5	None	
<u>Elected Per Town By-laws</u>							
Board of Cemetery	MGL Ch. 114, 22-26; BGB 40-215	Elected	Annually	1 per year	3	None	
Board of Trustees of the Public Library	BGB 40-225	Elected	Annually	2 per year	6	None	
<u>Select Board -Designated as Board of these Entities Per Town By-laws</u>							
Belmont Municipal Light Board	BGB 40-200	Select Board	N/A	N/A	3	None	
Parks Commissioners	BGB 40-200	Select Board	N/A	N/A	3	None	
Board of Survey	BGB 40-200	Select Board	N/A	N/A	3	None	

Independent Boards							
Retirement Board**	MGL IV, Ch 32, Sec 20	Independent		**	5		
Note: The Select Board and the School Committee are the only boards that are required by Massachusetts law to be elected by Town wide vote.							
All other positions may be appointed by provision of laws or charter approved by town vote.							
By law, the Select Board is authorized to act as Sewer Commissioners and the Board of Health if other provisions are not made.							
Town vote is required to combine the Treasurer and Collector positions, to authorize the Town Accountant to act as Auditor							
(and abolish the auditor position), to have the road commissioners act as sewer commissioners, to establish assistant assessors, and to appoint the tree warden and constables.							
All other town officers shall be appointed by the selectmen unless other provision is made by law or by vote of the town.							
* The Belmont Housing Authority has four elected members, plus one member appointed by the State.							
**The Belmont Retirement Board consists of five members: two members elected by active and retired members of the system, one appointed by the Select B							
the Town Accountant, and one elected by the four other members.							
August 2021							

IDEA #219 – CHANGE OPEN MEETING LAW

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Change open meeting law to allow municipal gov't to operate more like private enterprise

Other ideas included in this report

- None

Idea intent

The intent of this idea appears to be that Belmont boards and committees would be able to work more efficiently and effectively if they were no longer constrained by some or all of the requirements of the Massachusetts Open Meeting Law. Open Meeting Law requires public bodies to deliberate only in meetings that are open to the public and called with sufficient notice for public attendance, unless the topic is a narrowly defined legal or personnel matter, in which case the body is allowed to meet in executive session and then report on its deliberations publicly.

Weighted Final Score: 10

(Financial Impact: 1, Operational Impact: 0, Time Scale: 1, Ease of Implementation: 0)

Background Information

The Commonwealth of Massachusetts first adopted the Open Meeting Law in 1958 and the law has been revised in 1975 and 2010. Its intent is to ensure that policy decisions that affect the public should be made in a way that is open to public scrutiny and input. OML requires meetings to be announced with sufficient advance notice, deliberations be done in a way that allows for the public to observe the process, and for detailed minutes of meetings to be posted publicly.

Text of the MA Open Meeting Law:

<https://www.mass.gov/files/documents/2017/10/12/OML%20Text.pdf>

Regulations for implementation of the Open Meeting Law:

<https://www.mass.gov/files/documents/2017/09/25/New%20OML%20Regulations%20%28Clean%20version%29.pdf>

OML provides Belmont boards and committees with strict rules for how they conduct their business. These rules sometimes present challenges for public bodies. For example, the requirement for 48 hours public notice before a meeting can be held prevents a group from acting quickly to respond to urgent matters. However, these strict rules also ensure that the public has the opportunity to express feedback on decisions that are being made and likely makes for policy outcomes that are more accountable to the public.

On balance, the logistical advantages of eliminating some or all of the requirements of OML would likely be outweighed by a breakdown in transparency and accountability in governance. Public bodies often make decisions that require balancing conflicting perspectives among residents. In these cases, it's often impossible to please everyone. But deliberating publicly allows the public to observe the decision-making process and have input before a final decision is made. Without this public deliberation, public dissatisfaction with policy decisions would likely increase significantly.

Recommendations

- Relaxation of some or all of the requirements of the Massachusetts Open Meeting Law could lead to some efficiency in public bodies ability to act, but there would appear to be limited financial impact from this change.
- On a practical level, changing the impact of OML on Belmont boards and committees would require an act of the Massachusetts Legislature to either exempt Belmont from all or part of OML or to revise or eliminate the OML statewide. Either approach would require a significant effort and would be unlikely to result in change, because there does not appear to be a groundswell of support for either option.
- OML has been revised for the COVID-19 public health emergency, allowing public bodies to hold meetings remotely during the duration of the COVID-19 emergency. It is likely that there will be permanent revisions to OML that allow for some remote participation by members of the public even after the COVID-19 emergency is over. Other changes may be made to the OML in the future, but likely only in ways that improve public access to deliberations.

Next step

- None

Further Reading

- **Resources for Boards, Committees & Commissions: Open Meeting Law & Ethics**
<https://www.belmont-ma.gov/town-clerk/pages/resources-for-boards-committees-and-commissions-open-meeting-law-ethics>
- **The Open Meeting Law**
<https://www.mass.gov/the-open-meeting-law>
- **Open Meeting Law Guide and Educational Materials**
<https://www.mass.gov/doc/open-meeting-law-guide-and-educational-materials-0/download>

IDEA #220 – PROPERTY TAX REFUNDS

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Consider refunding taxpayers a portion of taxes paid in this past year given costs must have been less and services were reduced.

Other ideas included in this report

- None

Idea intent

To the extent that the Town saved money as a result of the COVID-19 pandemic, the Town should refund any savings proportionally to all taxpayers.

Weighted Final Score: 14

(Financial Impact: 0, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

Belmont's Free Cash is certified annually by the Massachusetts Department of Revenue. The amount certified as of July 1, 2020 is \$11,239,464. This is a record high level for Belmont. The increase in Free Cash reflects the Town's conservative estimates of revenues and other decisions made to manage the unknown financial impacts created by COVID-19, such as controlling spending, freezing hiring. And maximizing available Federal and State reimbursements.

However, the idea to issue property tax refunds is being ruled out because the FY22 Budget has already been approved by 2021 Annual Town Meeting. Departmental turnbacks that resulted from cost savings during the COVID-19 pandemic have already been appropriated: the FY22 Budget includes \$7.11 million in Free Cash, up 88% from the \$3.8 million used in FY21.

The leftover Free Cash balance after FY22 appropriated will be \$4.1 million, or 2.9% of General Fund revenues. This is below the minimum recommended Select Board/Warrant Committee guideline of maintaining Free Cash balances of 3-5% of General Fund revenues.

Regardless of Belmont's specific financial situation in FY21-FY22, the idea does raise the question of how municipalities can reduce taxes given reduced costs. In response, the first point is that the Town is not required to tax all the way up to its levy limit. If the Free Cash balance were sufficient to balance the budget without taxing up to the levy limit, the amount of revenues needed to be raised through property taxes would be reduced. The difference between the levy limit and the actual levy is called excess levy capacity, and it is within the law under Proposition 2½ for a community to have excess levy capacity in one year and then to levy up to its new levy limit in the following year.

If reduced costs were expected to be persistent—unlike the unusual impacts of a pandemic—the Town may consider that Proposition 2½ allows a community to reduce its levy limit by passing an override. A majority vote of the Select Board allows an override question to be placed on a town-wide ballot and requires a majority vote of approval by the electorate. If passed, the override results in a permanent decrease in the levy limit of a community because it reduces the base upon which levy limits are calculated for future years.

SCIG is not recommending in this write-up that Belmont can currently afford either significant one-time excess levy capacity or an override but is simply describing those mechanisms for clarity.

Recommendations

- None

Next Steps

- None

Further Reading

- FY20 Unreserved Fund Balance (Free Cash) Certification Announcement
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/free_cash_certification_from_the_town_administrators_office.pdf
- Warrant Committee Report FY 2021 Budget
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/fy21_warrant_committee_report.pdf
- Levy Limits: A Primer on Proposition 2½
<https://archives.lib.state.ma.us/handle/2452/127759>

IDEA #221 – IMPLEMENT 311 SYSTEM FOR NON-EMERGENCY REQUESTS

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Implement 311 system for non-emergency requests. Have a website to create ticket with file attachments for these requests and be able to check on status. Examples are trees down, potholes. See Cambridge/Boston for similar implementations

Other ideas included in this report

- None

Idea intent

Currently, Belmont residents use the non-emergency Belmont Police phone number or contact Town departments directly to report a variety of issues or requests. An additional option is to implement a technology solution where residents can submit their requests using a website or a mobile app. The requests can be tracked as tickets in which the Town respondent can update its progress and the requestor would receive notifications of its status. The digital history of the tickets provides an opportunity to data mine all the requests for analysis on response time, resource allocation, and other metrics.

Weighted Final Score: 34

(Financial Impact: 0, Operational Impact: 4, Time Scale: 3, Ease of Implementation: 3)

Background Information

Many municipalities offer a digital 311 application where residents can submit service requests through a mobile app, the municipality's website, or a call center. These include reporting potholes, tree maintenance or other non-emergency inquiries. There are several vendors that offer a 311 system either embedded in a Town website or a standalone service. The choice of vendor is dependent on a compatible work order system so that the reported tickets can route to the appropriate Town department. Previously Belmont had used [WebQA \(now GovQA\)](#) for 311 requests but it did not integrate with Town systems. If there is no integration with the Town's work order system, then requests reported to the 311 system would require manual entry into the Town work order system. Updates to the ticket would then require the respondent to update both the Town work order system and the 311 application.

Per SCIG Idea #46: Work Order Systems to Guide Efficiencies, Belmont departments use several different work order solutions. Many vendors of a 311 system also offer additional software solutions that include request and workflow management. The Town should consider a 311 system as part of a broader software solution for the Town because interoperability among other software deployments is crucial for a cohesive system. Therefore, selecting a vendor would require input from several Town departments.

The [Belmont Website Renewal Committee](#) is also considering a 311 application as a feature in their research into a new Town website. CivicPlus, the current Belmont town website vendor, offers the 311 application [SeeClickFix](#). A bundled package could provide cost, implementation, and support savings.

Criteria for a 311 vendor include:

- Must integrate with existing work order systems and other relevant Town software, or the vendor should offer an integrated 311 request and workflow management solution that can be adopted throughout the Town and serve the needs of the departments if an existing solution is to be replaced.
- Must have sufficient software support in case of an outage or support issue.
- Must be an actively maintained application receiving upgrades on an acceptable cadence. If a product were to lose vendor support, costs to switch systems in the future could be burdensome both in dollars and people hours.
- Resident facing user interfaces (mobile app, website forms) should have Town of Belmont branding so that it is recognized by residents as an official Town of Belmont application.

Recommendations

- A 311 system should be pursued that gives residents the ability to report issues through the Town website and a mobile app.
- Consider the vendor of the 311 system in the broader context of software solutions deployed in the Town such that the departments requiring access to reported tickets can keep an organized workflow. (See also Idea #46 Work Order System to Guide Efficiency.)

Next Steps

- Await the report from the Website Renewal Committee and follow its suggested recommendation and next steps regarding 311 integrations. After which, the Town should begin the required procurement process.

Further Reading

- *Requirements for US 311 platforms. Sample RFPS for 311 software vendors*
<https://askwonder.com/research/requirements-us-311-platforms-ik2ho6l54>
- *Spreadsheet of RFPs in above report*
<https://docs.google.com/spreadsheets/d/1qRrNGsPdbHrR7dt8RL7aUiiyGZIKGsfOtIMGuIzcvXM/edit>
- *City of Chelsea, MA RFP for DPW Work Order System and 311 Customer Relationship Management System*
<https://www.chelseama.gov/purchasing/pages/rfp-2019-204-dpw-work-order-system-and-311-customer-relationship-management-system>

IDEA #224 – MUNICIPAL BROADBAND INTERNET

Report Status: Fully Reviewed

Researched by: Travis Franck

Original Idea Text as Submitted

Town to provide municipal broadband system to generate new revenue stream. Leverage BLMD infrastructure to implement. See Chattanooga, TN.

Other ideas included in this report

- None

Idea intent

Provide a municipal option to Comcast and Verizon for home internet access.

Weighted Final Score: N/A (it could be implemented as enterprise fund or general budget; the pros/cons need to be considered.)

Background Information

Across the country there is growing interest in municipal broadband. According to estimate, over 900 communities have working broadband systems serving their communities (<https://muninetworks.org/communitymap>).

In Massachusetts, several communities operate broadband for their residents. The following map shows location of public broadband in the area.

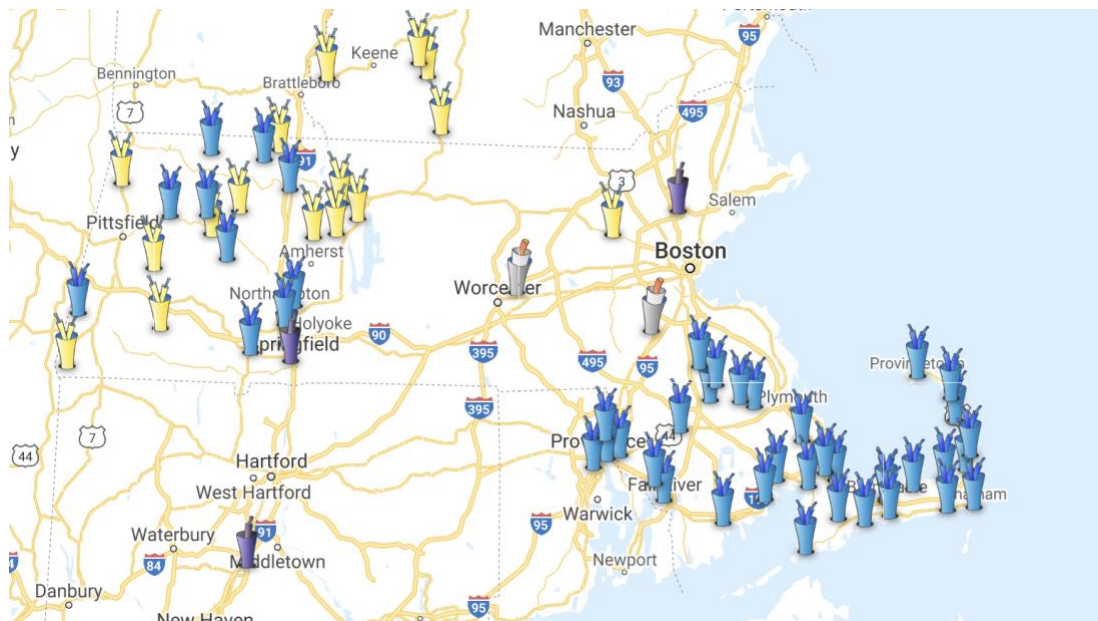


Figure 2 – Municipal broadband location near Belmont. Source: <https://muninetworks.org/communitymap>

Belmont Light began exploring the possibility of offering broadband in 2019 by hiring Fujitsu to conduct a high-level, first-order assessment of the business case. Specifically, Belmont Light explored a fiber optic broadband system in the town. The first version of the Fujitsu study estimated construction costs at \$28-35 million for a town-wide fiber network to municipal buildings, schools, homes, and businesses. A revised report (presented at a Light Board meeting on July 19, 2021; link below) concluded that Belmont Light would have to spend \$14-17million for construction, with the differences largely stemming from assumptions of the amount of existing resources (e.g., buildings and underground piping) that Belmont Light could take advantage of to build out fiber.

The annual cashflow was mostly negative in the first version of the study (-\$2mil to \$0.56mil) and positive with the revised estimate (\$1.2mil to \$2.6mil).

Overall, a takeaway from the Fujitsu study is that this undertaking would be a major capital project. The business case needs to be studied more carefully to make sure the expenditure is most likely going to be a positive for Belmont Light and the town.

Case studies from other communities should be carefully examined to think about municipal broadband in Belmont. Locally, Concord Municipal Light operates a fiber network that appears to have high satisfaction and affordable internet rates. Braintree had been operating broadband until December 2021, when they sold their internet business to Comcast (links below). New municipalities, like Holyoke and Easthampton, are actively consider installing fiber (links below), and these communities could be contacted also to consider their perspective. In 2021, after two years of study, an Easthampton committee concluded that creating a municipal broadband utility would be the correct choice for the community.

Outside of Massachusetts there have been several success stories. A study entitled “How Three Communities Built Next-Generation Networks” (link below) discusses many different pros and cons of the projects in Chattanooga TN, Bristol VA, and Lafayette LA. Difficulties include lobbying by incumbents (e.g., Comcast), communication with residents, and capacity and skills at the local utility.

The advantages include better customer service, keeping the money local, local employment opportunities, a smarter utility grid, and faster internet for low-income households. A study specific to Chattanooga, TN, concluded the broadband project had a high ROI (10 years) and over \$2billion in local benefits. Chattanooga is a bigger community that had limited broadband options before constructing their broadband system. A takeaway from these cases studies is that everyone community is different but there are broadband business models that can succeed.

Municipal broadband in Belmont would provide residents and businesses with an additional choice of internet provider. Belmont Light has a proven track record of high quality, responsive customer service, including few electricity outages and fast response times when an outage occurs. A broadband business operated by Belmont Light would building on this track record of being a responsive, town-owned department. Additionally, the revenue spent on internet access would stay in the town, supporting local jobs and increase town revenue.

The financial impact of broadband on Belmont finances could not be estimated directly yet for this report. Importantly, Belmont Light’s current electricity operations are separate from the Town’s general funds, as required by state law. The broadband business finances could be setup

in two main ways: 1) and enterprise fund, or 2) Belmont's general fund. The Massachusetts Division of Local Services publish a guidance memo entitle "Last Mile Broadband Project Financial Guidance" in 2017 that helps clarify these options. The current understanding at Belmont Light is that only towns that have a municipal light plant can enter the broadband market (implied in the memo also), but the finances could be setup either way.

For this report the Department of Telecommunications and Cable was contacted and provided the 2017 guidance memo. They suggested a next step of contacting the Division of Local Services directly (suggested contact below) if there are further questions about financial arrangements. Additionally, the State has a Mass Tech, which could help provide further guidance about deploying a local broadband system (see Further Reading for links).

One concern raised about investing a fiber network is the risk of obsolescence given the rise in wireless technologies like 5G. At this time, fiber is still considered the best technology for fast, reliable internet to homes and businesses. Unlike copper wires with physical limitations, the equipment on either end of the fiber cable can be upgraded to in the future to provide faster speeds in the future. Additionally, as wireless phone companies look to deploy 5G towers in Belmont, fiber will be used to connect those towers to the internet, and Belmont Light could be the provider of that cell tower internet service. While 5G and satellite internet options should be considered when reviewing the business case for municipal broadband, fiber appears to remain competitive and essential in the coming decades.

An additional concern raised in conversation with Belmont Light is the current capacity of Belmont Light to manage a large capital project. Belmont Light has expertise in managing capital projects and building infrastructure but their currently involved in upgrading the local electricity distribution network, with a goal of decommissioning the three substations in town. This project is important to down because it will make real estate available for other economic development (namely the Belmont Light building on Concord Avenue). This concern doesn't preclude a broadband system but should be considered by the Light Board and other relevant decisionmakers.

Recommendations

- The Municipal Light Board for Belmont Light should take the lead to explore this idea further.
- Belmont and Belmont Light should continue to evaluate the business case for municipal broadband, including deeper understanding of other local operators' experiences and national case studies
- The town and Belmont Light should discuss different financial arrangements for how this service would operate.

Next Steps

- The Light Board should receive a briefing from the General Manager including the current consultant reports and operational impact a broadband service could have on Belmont Light.

- Belmont Light and/or Light Board should contact local municipal broadband operators (e.g., Concord, Braintree, etc.) to understand the market conditions and their operating environment
- The Light Board should authorize the Detailed Engineering Design, mentioned on July 19, 2021, Light Board meeting, that would provide additional estimates of the business opportunity.

Further Reading

- Belmont Municipal Light Board meeting (7/19/2021) via Belmont Media Center
https://videoplayer.telvue.com/player/uClcIN88BHKHJoveFoaVN_8_5Tg72P0o/playlists/6575/media/656402
- Report: “How Three Communities Built Next-Generation Networks”
<https://cdn.ilsr.org/wp-content/uploads/2012/04/muni-bb-speed-light.pdf>
- [Holyoke] HG&E continues to explore possibility of municipal fiber network
<https://www.thereReminder.com/localnews/holyoke/hge-continues-to-explore-possibility-of-municipal/>
- Easthampton meeting minutes, including a committee report with their broadband evaluation conclusion
https://easthamptonma.gov/AgendaCenter/ViewFile/Agenda/_03032021-695
- Website of the Chattanooga Gig network websites:
 - <http://chattanoogaGig.com>
 - <https://epb.com/fi-speed-internet/>
- Tech Co Article
<https://tech.co/news/chattanooga-fastest-internet-usa-2018-08>
- “Chattanooga Uses Municipal Broadband to Connect Students in Historic Announcement”
<https://muninetworks.org/content/chattanooga-uses-municipal-broadband-connect-students-historic-announcement>
- “Chattanooga’s municipal broadband pays off with \$2.69 billion in benefits”
<https://cities-today.com/chattanoogas-municipal-broadband-pays-off-with-2-69-billion-in-benefits/>
- Braintree press release about sale to Comcast
<https://www.beldinternet.com>
- Massachusetts Regulator website
<https://www.mass.gov/orgs/departments-of-telecommunications-and-cable>
- Suggested DLS contact:
Sean Cronin, Senior Deputy Commissioner
croninse@dor.state.ma.us (617) 626-2381
- Mass Tech links:
<https://broadband.masstech.org>
<https://broadband.masstech.org/building-networks/last-mile/program-unserved-towns/last-mile-program-policy>
- See Appendix D – DLS Memo: Last Mile Broadband Project Financial Guidance
- See Appendix E – Fujitsu Broadband Analysis for Belmont Light

IDEA #227 – ALLOW WORK FROM HOME FOR TOWN EMPLOYEES

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Work from home opportunities for municipal employees to save space. Free up space to be used for other purposes. Reduce need for modular offices.

Other ideas included in this report

- None

Idea intent

Town Employee Work From Home Option

Weighted Final Score: 40

(Financial Impact: 2, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 4)

Background Information

The Town of Belmont responded to Governor Baker’s Covid-19 emergency orders by closing non-emergency town offices. As restrictions have been lifted, Town Hall, the Library and Town Departments have reopened.

With the Covid-19 lock down, the Town, like all employers, now has long-term experience with employees working from home, and can consider opportunities for office-based workers to work from home. This can be an attractive incentive for some employees, fostering greater employee satisfaction, and the Town can redeploy the space occupied by workers who will be permanently remote.

Recommendations

- Identify positions/work that can be done remotely or in a hybrid working model successfully on a permanent basis.
- Develop policies to offer a remote work option and necessary supports.
- Consider “hot desking” when evaluating the hybrid working model.
- Catalogue space savings and alternative uses.

Further Reading

- None

IDEA #236 – MOVE SCHOOL DEPARTMENT UNION NEGOTIATIONS TO A NEUTRAL PARTY

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Move union negotiations from school committee to more neutral party. Avoids any conflict/bias towards educators. Possible town benefit in reduced compensation/benefits.

Other ideas included in this report

- None

Idea intent

A more neutral party might balance the desires of the school community with the financial realities of the town.

Weighted Final Score: 0

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

Salaries, wages and benefits represented 85% of the total school budget in FY21 and 90% of total employees were subject to collective bargaining.

By Massachusetts law (MGL c. 150E, section 1), the School Committee or its designated representative serves as the “municipal employer” of school employees for collective bargaining purposes. The Town Administrator, as CEO of the town, participates and votes as a member of the school committee. Under the statute, the municipal official's role is to participate and vote "as a member of the school committee," whenever the school committee as a whole takes up the collective bargaining agreement. The statute does not guarantee that the municipal official will be at the negotiating table, unless the school committee as a whole is involved in the negotiations. The municipal official has the same rights and responsibilities of participation as any other member of the school committee in relation to collective bargaining, including the right to be kept informed about the progress of negotiations.

The Town Administrator is the municipal official included in negotiations and to be kept informed of School Committee negotiations. The Town Administrator will also vote on significant changes to the contract in accordance with the current law.

A summary of school bargaining units and a breakdown of union and non-union school employees is provided below.

Recommendations

Although the School committee legally controls collective bargaining for school employees, the SCIG recommends the following:

- That the Select Board and the School Committee work together to bring contracts into sync, where appropriate (e.g., health care employee/employer splits). As a first step, the Town Administrator and School Committee should outline the variances among the different collective bargaining unit contracts.
- That the Select Board and Town Administrator provide an annual top-down overview of budget guidelines and fiscal constraints. In FY21, salaries and benefits represented 85% of the total school department operating budget and impact long term costs such as health care, OPEB and pensions. As a result, negotiated changes in school bargaining contracts drive both the school budget as well as impact the overall fiscal outlook for the town.

Next Steps

- Select Board, School Committee.

Further Reading

- Massachusetts Department of Elementary and Secondary Education (DESE) Advisory on State Governance:
<https://www.doe.mass.edu/lawsregs/advisory/cm1115gov.html>

School Department Collective Bargaining

Employees as of Nov. 2021	Schools	% of Total Employees
Union	565	90.3%
Non-Union	61	9.7%
Total	626	100%

Note: The numbers include all full-time and part-time individual employees that meet the contract terms and will differ from Full-Time Equivalents (FTEs), a unit that measures employee hours equivalent to full-time workers.

School Department Collective Bargaining Units	Representing	Current Contract Dates
American Federation of State, County and Municipal Employees (AFSCME)	Cafeteria, Maintenance, and Custodial Workers	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit A	Teachers and instructional personnel (including long term subs), nurses, physical and occupational therapists, etc.	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit B	Directors, Assistant Directors and Assistant Principals	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit C	Secretaries and clerical aides	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021
Belmont Education Association (BEA) Unit D	Professional Aides, Classroom Assistants, Tutors and Campus Monitors	July 1, 2017-June 30, 2020 Memorandum of Understanding (MOU) 2020-2021

As of Fall 2021. Unless otherwise noted, collective bargaining units exclude managerial and executive positions.

Sources: Mike McAllister, School Department Director of Human Capital, Shawna Healy, Town Human Resources Director, School and Town human resources web pages.

IDEA #240 – INVESTMENT AND FINANCIAL ADVISORS

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Explore alternative financial products and financial advisors/firms to quickly adapt to market conditions to refinance or invest town funds (retirement funds, etc.) and reduce high interest rates.

Other ideas included in this report

- None

Idea Intent

To maximize the return on investments the Town makes in the market through the use of professional financial advisors. To reduce the Town's debt service fees through refinancing of the Town's debt stack.

Weighted Final Score: N/A (already implemented)

Background Information

The Treasurer's Department has three primary responsibilities:

1. **Treasury Management:** The Treasurer is the cash manager of the town and is responsible for the deposit, investment, and disbursement of town funds. The Treasurer is authorized by Town Meeting to issue debt on behalf of the Town with the approval of the Select Board. The banking services for the Town are selected, proposed, and managed by the Treasurer.
2. **Collection:** The Department collects real estate, personal property, and excise taxes and utility payments.
3. **Parking:** The Department processes parking violations, payments, and responds to inquiries.

The Treasury Management goals are as follows:

- Provide timely and accurate data
- Maximize investment earnings
- Increase direct deposits

In speaking with the Town's current Treasurer, Floyd Carmen, he provided the following additional comments:

- The Town currently has professional relationships with three financial investment advisors:
 - Ameriprise Financial

- Morgan Stanley
- Abbey Capital
- All three financial investment advisors are knowledgeable in municipal investing.
- All three financial investment advisors invest town funds in accordance with the Massachusetts list of legal investments pursuant to Mass General Law Chapter 167, Section 15A
- The Treasurer’s goal is to ensure that there is secure and steady growth, avoiding significant market up-turns and down-turns.
- Municipal Bond interest rates have been extremely low over the past several years. The Treasurer monitors the Municipal Bond market on a consolidated basis and refinances outstanding debt that the Town has when it results in a significant reduction in debt service costs.
- Investment earnings as of 12/31/20 was 25 basis points greater than the annual one-year term CD rate.
- The Capital Endowment fund’s investment return for the calendar year 2021 was approximately 14.1%.

Recommendations and Next Steps

The Treasurer should continue to utilize professional investment advisors to invest Town funds consistent with the Investment Strategy that has been established. In addition, the Treasurer should continue to monitor the Municipal Bond market and refinance Town debt when it results in reduction of debt service costs.

Further Reading

- [Town of Belmont, Fiscal Year 2022 Budget Book](https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf)
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf
- [The Commonwealth of Massachusetts Office of the Commissioner of Banks List of Legal Investments pursuant to Mass. General Law Chapter 167, Section 15A.](https://www.mass.gov/info-details/list-of-legal-investments)
https://www.mass.gov/info-details/list-of-legal-investments

IDEA #241 – ISSUE SPEEDING TICKETS THROUGH TRAFFIC CAMERAS

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Install traffic cameras in high-speed areas to increase revenue from fines. Reduces need for police officers in traffic patrol. Increases public safety

Other ideas included in this report

- None

Idea intent

The idea is to add revenue through issuance of speeding tickets from an automated traffic camera system.

Weighted Final Score: 17

(Financial Impact: 1, Operational Impact: 2, Time Scale: 1, Ease of Implementation: 0)

Background Information

Currently speed cameras are not allowed by law because the existing mechanism for moving violation tickets does not work for automated enforcement because the cameras do not provide a positive identification of the motorist as required by current law MA Chapter90C. The available enforcement technology is only able to read the license plate of the motor vehicle.

The Commonwealth of Massachusetts has a MA House Bill H.3706 titled “An Act Relative to Improving Safety on the Roads of the Commonwealth” currently pending in MA House legislature. This bill includes traffic cameras for red light violations only.

The Commonwealth of Massachusetts has a MA State Bill S.1545 and MA House Bill H.2532 titled “AUTOMATED ROAD SAFETY ENFORCEMENT PILOT PROGRAM” currently pending in MA state legislature. This bill includes automated ticketing of speeding violations as well as other motor vehicle infractions. The MA Senate bill is sponsored by William Brownsberger, Belmont’s MA State Senator, and is described in detail on his website (<https://willbrownsberger.com/automated-traffic-enforcement/>). If passed, cameras could be installed in intersections (1 per 2500 residents) and on school buses (unlimited) and be used for following “camera enforceable violations”:

- Failure to stop at a steady red light;
- Making an illegal right on a steady red light;
- Speeding;
- Passing a school bus when warning signals are activated;
- Blocking an intersection;

- Driving in a bus lane.

However, in safeguarding against municipal abuse or egregious ticketing, the following limitations of note would be applied:

- The maximum fine is limited to \$25.
- Municipalities must transfer any net profits from the use of cameras to the state.

Recommendations

- Should current legislation pass enabling automated moving violations, this idea can be revisited. Despite the seemingly lack of opportunity for revenue generation, it still may be a worthwhile public safety initiative to implement.

Next Steps

- None

Further Reading

- [Bill H.3706](https://malegislature.gov/Bills/192/H3706)
<https://malegislature.gov/Bills/192/H3706>
- [Bill H.2532](https://malegislature.gov/Bills/192/H2532/)
<https://malegislature.gov/Bills/192/H2532/>
- [Bill S.1545](https://malegislature.gov/Bills/192/S1545)
<https://malegislature.gov/Bills/192/S1545>
- <https://willbrownsberger.com/automated-traffic-enforcement/>

IDEA #250 – REVISIT SOLID WASTE CONTRACT

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Revisit solid waste disposal contract for next renewal; consider eliminating or scaling back bulky item and yard waste pickups. Consider more pay as you throw.

Other ideas included in this report

- 372 – Eliminate trash pickup

Idea intent

Evaluate possible avenues to reduce the costs for waste management

Weighted Final Score: 43

(Financial Impact: 4, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 3)

Background Information

Belmont currently has a temporary, 3-year Solid Waste and Recycling Committee “...established by the Select Board as a Committee to assist the Town in procuring a new collection contract and to consider possible enhancements in recycling efforts.” Given a group dedicated to exploring possible options to improve the town’s trash and recycling program, this report will be limited to a note about a specific opportunity to save by removing a premium requirement and the possibility this change might open up for regionalizing Belmont’s waste and recycling programs with Watertown.

Belmont’s DPW director noted that in 2013 or 2014 Belmont and Watertown made significant progress on potentially entering into a regional contract for waste management. In the end, the agreement fell through because Belmont required a 4-day schedule for pickup and Watertown wasn’t willing to pay the premium.

The rationale for requiring 4-day pickup was that Belmont never wanted a holiday to result in a Saturday pickup. At the time, many Belmont residents expressed concerns about Saturday pickups conflicting with soccer and other activities. According to the DPW Director, the premium costs for 4-day pickup in our current contract are about \$250,000 to \$300,000 a year.

Removing this premium might allow the dedicated committee to re-engage Watertown in discussions about a potential regionalized solid waste and recycling program.

Recommendations

The Solid Waste and Recycling Committee will make a dedicated, effort to fully explore and identify the best path forward for Belmont’s Solid Waste and Recycling programs.

Next Steps

- **The Solid Waste and Recycling Committee** should fully evaluate the potential savings that could be realized by removing the requirement that out waste and recycling be picked up on a 4-day schedule
- **The Town Administration and the Solid Waste and Recycling Committee** should work together to approach Watertown about the possibility of a regional Solid Waste and Recycling program.
- **The Select Board** should hold interim meetings with the Solid Waste and Recycling Committee to raise the visibility of this idea.

Further Reading

- Solid Waste and Recycling Committee
<https://www.belmont-ma.gov/solid-waste-and-recycling-committee>
- Recycling Calendar
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/recycle_calendar_fy22.pdf

IDEA #252 – EVALUATE TOWN ORGANIZATIONAL STRUCTURE

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Evaluate organization structure of town departments to eliminate unnecessary personnel (supervisors, etc.)

Other ideas linked to this report

- Idea #353 – Eliminate all Unnecessary Departments

Weighted Final Score: N/A

Background Information

This idea was not evaluated.

Themes surfaced from the many ideas evaluated which point to opportunities in:

- Centralization/Standardization
- Outsourcing
- Collaboration with neighboring communities/Regionalization

Additionally, there were other ideas that posed the elimination of unnecessary departments (Idea #353) and changes to the form of government (Idea #413 and Idea #216).

The Select Board review of the SCIG report could serve as an opportunity for Belmont to reorganize itself to facilitate improved decision making, minimize redundancy and costs, and potentially change how services are delivered to its residents.

Recommendations

Should Belmont look to reorganize and change how its services are delivered to residents, the Town Administrator, School Department Superintendent, and Department Managers should work together to optimize, reallocate, and/or reduce headcount to support any organizational and work system/process changes.

Next Steps

- No Next Steps are required.

IDEA #254 – MAXIMIZE CPA FUNDING FOR BELMONT STUDIES

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Use CPA funds to conduct relevant studies instead of town funds. Ensure mechanism in place that studies are conducted under CPA if applicable

Other ideas included in this report

- None

Idea intent

This idea is aimed at ensuring that the Town maximizes CPA (Community Preservation Act) funds, rather than scarce Town resources, to conduct studies allowable under the CPA.

Weighted Final Score: 50

(Financial Impact: 2, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 5)

Background Information

On November 2, 2010, Belmont voted to adopt the Community Preservation Act (CPA). The CPA provides a funding source for Open Space (including outdoor Recreational Land), Community Housing, and Historic Resources.

Belmont raises money for its Community Preservation Fund by imposing a 1.5% surcharge on local real estate taxes. Belmont collects close to \$1 million/year from the property tax surcharge. Additionally, each year the state distributes limited matching funds to the towns that have passed the CPA. These funds are collected from existing fees on real estate transactions at the Registry of Deeds.

The Community Preservation Committee (CPC) screens projects for Town Meeting, who is responsible for the appropriation of CPA funds. Preliminary Applications for CPA funds are generally available in the summer and due in September/October. Final Applications are generally due in late November. Sponsors of projects are encouraged to speak or meet with the CPC committee ahead of these deadlines. Further information is available in Belmont's

Community Preservation Plan

Belmont's current Community Preservation Committee is proactive in communicating its application schedule so that prospective projects are aware of the process and deadlines, and is in communication with relevant committees and Town offices that address Open Space, Recreational Land, Community/Affordable Housing and Historic Resources about respective studies and the process.

Community Preservation Fund Allowable Spending Purposes

	Open Space	Historic	Recreation	Housing
Acquire	Yes	Yes	Yes	Yes
Create	Yes	No	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	No	No	No	Yes
Rehabilitate and/or Restore	Yes, if acquired or created with CPA funds	Yes	Yes (new 7/8/2012)	Yes, if acquired or created with CPA funds

Chart adapted from "Recent Developments in Municipal Law", Massachusetts Department of Revenue, October 2012.

Recommendations

Belmont's Community Preservation Committee should continue its proactive approach to outreach and communications within the Town to ensure that planned studies relevant to Open Space, Recreational Land, Community/Affordable Housing and Historical Structures are funneled appropriately through the CPC process for funding.

Next Steps

- None

Further Reading

- May 2021 Annual CPC Report to Town Meeting (see pages 17-20 for information on funded projects)
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/2021_annual_cpc_report_to_town_meeting.pdf
- Town of Belmont Community Preservation Plan 2023
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/2021-09-14_fy23_cpa_plan.pdf
- About the Community Preservation Act
<https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/file/file/cpa.pdf>

IDEA #262 – NEW GROWTH FROM CONDO CONVERSION

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Belmont is having several houses being taken down and rebuilding with that said the property gets divided. Where there was a two-family existing and getting real estate taxed as one amount. The new condo is built, the land is now divided into two real estate taxes. These new real estate taxes should be going towards revenue for Belmont. If this had been happening, then where is this new income for Belmont going?

Other ideas included in this report

- None

Idea intent

This idea seems to imply that the Town of Belmont is not receiving additional tax revenue from multi-family homes that were renovated, converted to condos, and sold.

Weighted Final Score: N/A (already implemented)

Background Information

During condo conversion, a Master Deed is recorded which defines the interest and ownership of each unit. This change is not immediately reflected on the real estate tax bills. Per [Town of Belmont Converting to Condominiums Pamphlet](#), the real estate tax bills for any given fiscal year relate to the property's status and attributes as of the January 1 preceding that fiscal year. This date is known as the assessment date. Until then, an "Apportionment of the Real Estate Tax Bill" is filed by the new owners to the Town who will divide the current quarter's tax bill based on the ownership percentage interest specified in the Master Deed.

When the units are assessed separately on the assessment date, additional revenue, or income to the Town from the increase in unit value, is recorded as "New Growth" and can be found on the annual budget report. This is true of any new construction or development in the Town.

Recommendations

- None

Next Steps

- None

Further Reading

- Town of Belmont Converting to Condominiums Pamphlet
<https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/condoconversionpamphlet.pdf>

IDEA #263 – REEVALUATE LARGE TOWN SALARIES

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Perhaps there should be salary caps on positions making very large amounts. Along with new hires to start below existing salaries and make known a salary cap. This exists for lower salary workers in the schools (i.e., unit D stops at step 5) but that is nothing to where the town would save such as bigger/higher positions would be savings.

Other ideas included in this report

- Idea #278 – Bring Town Administrator salary (and any other grossly inflated salaries) in line with state average.
- Idea #297 – Salary freeze for Town Administrator and no travel reimbursement for commute.
- Idea # 348 – Cut the salaries and benefits of Superintendent and Town Administrator.
- Idea # 388 – Cap all salaries at \$100,000.

Idea Intent

Financial savings may be realized by lowering the salaries and benefits of the larger town employment contracts.

Weighted Final Score: 27

(Financial Impact: 2, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

There are five separately negotiated non-union contracts for senior administrators: the Town Administrator, School Superintendent, Fire Chief, Police Chief, and Library Director. Each of these positions requires availability around the clock and/or outside of normal working hours. The four Town contracts were negotiated or renegotiated in FY21 or FY22 for three years and are in place until FY23 or beyond. The Superintendent's contract was renegotiated for five years, ending 2025, plus a one-year extension. The current contracts are legally binding; the next opportunity to freeze or change the terms will be in FY24 or beyond. In FY21, the Town Administrator and Library Director received zero increase in their salaries, in line with what was asked of non-union Town department employees. (The Fire Chief and Police Chief were not yet hired.)

The Select Board is responsible for the negotiation of the contracts for the Town Administrator, Fire Chief and Police Chief. By law, the School Committee is responsible for contractual negotiations with the Superintendent of Schools, and the Library Board of Trustees is responsible for the Library Director's compensation and contract. These contracts cover salary, benefits, liability insurance, vacation, sick and personal leave, as well as other types of market driven

compensation. The largest compensation packages in Belmont (and in most towns) are for the School Superintendent and the Town Administrator who, by law, act as Chief Executive Officer for the School Department and Town, respectively.

Municipalities pay market rates to attract and retain the best possible qualified candidates for critical administrative positions, in line with the expectations of the community. Market compensation is driven by prevailing conditions such as supply and demand as well as cost of living. The Massachusetts Municipal Association reports that the market for senior municipal positions has become increasingly competitive. The number of municipal administrative vacancies is increasing due to “baby boomer” retirements as well as resignations due to life choices (e.g., the Winchester Town Manager, who are resigned after less than three years in her position). At the same time, the pool of qualified candidates is smaller, as fewer people are willing to take on a job that requires long hours away from family or have other options in a competitive job market. This is particularly exacerbated in smaller communities because there is often thinner management depth—fewer qualified candidates qualified to fill vacancies—and more “churn”—turnover of those who have gained experience and move on to a larger community or a larger job elsewhere at the end of their contract.

Each of the Boards responsible for negotiation independent contracts in Belmont uses compensation information from neighboring towns and other identified peer towns to determine the market compensation for the position. The town does not use statewide average salaries because they do not reflect the cost of living, size and/or complexity of a job specific to Belmont, nor the pay scales necessary to hire qualified candidates in the Boston Metro area. The cost of living in the Boston metro area is much higher than elsewhere in the state, and that impacts the salaries and wages paid across all categories of jobs.

When renegotiating contracts for existing employees, boards weigh performance as well as the benefits of maintaining management stability against the potential cost and disruption caused by turnover in the position. The process of selecting a new administrator in “normal” times can take three to six months and often requires the same or greater market compensation as well as potential one-time expenses. In addition to the time, effort, and cost to recruit and select a new administrator or superintendent, even the most experienced administrator will need time to understand town dynamics and initiate changes or programs. In the face of a national pandemic, it seems logical that towns chose to retain existing management rather than face a months-long gap in leadership.

Compensation packages for certain critical municipal administrative positions have expanded significantly in the past five to ten years due to demand for highly qualified, high-performance personnel in a scarce market, producing “sticker shock” for taxpayers across many communities.

A table of current benchmarking for the five contracts is provided below in Further Reading. These peer analyses show that Belmont is in line with communities of similar size and nature, including neighboring towns. With respect to the two School Superintendent and Town Administrator, several observations are highlighted here:

- Salary ranges for Town Administrators/Managers (excluding Belmont) in 11 communities with budgets of \$100 million to \$200 million range from \$176,800 to \$221,800. The average TA/TM salary is \$200,000. Total compensation, including transportation, deferred compensation, insurance, etc.) for the 11 towns averages \$210,000.

- Salary ranges for School Superintendents range in 10 districts identified as comparable by the School Committee range from \$ 184,000 to \$298,300 and average (excluding Belmont) \$224,000. Total compensation, including deferred compensation, transportation and other allowances, for School Superintendents was \$229,900 for seven of the 11 towns for which information was available.
- Total compensation for town senior administrative positions increasingly includes other methods of pay, including deferred compensation (funds added to tax-free retirement accounts), health insurance reimbursement, reimbursement for cell phone plans, paid disability/life insurance policies, and retention pay. New hires are often able to negotiate signing bonuses and moving costs or other one-time compensation. For example, the Town Manager in Arlington is paid a \$24,000 per annum housing allowance (and recently moved from Arlington to Dedham, housing allowance intact). His total non-salary compensation is almost \$50,000 per annum.
- Salary increases for Town Administrators and School Superintendents did not abate during the pandemic years of FY21-22. In towns where administrators took 0% in FY21, that was accounted for in FY22 raises. Existing overall compensation is lower than the Boston area, Douglas, a town of 9,000 administrators are often “bumped” up from contract to contract to keep compensation in line with the market. Examples include Wayland and Canton’s Town Administrators, Bedford’s Town Manager, and superintendent positions in Acton-Boxborough and Hopkinton. We note that Wayland, Canton and Bedford are all smaller than Belmont with significantly smaller budgets and higher town administrator/manager compensation. Small, more rural towns have also had to pay to attract or keep key employees. Although, increased its Town Administrator’s salary by 21% (\$20,000) in FY21.

Recommendations

Compensation for senior administrative positions is driven by many factors, including skill sets, experience, supply and demand, and local market pressures.

- The SCIG recommends that the boards responsible for negotiating these contracts ensure that up-to date market information is used to negotiate terms and conditions for independent contracts. The goal should be to balance attracting and retaining highly qualified administrators, while also acknowledging the town’s fiscal constraints. The comparable information used by the appointing authority used to set senior administrator compensation varied significantly in depth and usefulness.
- The SCIG recommends the following adjustments to future contracts:
 - a. The Town should consider whether longer contracts or automatic extensions would smooth out contractual increases.
 - b. Eliminate retention pay; pay beyond contractual salary should be merit-based.
 - c. Eliminate or limit additional pay such as transportation and insurance stipends.
- The annual goals and objectives for each of these positions should include a financial or operational goal that incorporates a cost savings goal.
- The SCIG recommends that the five contracts be posted on the Town and School websites, as many other communities do, to provide transparency to taxpayers.

- The Select Board should consider formal contracts for other key positions, such as department heads.

Next Steps

1. Select Board, School Committee, Library Board to develop a template for comparing independent senior administrator compensation across peer communities. The template should include metrics such as size of community, candidate's experience, and length of time in the position here or elsewhere, as well as metrics specific to the position (i.e., enrollment or total circulation) and should include current contractual information for peer communities.
2. Town Administrator and School Committee to post all senior administrative contracts on the Town and School websites, as many other communities do.
3. Select Board and School Committee to include cost savings goal in administrator's annual goals and objectives.
4. Select Board to evaluate formal contracts for other key town employees.

Further Reading

- See the **Idea Matrix** (XLS file) for several different tables of analysis comparing position salaries with peer communities. These tables include:
 - Idea 263 TA Comps
 - Idea 263 Supt Comps
 - Idea 263 FD Comps
 - Idea 263 PD Comps
 - Idea 263 Library Dir Comps
-

IDEA #268 – PENSION LIABILITIES/RETIREMENT BOARD SAVINGS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Reduce the ~ \$10 million we apply to our unfunded pension liability each year, which increases by about 4-5% annually, and will hit about \$14 million by 2029. The town is aggressively pouring money into this line item to achieve 100% funding status by 2029 - 11 years before we are legally required to do so. The town has stated that hitting this funding mark by 2029 will enable it to then address its "Other Post Employment Benefits" (OPEB) obligations. That is a commendable goal but only a handful of communities in the state are seriously trying to tackle OPEB. Action at the state level will probably be required to handle this issue, which, unlike pension funding, is not the subject of any statutory funding requirements. If, like AAA Bond-Rated Newton, we extended our goal for achieving 100% funding status on our pension obligation to 2035, we would probably free up millions of dollars per year that could significantly reduce our structural deficit. *(Ed. Note: The Belmont Retirement Board extended the amortization to 2031 based on the 2020 actuarial review. Newton's full-funding date is 2030.)*³⁸

Other ideas included in this report

- Idea # 295: Revisit our timeline for paying off our retirement and healthcare funding deficits.
- Idea # 237: Invest retirement funds in PRIT as opposed to town self-run. Better investment returns, more secure, reduces expenses on retirement board (travel expenses, management fees, attorney)
- Idea # 281: According to warrant committee member, Elizabeth Dionne, she found a way to save \$1M by shifting pension plan investment to a state managed plan. Apparently, the town will not only get better returns, it will also save on fees. If you haven't already seen The Buzz interview of Elizabeth, I encourage you to listen. It makes perfect sense to me but it's unclear who can implement the change. I hope our town is looking into this brilliant suggestion.
- Idea # 290: This should be no surprise. It costs over a million a year to have the retirement pension fund managed locally. This has been looked at by Dr Epstein and found to be true. Though the SB has no control over the Retirement Board, if you want to save a million dollars a year, you will change that relationship, soon. Its time to stop making believe this isn't an issue. Its an insult. Every dollar of underperformance is a dollar we pay, every year to meet the obligation and schedule. Why is the target completion at 2030, and not 2035 or 2037? You don't seem to be able to grasp this issue because its "out of our hands". It is if you allow it to be. Its our money that they are mis-managing. NEPC has said (and logic tells you), that managing a small fund portfolio is inefficient compared to a

³⁸ <https://www.mass.gov/doc/newton-retirement-board-valuation-report-2021/download>

very large portfolio. The overlapping, duplicated costs and higher overheads and fees are a problem. I expect your response will be that these costs are not significant. That is not what was found when looked at in the aggregate. If you doubt these numbers, you should be determining them yourselves. Let me restate the number that Mr. Epstein and others have said: \$1million on average, per year. If you think that isn't worth addressing you aren't serious about structural reform at all.

- Idea # 281: I found this interesting article about an Andover approach to OPEB. something to consider.
<https://www.mma.org/andover-and-its-employees-team-up-to-tackle-unfunded-liabilities/>

Idea intent

Reduce the amount of pension costs paid annually from the General Fund budget. There are several ideas included in this write up:

1. Extend the amortization schedule of the unfunded pension liabilities to free up cash.
2. Shift investment of Retirement Board assets to the MA Public Retirement Investment Trust (PRIT) for strong likelihood of improved investment returns, which would mitigate the size of the unfunded pension liability
3. Investigate other ideas, such as the unfunded liability trust started by Andover, to offset the pension and OPEB liabilities of the town.

Weighted Final Score: 57

(Financial Impact: 4, Operational Impact: 6, Time Scale: 2, Ease of Implementation: 1)

Background Information

The Belmont Contributory Retirement System (“BCRS” or “System”) is an independent governmental unit that was created in 1938 to provide retirement benefits to town employees and their beneficiaries under the provisions of Massachusetts General Laws Chapter 32. The Belmont Retirement System is a multiple-employer, cost-sharing, contributory defined benefit pension plan covering all employees of the Town, except for School Department employees who serve in a teaching capacity. Teachers are members of the Commonwealth of Massachusetts Teachers’ Retirement System and do not participate at the local level. (Teachers are included in the Town’s “Other Pension Employment Benefits” (OPEB), which are primarily comprised of retirement health benefits). Enrollment in the retirement system is mandatory immediately upon the commencement of employment for all permanent employees working a minimum of 20 hours per week. Employees pay between 5% and 9% of their wages into the System, based on when they were hired. The System provides for retirement benefits up to a maximum of 80% of a member’s highest three-year average annual rate of regular compensation. Benefit payments are based upon a member’s age, length of creditable service, level of compensation, and group classification.

The System is overseen by a five-member board (“Retirement Board” or “Board”). By law, the Retirement Board and its responsibilities are governed by rules and regulations promulgated by the State’s Public Employee Retirement Administration Commission (PERAC). The Board is comprised of two members who are elected by the system participants, the Town Accountant, a member appointed by the Select Board (currently the Town Treasurer), and a fifth member selected by the other four. The Board does not report to the Town Administrator, or the Select

Board; nor, is the Board subject to Town bylaws. The payment of pension obligations and decisions regarding the amortization of the pension liability are solely at the discretion of the Retirement Board in consultation with its actuary and subject to the approval of PERAC. Under current state law, municipalities must fully fund pension liabilities by 2040. Belmont's current liability is currently scheduled to amortize by 2031. However, the estimated annual payments in the budget are determined by the amount of the actuarial liability, which is recalculated every two years, and length of time scheduled for the amortization of the liability, which is determined by the Retirement Board and approved by PERAC.

Impact on the General Fund Budget

Payment of pension obligations is a non-discretionary component of the Town's operating budget and included in the Town's fixed costs before appropriating operating expenditures. Every two years an actuarial review solicited by the Retirement Board forecasts total pension obligations based on information known and estimated at that time. Based on these actuarial calculations, the Retirement Board determines the projected annual amount necessary to pay current retirees (the "normal" cost) and the projected amount necessary to fully fund the unfunded pension liability (the "payment on projected unfunded actuarial accrued liability"), as well as the date the current unfunded liability will be fully funded. The Town is then obligated to fund these amounts – the "actuarially determined contribution" -- based on the schedule set by the Retirement Board and approved by (PERAC). In reality, the payment schedule is in place for the next two years after the actuarial report is prepared, after which time the actuarial accrued liability and the actuarially determined contribution are reset with a new actuarial analysis. In FY22, the General Fund budget includes normal costs of \$2,331,374 and an amortization payment of \$8,827,932, a total of \$11,263,933. These numbers include enterprise and housing trust pension obligations.

Future actuarial analyses might differ significantly from the current actuarial analysis. The altered analyses could stem from plan experiences that differ from the assumptions used to conduct the analysis, including different economic or demographic assumptions, different investment return assumptions, changes in salary and benefits assumptions, and changes in provisions or applicable law.

Impact of Actuarial Changes to the Pension Liability and the General Fund Payment Schedule

The chart below shows the changes in the total pension liability over the past four actuarial cycles. Pension obligations—the present-day value of forecasted benefits paid to eligible beneficiaries—have increased in each of the cycles. Pension assets—the available funds to meet these obligations—have also increased. Pension asset values are a result of contribution payments made by employees to the plan, contributions made by the Town, and income from investment of the funds. The unfunded liability is the difference between forecasted benefits owed to employees and the assets the system is projected to have available to fund those benefits.

Ideally, pension assets would increase faster than pension obligations and result in increasingly lower liabilities. However, each component of the pension system is based on complex calculations that change with each biennial review. The table below underscores how pension obligations are not a static value but have increased in each of the last four cycles due to changes

in the assumptions used to calculate the liability. These assumptions include number of plan participants, salaries and salary increases, changing economic environments, expected retirement patterns and longevity, etc. and the rate at which the estimates are discounted to present value. The amount available to pay for the obligations—the pension assets—change based on the contributions of active participants, the contributions made by the town, and expected investment returns net of costs. Pension obligations can also be affected by changes in the plan, for example, small changes such as the 2018 increase from \$12,000 to \$13,000 in the retirement base eligible for cost-of living adjustments, and larger ones, such as the Pension Reform Act of 2011 (Ch. 176) enacted by the Massachusetts Legislature, which affected new members after April 1, 2012. An extension of the full-funding date can also impact General Fund pension payments, as well as the rate of growth in those payments, particularly in the first two years of the amortization schedule.

Belmont Retirement Systems Profile

2014, 2016, 2018, 2020 Actuarial Reports

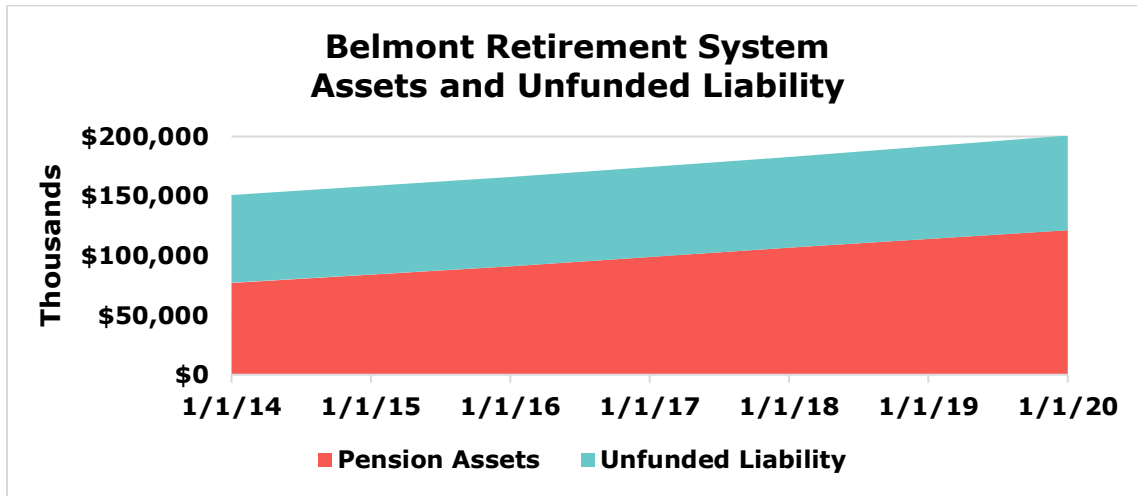
Actuarial Date	1/1/2014	1/1/2016	1/1/2018	1/1/2020
Total Obligations	\$150,911,920	\$165,850,771	\$183,043,747	\$200,829,546
Pension Assets	\$77,213,290	\$91,177,286	\$106,445,674	\$121,340,803
Unfunded Liability	\$73,698,630	\$74,673,485	\$76,598,073	\$79,488,743
% Funded	51.2%	55.0%	58.2%	60.4%
Annual Growth Rate in Town Payments to Plan	6.97%	6.96%*	5.75%	4.45%
Date of Payment in Full	2027	2029	2029	2031
Discount Rate	7.75%	7.40%	7.40%	7.15%

Does not include teachers who are members of the Massachusetts Teacher Retirement System (MTRS) and do not participate in the Belmont Retirement System.

**6.97% first two years, 4.45% thereafter. Amortization growth rates are the rate of growth of pension payments in the General Fund budget.*

Source: The Segal Group, Inc., Belmont Contributory Retirement System Actuarial Valuation and Review as of January 1, 2014, 2016, 2018 and 2020. Includes Town of Belmont, Belmont Municipal Light Department, Water and Sewer, and Housing Authority pension obligations.

The chart also shows how difficult it is to fully amortize the unfunded liability when total obligations are increasing. This is illustrated in the graph below, which shows that, while total assets have grown from investment income and Town contributions, unfunded pension obligations –the orange portion of the chart—do not reflect a net reduction commensurate with payments made by the Town. In 2018 and 2019, the Town contributed \$18.5 million to pension assets. However, the actuarial unfunded liability went up, not down, as total obligations increased based on new actuarial information and calculations. As a percentage of the overall obligations, the funded portion of the liability increased slightly from 58.2% to 60.4%.



Source: The Segal Group, Inc., Belmont Contributory Retirement System Actuarial Valuation and Review as of January 1, 2014, 2016, 2018 and 2020. Includes Town of Belmont, Belmont Municipal Light Department, Water and Sewer, and Housing Authority pension obligations.

Exhibit I includes the current amortization schedule, based on the BCRS 2020 actuarial review.

Factors to Consider

The Segal Group, Inc. has been the System’s actuary since the 2014 review. Each actuarial review evaluates all of the relevant factors and assumptions to determine the current value of pension liabilities owed to beneficiaries.

Of the many factors and assumptions that make up actuarial reviews, the section below focuses on several that can have a significant impact on the overall liability and therefore the net liability affecting the General Fund budget.

Breakdown of Eligible Participants and Salary Increases Used in Calculating Pension Obligations

The number of participants, type of participants and salary assumptions impact the current payment of retiree benefits (the “normal” cost), as well as the expected benefits to be paid in the future. As the number of participants increase and average salaries increase, so does the current value of estimated payments to be made. An increase in active participants leads to an increase in

pension obligations will increase over time as these employees age and eventually access benefits. The number of retiree participants impact the General Fund budget because the Town pays those benefits on a current basis. If more employees retire sooner than expected, the annual “normal cost” General Fund expenditures will increase.

The chart below breaks out participants by type. Since 2016, the number of total participants in the System has increased by 7.8%. This increase is primarily driven by the 2018-2020 increase in School Department non-teaching participants, as well as a higher number of inactive participants (primarily former employees who are owed benefits).

The ratio of non-active participants (retirees plus former employees, i.e. those owed money by the System but not paying into the System) to "active" participants paying into the System remained relatively flat in the past three actuarial reviews. However, a number greater than one indicates that active participant contributions may not be able to keep pace with retiree benefits. An increase in this ratio can indicate that investment returns will likely be increasingly relied on to meet future obligations.

The table also shows the 2016-2020 increases in the total payroll and average payroll. The actuarial review estimates the growth rate based on historical data as well as current and market expectations and adjusts for any differences in actual vs. assumed rates in the subsequent biennial review. Increases or decreases in total payroll and experience can have a significant impact on future liabilities.

Belmont Contributory Retirement System Data

Fiscal Year	2014	2016	2018	2020	% Change FY16-20*
Number of School (Non-Teaching) active participants	159	159	164	205	28.9%
Number of Municipal active participants	299	301	303	293	-2.7%
Total Active Participants	458	460	467	498	8.3%
% Increase Year over Year		4.4%	1.5%	6.6%	
Number of Retirees	346	348	354	351	0.9%
Inactive Participants	164	230	254	270	17.4%
Total Active and Inactive Participants	968	1,038	1,075	1,119	7.8%
% Increase Year over Year	n/a	7.2%	3.6%	4.1%	n/a
Non-Active Participants/Active Participants	1.14	1.26	1.30	1.25	n/a
Total Payroll (\$million)		\$25.0	\$26.4	\$29.7	12.5%
Average Payroll		\$54,416	\$56,521	\$59,557	9.5%

**Please note that the percentage changes include only the past three cycles. In FY16, the BCRS upgraded its systems and made adjustments based on a review of prior system entries. The 2014-2016 growth in participants does not necessarily match to actual increases in new members from 2014-2016 and therefore has been excluded from the growth percentage.*

Note: Active participants are current employees making payments into the retirement system. Inactive participants are employees who no longer work in Belmont but to whom retirement benefits are owed. Does not include teachers who are members of the Massachusetts Teacher Retirement System (MTRS) and do not participate in the Belmont Retirement System.

Source: The Segal Group, Inc., Belmont Contributory Retirement System Actuarial Valuation and Review as of January 1, 2014, 2016, 2018 and 2020. Includes Town of Belmont, Belmont Municipal Light Department, Water and Sewer, and Housing Authority pension obligations.

Discount Rate

Actuarial liabilities also change from review to review due to changes in the discount rate used to express future pension liabilities in today's dollars. As a plan's discount rate goes down, the liability—and therefore the amount needed to be funded—increases. Conversely, if the discount rate goes up, the pension liability decreases, as returns are expected to represent a higher portion in funding the liability over time.

Since 2013, PERAC has recommended a decrease in the discount rate in each actuarial cycle based on independent long range capital market projections. For 2021 reviews, PERAC generally recommended a discount rate of 6.75-7.15% or below. It is likely that the discount rate

recommended by PERAC will continue to decline.³⁹ The discount rate used in the BCRS 2020 actuarial review was 7.15%. The System’s upcoming 2022 actuarial review will be based on December 31, 2021, financials.

An independent audit of System’s 2018 and 2019 financials by Powers & Sullivan LLC included calculations showing the impact a 1% increase or decrease in the current discount rate would have on the System’s total liabilities as of 12/31/2019, as shown below. A 1% change in the discount rate is unlikely, however, lower discount rates have contributed to increases in actuarial liabilities in the BCRS 2016 and 2020 actuarial reviews.

Discount Rate Sensitivity	12/31/19 Total Pension Liability (\$000)
1% decrease (6.15%)	\$98,927
Current Discount Rate (7.15%)	\$76,746
1% Increase (8.15%)	\$58,037

Source: Powell & Sullivan LLC, Belmont Contributory Retirement System, Report on Examination of Basic Financial Statements, December 31, 2019 and 2018, <https://www.mass.gov/doc/belmont-retirement-board-private-audit-report-years-ended-2019-and-2018/download>. Numbers were calculated using a 2029 full-funding date and will vary from other charts herein. Does not include Enterprise fund or Housing Trust pension payments.

Exhibit II includes discount rates used by communities with similar debt ratings, as well as other communities comparable to Belmont.

Extension of the Date for Full Amortization of the Unfunded Pension Liability

The State requires towns to fully fund pension liabilities by 2040. PERAC recommends complete amortization of the unfunded liability no later than 2035 to allow flexibility in the event of a market downturn similar to the one experienced in 2008. Almost 80% of PERAC members plan to fully amortize pension liabilities by 2035.⁴⁰ However, some systems, like Hingham, have a longer amortization date, but front load the amortization. This provides flexibility to increase the rate of repayment to accommodate actuarial changes over time.

The rate of repayment that a town must make is considered along with the end payment date. Some retirement systems set an annual fixed rate of repayment (in Arlington’s case, 6%) per year.

Since 2016, the Retirement Board has extended the full-funding date twice: in FY16, the time allotted to fully amortize the Town unfunded pension liabilities schedule was extended from 2027 to 2029 and, in 2020, the Retirement board extended the date from 2029 to 2031. The table below shows the amortization payment for 2022 scheduled as of each of the last four actuarial cycles. This shows the changes in this one payment from Review to Review as the amortization schedule is reset every two years and underscores how the outer year “savings” projected in one

³⁹ <https://www.mass.gov/doc/perac-pension-news-57/download>

Lexington: <https://www.mass.gov/doc/lexington-retirement-board-approval-of-funding-schedule-nov-2021/download>;
Melrose: <https://www.mass.gov/doc/melrose-retirement-board-approval-of-funding-schedule-nov-2021/download>

⁴⁰ <https://www.mass.gov/doc/perac-pension-news-57/download>

review may not necessarily be realized due to changes in net pension liabilities and other factors, such as the relative length of repayment.

As a result of the 2016 review, an amortization schedule was set that showed that six years later in FY22, the town would pay \$815,000 less than previously scheduled in 2014. The 2018 review reset the amortization based higher actuarial obligations and without an extension of the date of repayment, resulting in a \$425,000 increase in the Town’s 2022 payment relative to what was forecast in 2016. In 2020, the projected 2022 amortization payment decreased by \$140,100—after a 2-year extension from 2029 to 2031. Note that the Town’s 2022 payment is higher than scheduled in 2016 despite two extensions of the final repayment date in 2016 and 2020.

Nonetheless, the 2020 Review’s extension of the final payment to 2031 allowed for a reduction in the annual rate of growth in payments (from 5.75% to 4.45%). The extension likely mitigated a payment increase for the General Fund budget that would have taken place had the final payment date remained 2029.

Actuarial Cycle	2014	2016	2018	2020
Unfunded Pension Liabilities (\$000)	\$73,698.6	\$74,673.5	\$76,598.1	\$79,488.7
Amortization Full-Funding Date	2027	2029	2029	2031
Scheduled Amortization Payment for 2022 used	\$11,803.7	\$10,988.7	\$11,404.1	\$11,264.0
In each respective Review				
<i>Change in 2022 General Fund Payment</i>	<i>n/a</i>	<i>(\$815.0)</i>	<i>\$425.4</i>	<i>(\$140.1)</i>
Rate of growth of amortization payments used	4.45%	6.97%*	5.75%	4.45%

*6.97% for the first two years, followed by 4.45%.

Source: The Segal Group, Inc., Belmont Contributory Retirement System Actuarial Valuation and Review as of January 1, 2014, 2016, 2018 and 2020. Includes Town of Belmont, Belmont Municipal Light Department, Water and Sewer, and Housing Authority pension obligations.

Exhibit II includes retirement system amortization dates for communities with similar debt ratings, as well as other communities similar to Belmont.

Investment Returns

Investment results impact the rate at which the pension assets grow and have a direct impact on changes in the unfunded pension liability. Higher investment returns increase the assets available to fund the pension liability. Lower investment rates can contribute to higher amortization and can lengthen the time necessary to fully fund the pension debt.

The table below summarizes 1-, 5-, and 10-, and 36-year investment returns as for PERAC’s 104-member contributory retirement systems. The BRS is below the composite average of the 104 systems in all but the 36-year view. In the past one and over the past five years, Belmont’s investment returns, as provided by PERAC, was in the lowest 10% of all 104 member systems. This is a trend downward from rankings based on 10- and 36-year returns.

The chart also shows the difference between investment returns generated by the Pension Reserves Investment Management (“PRIM”) Board and the BCRS for the same periods, again provided by PERAC. PRIM manages the assets of the [Pension Reserves Investment Trust \(“PRIT”\) Fund](https://www.mapension.com/investments/#prit-fund-core) (<https://www.mapension.com/investments/#prit-fund-core>) for public employee pension benefits on behalf of Massachusetts State Employees, Massachusetts Teachers’, and Boston Teachers’, as well as local participating retirement systems throughout the Commonwealth that elect to invest with PRIM, either by transferring all assets or investing a portion of their assets (as Belmont does). PRIM’s investment returns have exceeded BCRS returns in each of the 1-,5-,10-, and 36-year periods benchmarked by PERAC. Over the past five years, PRIM outperformed the BCRS by 0.87% and, in 2020, by 1.31%. For 2020, this difference represents approximately \$1.5 million; the cumulative effect of higher investment returns over time is much greater.

Note: The PERAC composite average includes PRIM returns.

	2020 Return	5-Year Return	10-Year Return	36-Year Return
Investment Return-Belmont	11.30%	9.55%	8.75%	9.38%
Investment Return-PERAC Composite Average	12.82%	10.38%	8.93%	9.32%
<i>Difference Between Composite Average Returns and BCRS Returns</i>	1.52%	0.83%	0.18%	-0.06%
Number of PERAC Systems	104	104	104	103
# of Individual Systems Exceeding Belmont's Return	96	95	75	22
<i>Belmont Rank (Highest to Lowest Return)</i>	97/104	96/104	76/104	23/103
Investment Return-PRIM	12.61%	10.42%	8.97%	9.62%
<i>Difference between PRIM returns and BCRS Returns</i>	1.31%	0.87%	0.22%	0.24%

Source: PERAC 2020 Investment Report, <https://www.mass.gov/doc/2020-investment-report/download>

System Costs

System administrative costs are included in the “normal cost” portion of pension expenditures in the General Budget. The table below shows the BCRS actuarial administrative expense estimates (assumptions) compared to the actual administrative expenses for 2014 through 2020. Estimated administrative costs are also included in actuarial calculations of the pension liability. Actual positive or negative variances between expected administrative expenditures and actual expenses impact the calculation of the liability. The BCRS has exceeded actuarial estimates in each year between 2016 and 2019. These variances, although small, were included in the negative variances reported in the actuarial reviews for 2018 and 2020 and administrative cost assumptions were increased in the 2020 review.

In the FY22 Warrant Committee Report, the Pension, OPEB, and Debt subcommittee identified rental costs and legal expenditures as two areas of costs that warrant review by the Retirement Board.

Administrative expenses do not include investment fees, which are factored into the discount rate.

Year	Administrative Expense Assumptions	Actual Administrative Expenses
2014	\$175,000	\$154,000
2015	\$182,000	\$183,000
2016	\$290,000	\$322,000
2017	\$298,000	\$323,000
2018	\$233,000	\$315,000
2019	\$242,000	\$315,000
2020	\$290,000	n/a

Exhibit III Includes a table comparing fees for similar size systems.

Other Pension and Employment Benefits (OPEB)⁴¹

In addition to pensions, Belmont provides its employees with healthcare and life insurance benefits upon retirement. These OPEB benefits are managed and overseen by the Town and not by the Belmont Retirement Board. There is no state oversight agency such as PERAC monitoring the status of compliance with OPEB funding. The Town provides OPEB benefits to teaching staff; in contrast pension benefits are provided to teachers by the State.

The Town pays OPEB benefits for retirees on a “pay-as-you-go” basis, meaning the Town makes payments out of the current budget to cover retiree health costs in real time as they are incurred. The FY22 budgeted amount for retiree health benefits is \$2.1 million. Although the cost each year of current retirees’ OPEB benefits have been fully and adequately covered by the Town over the years on a pay-as-you-go basis, the projected OPEB benefits earned by Town employees on an actuarial basis substantially exceed the reserves set aside at of FY22.

As of the June 30, 2021, actuarial report, the Town’s unfunded OPEB liability was \$91,339,148. This unfunded liability is lower than the unfunded liability of \$95,366,839 as of the prior report dated June 30, 2019. The discount rate was reduced to 6.25% in the 2021 review from 6.5% in the 2019 review. The liability decrease is largely the result of net of several factors including a change in the discount rate offset by updated per capita costs, contributions, future trends and Medicare plan enrollment.

In the 2010s, the Town initiated an OPEB funding policy and created an “OPEB Trust Fund” to begin to fund OPEB obligations owed by the Town to retirees. The annual contribution is calculated using a formula that considers both the Town’s reserves and the level of the unfunded liability. Although the Town’s policy not intended to make significant reductions in the

⁴¹ This section uses information originally included in the FY22 Warrant Committee report, Pensions, OPEB and Debt section and updated for FY22.

liabilities, the policy provides an initial framework and is acknowledged favorably by rating agencies. The OPEB Trust has a balance of approximately \$6.2 million and is managed by the Town Treasurer. The actuarial OPEB liability is valued every two years by an actuary and provides the Town with disclosure information needed for the audited financial statements in accordance with GASB accounting Statements 74 and 75.

In FY21 and FY22, the Town budgeted \$50,000 from Free Cash into the OPEB Trust to contribute toward the Town's portion of the unfunded OPEB liability. This lower contribution is the minimum contribution permitted under the Town's OPEB funding policy and is significantly lower than the Town's FY20 contribution of \$552,695.

Summary

- The Town's FY22 pension contribution of \$11.3 million represents a large portion of the Town's general fund operating budget. As of 1/1/20, the Belmont Retirement System was 60.4% funded, which means the Town does not currently have the actuarial assets to cover expected pension obligations and must amortize the difference through General Fund payments to the System. In addition, the Town pays more than \$3 million in current town and school retiree health insurance benefits annually. Both pension and OPEB obligations are recalculated every two years.
- In spite of large annual General Fund contributions to the pension fund by the town and two extensions of the full funding date, actuarial pension liabilities have grown by almost \$5.8 million between 2016 and 2020.
- Belmont's pension obligations are expected to increase in future actuarial reviews, including the 2022 review underway.
 - The discount rate is expected to continue to decrease, based on long term capital markets outlooks and PERAC guidance⁴². This will perhaps have the greatest impact in increasing actuarial pension liabilities in the foreseeable future.
 - The impact of the pandemic on the 2020 assumptions is yet to be known, although anecdotally, there has been a reported increase in retirees. Higher than expected payouts in the near future leave fewer current assets available to benefit from investment returns farther in the future.
 - For the 2022 review, it is anticipated that the System will report increases in total participants, as well as higher payroll and average salaries, based on recent employee counts and contractual obligations.
- Investment returns, as reported by PERAC, are near the bottom of PERAC's 104 member systems.
 - Improving investment results will help lower overall pension obligations and positively impact the General Fund budget. Segal notes that the need for cash from the investment portfolio to meet benefits is particularly true as the system matures (i.e., more participants are receiving benefits than there are participant

⁴² <https://www.mass.gov/doc/perac-pension-news-57/download>

contributing to the system).⁴³ The BCRS ratio of non-active (i.e., retiree and others) to active participants paying into the system was 1.25 in the 2020 review. The greater need for cash modestly dampens investment returns.

- Maintaining Belmont’s AAA rating is a priority for the town. The S+P’s 2020 credit opinion for Belmont identified its large pension and OPEB costs as a risk, given the agency’s expectation that these obligations will increase.⁴⁴ In their opinion, Belmont’s “actuarially determined contribution is determined on weak underlying assumptions and methodologies”, putting Town at risk of unanticipated escalations in town contributions. Since the date of the opinion, the 2020 BCRS actuarial review increased total liabilities and extended the date of funding by two years. At the time of the opinion, Belmont was using a 7.4% discount rate; S+P viewed 6.5% as a sustainable discount rate to mitigate market volatility. We note that the amortization dates Massachusetts towns with similar debt ratings are generally in the 2029 to 2031 range.
- The \$1 million savings referenced in the idea texts at the beginning of this write up might have erroneously been interpreted as direct savings to the General Fund budget. However, the \$1 million in savings referenced should refer instead to estimates that compare PRIM returns to BCRS returns. This does not directly impact the budget by \$1 million; instead, the analysis was done to estimate the cumulative impact over several years of lower investment returns on pension asset levels.
- While extending the full funding date often appears to “save millions”⁴⁵, the actual impact on the General Fund budget has been modest in an era of rising pension liabilities and declining discount rates, as shown above. The 2016 and 2020 extensions of the full funding from 2027 to 2031 helped smooth General Fund payments and, in 2020, the extension reduced the percentage growth in General Fund pension costs. However, forecasted “savings” in the later years are somewhat illusory since the amortization schedule for the outer years changes with each biennial reset of the schedule; the “savings” forecast in the prior actuarial assessment does not necessarily come to fruition. Most retirement boards do not use repayment date extensions to maximize current savings in the current period as such extensions reduce the flexibility to manage the obligations by 2040 if market conditions change.
- Lastly, the SCIG did not have time to adequately review the suggestion regarding Andover’s program to reduce pension and OPEB costs (see further reading below). This is a collectively bargained program through which employees contribute to offset pension and OPEB liabilities. Further research is needed to assess the viability and impact of such a program in Belmont.

Recommendations

The Retirement Board acts independently from the Town and sets expectations with the actuary. Many variables contribute to the pension costs and no one variable contributes directly to

⁴³ Source: *The Segal Group, Inc., Belmont Contributory Retirement System Actuarial Valuation and Review as of January 1, 2020.*

⁴⁴ S+P Global Ratings, *Summary: Belmont, Massachusetts; General Obligation, May 26, 2020.*

⁴⁵ Idea #268 text found above.

reducing the General Fund budget. Some actuarial assumptions are outside of the Board and the Town's control, such as demographic trends and economic assumptions. However, factors that can be changed or controlled--small or large--can, over time, mitigate the impact of rising pension costs on the General Fund budget.

The SCIG recommends action on the following:

1 – Investment Returns and Investment Fees

BCRS's subpar investment returns relative to other Massachusetts contributory retirement systems should be unacceptable to the Retirement Board, employees, retirees, the Town, residents, and the Select Board. BCRS one- year and five-year returns have been in the bottom 10% of all 104 PERAC members and in the bottom 27% when averaged over the past 10 years. The cumulative impact of this variance affects the Town's net unfunded pension liabilities and the pace at which the Town can fully fund these obligations. Pension obligations are expected to continue to rise, discount rates are expected to continue to decline, and, as the System matures, investment income will be increasingly relied on to offset decreases in employee contributions.

The Retirement Board independently determines investment strategies and asset allocation, chooses investment managers and sets policies for how investment returns will be recognized. PRIM, the state's pension investment management firm, has consistently outperformed the BCRS.⁴⁶ PRIM, due to its size, benefits from a lower fee structure and broad access to diversified investments. In addition, PRIM provides professional management beyond the capability of most municipal retirement boards, which, like Belmont's, are typically comprised of retirees and have limited professional investment expertise. Towns that contract with PRIM to manage pension assets can reduce investment management risk while still retaining local control of retirement plans and actively managing retiree benefits.

The SCIG supports and reiterates the Warrant Committee recommendations, as follows:

- The Warrant Committee recommends that the BRS Board make an annual presentation to the Warrant Committee and the Select Board that will include the status of the System and a comparison of the investment performance of the BRS to that of PRIT. BRS returns should consistently outperform PRIT to justify ongoing active management by the BRS Board of assets that are not already invested in PRIT.
- The Warrant Committee recommends that the Town engage the BRS Board in active review of two ways to reduce the Board's administrative costs, all of which come out of the Town's General Fund – moving Board staff from leased space to Town-owned space and utilizing the Town's labor counsel, rather than keeping separate counsel on retainer.
- The Warrant Committee recommends that the Select Board and the Warrant Committee receive an update from the BRS Board when the next draft actuarial report is prepared, prior to the BRS Board formally adopting that report being formally adopted and sent to PERAC.

The SCIG also notes that the Select Board appoints one member and the Town Administrator have oversight of the Town Accountant. The SCIG recommends that the Select Board and Town

⁴⁶ PERAC 2020 Investment Report, <https://www.mass.gov/doc/2020-investment-report/download>

Administrator take a more active role in communicating Town concerns and proposed actions to the two representatives of the Town on the Retirement Board.

Lastly, the SCIG recommends increased transparency on the part of the Retirement Board. This would include posting updated minutes and annual investment returns on the BCRS website and allowing time for public comment at Retirement Board meetings.

2 – Personnel/Salaries and Benefits

The Select Board/Town Administrator and School Committee each participate in negotiations related to the hiring and compensating of employees. Salaries and benefits currently represent over 75% of the net operating budget and negotiated collective bargaining contracts drive compensation levels and increases for more than 85% of the total town and school employees. The addition of benefits-eligible employees not only adds to current budgeted payroll but also creates long term retirement and pension obligations, which are often overlooked in the hiring process.

The SCIG recommends that the Select Board and School Committee actively work together to mitigate rising retirement liabilities by implementing the following recommendations, several of which were also recommendations of the Financial Task Force II.

- Align the terms and conditions in collective bargaining terms across town and school unions, in particular with respect to the employee/employer split for health insurance premiums.
- With each contract negotiation, evaluate and report the impact of prospective collective bargaining terms on retirement and pension costs.
- Develop a template to assess the all-in cost –including retirement costs--of hiring benefits-eligible employees to determine whether increasing headcount is more cost-effective than outsourcing or contracting for the service.

Next Steps

- Select Board to contact Retirement Board to schedule a date to review 2021 investment results and set a timeframe for future annual reviews of investment results.
- Town Human Resources Director and School Director of Human Capital to identify differences in contract terms and identify area that can be aligned.
- Select Board and School Committee to develop a template to compare the all-in cost/benefit/cost effectiveness of hiring a new benefits-eligible employee vs. outsourcing. This would include projected retirement costs and be used in considering the addition of personnel.

Further Reading

- <https://www.mma.org/andover-and-its-employees-team-up-to-tackle-unfunded-liabilities/>
- <https://www.mass.gov/massachusetts-public-retirement-systems>
- <https://www.mass.gov/doc/belmont-2020-annual-report/download>
- June 30, 2021 OPEB Valuation - Town of Belmont.pdf
- Please refer to footnotes for additional information.

Exhibit I
BCRS Amortization Schedule
Based on 2020 Actuarial Review

	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	2031	2032
Employer Normal Cost	\$2,256	\$2,331	\$2,409	\$2,489	\$2,572	\$2,658	\$2,746	\$2,838	\$2,932	\$3,029	3130	3234
Amortization	\$8,527	\$8,932	\$9,356	\$9,800	\$10,263	\$10,749	\$11,257	\$11,789	\$12,346	\$12,928	13129	
Total Actuarial Contribution	\$10,784	\$11,264	\$11,765	\$12,288	\$12,835	\$13,407	\$14,003	\$14,627	\$15,278	\$15,957	\$16,259	

Employer Normal Cost is the amount that the Town pays to current retirees in each year.

Amortization represents the contribution the Town makes in each year to reduce the estimated gap between the amount of actuarial pension obligations the Town owes to current and former employees and the amount of assets on hand to fund those obligations. These payments are set by the Retirement Board after each actuarial review and are approved by PERAC, after which the Town is obligated to make them.

Source: The Segal Group, Inc., Belmont Contributory Retirement System Actuarial Valuation and Review as of January 1, 2020. Includes Town of Belmont, Belmont Municipal Light Department, Water and Sewer, and Housing Authority pension obligation

Exhibit II
Actuarial Pension Information for Selected Communities

	2019 Rating	Full Funding Date	% Funded	Discount Rate Assumption	Actuarial Review Date	Non-Active/Active Ratio
Debt Rating of Aaa						
Belmont	Aaa/NR	2031	60.4%	7.15%	1/1/20	1.25
Brookline	Aaa/AAA	2030	59.6%	7.20%	1/1/20	1.91
Concord	Aaa/NR	2029	88.6%	6.75%	1/1/20	0.89
Hingham	Aaa/AAA	2035	70.4%	7.40%	1/1/20	1.00
Lexington	Aaa/NR	2030	80.4%	7.25%	1/1/20	1.03
Newton	Aaa/NR	2030	57.4%	7.25%	1/1/21	1.20
Wellesley	Aaa/AAA	2030	77.7%	6.00%	1/1/21	1.13
Winchester	Aaa/AAA	2029	80.5%	7.25%	1/1/21	1.16
Debt Ratings below Aaa						
Arlington	Aa1/AAA	2033	54.5%	7.00%	1/1/20	1.20
Marblehead	NR/AAA	2039	62.3%	7.15%	1/1/20	0.90
Milton	NR/AAA	2026	82.6%	7.00%	1/1/21	0.89
Needham	NR/AAA	2033	65.6%	65.6%	1/1/20	0.96
Watertown	Aa2/AAA	2023	91.7%	91.5%	1/1/20	1.14

Note: Towns selected based on similar debt ratings, system size, proximity, and profile. Acton, Dover, Wayland and Weston, all rated Aaa, are not included here as they are part of the Middlesex Contributory Retirement System. In a letter to Marblehead dated November 2021, , PERAC warns that Marblehead System “has very limited flexibility in the event of a market downturn, future

actuarial losses, or changes in assumption that increase the plan’s liability, and it is possible appropriation increases in excess of 8.6% may be required as part of the 2022 or future actuarial valuations”. In funding schedule approval letters to Hingham and Watertown, PERAC noted that the discount rates used was outside the parameters recommended by PERAC. In a letter to Watertown dated 12/18/20, actuarial assumptions used by Watertown were deemed the “least conservative” of any Chapter 32 system in MA and did not approve the 2023 appropriation pending an updated actuarial review.⁴⁷

Sources: PERAC: <https://www.mass.gov/lists/retirement-board-funding-schedules-approved-by-perac#m->; most recent town actuarial reports, PERAC member systems valuations.

⁴⁷ PERAC : <https://www.mass.gov/lists/retirement-board-funding-schedules-approved-by-perac#m->

Exhibit III

Comparison of Administrative Fees for Retirement Systems of Similar Size

Retirement System	# Participants In System	Actuarial Estimate of Administrative Costs	Actuarial Year
Arlington	1,792	\$453,000	1/1/20 Report
Belmont	1,119	\$330,000	1/1/20 Report
Hingham	1,203	\$144,740	1/1/20 Report
Lexington	1,535	\$275,000	1/1/20 Report
Needham*	1,225	\$375,000	1/1/20 Report
Watertown	1,130	\$340,000	1/1/20 Report
Wellesley	1,474	\$275,000	1/1/21 Report
Winchester	847	\$180,000	1/1/21 Report

Note: Investment fees are not included in the table above.

Source: PERAC member systems actuarial valuation repo

IDEA #269 – TRANSFER HEALTH CARE INSURANCE TO THE GIC

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

We should offer a good deal to our employee unions to induce them to agree to letting the town go into the Group Insurance Commission (GIC) for the provision of health insurance. Currently, the town provides health insurance through a self insurance system that offers our employees a one-size fits all single health insurance plan. To lower its premium costs for that plan, the town has twice over the last ten years invoked MA General Law Ch. 32B to raise the deductible and copays imposed on our employees with devastating effects on staff morale that have negatively impacted our ability to recruit and retain our human capital - at considerable expense to the town. Since most GIC plans offer relatively low premiums, making this move will provide the town with the favorable premium structure it desires without going through the stress and tumult that will accompany its periodic invocations of Ch. 32B. In addition, the employees, who now have GIC copays and deductible without the accompanying GIC benefit of being able to choose from many plans, will get some choices that could prove very helpful. For instance, a relatively healthy employee could choose a GIC plan with high deductibles and copays but low premiums while other employees could go in the opposite direction. The City of Melrose calculated that it would save about \$3 million a year when it went into GIC several years ago. It induced its employee unions to agree to the shift by slightly increasing its share of the premiums and still saved \$2 million annually from the move - without enraging its staff. You have to give to get but there is a win-win opportunity here that we should not squander.

Other ideas included in this report

- #337 – Review the Town's health insurance structure to see if there are different ways to reduce premiums.

Idea intent

Reduce health insurance costs and mitigate growth in costs

Weighted Final Score: 54

(Financial Impact: 5, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 2)

Background Information

The Town of Belmont currently self-insures school and town employees and retirees' health costs through its Health Insurance Trust. The Trust is self-insured and maintains a reserve to buffer against year-to-year variability in claims. Belmont handles enrollments, cancellations, and other subscriber changes in house. Plan administration is negotiated annually and is currently outsourced to Harvard Pilgrim. In 2012, at the time Belmont's self-insured plan was put into place, the Town opted not to join the state-wide Group Insurance Commission (GIC), and instead

created a plan that was intended to mimic the features and match the costs of the GIC with respect to co-pays, out of pocket expenses, etc.⁴⁸ Between 2012 and 2019, the GIC plan evolved and changed, but Belmont's plan did not follow suit. In 2019, the Town redesigned its health care plan to match the GIC plan, resulting in an increase in plan deductibles and copays for the first time in almost a decade.

The Group Insurance Commission (GIC) is a quasi-independent state agency governed by 17-member commission appointed by the Governor. Established by the Legislature in 1955, the GIC was formed to provide and administer health insurance and other benefits to state employees and retirees, their dependents and survivors. In 2007, the Massachusetts Legislature approved the addition of city and town employee health insurance as a means to reduce the rate of growth in health care expenditures by accessing GIC's economies of scale and broader risk base. The GIC also covers housing and redevelopment authority personnel as well as retired municipal employees and teachers in certain governmental units. The Group Insurance Commission (GIC) provides high-quality, affordable health insurance and other benefit options to over 220,000 subscribers and 460,000 members.⁴⁹ As of January 2022, 11 Massachusetts cities, 27 Towns, 10 school districts and other collaboratives (including LABBB) offer employee health insurance through the GIC. Neighboring communities that use the GIC include Arlington, Bedford, Brookline, Hingham, Lexington, Somerville, Sudbury, Watertown, and Weston. The GIC is responsible for designing and selecting the overall plan offered to its members and the participating towns are responsible for determining the employee/employer health insurance contribution ratios.

Municipal employers formally adopt Chapter 32B, Section 19 or Chapter 32B, Section 23 in order to join the GIC's health plan coverage. Under Section 19, union members and retirees negotiate together as a Public Employee Committee (PEC) whether to join GIC health coverage and send a notice of intent to the GIC which starts the process. Under Section 23, the unions have 30 days to negotiate following notice of a proposal from the Town. If no agreement is reached after 30 days, the proposal goes to a review panel, which must order the transfer of enrollees to the GIC if, as measured by guidelines in the statute, the panel finds savings from the transfer would meet or exceed the savings test in statute 23 and would sufficiently mitigate the impact on those negatively affected by the transfer. The participation of non-union employees is determined by the municipality's chief executive officer (Town Administrator). The GIC must receive the necessary subscriber data for a transfer by December 1st in order to initiate coverage by July 1st of the next year.

The bargaining agreement to joining GIC covers three issues: 1) whether to join GIC health coverage; 2) the health premium contribution ratios, which must be consistent across types of subscribers; and 3) terms for withdrawal. Insurance carriers and benefits may not be bargained; GIC negotiates those on behalf of all of its subscribers. There is an initial minimum 3-year term requirement to join the GIC, after which municipalities can opt out.

⁴⁸ *Select Board meeting 8/26/19*

⁴⁹ <https://www.mass.gov/service-details/gic-participating-municipalities-regional-school-districts-charter-schools-and-planning-councils>

For employees, there is often initial resistance to GIC consolidation based on resistance to changing healthcare providers and skepticism about state-led health care and potential changes in benefits. For municipalities, joining the GIC can result in savings and reduce the rate of growth of health care expenditures. Under Chapter 32B, these savings are shared with employees as a way to mitigate any increases in subscriber costs.

A major benefit to towns is that joining the GIC removes a key point of tension between unions and town government by transferring health insurance plan and design to a third party (GIC). The Select Board has the authority to change the terms of the plan without collective bargaining, however, presenting the plan can lead to contentious meetings between the Town, as health insurance provider, and employees upset with increases in insurance costs. This can lead to year-to-year inaction by either party, and has in the past resulted in the Town absorbing health insurance cost increases that would otherwise be partially passed on to the insured.

While many towns that have joined the GIC over the years have reported significant savings in health insurance costs, it is difficult to compare one town to another, as the starting points for each town are often quite different. The Town is currently in the process of reviewing what the potential cost savings would be if Belmont were to join the GIC and to understand what kind of mitigation there might be to offset increases in employee costs. The Select Board, in consultation with the Town's health consultant, has recommended that the Town wait for the GIC to complete its bidding process for the FY24 plan in order to have the most current and accurate information to use to estimate any savings. This is expected to happen by this summer, as any town desiring to join would need to commit by December 2022 for the FY24 plan. The Town Administrator has reached out to the unions to update them and understand their perspective and views on such a move.⁵⁰

If the Town decides to move forward, the Select Board will make a motion to engage in Chapter 32B, Section 23, as outlined above. After review by the Insurance Advisory Committee (IAC), the design plan will be negotiated with the unions, with subscribers represented by the Public Employees Committee (PEG), consisting of one representative for each collective bargaining unit, as well as a retiree. The plan will include the Town's proposal to mitigate the impact of these changes for subscribers, including retirees, low-income subscribers and subscribers with high out-of-pocket health care costs, who would otherwise be disproportionately affected. The unions and PEG will then have 30 days to respond to the proposal.

Recommendations

School, Town, and retiree health insurance costs were budgeted at \$12.4MM in FY2, representing 11.5% of the net operating budget. Between FY16 and FY21, total health insurance costs increased by a 5-year compound annual growth rate of 6.3%, well above the Town's recurring revenue growth and directly impacts growth in the structural deficit. GIC growth rates are expected to be lower and initial savings will be calculated once GIC finalizes providers for the FY24 plan.

- The SCIG recommends evaluating the new GIC plan when it is determined this summer and, barring any analysis to the contrary, moving forward with GIC for FY24

50 Select Board meeting minutes, 11/15/21.

to help manage the Town's health care costs. This supports the recommendation made by the Financial Task Force II in its July 2021 Final Recommendations.

- The SCIG also recommends aggregating School and Town health insurance expenditures into a single budget (Town) to improve efficiency in tracking and analyzing total employee and retiree health insurance costs, simplify presentation and enhance transparency. This also supports the Financial Task Force II Final Recommendations of July 2021.

Next Steps

- Town Administrator and Health Consultant to review GIC plan in late spring/summer and create plan for Belmont to join GIC.
- Select Board, based on the projected savings and mitigation plan, to move forward under Chapter 32B, Section 23 to join the GIC.
- Town Administrator and School Department to work together to consolidate health insurance expenditures in one budget line for the next budget cycle.

Further Reading

- *MA GIC site*
<https://www.mass.gov/info-details/the-process-of-joining-municipal-health-insurance-with-the-gic><https://>
- *MA General Laws, Chapter 32B*
<https://malegislature.gov/laws/generallaws/parti/titleiv/chapter32>

IDEA #271 – TAX REVENUE FROM SHORT-TERM RENTALS

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Issue licenses for AirBnB and other host services and collect tax revenue on that.

Other ideas included in this report

- 285: Belmont categorizes Airbnb-type rentals like a bed and breakfast. In residential neighborhoods, residents can rent up to three rooms in their house for seven days or longer. Short-term rentals, however, require special permit from Zoning Board of Appeals. Could this restriction be reviewed and possibly be loosened or lifted in order to generate more revenue?

Idea intent

Regulating short-term rentals would generate more tax revenue for the Town.

Weighted Final Score: 47

(Financial Impact: 3, Operational Impact: 2, Time Scale: 3, Ease of Implementation: 3)

Background Information

In December 2018, the Governor signed Chapter 37 of the Acts of 2018, *An Act regulating and insuring short-term rentals*, amending Chapter 23A of Massachusetts General Laws. The Act expanded the state room occupancy excise tax to include “short-term rentals”, meaning an occupied property that is not a hotel, motel, lodging house, or bed and breakfast, where at least one room or unit is rented out through the use of advance reservations for a period of not more than thirty-one consecutive calendar days.

In addition to the state excise, each Massachusetts city and town may impose a local option room occupancy excise tax of up to 6% of the amount of rent, and the Act likewise expanded the local option excise to apply to short-term rentals. The local excise would apply to the same occupancies as the state excise. Further, the Act allows cities and towns that have imposed the local option excise to impose community impact fees of up to 3% of the amount of rent on two separate types of short-term rentals: 1) a “professionally managed unit”, defined as one of two or more short-term rental units in the same city/town not located within a dwelling that includes the operator’s primary residence, and 2) a unit that is located within a two-family or three-family dwelling that includes the operator’s primary residence. To be clear, if a community has not adopted a local option room occupancy excise, it cannot adopt a community impact fee; likewise, if a community has not adopted the first type of community impact fee, it cannot adopt the second.

As of now, Belmont has not adopted a local room occupancy excise tax. It can do so by a majority vote of Town Meeting accepting G.L. c. 64G, § 3A and establishing the rate, up to 6%

of rent. If Belmont adopts a local option excise, it can then also adopt one or two community impact fees by a majority vote of Town Meeting accepting G.L. c. 64G, § 3D and establishing the rate, up to 3% of rent.

If adopted, the Town will not be required to collect the excise or the community impact fee, since they are paid directly to MA Department of Revenue (DOR) and then distributed from DOR to the Town on a quarterly basis. Owners/operators of short-term rentals are required to be registered with DOR. As of January 14, 2022, there are thirty-seven properties in Belmont that are registered with DOR as short-term rental properties.

Revenue from the local option excise is general fund revenue and may be appropriated for any municipal purpose. Revenue from the community impact fees is partially restricted: at least 35% must be dedicated to affordable homes or local infrastructure projects. A “local infrastructure project” is a capital project for which a community could borrow, but not to fund the payment of debt service.

As part of the research process for this idea, housing data was obtained from the U.S. Census Bureau (2019 American Community Survey 5-Year Estimates) and short-term rental data was obtained from AirDNA (a firm that tracks the performance of properties on Airbnb and Vrbo). Figure 1 shows data points from the following ten nearby municipalities, all of which have adopted the local option room occupancy excise: Watertown, Arlington, Lexington, Acton, Wellesley, Concord, Wakefield, Needham, Walpole, and Sudbury.

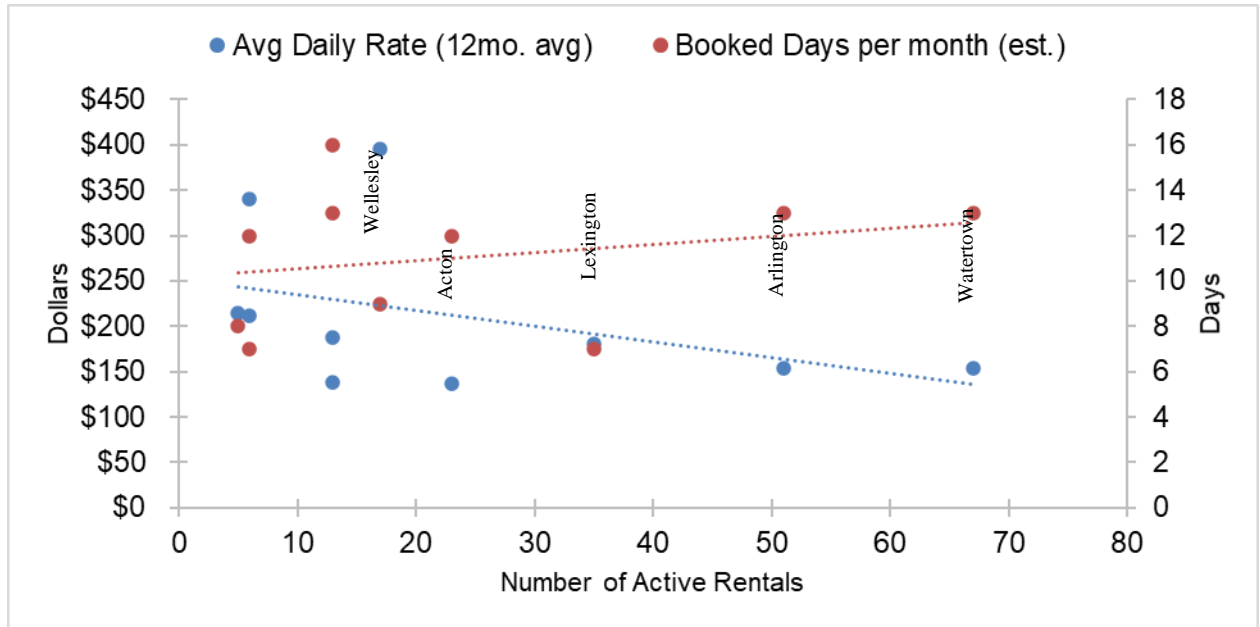


Figure 3: Short-term rental market data from AirDNA

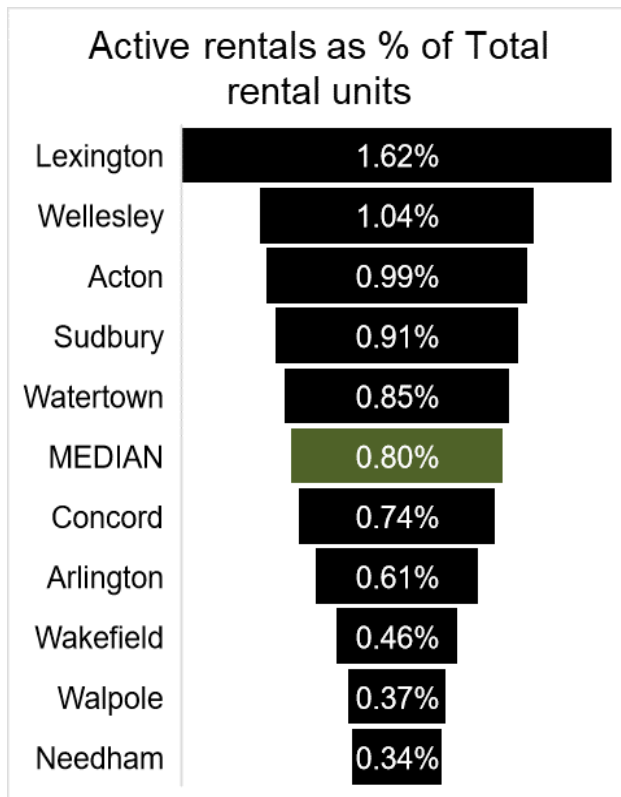


Figure 2: Short-term rental data from AirDNA and housing data from U.S. Census Bureau

Applying the median percentage of active rentals per total rental units (from Figure 2) to Belmont’s rental housing stock, Belmont could reasonably expect **29** active short-term rentals. Given that, using the trendlines of market data from Figure 1, Belmont could reasonably expect a **\$202** average daily rate, and **11** booked days per month per short-term rental property.

To further test reasonableness of these estimates, comparisons of the number of active short-term rentals to vacant housing units and the average daily rate to median rent are shown in Figure 3.

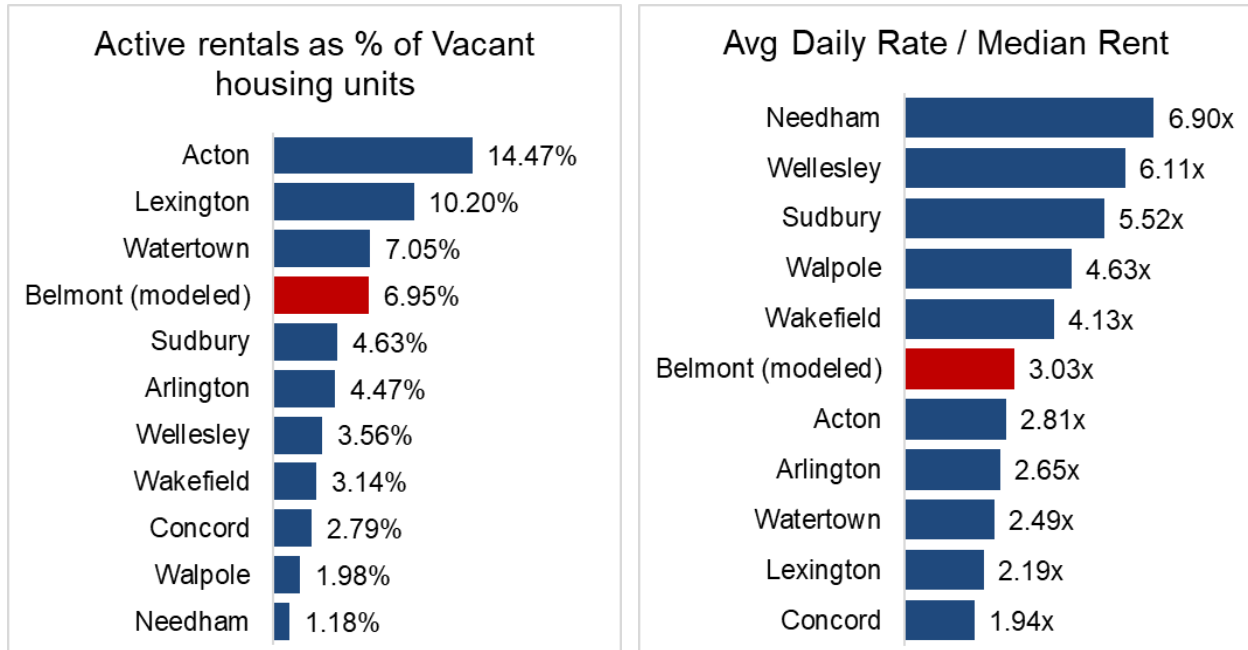


Figure 3: Short-term rental data from AirDNA and housing data from U.S. Census Bureau

Based on these estimated variables, if all active rentals met the criteria for a community impact fee, Belmont’s adoption of a 6% local excise and 3% community impact fees would generate additional revenue of **\$70,796** per year.

One argument against allowing short-term rentals is the potential for property owners to convert existing long-term rental units to short-term rental units, thereby creating pressure on the market for long-term rentals and creating conditions that might cause displacement of current residents. Belmont could mitigate this risk by pairing it with a bylaw designed to relieve pressure on the long-term rental market. For example, implementing an accessory dwelling unit bylaw would allow homeowners to rent out a self-contained apartment in their owner-occupied single-family home. This works well in communities where land for new construction is limited and demand for housing is high, such as Belmont.

Recommendations

- Select Board and Planning Board jointly present articles for Town Meeting to adopt a local option room occupancy excise at 6% of rent, as well as two community impact fees at 3% of rent
- Select Board and Planning Board jointly present article for Town Meeting to implement an accessory dwelling unit bylaw

Next Steps

- With reference to the Airbnb analysis provided to the Select Board by the Planning Board (as noted in the Planning Board’s meeting minutes from December 3, 2019), Select Board to initiate further discussions with the Planning Board, Housing Trust, and broader community about the opportunity for additional revenue from short-term rental excise taxes and fees, as well as an accompanying bylaw to mitigate risk of displacement of residents

Further Reading

- An Act regulating and insuring short-term rentals
<https://malegislature.gov/Laws/SessionLaws/Acts/2018/Chapter337>
- FAQs providing information of interest to municipal officials regarding An Act regulating and insuring short-term rentals
<https://www.mass.gov/doc/room-occupancy-excise-faqs-short-term-rentals/download>
- MA Division of Local Services’ Municipal Databank
https://dlsgateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=LocalOptions.Room_Tax_Impact_Fee
- U.S. Census Bureau
<https://data.census.gov/cedsci/profile?g=1600000US2505105>
- AirDNA
<https://www.airdna.co/>
- Mass.gov information on Accessory Dwelling Units
<https://www.mass.gov/service-details/smart-growth-smart-energy-toolkit-modules-accessory-dwelling-units-adu>
- Planning Board meeting minutes from June 18, 2019
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/minutes/2019-06-18_planning_board_minutes.pdf
- Planning Board meeting minutes from December 3, 2019
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/minutes/2019-12-03_planning_board_minutes.pdf

IDEA #272 – CHARGE CONGESTION PRICING

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Charge congestion pricing for traffic passing through Belmont Center instead of taking Route 2 all the way to Alewife. This would increase revenue and decrease traffic congestion but would probably require state legislative approval.

Other ideas included in this report

- None

Idea intent

We interpret the intent to be as written: Evaluate the feasibility of implementing congestion pricing for cut-through traffic and estimate the likely efficacy of such pricing in reducing traffic and increasing revenue, as well as other potential outcomes.

Weighted Final Score: 0

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

Belmont suffers from a great deal of cut-through traffic. The 2018 Town Wide traffic study revealed that the majority of cars driving in Belmont in both the morning and evening rush hours are cut-through traffic from other towns, particularly adjacent towns, exacerbated by heavy traffic around schools for drop-off and pick-up times.

Congestion pricing is one possible approach to address this problem. To understand the feasibility and acceptability of this approach, consider what would need to happen to implement it in Belmont:

1. Change state law to allow it or, possibly adopt a home rule law after successfully seeking home rule.
2. Local adoption. This may require a vote of Town Meeting and perhaps a ballot initiative.
3. Purchase, installation, operation, and maintenance of equipment to identify cars coming into Belmont from out of town and a process to charge these drivers money at each point of entry in and out of town. This system/process would need to identify drivers from Belmont if the goal is not to charge locals for coming and going. Alternatively, we could limit the access points during certain hours to reduce the costs.

The charge for those driving through would need to be high enough to disincentivize enough cut-through drivers from coming through Belmont to ease congestion, but not reduce it so much that we don't recover the costs of the purchase and operation of the system itself. The pricing would need to account for non-congestion hours when, presumably, we wouldn't charge people to drive through town.

The system would also need to be efficient enough that it didn't cause the reduced traffic to move at the same, or slower, rate as the un-reduced traffic.

There's also the potential consequence of neighboring communities installing similar systems for their own towns, leading to an ugly situation for both traffic flow and community relations with our neighbors.

With these practical and inter-community relations considerations in mind, it seems unlikely that congestion pricing systems can be deployed to reduce traffic that would drive a net benefit for Belmont residents.

Potential Alternative Solutions

The traffic problems facing Belmont have their roots at the regional level, so real solutions will be slow and need to work at both the local and regional levels.

One possibility is to improve the access to and capacity of alternative modes of transportation for residents of Belmont and our neighboring communities. Improving the existing Bus and Commuter lines that serve the region and adding capacity and accessibility for bicycle, pedestrian, and other modes of transit will ease the burden on our roads over time.

Locally, reducing the number of car trips for getting students to and from our schools could significantly reduce traffic congestion, particularly in the morning when rush-hour traffic and school drop-off traffic coincide. Improving the safety of options like walking or biking to school – through programming and infrastructure improvement – and adding the pedestrian underpass to the new 7-12 school have the potential to reduce school-related car trips and ease congestion and parking pressures within town.

As we emerge from the Pandemic, programs encouraging and enabling car-pooling, “walking/biking bus,” walk to school days, and the like can contribute to a reduction in car trips and ease traffic.

Finally, focusing our road design on the experience of people, particularly residents, rather than prioritizing the expedient movement and convenient storage of private motor vehicles may more effectively achieve the goal of reducing cut-through traffic than a system of tolls. In other words, if we prioritize making Belmont a nicer place to be instead of prioritizing making it an efficient place to drive through, we may find that it is a nicer place to be that is less appealing to drive through.

Recommendations

- The town should increase its support for walking and biking to school through increased programming and continued improvement of infrastructure
- The town should continue its efforts to complete the underpass connecting the north section of town to the south, and, critically, to the 7-12 school campus, and complete the Belmont Community Path from Blanchard Road to the Waltham line.

- The town and its representatives in state government should continue to advocate for improved and increased public transit service on the bus and commuter lines that serve Belmont, as well as for improvements at the Alewife interchange.
- The town should consider making traffic flow changes at times of congestion to keep cut-through traffic on through-roads. For example, by making the lower section of Goden street and its neighboring streets one-way from 7-9am.
- The town should consider other ways to disincentivize driving hurriedly through town like stop signs, raised pedestrian crossings, priority lanes and signals for pedestrians, cyclists, and public transportation.
- The town should consider designing complete streets that prioritize people over the expedient movement and convenient public storage of private motor vehicles.

Next Steps

- The Transportation Advisory Committee should continue to seek project funding to improve pedestrian and bicycle access to and around our schools
- The town should adopt a complete streets vision in an updated Comprehensive / Master plan for the town

Further Reading

- <https://willbrownsberger.com/alewife-traffic-issues/>
- <https://willbrownsberger.com/mount-auburn-fresh-pond-improvements/>
- <https://willbrownsberger.com/rail-at-rush-hour/>
- 2018 Town-wide Traffic Study:
https://www.belmontpd.org/sites/g/files/vyhlif296/f/uploads/2018-11-08_belmont_townwide_study_tac_meeting_-_final_part_1.pdf
- <https://www.mass.gov/complete-streets-funding-program>
- <https://www.mass.gov/safe-routes-to-school>
- Safe Routes to School improvement project at Common and School streets:
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/uploads/07-27-20_608911_-_belmont_prelim_row_plans.pdf

IDEA #275 – REAL ESTATE TRANSFER FEES

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Impose a real-estate transfer tax. This tax would apply to real estate sales in Belmont and could be paid by the buyer. It could apply evenly to the whole sale or it could be graduated stepped – e.g., a “mansion” tax of 1% or 2% of the sale price over \$1 million. Belmont would need state legislative approval to do this, but Brookline and other towns are pushing for similar taxes. The money could even be earmarked for affordable housing or the schools. This is being considered at the state level now.

Other ideas included in this report

- #343 [paraphrased]: Has Belmont considered pursuing a home rule petition to implement a transfer tax on high-end real estate sales, along the lines of what Boston is now attempting, as a possible mechanism to increase funding for affordable housing. There may be some momentum building state-wide.

Idea intent

Additional revenue could be raised by implementing a real estate transfer tax

Weighted Final Score: 57

(Financial Impact: 6, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 1)

Background Information

There are several municipalities in Massachusetts that have submitted locally approved petitions to the state legislature to allow them to impose real estate transfer fees. Among them are Arlington (H.4295), Brookline (HD.3571), Cambridge (H.4282), and Concord (S.2437). As the House Representative for the 24th Middlesex district—including Belmont, part of Arlington, and part of Cambridge—Rep. Dave Rogers is a petitioner for H.4295 and H.4282.

Although the particular calculations differ in each of these home rule petitions, there are several shared characteristics. They all specify a minimum dollar threshold, which effectively exempts lower-value transactions. They all contain other specific exemptions, most commonly for property subject to an affordable housing restriction and for transfers to charitable or religious organizations, if used for affordable housing. They all specify that funds shall be deposited into an affordable housing trust fund.

In addition to these home rule petitions, there is a proposed bill that would insert a section into state law that expressly empowers cities and towns to impose a fee on certain real estate transactions to support affordable housing (S.868). This would eliminate the need for municipalities to petition for state authorization one by one.

The proposed state legislation includes the following parameters: (1) transfers for less than the state median sale price of a single-family home are exempt; (2) the amount of the transfer fee can be between 0.5% to 2% of the purchase price, or up to 6% in the case of a speculative sale; (3) the municipality can designate whether the fee shall be paid by the buyer, seller, or an allocation from each; (4) all fees shall be deposited in a Municipal Affordable Housing Trust Fund, or otherwise designated exclusively for affordable housing purposes. The proposed legislation provides for several exemptions—including those described in the home rule petitions above—and further provides that any city or town may adopt further exemptions.

The most recent sales list available from the Belmont Assessors’ Office is for calendar year 2020. According to real estate analytics firm The Warren Group, there were 61,732 single-family home sales in Massachusetts in 2020; the year-end median sale price was \$447,000. Of the 299 home sales in Belmont in calendar year 2020, two would have been exempt under the proposed state legislation on the basis of being less than the state median sale price of a single-family home. With the limitation that we don’t know for sure how many of the remaining 297 transactions might have been exempt for other reasons, we can apply the range of possible transfer fees (0.5% to 2% of the purchase price) to the 297 remaining transactions to estimate a range of possible revenues to fund affordable housing in Belmont.

**Scenario Analysis for Belmont's
Annual Real Estate Transfer Fee Revenue
based on calendar year 2020 sales**

	<u>0.5% fee</u>	<u>1.0% fee</u>	<u>1.5% fee</u>	<u>2.0% fee</u>
No add'l exemptions	\$ 1,719,655	\$ 3,439,310	\$ 5,158,964	\$ 6,878,619
10% add'l exemptions	\$ 1,547,689	\$ 3,095,379	\$ 4,643,068	\$ 6,190,757
20% add'l exemptions	\$ 1,375,724	\$ 2,751,448	\$ 4,127,172	\$ 5,502,895

Recommendations

- If Bill S.868 passes state legislature in 2022, Select Board to prepare a warrant article for Town Meeting to vote adoption of a real estate transfer fee program as defined by state law
- If Bill S.868 does not pass state legislature in 2022, Select Board to prepare a warrant article for Town Meeting to seek a home rule petition modeled upon existing home rule petitions that have been passed by nearby towns

Next Steps

- Select Board to discuss the topic of real estate transfer fees with Belmont’s State Senator and/or State Representative to understand the likelihood of passing state legislature as a statewide bill or home rule petition, and decide further next steps accordingly

Further Reading

- An Act empowering cities and towns to impose a fee on certain real estate transactions to support affordable housing
<https://malegislature.gov/Bills/192/S868/>
- An Act establishing a real estate transfer fee upon the transfer of property in the town of Arlington
<https://malegislature.gov/Bills/192/H4295/>
- An Act authorizing the town of Brookline to impose a real estate transfer fee
<https://malegislature.gov/Bills/192/HD3571/>
- An Act authorizing the city of Cambridge to impose a real estate transfer fee
<https://malegislature.gov/Bills/192/H4282/>
- An Act establishing a real estate transfer fee upon the transfer of property in the town of Concord
<https://malegislature.gov/Bills/192/S2437/>
- Belmont Sales List – Calendar Year 2020 and FY2022 Assessments
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/cy20_sales_fy22_assessments_report_for_website_0.pdf
- Massachusetts Median Single-Family Home Price Tops \$500,000 in 2021
<https://www.thewarrengroup.com/2022/02/01/massachusetts-median-single-family-home-price-tops-500000-in-2021/>
- Brookline Petitioner’s Article Description for Town Meeting
<https://www.brookline.k12.ma.us/cms/lib/MA01907509/Centricity/Domain/62/ARTICLE%209%20-%20Real%20estate%20transfer%20tax.pdf>

IDEA #279 – LEONARD STREET SUMMER USE

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

We strongly encourage making a PERMANENT SEASONAL CHANGE OF LEONARD STREET into a one-way street with wide sidewalks and protected open air spaces during the warmer months.

We believe the commerce (therefore sales tax revenues) and the public spirit of Belmont is enhanced by "opening up the street" during a generously, broadly defined "one-way" season of April 1st to November 15 each year.

Other ideas included in this report

- None

Idea intent

Barricading the northbound lane to allow for open-air shopping and dining in Belmont Center should be done every year, beginning as early in the spring and ending as late in the autumn as weather allows.

Weighted Final Score: 40

(Financial Impact: 1, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 4)

Background Information

In 2020, in response to the COVID-19 pandemic, outdoor dining was implemented in many places as a way for restaurants to operate in a way that decreases risk of virus transmission. Belmont acted on this by limiting traffic on Leonard Street in Belmont Center to allow dining to extend onto sidewalks and into the street.

This seasonal change of Leonard Street was considered a success by many members of the public and some business owners. In 2021, the Select Board approved the plan to do it again, with a few changes based on feedback and lessons learned from 2020. For example, because outdoor dining benefits certain businesses while others may prefer maximizing parking spaces, the configuration was tailored to accommodate this.

To evaluate this idea submitted as a structural change, the Structural Change Impact Group subcommittee discussed the inclusion of the word "permanent" and decided that the inclusion of the word "seasonal" meant that the idea intent was not permanent infrastructure changes, such as narrowing the street and expanding the sidewalks. Instead, we interpreted the intent to be that it would automatically renew every year, without requiring approval by vote of the Select Board.

We are not recommending it to be "permanent" in this sense for multiple reasons, among them: (1) as different types of businesses come and go from Belmont Center, the outdoor dining plan

will have to adapt to different configurations of parking spaces versus dining areas, (2) fixed dates set now may not be the appropriate timeframe every year, and the outdoor dining plan will have to adapt to the weather expectations of each particular year, and (3) there are currently a variety of potential funding sources for seasonal configuration, such as grants or private donations, but it remains to be seen whether these sources would exist in the future or if a “permanent” mandate would have to be added to the Town’s operating budget. As such, we are recommending that an outdoor dining plan tailored for these specific considerations be approved by the Select Board on an annual basis.

Note: The Transportation Advisory Committee also has considerations about Belmont Center traffic flow, but these were not directly considered in this report.

Recommendations

- Select Board to review specifics and approve lane closure annually by March, in collaboration with the Economic Development Committee and Belmont Center Business Association

Next Steps

- Select Board to put this topic on their agenda before March 2022

Further Reading

- One-Way Leonard Street Returns For Spring, Summer and The Fall
<http://belmontonian.com/news/one-way-leonard-street-returns-for-spring-summer-and-the-fall/>
- Select Board Meeting Minutes from March 29, 2021
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/minutes/2021-03-29_select_board_minutes.pdf

IDEA #286 – INCREASE PARKING FEE REVENUE

Report Status: Fully Reviewed

Researched by: Joe Bernard

Original Idea as Submitted

Charge for parking near Joey's Park (Cross St, Monroe, Frost, Middlecot, Sherman, Broad) on weekends. Collect payments with a zoned parking app so that meters are unnecessary. Let Belmont residents deduct parking fees from their property tax bill.

Other ideas included in this report

- 32 - Review Town-wide parking fee opportunities: Cushing and Waverly Squares, Trapelo Corridor, Concord Ave, etc. Consider parking fees for students at MSHS.
- 114 - Create additional parking opportunities on Concord Ave (i.e., the vacant town-owned lot to the right of JV Soccer Field)
- 329 - Parking on Leonard St in Belmont center is very, very cheap. I would happily pay 4x what the current rate is! Easy way to increase revenue.
- 399 - Create the Dick Betts planned parking lot targeting commuter rail users along the Royal Road parcel. Develop competitive, attractive pricing structure to encourage Town residents to purchase parking access passes, in relation to Alewife T parking. Coordinate ALL parking rates for this new lot and the Claflin lot and in front of Lions Club to drive participation. Use permeable surfaces and include pay to charge EV stations.

Idea intent

Implement a system for charging parking fees in places where the demand for parking is high. Increase rates for parking in/around Belmont Center. Build new parking lots on town-owned property.

Weighted Final Score: 37

(Financial Impact: 3, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 3)

Background Information

In accordance with Massachusetts state law, a Parking Clerk for the town is appointed by the Select Board. Currently, the Town Treasurer has been delegated the responsibility of Parking Clerk for the Town. The Treasurer's Parking department processes parking violations and payments, responds to inquiries, and arbitrates parking violation requests for dismissal. The Town's Police department is responsible for enforcement of parking bylaws, and the Town's Community Development offers guidance on land use questions such as building new parking lots on town-owned property.

The current system for paid parking is multi-space pay-by-plate parking meters in Belmont Center. The intention of charging for parking in these spaces is to increase parking turnover, thereby increasing availability for patrons of Belmont Center's businesses. At current rates, the

first 30 minutes is free and additional time is \$1 per hour, up to a total of 90 minutes per day. The meters accept payments by cash or credit card, and require patrons to input their license plate number, even if they are only parking for the free period.

In addition to Belmont Center's parking meters, the municipal parking lots located in Waverley Square, Cushing Square, and Claflin Street charge for parking at the rate of \$1 per hour. The Claflin Street lot also provides an all-day option for a \$5 fee. Municipal lot passes are available for employees of local businesses at a cost of \$60 per month. Commuter passes are available at a cost of \$90 per month; weekday commuter parking is available on Royal Road in front of the Belmont Lion's Club and in the Claflin Street parking lot. Passes are administered by the Traffic Division of the Police Department.

Parking receipts for the last four fiscal years were: FY18 \$119,727, FY19 \$109,207, FY20 \$76,280, and FY21 \$35,243. Through the first seven months of FY22, receipts have totaled \$36,184. The annual budget for Parking Meters & Devices Expense is \$45,000.

The point made in ideas submitted to SCIG is that there are other areas in town where the demand for parking is high but parking is free, such as Concord Ave, Joey's Park, Cushing Square, Waverley Square, and the Trapelo Road Corridor. This may be an opportunity for additional revenue from parking fees. However, targeting specific streets for new parking fees would be ineffective if it creates spill-over to nearby side streets where parking remains free. Therefore, establishing such parking fees should not be considered a quick win that can be easily implemented. Instead, it would require a comprehensive, town-wide study conducted by subject matter experts.

The same careful approach should apply to the idea to charge parking fees for students. In fact, the Select Board recently formed a temporary Traffic Working Group—Middle and High School to examine and make recommendations on traffic issues, including parking issues, related to the building project. One of their findings is that, despite the lottery for student parking on the school side of Concord Ave, students are frequently parking on nearby side streets even when other parking is available. The Select Board has enacted temporary parking bans on certain side streets to compel students to park in designated areas. It is unknown at this point whether the problem will persist when the building project is complete, or whether the current parking bans will be sustainable if it does. But it seems fair to assume—based on observed behavior—that implementing fees would disincentivize parking on campus and increase parking on nearby side streets.

It is worth noting that all of the available methods for collecting fees—whether a parking app, parking meters, or parking permit stickers—have up-front setup costs and ongoing costs for administration and enforcement. The Town must evaluate which method(s) is practical at current staffing levels and estimate the incremental costs associated with that method (e.g., licensing fees for an app, capital expense for meters, signage, and more).

Regarding increasing rates in Belmont Center, this may be a feasible way to increase revenue from parking fees, but it is important to note that the stated intention of charging for parking here is to facilitate patronage of local businesses, not to maximize parking revenue. If rates are raised to the point where patronage is diminished, the losses to local businesses and to Belmont's commercial tax base may offset any potential increase in parking revenue. For this reason, implementing rate increases should only be considered after a thorough analysis of parking rates for similar shopping areas in other towns, as well as consultation with Belmont's Economic

Development Committee (EDC) and Belmont Center Business Association (BCBA) for their feedback.

The Town has engaged consultants to provide parking studies in the past, notably in 2002 and 2012. However, these studies had a narrow focus on commercial centers. The 2002 study analyzed Belmont Center, Cushing Square, and Waverley Square. The 2012 study was specific to Belmont Center. While some recommendations from these studies have been implemented, many of them are outdated now. To develop an adequate response to the ideas SCIG received, an updated comprehensive study should be undertaken.

Recommendations

- Select Board to request a comprehensive study of town-wide opportunities for parking revenue. This study should include analyses of town-wide supply and demand, fee collection methodology to maximize net revenue, and comparisons of regulations and pricing in similar towns. Input should be solicited from all stakeholders, such as EDC, BCBA, business owners in Cushing Square, Waverley Square, and elsewhere, as well as town residents.

Next Steps

- Select Board and Community Development to develop RFP for comprehensive, town-wide parking study.

Further Reading

- Belmont Parking Clerk
<https://www.belmont-ma.gov/parking-clerk>
- Belmont Parking Meters
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/parking_meters_coming_to_town.pdf
- Belmont Parking Rules & Regulations
<https://www.belmont-ma.gov/parking/pages/parking-rules-regulations>
- Municipal Parking Study (2002)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/2002_parking_study.pdf
- Belmont Center Parking Management Plan (2012)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/final_parking_management_plan.pdf

IDEA #293 – ADJUSTMENTS TO ENROLLMENT

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

No new hires in schools for a year. I have heard that a lot of students have moved onto private schools because of COVID. We should reassess after we have concrete numbers.

Other ideas included in this report

- None

Idea intent

Adjust FTEs in response to lower enrollment in order to decrease/maintain the salary line item in the school budget.

Weighted Final Score: 40

(Financial Impact: 3, Operational Impact: 0, Time Scale: 3, Ease of Implementation: 3)

Background Information

Staffing including any new hires is assessed on a yearly basis by the School Department and the School Committee. In 2021, due to the failed override, the SC/SD had to cut FTEs from the originally proposed FY22 budget. These reductions were based on enrollment levels in various grades/activities.

Enrollment is always a major factor in determining staffing and new hires across the district, at every grade level. During the period of 2019-2021, enrollment in Belmont Public Schools evidenced an unanticipated decrease as did the majority of public school districts in Massachusetts due to impacts of COVID.

- On October 1, 2019 total enrollment in grades K-12 stood at 4700 students.
- On October 20, 2020 enrollment was at 4420 students
- On October 21, 2021 the total enrollment of students in grades K-12 was 4358, a difference of 342 students over two years (-7.3%).

Numbers from the Belmont Public Schools Enrollment Study that was completed by McKibben Demographics in 2018 have been the basis for staffing and reconfiguration decisions. That report projected district enrollment in 2021 to be 538 more students than actual.

Recommendations

If the 2018 McKibben numbers are the basis for the MSHS reconfiguration/vision, then the vision needs to be relooked at by the School Committee to take into account actual variances from forecasted enrollment and determine whether the position "asks" for the district match the actual enrollment trends.

In this period following a defeated override, the vision for how FTEs are being allocated needs to be very clear and understandable in order for residents to understand any additional "asks".

Next Steps

- The School Committee and School Administration should:
 - Clearly define the reconfiguration plan for FTEs. Have reconfiguration plans changed with drop in enrollment.
 - Make clear how some of the available Federal Funds can be used to help support pandemic-related student needs (social workers, etc.).

Further Reading

- None

IDEA #303 – RESIDENTIAL TAX EXEMPTION

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Set higher tax rate for out-of-town property owners, and even higher for corporate property owners.

Other Ideas Included in this report

- 355 - Impose higher tax rate on every property that is worth more than \$2.5 mil.

Idea intent

The idea is focused on changes to the tax assessment and rate process in current use by the Town of Belmont. The idea advocates for a split commercial/industrial vs residential tax rate as well as a residential exemption for qualifying property owners. Enacting the former can reduce the tax burden for all residential property owners while the latter reduces the tax burden for property owners residing within the Town of Belmont and whose assessment value is below the Break-Even Point, the calculated valuation where a homeowner would pay the same amount regardless of the community's adoption of the exemption.

Weighted Final Score: 23

(Financial Impact: 0, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

Both a state residential exemption (SRE) and a split commercial/industrial vs residential tax rate have been explored annually by the Board of Assessors. Split rates have been determined to be inconsequential since 95% of the properties are residential classification. In addition, the Board of Assessors has stated that increased commercial rates would be a disincentive for bringing new businesses to the Town.

The FY2021 Tax Classification report to the Select Board included data on the effects on tax bills after implementing a residential exemption at 10%, 20% and 35%, the maximum allowed by MA law. The calculated Break-Even Point was determined to be \$1,326,300, meaning eligible homes assessed below this amount would have a reduced tax burden while homes assessed above would incur higher taxes as a result of a residential exemption at any rate.

Split Commercial/Industrial to Residential Rate

MA law allows a single tax rate for all property types or a split rate between the Residential and Open Space properties (RO) and Commercial, Industrial and Personal properties (CIP). To calculate possible split rates between the two groups, you must first examine the full and fair cash values (FFCF) and the tax levy. The FFCF is the total assessed value of all properties (FY21: \$9,488,120,829 of which \$9,020,342,800 belong to RO parcels or 95.0699%). The tax levy is the amount of tax revenue to collect after factoring in new growth and a maximum

increase of 2.5% (MA Proposition 2.5) from the previous year's levy (FY21: \$109,568,817). Thus, in a single tax rate system, applying the 95.0699% RO ownership to the total tax levy equates to \$104,166,916 responsible by the RO taxpayers. The tax rate is calculated by dividing the levy by FFCV and multiplying by 1,000 ($\$104,166,916 / \$9,020,342,800 * 1000 = \$11.55$)

	FFCV	FFCV%	Max Allowable Levy using FFCV%	Tax Rate at Max Levy
Residential	\$ 9,020,342,800	95.0699%	\$104,166,916	\$11.55
CIP	\$467,778,029	4.9301%	\$5,401,901	\$11.55
Total	\$ 9,488,120,829	100.0000%	\$109,568,817	

Source: Town of Belmont Fiscal Year 2021 Tax Classification Letter to Select Board

A split rate allows the percentage responsible by the RO taxpayers to be shifted to the CIP taxpayers to reduce the tax burden of residential homeowners. By law Belmont's maximum CIP shift allowed is 150% of its full and fair cash value (FFCV). This means the 4.9301% responsibility of the CIP taxpayers can be multiplied by a maximum factor of 1.5, which equals 7.3952%, leaving 92.6048% of the tax levy to the RO property owners. Taking these new percentages and applying them to the total tax levy provides the new levy obligations per class.

	FFCV% after shift	Levy after shift	Levy Adjustment %	Tax Rate
Residential	92.6048%	\$101,465,966	97.4071%	\$11.25
CIP	7.3952%	\$8,102,851	2.5929%	\$17.32
Total	100.0000%	\$109,568,817	100.0000%	

Source: MA DLS Gateway https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=TaxRate.CIP_TaxShift

Calculating the percentage difference in levy obligations for RO taxpayers leads to a levy adjustment of 97.4071% ($\$101,465,966 / \$104,166,916$). This ratio is called the minimum residential factor (MRF) which is the maximum allowable shift from the initial total tax levy obligation by RO taxpayers.

Based on Belmont's average single-family assessed value of \$1,326,300 and using the tax rates before and after the shift, the average single-family tax bill and difference can be computed. Therefore, in the maximum shift scenario, single-family homeowners save \$397 on average, while the tax burden of commercial properties increases by \$7,658 on average.

	Rate Shift	Avg Valuation	Tax Bill No Shift	Tax Bill Max Shift	Tax Bill Shift Diff	Tax Bill Shift %
Residential	\$0.30	\$1,326,300	\$ 15,316	\$ 14,919	\$(397)	-2.59%
CIP	\$ (5.77)	\$1,326,300	\$ 15,316	\$ 22,974	\$7,658	50.00%

Source: Town of Belmont Fiscal Year 2021 Tax Classification Letter to Select Board

State Residential Exemption (SRE)

Residential exemptions are designed to shift the property tax burden from the permanent residential homeowners to the owners of rental properties and vacation homes. It is a net neutral revenue initiative to the municipality but does incur labor costs to verify residency. SREs are typically found in cities with large rental populations such as the immediate Boston metro area or in seasonal/vacation towns like on Cape Cod.

MA municipalities with State Residential Exemption	
Boston Metro Cities	Residential Exemption: Percentage Factor (FY19)
Boston	35%
Brookline	21%
Cambridge	30%
Chelsea	30%
Everett	25%
Malden	30%
Somerville	35%
Waltham	35%
Watertown	23%
Cape Cod/Vacation Towns	
Barnstable	20%
Nantucket	25%
Provincetown	25%

Somerset	10%
Tisbury	18%
Truro	20%
Wellfleet	20%

In 2019 the Town of Lexington Select Board commissioned an ad hoc Residential Exemption Policy Study Committee to research implementing a residential exemption. The committee produced an exhaustive 192-page final report with expert testimony from economists and housing policy experts, local real estate agents, and assessors from other communities.

Recommendations of 2019 Lexington Residential Exemption Policy Study Committee:

Local Tax Policy:

1. Do not adopt the Massachusetts Residential Exemption (SRE).
2. Develop for community consideration a proposal for a means-tested and/or age-based residential exemption.
3. Promote awareness of existing programs such as tax deferrals, exemptions, and the Massachusetts Senior Circuit Breaker Tax Credit.
4. Evaluate increasing eligibility thresholds significantly for the Lexington Property Tax Deferral Program.

State Advocacy:

5. Advocate for expanded access to tax deferrals for homeowners with existing or future mortgages and home equity loans.
6. Advocate for expanded access to the state administered Senior Circuit Breaker Tax Credit for surviving spouses and those with homes above the current eligibility thresholds, as well as expanding the level of rebate.

Further Study:

7. Further study the financial needs and supports necessary for Lexington's population of older (80+) seniors to age in place.
8. Further study methods to retain middle-aged residents, who have the highest rate of self-forecasted out-migration among all age-cohorts in our survey.

As mentioned in the second recommendation of the committee, an alternative option to the State Residential Exemption (SRE) at a town's disposal is to enact a locally devised policy for exemptions targeting seniors known as the Means Tested Residential Exemption (MTRE). Whereas the SRE applies to all owner-occupied residential properties, a MTRE can specifically target seniors upon meeting income, asset, and residency criteria. Five communities have instituted this exemption: Concord, Sudbury, Wayland, Reading and Hopkinton. However, as Lexington discovered, some benefits of MTRE would be offset by reduced State-paid benefits that residents would have otherwise received such as the Massachusetts Senior Circuit Breaker Tax Credit (2016). This rebate applies if a Household's property taxes exceed 10% of their income but for those close to the 10% threshold, a reduction of property taxes from MTRE would reduce the benefit from the tax credit. Further study of MTRE and its benefit for Belmont seniors is warranted.

Recommendations

- In keeping with the Town of Belmont's goals for increased transparency, the Board of Assessors should include in the annual Tax Classification Hearing letter detailed explanations and walk-throughs of the process and calculations leading to the recommendation of adopting a residential factor of 1. The current Letter does not include the Minimum Residential Factor (MRF) calculated by DOR through DLS Gateway (97.4071%) nor the lowest percentage of share of the tax levy paid by RO taxpayers since classification began. Many towns include common assessment terminology and provide layman's terms of MA tax rate shift regulations. While the Letter does include tables and calculations of the maximum CIP shift of 1.5, the Letter lacks context for the resident's understanding. See the referenced classification hearing links for examples.
- As Belmont's commercial tax base expands, the analysis conducted to support the Select Board's vote on whether to enact a split commercial vs residential rate should include research into the commercial rate of nearby municipalities. The alternatives that businesses face is Belmont's commercial rate versus other municipalities' commercial rate, not Belmont's commercial rate versus Belmont's residential rate. So, a split commercial vs residential rate is not inherently a disincentive to businesses, but we should consider our competitiveness within the broader region. This distinction will become more important when Belmont's commercial tax base is more than 5%.

Next Steps

- Propose to the Board of Assessors to investigate adopting a Means Tested Residential Exemption or other age-based residential exemption targeting seniors. See Idea #164 for more information about Tax Relief for Seniors.

Further Reading

- [MA DLS Living with the Residential Exemption](#)
- [MA DLS Introduction to Assessment Administration: Law, Procedures and Valuation](#)
 - [Chapter 4: Property Tax Classification Module](#)
- [Town of Belmont Fiscal Year 2021 Tax Classification Letter to Select Board](#)
- [Town of Belmont 12/10/2020 Meeting of Select Board](#)
- [Town of Lexington 2019 Residential Exemption Policy Study Committee Final Report](#)
- [Town of Mendon Taxation Aid Committee Report on Means-Tested Real Estate Property Tax Exemption](#)

Tax Classifications Letters/Presentations

- [Town of Lexington FY2021 Tax Classification Packet](#)
- [Town of Topsfield FY2020 Classification Hearing Packet](#)
- [Town of Natick FY2019 Tax Classification Hearing Presentation](#)

- [City of Northampton FY2021 Tax Classification Hearing Presentation](#)

IDEA #304 – TOWN RUN LIQUOR STORE

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Town run liquor store in addition to existing permits

Other ideas included in this report

- None

Idea intent

Much like New Hampshire, generate revenue by selling alcohol.

Weighted Final Score: 30

(Financial Impact: 4, Operational Impact: 0, Time Scale: 1, Ease of Implementation: 0)

Background Information

The Town of Belmont would not be able to legally operate a town-owned liquor store under state law. The Commonwealth operates under “free enterprise” laws, issuing licenses to private businesses to sell alcoholic beverages, vs operating as an alcohol beverage control state, like New Hampshire, where the state owns all liquor stores, or states like Maine or Vermont, where the state sells alcoholic beverages to private vendors at set prices.

Recommendations

- Idea #304 needs to be ruled out because it is not legal under state law

Next Steps

- None

Further Reading

- <https://www.mass.gov/doc/frequently-asked-questions-spring-2018/download>

IDEA #309 – ROAD SALT VS SAND

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Reduce road salt usage to just enough to keep the sand from freezing. Road salt is far more expensive than sand and the overuse has the hidden costs. Eliminating the current use of road salt would save money in purchasing as well as in the labor of the current over-application of the product plus the inevitable collateral damage.

Other ideas included in this report

- None

Idea intent

Reduce use of road salt in winter road treatments relative to sand.

Weighted Final Score: 26

(Financial Impact: 0, Operational Impact: 0, Time Scale: 3, Ease of Implementation: 5)

Background Information

The Subcommittee on Town Services, Budget and Revenue met with Belmont Public Works and Highway staff on 11/5/2021 to discuss this issue.

The Subcommittees findings based on this conversation are as follows.

- Belmont does not use sand in pretreating or treating its roads. The use of sand is actually detrimental to the environment for several reasons: it clogs storm drains, it chokes out wetlands, and absorbs hazardous waste on the roads.
- For the latter reason, it becomes hazardous waste, needs to be cleaned off the roads and sent to specialized landfills for deposit. This makes the use of sand more expensive than salt, and there are fewer deposit options each year.
- Also, sand does freeze
- Salt usage is regulated by the Commonwealth. Belmont practice is to use a biodegradable pre-treatment before winter storms and to use a calibrated amount of salt on the roads during storms.

Recommendations

- This idea has been ruled out given the information on sand use today and the cost of removing and disposing of sand to specialized hazardous waste sites.

Next Steps

- None

Further Reading

- Road Treatment Types in MA
<https://www.mass.gov/service-details/road-treatment-types>

IDEA #311 – POLICE DETAILS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

The complaint I hear most often concerns the wide-spread and over-use of police to handle street openings, highway work, and tree trimming. Recently, we watched as two police officers stood at either end of Louise Road while a gas line was being installed. People have the perception that the police officers mainly stand around and talk to the people who are digging in the street. People are aware that Massachusetts is one of the few states, and maybe the only state, that still makes widespread use of police officers to do traffic details. Belmont does not have high-speed highways, or lots of heavy truck traffic. Many people believe that traffic cones and warning signs and blinking lights should suffice.

Most people have the perception that very few drivers drive recklessly in an area where traffic cones indicate road work is being done. Most of us are unaware of events where drivers ignore and collide with traffic cones. We are aware that traffic details are "extra money" for police officers, but we also believe that it would be a better use of the talents and skills of police officers to police work or community outreach, instead of the brain-numbing boring job of standing in foul weather and watching road work, just to collect overtime pay.

Think of the optics. It visibly undermines the Town's efforts to make wise use of its resources, if everyone witnesses the squandering of money for police-staffed traffic details.

Other ideas included in this report

- #299 – Eliminate Police requirement for town DPW, Light Dept or road work (BPD could continue to do detail work for National Grid).

Idea intent

Reduce Police Department expenditures by changing requirements for police details for road work and tree trimming.

Weighted Final Score: 07

(Financial Impact: 1, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information:

Police details for third-party contractor work (e.g., National Grid, Eversource, road contractors, State project such as Trapelo Rd., etc.) are paid by the third party through the Police Department. Police officers sign for paid details on a voluntary basis during their time off outside of their workweek hours; payment by the third party is made through the Police Department, which collects a 10% administrative fee—a recurring annual General Fund revenue in non-COVID

years of \$65,000-90,000. The use of police detail and the number of officers/flaggers required is determined by the third-party contractors, based on state law and internal guidelines.

For town work done by town employees (including pothole repairs, Belmont Municipal Light work, etc.), the town uses road closings to minimize costs. Details are provided for and paid for by the town in cases where public safety is deemed to be at risk, such as high traffic areas, or areas of reduced visibility. Between October of 2020 and October of 2021, the amount paid by the Town for such details was \$111, 148, approximately half of which was for Community Development projects. The Town Clerk's Office (elections), Belmont Municipal Light, and the Water Department accounted for another 40% and the balance was for highway work and school details.

Detail rates and conditions are set by collective bargaining contracts and vary from town to town. In general, paid detail work is significantly higher than regular pay on an hourly basis. In addition, payment is often contracted for a minimum number of hours, regardless of the actual hours worked.

In 2008, state legislation was introduced to replace the requirement that police be present at road construction sites with one that allowed civilian flaggers for certain low traffic or low speed areas. This legislation was intended to save money both at local and state levels. However, the reform has made little difference in part because Massachusetts prevailing wage law (determined by the Executive Office of Labor and Workforce Development) requires that civilian flaggers be paid a rate nearly equal to that paid by collective bargaining agreements with organized labor in that area, which, in effect, means similar rates to police officers. Lack of perceived savings, together with law enforcement desire to retain lucrative details, has resulted in very little usage of civilian flaggers in MA.

Massachusetts laws, along with local laws, determine who can direct traffic, stop traffic, or detour traffic. In Belmont, as is in the case of every other community in Massachusetts, only police officers or their designees are allowed to direct traffic. Crossing guards are allowed to stop traffic, allow crossing and return to the side of the road.

Recommendations

None. The ability to change police details for roadway and tree trimming work in Belmont is limited by state laws, third-party requirements, and public safety concerns.

Next Steps

- None

Further Reading

- Study on outcome of 2008 MA state flagger reform
<https://pioneerinstitute.org/pioneer-research/better-government/what-ever-happened-to-flagger-reform/>

IDEA #312 – LIMIT NEW TENNIS COURTS TO ONE

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Spend less. In the last capital committee meeting minutes, all spending was approved. Why are we discussing one or two tennis courts? One is cheaper, decision made. Etc.

Other ideas included in this report

- None

Idea intent

One New Tennis Court vs Proposed 2 at Winn Brook Courts

Weighted Final Score: n/a (already implemented)

Background Information

The new Belmont High School campus did not include plans for tennis courts, and two additional courts were proposed as additions to the current courts at Winn Brook. There was much discussion and debate about the location and need for additional courts. One new court was approved at Town Meeting on June 7, 2021.

Recommendations

- Town Meeting 2021 already voted to approve the one new tennis court using CPA money.

Next Steps:

- None

Further Reading

- <https://www.wickedlocal.com/story/belmont-citizen-herald/2021/06/09/belmont-town-meeting-approves-funding-additional-tennis-court/7607602002/>

IDEA #313 – COMMUNITY ENGAGEMENT COMMITTEE

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Idea Text

Create a formal community engagement/volunteer committee whose charge is to create, manage, sustain, and promote community and volunteer-based initiatives within the Town.

Other ideas included in this report

- None

Idea intent

A Community Engagement Committee would act as a liaison between the Town of Belmont and its residents who seek to serve through voluntary contributions. The committee would promote current community initiatives, assist residents starting new ones, be a source for transitioning leadership on existing programs, and confer with Town resources as needed to implement or maintain them. Its main charge would be to foster community spirit, empower engagement among the Town's residents and ensure opportunities for residents of all ages and diverse backgrounds to become involved with the betterment of the Town and its people.

Weighted Final Score: 40

(Financial Impact: 1, Operational Impact: 2, Time Scale: 3, Ease of Implementation: 5)

Background Information

Currently, there are several volunteer initiatives within the town, yet there is no centralized repository to inform residents of upcoming events and solicit their participation. Social media is used by residents as a primary means of promoting a community initiative or event. However, there are myriad groups and subgroups among several platforms that such communication can get lost in a news feed or not seen at all depending on the platform's algorithms. None of these posts are from official Town departments, committees, or government boards. Such a committee could solve this by being responsible for cataloging and curating a list of current community initiatives, assembling contact information to its leadership, and communicating with them on their needs and sustainability. This information could be disseminated to the public so that community groups could be promoted, and residents could stay abreast of upcoming opportunities to participate.

Additionally, the Committee could assist residents who wish to commence new initiatives by providing them information, resources, or just a place to start. Also, if current leadership of a program is looking to step down, this committee could provide an infrastructure by which community initiatives could be passed on in ownership to other residents or groups.

Possible town representation could include the Human Rights Commission, the newly created Diversity Task Force and School Committee and several Resident Members. Often residents are

looking to participate in Town committees but may be hesitant because they feel they lack qualifications. This committee opens the door to new government involvement with the only qualification being a willingness to serve and a commitment to community engagement.

Bringing diverse residents together leads to an engaged community which can help to foster new ideas previously unexplored. Some of these ideas when implemented could result in new efficiencies or cost mitigations if they happen to relieve the Town of certain costs.

What follows are role-based concerns that could be addressed by the formation of a Community Engagement Committee:

- *As a volunteer*, I am looking for opportunities where I can help to make a difference and the community a better place. I may be looking for events of a specific type (cleanups, fund raising, etc.), those best suited to certain individuals (small children, teenagers, seniors, etc.), or those of a particular topic (environmental, housing, food assistance, etc.). I am finding it difficult to find such events and would like a central place to learn about possible involvement.
- *As an organizer*, I would like a more efficient way to solicit volunteers and those interested in joining my group. I may also look for new leadership for my group as I no longer wish to invest the same amount of time. I am finding it difficult to promote my program beyond the small percentage engaged in specific social media groups.
- *As a resident seeking to join town government*. I would like to participate in a government committee where my willingness to serve is sufficient qualification.
- *As a town leader*, I would like for greater community engagement and civic participation. The more residents involved in such initiatives, the more likely for a welcoming environment and richer community spirit. As a byproduct, there could be possible revenue savings from the transfer or implementation of programs otherwise at cost to the Town.

The closest instance of such a committee is the Town of Bourne which recently formed a Community Engagement Committee in May 2019. Per the committee's webpage, "The Bourne Engagement Committee's mission is to sponsor and encourage community events, projects, activities, services, programs, and public improvements which are of mutual interest to the visitors and residents of the Town of Bourne, and, which strengthen the Town by fostering community involvement and spirit." Although this committee includes funding assistance for community initiatives, the Belmont equivalent need not to do so, unless so desired by the Town or desired by the residents.

A non-profit SPUR representing Swampscott, Marblehead, and Salem was established to empower citizens in becoming a "Community of Doers". The website provides a list of multi-generational volunteer opportunities throughout the constituent towns as well as offers learning programs and seed grants to community initiatives. While not a municipal program, SPUR can serve as a model for a similar implementation within Belmont (and perhaps regionalized with surrounding communities) in terms of volunteer opportunity promotion.

Recommendations

- Create a Belmont Community Engagement Committee with several Resident Members and representation from appropriate Town committees (Human Rights Commission, Diversity Task Force, School Committee, etc.).

Next Steps

- The Select Board consider creating a Community Engagement Committee, potentially asking the Council on Aging or a resident to submit a proposal.

Further Reading

- <https://www.townofbourne.com/community-engagement>
- https://www.quincyma.gov/govt/elected/city_council/community_engagement_committee.htm
- <https://www.wilmingtonma.gov/school-department/events/173481>
- <https://www.spur.community/>

IDEA #316 – ROAD SIGNS AND TREE SELECTION

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Reduce DPW/Facilities spending: 1) Do not replace perfectly good street signs. 2) Let residents select the tree they want on their street as long as they pay for it (and follow the rules). When we needed a new tree, the town was going to put in a ~sapling. We were willing to pay for a bigger tree and worked w the tree warden to understand our choices. This option could be advertised. Leave a flier in the mailbox of neighbors nearby.

A perfectly good street sign was replaced in our neighborhood by another sign that indicated the same road name and "Not a Thru Way." The new sign is exactly the same color and size as the old one, with the exception of "Not a Thru Way." The road that was being indicated as "Not a Thru Way" is about 100 feet long, and people *never* accidentally go down it thinking it is a through way.

This work took two Town employees about 15 minutes, plus the cost of the new sign.

Other ideas included in this report

- None

Idea intent

Cost Savings on Town Street Signs; Resident Satisfaction regarding new trees.

Weighted Final Score: 40

(Financial Impact: 1, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 4)

Background Information

Street Signs

According to Jay Marcotte, Director of the Belmont Department of Public Works, the Commonwealth, within the past 5-10 years, mandated new regulations for street signs with reflective and readability standards re color and font size. The Town's phased in new street signs to meet this mandate. Signs now are only replaced if damaged.

Trees

Chapter 87, Mass. General Law, stipulates that towns must have a Tree Warden, and delineates the responsibilities of the town and this position. With the resignation of long-time (35 years) Tree Warden Tom Walsh, Jay Marcotte is the Town's Interim Tree Warden. They are reviewing all processes for the system by which the town allocates, sources and plants trees. On average, the town has a \$12,000-15,000 annual budget for an average of 100-125 new trees per year. The

selection of trees and all related processes are being updated. The Interim Tree Wardens are part of and will work with the Town's Shade Tree Committee on any revisions.

Recommendations

- No further action is needed regarding street signs. The changes were state-mandated and are completed.
- A new system for new sidewalk tree planting is in process, and no immediate action is recommended while this review process and revisions are underway.

Next Steps

- Select Board should hire a dedicated tree warden to ensure that we meet the State requirements of employing a Tree Warden position.
- Evaluate the option of hiring this position in partnership with another town.

Further Reading

- Guide to Local Tree Bylaws
<https://www.mass.gov/doc/tree-bylaw-and-ordinance-guide/download>

IDEA #318 – REDUCE STREETLIGHT AND OUTDOOR LIGHTING BRIGHTNESS

Report Status: Fully Reviewed

Researched by: Travis Franck

Idea Text

Have Belmont Light turn their newly installed led lights down by 1/2. People I have talked to about their new streetlights complain that they are way too bright. Tim Brothers, manager of the MIT Wallace Astrophysical Observatory and Vice President of the Massachusetts chapter of the International Dark Sky Association, in the video link below talks about all the important environmental and health benefits of turning down the lights. Kudos to the Light Dept. for installing the new healthier led bulbs. Tim Brothers makes 2 more comments in this video that might be relevant: 1) 2700k bulbs are healthier (I believe Belmont is using 3000k); and 2) the town of Westford, MA turned their streetlights down by 50% and no one even noticed!

Other ideas included in this report

- 318 – Reduce LED street light brightness
- 282 – Reduce light usage on town fields and facilities
- 288 – Reduce brightness of Wellington lightening

Idea intent

SCIG considers the suggestions to ask the town and Belmont Light to assess whether there could be new lightening settings that change the brightness, the timing, and the efficiency. These changes could reduce costs, reduce emissions, and improve the quality of life for neighbors of these facilities.

Weighted Final Score: 54

(Financial Impact: 3, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 4)

Background Information

The streetlights of Belmont are owned and maintained by Belmont Light. The lights for parks and fields near schools are on the respective school circuits (“behind the meter” of the nearby school building). The Town pays for the streetlight electricity and pays for the light fixtures and electricity at the parks/fields. The savings for streetlights and field lights would differ because they are charged two different prices of electricity. For reference, the current rate for municipal streetlighting is \$0.25853 per kWh.

Belmont Light began upgrading the streetlighting system from high-pressure sodium bulbs to LEDs bulbs in 2019. This conversion from reduces the energy use of streetlighting about 40% (70W to 40W). As of January 2022, Belmont Light has upgraded about 70% of the streetlights in Belmont. Belmont Light chose LED fixtures that emit 3000K temperature light after considering

2700K, 3000K, 4000K. The decision was made after considering energy efficiency, aesthetics, public safety, and cost (2700K streetlights weren't being produced at scale). The new LED streetlights can be independently controlled from a central location (i.e., remotely), including setting the brightness. Belmont Light initially sets the new LED bulbs to 100%. A limited number of bulbs have been remotely dimmed based on neighborhood feedback.

Proper lighting of streets and walkways is primarily a public safety issue. Belmont Light stated they are willing to adjust streetlighting brightness but would like to work with the Police Dept and relevant town officials to decide the best course of action.

Financially, the town spent \$298k in 2019 and \$258k in 2020 on streetlighting electricity costs (Belmont Light Audited 2020 Statement, pg. 44). The decrease in costs from 2019 to 2020 could be because of the active LED conversion. To estimate the potential savings from dimming streetlights, let's assume that, after 100% conversion, the annual streetlight electricity costs are around \$240k (ballpark). Also, assuming a linear savings in energy costs (dimming 10% saves 10% of electricity), the potential savings of dimming all the streetlights in town would be:

Light Brightness	Dimmed by	Annual Savings
100%	0%	\$0/year
90%	10%	\$24,000/year
75%	25%	\$60,000/year
50%	50%	\$120,000/year
30%	70%	\$168,000/year

To score this idea, the semi-conservative value of 75% was used, with the rationale that some streetlights could be dimmed more and others less based on public safety considerations. It is noted that the submitted idea text suggested that 50% was reasonable based on another community's experience and, if implemented, would save Belmont more money.

Field and exterior school lighting is more difficult to estimate. Belmont Light commented that these lights are not LED and there current are no plans to convert them to LED. They are owned and operated by the School Department and the Department of Facilities. If those bulbs are still the older high-pressure sodium bulbs, there could be large savings from converting them to LED and then programming them with lower output (dimming) and potentially different on/off schedules. There would be an upfront cost to convert the bulbs, but with a corresponding on-going annual energy savings (approx. 40% using the streetlight figure above).

Recommendations

- Belmont's streetlights should be adjusted by Belmont Light in conjunction with Town public safety personnel. The process of dimming the new LED streetlights is straightforward since it is centrally controlled via software. The speed of implementation depends on the bandwidth of the individuals involved.

- The annual costs savings could be significant and would be reoccurring every year (\$500k-\$1mil over 10 years).
- The Department of Facilities should review lightening at fields and parks and budget to upgrade lighting for on-going energy and maintenance savings. This could be part of an Energy Service Company (ESCO) project (Idea #302).
- There would be additional cost savings if the field and building lights were also managed differently.

Next Steps

- The Town Administrator and/or the Select Board should instruct the Police Department and the Facilities Department to work with Belmont Light to adjust the brightness of streetlights.
- One possible first step is to review any standard recommendations for streetlighting lumens and to adjust the LED lights to output this lumen brightness. Lighting is location-specific so adjustments might need to be made. Additionally, this is a first step and brightness could be further lowered and should be reviewed.
- The default setting of new installations should not be 100%, but instead should be significantly lower.
- Separately, the Facilities Department should examine field and exterior lightening fixtures and consider upgrading the lights to LEDs that could also be centrally controlled.

Further Reading

- Belmont Light 2020 Audited Financials
<https://www.belmontlight.com/wp-content/uploads/2021/06/2020-Belmont-Light-AFS.pdf>
- Belmont Light LED Streetlight Project webpage
<https://www.belmontlight.com/about/projects/ledstreetlights/>

IDEA #321 – NEW VEHICLE PURCHASING POLICY TO MOVE TO ELECTRIC VEHICLES

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Propose to the Select Board and the Capital Management committee of the Town to adopt (with TMM voting support) a new vehicle purchasing policy applicable across the Town's fleet that all new vehicles (whether cars, trucks, vans, etc.) scheduled to be purchased shall be EVs, unless either (1) functionally the EV alternative does not satisfy the needs and demands of the proposed use and application of the fleet vehicle or (2) the EV is significantly more expensive (as a lifecycle cost analysis demonstrates, not just the purchase price) than the non-EV alternative.

Other ideas linked to this report

- None

Weighted Final Score: 56

(Financial Impact: 3, Operational Impact: 6, Time Scale: 1, Ease of Implementation: 4)

Background Information

The Town of Belmont Energy Committee is writing a policy to specifically guide the transition of Belmont's fleet to electric vehicles.

As part of Idea #54 Fleet Management, the SCIG recommends that Belmont improve its fleet management through the writing, implementation, and enforcement of policies/procedures that guide its management from purchase, use, maintenance/repair, and resale/retirement. These policies/procedures should be contained in a manual and adopted to ensure that the Town of Belmont's vehicles are managed in an efficient, economical, and safe fashion, consistent with policy. The State of Massachusetts' policy manual can be a starting point for Belmont to draft and write its policies and procedures. Additionally, policies, for example this one drafted by the Energy Committee pertaining to the transition of Belmont's fleet to electric vehicles can sit or be referenced in the Fleet Management Policy and Procedures Manual.

Recommendations and Next Steps

No specific action required by SCIG on electric vehicle policy recommendation as Energy Committee is writing policy for guidelines to transition to electric vehicles.

Along with the financial savings, implementing this idea helps the Town achieve the Climate Action Roadmap, which was adopted by a vote of Town Meeting.

Policy and Procedures manual to be written by Town to guide management of Belmont's fleet should include or reference the Energy Committee's policy to guide transition to electric vehicles.

IDEA #326 – CONTRACTOR ACCOUNTABILITY

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

Be able to hold contractors more responsible. This may be best served by a state-wide program. It seems if contractors don't do the job they were hired to do correctly, they are off the hook because it costs too much to go after them. There should be sharing of information between the cities and towns, so contractors who don't do the job properly are prevented from being hired by other municipalities.

Other ideas included in this report

- None

Idea intent

Contractor Accountability

Weighted Final Score: N/A (already implemented)

Background

Massachusetts General Law 30B has specific and strict regulations for processes to bid for contractors, requiring towns and cities to contract with the lowest qualified bidder. Town departments do reference checks as part of the bidding process. In addition, the Massachusetts Division of Asset Management and Maintenance maintains a public list of contractors who have been disbarred, suspended, or decertified.

Discussion with Town department heads indicate that the Town has tightly written specifications in contracts per state requirements and exercises these to address any lapses, delays, or errors in service provisions.

There is a statewide bid/contract list. The procurement process for contractors on this list is a more expedited process.

Procurement is complex in the Commonwealth. Our Town Administrator has an MCPPO (Massachusetts Certified Public Purchasing Official) designation, which is a resource for Town departments.

Recommendations

- Since there is a state-wide program on contractor selection that includes quality incident reports and the Town is adhering to state requirements and best practices, there are no further recommendations.

Next Steps

- Continue to adhere to state requirements and best practices in bidding, contract selection and management.

Further Reading

- Massachusetts Uniform Procurement Act
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleIII/Chapter30B>
- State Bid/Contract List
<https://www.mass.gov/buy-from-a-statewide-contract>

IDEA #327 – HOLD OPEN UNION NEGOTIATIONS

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

In the Belmontonian article the BEA stated their desire to have open bargaining (inviting all community members to attend negotiations). http://belmontonian.com/news/statement-belmont-education-association-addresses-its-approach-to-teaching-in-covid/?fbclid=IwAR0x3nEQNvNWN9y_JIHvUkwtY9Y1Tt6x1xGuDOLYyAxgpQdu3Fvh-OISSSk This is a great idea. What better way to provide transparency than having all 7 union negotiations be public meetings. There still can be executive sessions to discuss strategy but the actual negotiations should be public so residents are fully informed on the process. If BEA is willing, why isn't the school committee?

Other ideas included in this report

- None

Idea intent

Increase transparency in regard to union negotiations.

Weighted Final Score: 30

(Financial Impact: 0, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 3)

Background Information

Open bargaining or bargaining in public was proposed by the Belmont Education Association (BEA) as stated in the Belmontonian article from March 2021. The BEA is made up of four units (A, B, C, and D). Both parties, the BEA and the Belmont School Committee (BSC) need to agree to bargain in public. Thus far, the BSC has rejected the idea, counter proposing that all negotiating sessions shall be closed. Notably, Massachusetts courts have consistently rejected arguments that the Open Meeting Law requires that bargaining be public.

Open/public bargaining opens the books, provides full disclosure, and allows everyone to know what is presented, discussed, explained, offered, and accepted or rejected. The public is not allowed to comment. There is to be no dialogue with or between members of the public. They are not allowed to be in the caucus discussions. Basically, they only observe. Closed/traditional bargaining means that only the designated bargaining committee members for each party (BSC and BEA) attend and neither party will discuss any details of the negotiating process with the press or otherwise divulge to the public (including social media) unless an impasse has been declared by either party.

There is evidence that the BSC has been flexible and has agreed to different types of bargaining with the BEA. Prior to the most recent round of negotiations, the method and manner by which the parties conducted contract negotiations varied. In 2011, for example, the BEA and the BSC

engaged in a form of hybrid negotiations. The parties agreed upon written ground rules that provided that either party could “withdraw from interest-based bargaining and proceed with traditional or positional bargaining” at any time. Interest-based bargaining involves a collaborative problem-solving approach to contractual agreements as opposed to the traditional position type bargaining.

Prior to 2014 contract negotiations, the parties entered into written ground rules that established they would use coalition-style, interest-based bargaining. Coalition bargaining refers to the structure of the parties involved in the negotiations. Typically, there is one employer and one union. There could be a single employer and a coalition of bargaining units. There also could be multiemployer bargaining, where all school committees in the Boston metro area chose to act as a single "employer association" in the bargaining relationship. In neither of these examples from 2011 nor 2014 were the negotiations open to the public.

Recommendations and Next Steps

- While it remains up to the School Committee whether to disclose any reasons why they reject(ed) the BEA’s proposal to bargain in public, making a public statement would increase transparency and help the community understand their decision.
- The Select Board should assess whether parties would be amendable to holding open negotiations with the non-school unions in town, making a public statement to increase transparency and helping the community understand their decision.

IDEA #330 – REGIONALIZE PUBLIC SERVICES

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

I would like to see as many police and fire and town services regionalized if possible. Why couldn't Belmont work with Arlington and Watertown, two like sized towns, to consolidate services like 911? Are there other roles within the police and fire that could be reduced. The fact that the bar for need for police is to have a new car every three years is not commensurate with the level of service in the schools. Would there be any draw back a regionalizing the entire police force? Aside from dealing with the union contracts, I do not see a downside of cutting over lapping jobs.

Other ideas included in this report

- 1 - Share services of plumbing and electrical inspectors
- 5 - Explore regionalization of HR duties
- 6 - Continue to explore opportunities for regionalization
- 7 - Regionalize health services
- 8 - Look at merging positions with neighboring towns
- 69 - Regionalize snow plowing
- 132 - Join NEMLEC
- 133 - Mutual aid
- 222 - Unify police and fire as a public safety force; volunteer fire department
- 223 - Outsource emergency response services
- 243 - Look into organization structure of police/fire
- 251 - High level examination of goals of police/fire
- 308 - Forum had misleading information on fire services
- 368 - Withdraw from NEMLEC
- 369 - Response to item 222
- 370 - Close the Belmont Center fire department
- 371 - Transition to volunteer fire department
- 414 - Coordinate spot pavement patching with adjoining towns

Idea intent

This collection of ideas all center around the possibility of regionalizing public services with other municipalities. Rather than explore only the specific ideas that were submitted, we have undertaken a broad review of the possibilities for regionalizing town services, staffing, equipment, and functions with neighboring communities. Note: Regional purchasing agreements are included in a separate report for Idea #2, and a report on regionalizing dispatch and other public safety services including Advanced Life Support are in Idea #112.

Weighted Final Score: 40

(Financial Impact: 4, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

Belmont provides many services to town, including these key areas we explored as we reviewed and evaluated potential opportunities to regionalize some of what we do by working together with nearby communities. Regionalizing services can be difficult because it requires finding a partner community and working through the complexities of crafting an arrangement that is satisfactory to all municipalities involved. There can be the additional complexity of transferring from an existing mode of providing a service to a regionalized version. Generally, luck favors the prepared and communities that are proactive and organized in their efforts to seek out opportunities to regionalize are met with more success in finding and establishing regionalized agreements.

Waste collection

Belmont made significant progress on the concept of regionalizing waste collection services with Watertown in 2013. This effort was stymied over differences relating to the number of days per week waste collection would occur. Belmont currently pays a premium for 4-day collection to ensure that holidays do not result in waste collection happening on a Saturday. Watertown wasn't willing to pay such a premium.

The potential benefit of regionalizing could be significant. Waste collection vendors have to dedicate vehicles to cover routes for a whole day even if it only takes the morning. A regionalized contract involving two towns would allow the vendor to dedicate fewer total vehicles to cover the same area and allow for more efficient routing and planning. In our conversations with Belmont's DPW the premium for 4-day service was estimated at about 10% of our annual waste management contract, or \$300,000 a year. Removing this premium and opening the door to regionalized service with Watertown could represent a significant savings.

For more detail on Solid Waste and Recycling Programs, see Idea #250.

Public safety

- For more details on regionalizing public safety, see Idea #112: Regionalize Public Safety

Schools

- LABBB Collaborative - Existing regionalized, specialized special education. For more detail see *Idea #131 - Provide Regionalized Special Education*.
- Vocational, Technical and Continuing Education - For more detail see *Idea #373: Explore VTCE Options* and *Idea #177 - Withdraw from the Minuteman Regional School District*.

Library

Belmont is currently a member of the Minuteman Library Network (<https://www.minlib.net/>), a regional group of 36 public libraries and 6 academic libraries housed at local colleges and universities. Member libraries receive the following services:

- Shared technology (group purchasing)

- Internet and telecommunications (internet access, hardware, and a suite of email and productivity software tools)
- Cataloging and record management (central site staff provide cataloging and quality control services)
- Staff training and support (shared hub for knowledge, policy, and technical expertise)
- Reports and statistics (prepared and self-service reporting to assist in evaluating collections and services that are responsive to patrons' needs)

Further regionalization of the library while continuing to operate a local branch in Belmont is unlikely to realize significant savings. Regionalizing the administration of a library might result in a marginal reduction in administrative headcount, but likely at some cost to the quality of services and programming offered as well as the support provided to other library staff. Belmont's physical library may be small, but its use is not.

Public works

Our public works department currently participates in regional purchasing groups and could see benefits from participating in more, or expanded purchasing groups for things like equipment (for more detail on these agreements, see report on idea #2 - *Regional Purchasing Agreements*).

Specific positions

- Tree Warden
 - The state mandates that each municipality have a qualified Tree Warden. Belmont currently employs DPW Director Marcotte as its Tree Warden, but it's possible another nearby community might be willing to share a part-time Tree Warden,
- Animal Control Officer
 - Belmont currently employs a part-time Animal Control Officer. It's possible we could improve the Officer's working conditions and provide stability in the position by working to share the position with another community.

Recommendations

1. Remain a member of NEMLEC, The Minuteman Regional Library Network, and LABBB.
2. Develop a process to regularly evaluate the services we provide to determine if there may be an opportunity to provide a given service through an agreement with one or more neighboring communities. Consider seeking funding for transitions and other associated costs through Massachusetts' Community Compact Cabinet's Efficiency & Regionalization grant program: <https://www.mass.gov/efficiency-regionalization-grant-program>
3. Work with neighboring communities to establish formal, coordinated processes for working together across municipalities to more readily identify and act upon opportunities for regionalization of services (e.g. MORE - <http://www.cmrpc.org/municipalities-organized-regional-effectiveness-more>).

4. Consider regionalizing specific services now:
 - a. Waste Collection
 - b. Tree Warden. The state mandates that all municipalities have a Tree Warden. Currently, our Tree Warden is not a dedicated position, so there's potential to shift the position to a part-time, regionalized position if we are able to identify another municipality who either has no current Tree Warden or who would like to reduce the house of their existing Tree Warden.
 - c. Animal Control Officer. Belmont currently has a full-time Animal Control Officer, so regionalizing this position would likely mean a reduction in service for Belmont. The arrangement could be similar to the one used with the electrical and gas inspectors we used to share with Watertown.

Next Steps

- In upcoming contracting, the Solid Waste & Recycling Committee, the Town Administration and Select Board should remove the provision for the premium 4-day trash service and coordinate with Town leaders in Watertown to negotiate a single contract for regionalized waste management service
- The Town Administration should inquire with other nearby municipalities about the possibility of paying our Animal Control Officer and/or Tree Warden on a part-time basis to work in their town.
- The Select Board should form a group to develop and implement a process to regularly evaluate town services for the potential for regionalization AND to regularly connect with nearby communities on this specific topic, potentially working to form a regional group of municipalities that are interested in identifying and acting on opportunities for regionalization.

Further Reading

- *[Belmont] Select Board OKs 5 year Trash Processing Contract*
<http://belmontonian.com/news/select-board-oks-5-year-trash-processing-contract/>
- 2016 “Solid Waste Collection Contract Extension”
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/solid_waste_contract_extension_0.pdf
- Belmont Solid Waste and Recycling Committee
<https://www.belmont-ma.gov/solid-waste-and-recycling-committee/agenda/solid-waste-recycling-committee>
- Report of the Regionalization Advisory Commission (Massachusetts, 2010)
https://www.cityofmelrose.org/sites/g/files/vyhlf3451/f/uploads/report_of_the_regionalization_advisory_commission.pdf
- The Massachusetts Association of Regional Planning Agencies
<https://massmarpa.org/>

- Massachusetts Association of Regional Planning Agencies’ “Regionalization Best Practices Guide” website
<http://www.regionalbestpractices.org/>
- “Regionalization 101” presentation from the 5th Annual Regionalization and Innovation Conference (2013)
<https://www.mass.gov/doc/regfinalpdf/download>
- Massachusetts Shared Services Manual (2013)
<http://www.mapc.org/wp-content/uploads/2017/10/2013-shared-permit-manual-web.pdf>
- Municipalities Organized for Regional Effectiveness (Central Massachusetts Regional Planning Commission):
<http://www.cmrpc.org/municipalities-organized-regional-effectiveness-more>

IDEA #334 – REDUCE SERVICES TO TOWN COMMITTEES

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Town Meeting, Committees and Commissions Support - have them create their own documents and slides. Compile committee and commissions reports and call it the Annual Report. Print no Annual Report. Not have staff attend committee and commission meetings

Other ideas included in this report

- 214 - Reduce Town Documents;
- 335 - Update Open Meeting Law for Collaboration

Idea intent

Our assumption is that this idea is aimed at reducing the number of hours Town staff spend supporting boards, committees, and Town Meeting and to save on materials like paper, toner, and wear & tear on equipment like printers.

Weighted Final Score: 07

(Financial Impact: 1, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

Massachusetts General Law Chapter 41 includes requirements for Town Clerks' powers and duties, which include recording and reporting to the state all votes at all Town Meetings, running and reporting on elections, recording and reporting to the state on all appropriations, executions of contracts, and more. Therefore, they cannot reduce their presence at meetings or work to report on those meetings while also complying with state law.

Broadly speaking, governments and businesses have different responsibilities to their constituents. Businesses may choose not to serve all people, but governments do not have this choice – they are legally required under Massachusetts law to meet the needs of those they serve, which is everyone who works, learns, and resides in Belmont. In other words, businesses may choose which constituents they serve but governments may not.

For example, a business could mandate that all employees access materials for a meeting using electronic devices, allowing the business to save the costs of printing and distributing paper materials. The Town, on the other hand, cannot mandate that all Town Meeting Members access materials like the Warrant via electronic device because some may not have the skills, the tools, the access to do so.

The Town is obliged to provide paper materials. This obligation to all constituents is not just a philosophical choice of the Town, but a legal obligation as this type of service of all constituents' needs is the fundamental role of government.

Additionally, the experience of SCIG members on other committees is that committees are already generating their own materials, sliders, etc. No one had experience across several different committees with support from Town Hall staff.

Recommendations

- We do not recommend any action on this idea other than to continue evaluating ways to reduce waste by disseminating hard copy materials only to those who desire/need them.
- This idea has been ruled out because it would have a modest financial impact and require a fundamental change to the role of the Town Clerk and the Clerk's office as defined in Massachusetts General Law.
- The score is low because it has a modest financial impact accompanied by a decrease in the quality of service delivered

Further Reading

- Massachusetts General Laws, Chapter 41, Section 15: Town clerks; powers and duties
<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section15>

IDEA #336 – EMPLOYEE INCENTIVE/BONUS/EMPLOYEE PROGRAMS

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Explore ways to incentivize town employees to look for improved efficiency and financial opportunities. The incentive could take several forms: incentive bonus pool for cost saving measures; incorporating cost savings into manager's objectives (rewarded if met); Employee recognition award for any employee, where there is both public recognition and also a financial incentive that could scale with the size of the savings.

Other ideas included in this report

- 50 - Establish an incentive bonus pool for department heads and other employees to reward them for the development and implementation of innovative and cost-saving ideas.
- 51 - Incorporate costs savings into managers' objectives and issue merit increases if cost savings are met
- 324 – Implement an Innovation or Employee Recognition Award program for individual contributor

Weighted Final Score: 54

(Financial Impact: 4, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 2)

Background Information

Members of the SCIG-Subcommittee met with the Town Human Resources Manager and the Town Administrator and gathered the following input:

- **Incentive Programs:** None exist; Implementation is restricted by what unions can accommodate for union workers
- **Merit Pay Programs:** Not applicable for union workers, is in place for non-union though the conducting performance reviews was only implemented in FY2019. Merit is tied to performance and incremental to Cost of Living Adjustment. Employees' objectives do not include ones to take losses out.
- **Both Merit and Incentive programs** could be pursued but would need to be fully defined and negotiated into future contracts for applicable employees.

Recommendations

Design and implement an employee recognition program that acknowledges a specific accomplishment, action or behavior by an employee that goes above what is expected as part of his or her job responsibilities. Program should be designed and aligned to by Human Resources, Town Administrator, and Department Managers and then presented to the Select Board for approval.

- Monthly recognition award of \$50 gift certificate from a business in Belmont to fixed number of employees (individual contributors) per month (e.g., two employees per month are selected)
- Employees can be nominated by anyone (residents, colleagues, managers, etc.)
- Nominations/Recognition should be connected to a specific accomplishment, action or behavior that is consistent with what the Town desires of its employees
- Agenda topic of “Employee Recognition” is added to an existing monthly meeting where department heads review nomination forms and select awardees
- Management/Execution by managers needs to be timely, sincere, consistent, and personal to be meaningful
- Public recognition can be made through the town website, the Town Administrator monthly bulletin, and even a designated monthly Select Board meeting
- Existing department budgets are expected to cover cost of program

SCIG recommends that the Select Board and School Committee begin to incentivize department heads to look for improved efficiency and financial savings opportunities (without impacting the quality of services or education) through first augmenting/revising their leaders’ next year’s annual objectives/goals to include one, if one does not already exist, to deliver cost savings/greater efficiencies to the Town of Belmont resulting from efforts like outsourcing, regionalization, improved warranty terms, make vs. buy, savings from a technology change, productivity improvement (efficiencies), cost avoidance, etc.. As current contracts for these senior positions include a preset percent salary increase, it is not recommended that an incremental bonus be provided in addition to compensation outlined in the contract at this time. What is recommended is modifying objectives for senior leaders in FY23 beginning July 1, 2022, to include an objective with a quantified target to deliver cost savings to the Town of Belmont. This step will help to begin to build a culture and the associated actions to drive cost savings without compromising on the quality of services or education.

The next phase of this step of revising goals and objectives to include cost savings, could entail growing the employee recognition program later to include a higher monetary award to employees for cost savings ideas that will result in savings to the town without compromising on quality of services or education. The savings projects ideas will need to be tracked through the different phases of Identified, and if approved, Initiated, and Implemented. As this monetary award will be higher, input from unions will be required. Human Resource managers can consult with companies in the private sector who also have unions and have employee recognition programs that have a monetary award.

SCIG also recommends that the Town of Belmont leverage the use of the Collins Center for Public Management and its network to assess and drive compensation package changes that potentially include bonus pools to incentivize leaders to deliver savings and drive efficiencies in their respective municipalities. The approach to leverage the use of the Collins Center will better ensure that compensation practices in Belmont are consistent with other municipalities.

Next Steps

- Select Board and Town leaders align on whether to proceed with an employee recognition program and ask the Human Resource Managers to design one and present it for approval and implementation

- Select Board and School Committee review and modify existing Goals and Objectives for senior leaders to include one to deliver cost savings/greater efficiencies to the Town of Belmont. The objective should include a quantified target.
 - Later, after consideration, thought and union consultation if required, leaders consider modifying the employee recognition program to include another tier for awarding employees more dollars for cost savings ideas that are identified, approved and initiated and implemented.
- Select Board / Human Resource managers collaborate with the Collins Center to redesign and propose compensation packages that include bonus pools to incentivize leaders to deliver savings and drive efficiencies.

IDEA #337 – HEALTH CARE COST RATIOS

Report Status: Fully Reviewed

Researched by: Norma Massarotti

Original Idea as Submitted

Review the Town's health insurance structure to see if there are different ways to reduce premiums. Opportunities should be considered in light of GIC. Different ideas include moving to higher deductible plans but covering all/portion of those deductibles for employees (e.g., Wellesley and Northampton); changing the cost sharing ratio (school from 80/20 to 70/30, town from 75/25 to 65/35; implement spousal surcharges and charge more for larger families); making the school and town cost sharing match; and sharing the savings of moving to GIC will the employees/unions to make the change more amendable.

Other ideas included in this report

- 55 – Institute HRAs (Health Reimbursement Arrangements) like done in Wellesley and Northampton to seek savings in health insurance and OPEB costs; would have higher co-pay and cap on employee costs per year (when employee reaches cap, town reimburses over cap)
- 58 – Change the employer-employee cost ratio for health insurance (school from 80/20 to 70/30, town from 75/25 to 65/35); implement spousal surcharges and charge more for larger families
- 59 – Change the employer-employee cost ratio for health insurance so that School (80/20) and Town (75/25) plans match

Idea intent

Mitigate impact of healthcare costs on taxpayers by shifting more cost to employees and standardize cost ratio between town and school.

Weighted Final Score: 47

(Financial Impact: 5, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 2)

Background Information

The Financial Task Force II recommendation report dated July 15, 2021, includes steps to be taken by the Town and School to help mitigate healthcare costs:

- Consider bringing the Town and Schools into the Massachusetts Group Insurance Commission (GIC) Health Insurance program
- Alignment of Health Insurance “Split Ratios” across Town (75/25) and School Employees (80/20)
- Aggregation of Health Insurance across Town and Schools

Recommendations

In addition to the steps recommended by the FTF II, the SCIG recommends that the Town of Belmont further evaluate the financial and non-financial of the following:

- Adding a spousal surcharge where an employee must pay an additional cost to cover a working spouse who has the option to elect health coverage from his or her employer and has declined the coverage
- and/or providing a monetary incentive to qualifying employees who unenroll in the Town's health care plan (see table in Further Reading below)
- Setting expectations that healthcare costs/ratios are revisited during each contract and union negotiations to balance Belmont's market competitiveness with cost effectiveness.
- Revisiting unilaterally grandfathering previous healthcare cost ratios to only grandfathering a subset of employees based upon having higher years of service in the Town of Belmont so that the Town of Belmont realizes savings earlier.

Other ideas recommended that Belmont institute Health Reimbursement Accounts. Belmont does offer Flexible Spending accounts to its employees which are guided by IRS guidelines. The program is managed by external plan advisors.

Next Steps

- The Select Board and School Committee should review the recommendation and consider the cost/benefit of programs like Spousal Surcharge and Opt-out. A pilot or trial could be an option.
- The Select Board and School Committee should consult with both Town and School Human Resource managers who meet with their counterparts in other towns to learn from their pilots or implementations for input into the design of Belmont's plan.
- Contact the towns who have opt-out incentive to discuss uptake and learn from their experience.
- Financials, if required, can be run by Town and School accountants to confirm savings estimate.

Further Reading

Opt-Out Example Guidelines for the Town of Sudbury, MA:

The guidelines for the Program are:

- (a) The Opt-Out incentive is only available to Active employees who have been enrolled in the Town's health insurance for a minimum of two (2) continuous years and then choose to Opt-Out.
- (b) The Town will pay a set waiver incentive amount: \$1,500 per year for individual plan; and \$3,000 per year for a family plan upon proof of other insurance.
- (c) The Town will pay the Opt-Out benefit via payroll on a bi-weekly basis, less any required withholdings.
- (d) If there is a qualifying event in which an employee who has opted-out needs to opt back onto Town insurance, the employee will be allowed to do so as long as it is within 30 days of the qualifying event.
- (e) The only way to receive the Opt-Out incentive is if the employee is not covered by the Town's health plans in any way OR by health insurance coverage through the Lincoln-Sudbury Regional High School. (This includes through a parent or spouse's plan.)
- (f) Changing from a family to individual plan does not count.
- (g) The Opt-Out will have a sunset provision. We'll continue the program for three years and will then review as to whether or not to continue to offer it. If the Town decides not to continue the Opt-Out Program, employees will be given an opportunity to get back onto the Town's health plans if they choose. (The three-year period runs from 7/1/19 to 6/30/22).
- (h) Any issues or disputes that arise regarding enrollment periods or rules and regulations relating to the implementation of the program shall be reviewed by the Town's Assistant Town Manager/Human Resources Director. His/her determination shall be final and binding.
- (i) Should there be a case where an employee did not meet the criteria and received the opt-out in error, the employee must reimburse the Town the Opt-Out money they received through Town payroll deductions.
- (j) Employee must provide "proof of other insurance" on employer letterhead or health cards showing coverage effective date.

Links were active at time of writing though can change/be broken.

City/ Town	Opt-Out Incentives	Link
Sudbury	\$1500 individual \$3000 family	https://cdn.sudbury.ma.us/wp-content/uploads/sites/305/2014/08/InsuranceOptOutIncentiveInformation.pdf?version=a9f1b3ab17637e89e26cee531a0911ea
Wellesley	\$2250 individual \$4500 family	https://www.wellesleyma.gov/DocumentCenter/View/292/Opt-Out-Application-PDF?bidId=
Milton	\$2500 individual \$5000 family	https://www.townofmilton.org/sites/g/files/vyhlf911/f/uploads/opt_out_2019.pdf
Lexington	\$2500 individual \$5000 family	https://www.lexingtonma.gov/sites/g/files/vyhlf7101/f/uploads/opt_out_program_materials.pdf

Financials for Town of Belmont to assist in understanding Opt-out:

Town of Belmont MA Annual Health Insurance Costs July 2021 - June 2022						
HP HMO	Total Cost	Employee		Town		
		@20%	@25%	@80%	@75%	
Individual	\$ 10,674	\$ 2,135	\$ 2,669	\$ 8,539	\$ 8,006	
Family	\$ 29,920	\$ 5,984	\$ 7,480	\$ 23,936	\$ 22,440	
Opt Out						
Annual Town Cost for full year enrollment				Town Savings per Opt Out Employee		
Individual	2000		Year 1	Ind	\$ 6,539	\$ 6,006
Family	4000			Fam	\$ 19,936	\$ 18,440

City/ Town	Flexible Spending Accounts*	Details
Belmont	Yes	Administrated by Cafeteria Plan Advisors \$2750 (Health Care Costs); \$5000 (Dependent Care Costs)
Sudbury	Yes	
Wellesley	Yes	Available if employee is enrolled in Benchmark Health Insurance Plan
Milton	Yes	Administered by Cafeteria Plan Advisors
Lexington	Yes	Administered by Benefit Strategies
An FSA is a great way to set aside money on a pretax basis to pay for healthcare expenses for you and your dependents (Health Care) or for care of your child or disabled adult dependent while you work (Dependent Care), thereby lowering your state and federal tax liability.		

IDEA #338 – FIRE DEPARTMENT OVERTIME

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Review and renegotiate the personal leave policies for Fire Department personnel to reduce the overtime costs. At the most extreme, overtime compensation could be eliminated; shift pattern adjustment might also reduce overtime costs.

Other ideas included in this report

- #63 – Eliminate overtime compensation and change the shift patterns for 24/7 service jobs
- #64, #65 – Renegotiate number of FD personnel allowed out on personal leave per shift to reduce overtime [duplicate entries on the website form]

Idea intent

Reduce Fire Department overtime expenditures.

Weighted Final Score: 43

(Financial Impact: 4, Operational Impact: 2, Time Scale: 1, Ease of Implementation: 2)

Background

The firefighters' collective bargaining contract requires the Department to maintain a minimum shift size of 11 firefighters for each of four shifts (a total of 44 firefighters), based on minimum Department staffing of in-service equipment: two engines with three firefighters per engine, one ladder truck with two firefighters, one ambulance with two EMT/paramedic firefighters, and one shift commander per shift commander vehicle. (The National Fire Protection Association (NFPA) recommends a minimum shift of 17.) The Department budgets and hires 12 per shift (48 firefighters), one firefighter in excess of the minimum, so that these levels can be met when any one member of the shift is absent due to illness, injury, vacation, personal leave, or other reasons. For any shift that is below the minimum, the Department is required to fill the vacancy with another firefighter and pay overtime at 1.5x base pay.

The Department's Fire Suppression unit is fully staffed around the clock. Firefighters work 24-hour "tours" twice over the course of eight days: 24-hours on, 72-hours off, 24-hours on, 72-hours off. Each 24-hour tour is split into two shifts, a 10-hour day shift from 7:30 am until 4:30 pm and a 14-hour night shift from 4:30 pm until 7:30 am. A firefighter has approximately 91 tours per year, totaling 2,190 hours per year.

By contract, firefighters receive 48-240 hours (1-5 weeks based on 8-day weeks) of vacation per year based on longevity. For firefighters, a week's vacation is equivalent to two tours, or 48 hours off, which can be taken in 10 or 14-hour shifts. Sick leave is accrued at 15 hours/month (180 hours per year), accruing up to 2,400 hours (those hired before 2016 are eligible to accrue more). Accrued sick leave can be used for non-work-related illness and injury. Firefighters are

also entitled to 28 hours of personal time, and 24 hours or more of bereavement time. For a firefighter with 5-10 years on the force, the total amount of eligible vacation, sick and personal leave is 376 hours, or 17.2% of total contracted hours.

Department overtime costs vary from period to period based on the number of below-minimum shifts needed to be covered, as well as the mix of long term and short-term absences. The budgeted number of positions (48) provides for the minimum to be met without overtime when one firefighter per shift (four per week), are out at any point in time. When the Department has long-term and/or multiple vacancies, employees on long term injury or medical leave, and/or employees on military leave, in addition to vacations and personal leave, the impact on overtime expenditures can be significant. Vacancies, which primarily arise when personnel retire unexpectedly or when firefighters leave the department to transfer to other departments, can take up to a year or more to fill based on Civil Service and training requirements. The Fire Chief estimates that a vacancy that reduces one shift size by one firefighter below the minimum results in approximately 2,200 hours of overtime per year, or in excess of \$125,000. Overtime hours generated by long-term medical or injury leave can result in payment of a multiple of 2.5x salary for those hours, as the Town incurs both salary costs for the employee on leave as well as overtime costs for his or her replacement.

Under the current contract, employees are allowed to take up to two weeks of vacation between June 15 and September 15. During this summer period, three employees per fire suppression shift may be absent at any one time, or two firefighters below the required minimum staffing per shift. Additional overtime expenditures are incurred for fighting fires beyond shift hours, mutual aid, call-backs, hold overs, jury duty, court duty, etc. Members called back for any reason other than mutual aid receive regular 1 ½ x overtime for a minimum of four hours; for mutual aid, call backs are paid double time for a minimum of four hours. Holdovers are paid 1 ½ x for a minimum of four hours after the first hour.

The firefighters' contract includes clauses intended to help the Department manage vacancies, such as a retirement notification incentive. Firefighters who give 12 months' notice of retirement date receive a bonus equal to 5% of their base pay for the year prior to their retirement date. Notice of early retirement allows the Department to engage in the lengthy Civil Service process to fill the position before the firefighter leaves, thereby saving on overtime that would have occurred without notice. The contract also includes a sick leave incentive that rewards firefighters who have taken less than 60 hours of sick leave with 14 hours of paid leave.

FY22 Fire Suppression overtime is budgeted at \$605,000 or 13% of fire suppression salaries. The Town Administrator has informed the Warrant Committee that Fire Department overtime costs are expected to exceed the budget by a significant amount due to six vacancies, COVID exposures and illness, and one long-term injury/medical leave. For the period between July 1, 2021, and January 27, 2022, the Department reported 11,629 overtime hours, almost half of which was attributed to overtime for vacation. On an annualized basis, this equates to the equivalent contracted hours of nine firefighters. More detailed information and the dollar impact of this will become available as the fiscal year progresses.

Recommendations

Part of the SCIG's mandate is to identify opportunities for recurring expense reductions that will improve finances and reduce the Town's structural deficit. Fire Department overtime is a large,

recurring expense that is driven by contractually negotiated staffing levels and collective bargaining agreements. The terms and distribution of overtime hours is a highly structured part of the firefighters' contract, and any changes will require collective bargaining.

The SCIG recommends that the Town take steps to determine if there are ways to make changes to reduce the overall level of these expenditures, while recognizing that, for many firefighters in Belmont and, elsewhere, overtime pay is an expected part of compensation which is acknowledged in the current contract structure.

The SCIG submits the following areas to be evaluated:

1. Withdrawal of the Belmont Fire Department from Civil Service. Filling a vacancy through the Civil Service process can take up to a year or more (see Idea #33 Civil Service). The Department currently has six vacancies dating back to FY21. Five of the vacancies have been filled; three will complete training in early April 2022 and two will complete training in late May. The next Civil Service list will be available in March 2022, which will start the process of vetting, hiring and training for the sixth vacancy. During the last year and other periods of multiple vacancies, Department overtime expenditures incurred to meet minimum shift sizes have ballooned. Non-civil service towns report a faster hiring process and lower overtime costs associated with vacancies. Withdrawal from Civil Service is expected to result in a faster hiring process and significantly lower overtime expenditures for the Town over time. Collective bargaining is required to withdraw.
2. Benchmark Belmont's firefighter contract against current practices elsewhere. Based on a review of the Arlington, Lexington, Wellesley and Winchester firefighter contracts, communities have different approaches and incentives regarding leaves and overtime. Collective bargaining terms must be looked at as a whole package of terms and conditions. However, the review identified several independent ideas to consider:
 - Reduce the number of firefighters/officers per shift that can be on summer vacation at the same time. The "summer period" concurrent vacation policy virtually guarantees that the Town will incur large amounts of overtime during the summer months and depletes the number of firefighters available to support the department during major emergencies since up to 25% of the Department's staff can be on vacation during any 7-day period. The number of weeks defined as the "summer" period can be extended to spread vacations over a more time. Reducing concurrent vacations will not eliminate vacation overtime hours but will reduce overall overtime expenditures.
 - Identify other "best practices" for Belmont to pursue. Lexington has a fiscal clause that allows reallocation of staffing and cross-staffing of some equipment in the event of Town fiscal needs. Other towns provide varied incentives to reduce absences that result in overtime.
 - Consider a shift pattern change. Evaluate the cost/benefit of shift adjustments to determine if changing the on/off schedule can reduce concurrent absences. Reach out to Arlington, Lexington, Wellesley and other towns that have a shift pattern of 24 on, 24 off, followed by five days off to determine if that assists in managing vacations/overtime costs. The Fire Chief believes that this will be perhaps the most difficult to attain without firefighter support as this would

disrupt current external obligations (family schedules, outside jobs and activities etc.) that work with the current shift pattern.

Another suggestion over the years has been to increase the number of budgeted positions from 12 to 13 per shift, or to reduce the minimum number per shift from 11 to 10. In the latter option, Belmont would maintain 12 firefighters per shift and would not be required to fill vacancies with overtime until two firefighters per shift were absent—a potentially significant savings in overtime. This would require lowering the minimum on one piece of equipment or eliminate the shift commander and could result in a reduction in service during times of high absences. The Fire Chief believes that the minimum shift is already below safe staffing minimum of 15 (per NFPA) and adamantly believes that reducing the minimum shift would compromise the safety of the community and of the firefighters. He notes that Belmont’s building density and high percentage of wood-frame construction places the community at a higher risk profile in the event of fires than in more communities that are less dense. While Winchester has the same total number of firefighters as Belmont and currently operates with a minimum shift size of 9,⁵¹ Belmont’s population density is 5,662 per square mile is 50% higher than Winchester’s 3,790 population per square mile.

Increasing shift size without increasing the minimum will also result in lower overtime costs, but these savings would be offset by the costs of adding four firefighters (one per shift) at an estimated entry level cost of \$75,000-80,000 per firefighter (including benefits), or an initial total of at least \$300,000 per annum, not including long term retirement benefits. Public safety officers are the highest cost employees on an all-in basis, due to both the physical demands of the job (which affects health insurance, injuries, long term disability, etc.) and the eligible retirement age of 55 (vs. 60 for most other town employees). The SCIG is not recommending increasing the shift size at this time. Any evaluation of the cost/benefit of increasing minimum shift size should consider the impact both with vacancies and without vacancies.

Next Steps

- Town Administrator to pursue withdrawal of Fire Department from Civil Service. (for more details about Civil Service, see Idea #33).
- Town Administrator to work with the Fire Chief to identify potential ways to reduce overtime.
- Town Administrator and Fire Chief to reach out to other communities to benchmark contracts and identify peer community ideas to mitigate overtime expenditures
 - Possible engagement of the Warrant Committee Public Safety Subcommittee to assist in reviewing peer community overtime costs.

Further Reading

- None

⁵¹ Winchester FY22 Budget, Fire: <https://www.winchester.us/ArchiveCenter/ViewFile/Item/237>

IDEA #340 – BUDGETING/ACCOUNTING FORECASTING SOFTWARE

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano and Matt Gasbarro

Original Idea as Submitted

The Town and School Department should investigate purchasing a budgeting/accounting and forecasting software solution. All the current work is done in Excel and it is very cumbersome and takes significant effort to update as well as generate tables and graphics. On the Town side, the Excel 5-year financial model takes a significant time to update because of all the formulas and links and is prone to error when updating. On the Schools side, the Excel budget book is also difficult to update and prone to error but also does not allow for the easy creation of tables and other visuals. There would be upfront costs but that would be paid back in significant time savings as well as the ability to provide much more transparency with an easy-to-use reporting and visitation tool. Finally, a software solution would allow for more sophisticated budgeting and forecasting such as being able to exactly and easily report the turnover costs of existing staff and in turn produce more accurate budgeting.

Other ideas included in this report

- None

Idea intent

This idea focuses on replacing with contemporary financial planning software the time-consuming and cumbersome Excel workbooks used by the Town and the School Department.

Weighted Final Score: 53

(Financial Impact: 1, Operational Impact: 9, Time Scale: 2, Ease of Implementation: 3)

Background Information

The current Excel workbooks are used only for financial projections and modeling, and were developed by the Collins Center, which has done this same work for other towns similar to Belmont. There are two Excel workbooks. The one for the Town is the responsibility of the Town Administrator, and the one for the School Department is the responsibility of the Superintendent. Accuracy is maintained through version control and limited editors of the workbooks.

For the Town, the Town Administration Office is the chief user of the Excel workbook. For the School Department, it is the Superintendent's office. Entering the data and formulas which drive the calculations in the workbooks must be done manually, as well as running routine and special reports. Some of these reports, particularly for expenditures, originate from MUNIS, are exported to Excel, and the information is reformatted into meaningful totals and subtotals.

Like several towns in Massachusetts, Belmont uses [MUNIS](#), an enterprise resource planning (ERP) software offered by Tyler Technologies. The vendor also offers numerous add-on modules to augment the ERP many of which have been purchased by the Town. One module not procured is a [Budgeting module](#) which offers financial projections. However, trials by the Town Administration Office have revealed the module not to be user-friendly and the Superintendent's Office's evaluation found specific issues such as:

- There are different needs between creating a budget for next year vs. projecting costs within the current year
- Teachers on leave this year (which would be excluded from an intra-year projection; but included in a next year's budget calculation) and the reciprocal of substitute teachers filling in this year for the permanent teachers on leave.
- Seasonal stipends, such as athletic coaches and fine arts and club advisors (e.g., an intra-year projection in the winter would need to exclude fall coaching stipends; but they would need to be included in a calculation for next year's budget)

The Town Administration Office is not aware of other projection software that other towns are using, except for the Excel workbook that the Collins Center created through their "Best Practices" Program.

Purchased MUNIS modules
Accounting (GL,BG,AP)
<u>Accounts Payable</u>
<u>Accounts Receivable</u>
Applicant Tracking
CAMA Bridge
<u>Cash Management</u>
Central Property File
Fixed Assets
<u>General Billing</u>
<u>General Ledger</u>
<u>HR Management</u> (suite of modules)
MA Excise
MA Tax
MA Tax Title
MapLink GIS Integration
<u>Project & Grant Accounting</u>
<u>Purchase Orders</u>
<u>Requisitions</u>
Role Taylored Dashboard
Student Activity Accounting
TylerForms

The [Financial Task Force II](#) produced a list of “Long Range Strategic Planning Recommendations” as part of its [2021 Final Recommendations report](#). One such recommendation was adopting a budgeting and forecasting software that would be more flexible and efficient than the current Excel workbooks. The process for choosing a software package is the same procurement process the Town must follow for all goods and services. It would entail soliciting bids from companies that provide the software solution and choosing the product that best meets the Town’s needs at the best price. The Town Administrator’s Office and the Accounting Office would be the major stakeholders in this process for the Town as well as the Superintendent’s Office for the School Department.

The MUNIS Budgeting module, or another software option, would require funding for purchase/licensing and annual fees, as well as staff training and data migration.

Recommendations

The Town Administrator's Office and the School Department should investigate modernizing their systems for financial forecasting. A MUNIS module or software which integrates with MUNIS would eliminate manual data entry and report generation, as well as errors inherent in this approach.

Next Steps

- Since the Town is already using MUNIS for other finance functions, the Town Administrator's Office should revisit the latest version of the MUNIS Budgeting module via a demonstration and check on performance with other towns that have licensed this module.
- At the same time, the Town should reach out to towns to see if they are using systems other than MUNIS or the Collins Group Excel workbook, and review this in light of the MUNIS option.
- Based on this information, the Town Administrator's Office and School Department should develop a scope of services for moving to financial projections software and begin the required procurement process.

Further Reading

- MUNIS website
www.tylertech.com

IDEA #341 – ELECTRONIC PAY STUBS AND OTHER PAYROLL IDEAS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

The way payroll provides a check stub goes back to when employees received an actual check with the paystub. Today, the town spends thousands of dollars printing check stubs for mostly direct deposit funds. This is a waste of paper, envelopes, time and postage to send the stubs if the employee is home sick or on leave. The town must provide the record but if an electronic stub were provided through safe, online access and a way to print it at work, the town could save dollars over a small period of time.

Other ideas included in this report

- #407 – 1) We also should not issue paper paystubs at all, except to the few employees town wide who do not have email. This is a large expense in postage, processing, stuffing envelopes, etc. It's an outdated practice. Most organizations issues electronic paystubs. 2) The Town should include vacation, sick, personal and other time off totals on staff members paychecks weekly. This is something that many other municipalities do, and that would save untold hundreds of hours town wide in staff time annually. It can be easily configured with software.

Idea intent

Increase efficiency in payroll services to reduce expenditures, increase efficiency and enhance employee satisfaction. Move from paper-based payroll to electronic, add accrued leave to pay notices, change payroll frequency and timesheet reporting.

Weighted Final Score: 63

(Financial Impact: 3, Operational Impact: 6, Time Scale: 3, Ease of Implementation: 4)

Background Information

In 2011, the Massachusetts Department of Revenue Division of Local Services conducted a financial management review of the Town of Belmont.⁵² The August 2011 report recommended the following changes to payroll/personnel services, all of which are still relevant today:

- Grant remote entry access to all departments to enter payroll into the MUNIS system (this is currently done by the Municipal Light Department). Current practice is to manually input payroll data received by from the department, a duplication of effort. Changing this practice shifts the responsibility to the departments to ensure correct pay

⁵² <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

codes and funding sources and replaces a paper process that requires manual entry of department payroll. The Treasurer's office would compare the electronic data to be signed off by the accountant.

- Approve and submit payroll timesheets after the close of the work week. Currently, time sheets are prepared and submitted prior to the work week, requiring changes to be made last minute or in the subsequent pay period. As a result, accruals are not up to date and the town does not include employee balances of sick, vacation and personal time on their pay stub.
- Use the MUNIS system to track and report personal leave balances for all employees. (This is currently done for the Belmont Municipal Light Department, and School employees have access through a separate system.) This will likely require a change in timesheet reporting (see above) and will also require reconfiguration of the MUNIS module to reflect personal leave accruals in each collective bargaining contract. Currently, the Belmont Municipal Light Department provides this and the town owns the MUNIS module for such.
- Move all employees to a bi-weekly payroll schedule for all employees to increase efficiency and free up employee time for more-value added tasks. Currently, teachers and most school employees are paid on a bi-weekly pay schedule, however, many town employees are paid weekly. The move to bi-weekly paychecks will require collective bargaining.

Electronic Pay Stubs

The Town Human Resources Director states that receiving electronic pay notifications is in high demand among town employees. School employees have access to payroll information on a separate system. The Town accountant is currently working on adapting the module used by BMLD for town use; the current status is "in progress" with differences in accounting and reporting to be ironed out.

Detailed Estimate of Cost Savings from Conversion to Electronic Pay Stubs

Currently, the Treasurer and School Department handle approximately 1300-1700 total paychecks per week. Direct deposit is required under school collective bargaining contracts and, while not required by Town contracts, all but a dozen opt to have their check deposited directly into their account. Seasonal employees, such as teenage lifeguards, are paid with paper checks. The number of paychecks/stubs produced in any week will depend on the payment schedule of the employee (weekly or biweekly) and the number of seasonal or contractual employees to be paid during that period.

The Treasurer's office manages payroll and receives weekly paper pay notifications from the vendor. Approximately 500 paychecks and paystubs for Town departments are stuffed into envelopes by the Treasurer's office by hand and distributed by interoffice mail to the Department Heads for distribution. School paystubs (approximately 650 bi-weekly and 150 weekly) are sent from the Treasurer's office by interoffice mail and are prepared for distribution by the School Finance Department. They are then sent via interoffice mail to the relevant schools for distribution. Paystubs are mailed to employees on vacation or leave.

The chart below conservatively estimates the costs associated with the distribution of paper pay notices. The analysis includes “hard” costs, such as paper and envelopes, including paper copies of W-2 statements at year-end and an estimated 1000 1095(c) tax forms (which require specialized envelopes) mailed to employees. In addition, “soft” costs to stuff are estimated. According to the Treasurer, the process of stuffing the envelopes for employees on the town side takes approximately eight hours per month. The School Department estimates this task takes sixteen hours per month for school paychecks. Once distributed to the departments across town buildings, time is required for delivery of payroll notices to the employees, i.e., by mail slot or in person (either distributed in the department or picked up by the employee). Additional town resources are also required to locate paper copies of paystubs and W-2s for employees refinancing mortgages, or for a variety of other reasons. The analysis assumes that no incremental costs associated with interoffice mail deliveries, as this service exists whether payroll is distributed through it or not.

Estimated Annual Costs for Paper Pay Stubs

	Estimated Annual Hours	Estimated Annual Dollar Cost
Annual Cost of Paper and Envelopes		\$3,200
Annual Cost to 1000 Mail 1095(c)s (Envelopes + Postage)		\$1,000
Postage-Mail to Employees on Vacation or Leave		\$150
Total Supply Costs		\$4,350
Envelope Stuffing-Town (2 hours/week)	104	\$2,080
Envelope Stuffing-School	192	\$3,840
Interoffice Mail Delivery Time (from Treasure to six town department building from school finance to six school buildings)	N/A	N/A
School Secretarial time to distribute to mailboxes	78	\$1,560
Town Secretarial time to distribute in person or mailbox	130	\$2,600
Employee Requests for Copies of Paystubs	26	\$520
Total Employee Costs		\$10,600
Estimated Annual Hours	530	
Estimated Annual Costs		\$14,950

Sources: Floyd Carman, Treasurer, Mike McAllister, School Department Director of Human Capital, Shawna Healey, Town Director of Human Resources for the envelope stuffing hours and supply costs.

Other estimates by author: Distribution of paychecks in six schools: 15 minutes per week/school; employee and administrative time to distribute paychecks for town department: average of 10 min per sub-department or location. An average cost of \$20/hour (including benefits) was used to calculate costs.

This savings in time and effort would not likely translate to a “hard” labor cost savings, since the staff performing such tasks spend just a few hours every week on them. However, the time and effort spent on these tasks represents “opportunity costs” for staff time that could be diverted to other more value-added activities. Efficiencies from other payroll services ideas included in this write up would increase the potential savings for the town, and the cumulative savings in time would be more significant.

In addition to the elimination of recurring expenditures and the opportunity to use staff for more value-added tasks, there are a number of benefits for the employee. These include safe and secure access to electronic records to view and update personal records, such as a name change, change in marital status or a change in address or email address; easy access to compensation information and history; and ability to request a change in voluntary deductions or request a reprint of the W-2 form.

Lastly, many employees, especially those who increasingly manage finances on-line, dispose of the paper paystubs and use their bank accounts to check the pay amounts. While this does not have a financial impact on the town, it does contribute to environmental waste and recycling costs.

Cost to Convert from Paper to Electronic Paystubs

The cost associated with conversion to electronic pay stubs are expected to be one-time human capital costs. Belmont Municipal Light (BMLD) already provides electronic paystubs and, as a result, the town already owns the module necessary to add this to the town's accounting system (MUNIS). Implementation will require one-time programming changes and training to the extent required, and significant communication and advance notice to Town and School employees regarding the change. It is possible that resources would be needed to work with MUNIS consultants for the conversion. Any employee without access to a computer or device to receive the paystub would need to be provided access to a device to review and print the information. The change would not require collective bargaining.

A survey of surrounding towns reveal that Arlington, Lexington, Watertown, and Winchester all require direct deposit and electronic notification of pay. If an employee does not have a bank account or computer, the employee can obtain a paper check or is provided access to a computer.

Adding Accrued Leave Days to Paystubs

Employees also want accrued sick, vacation, and leave days to be printed on paycheck stubs, or accessible through an electronic pay portal. School employees, through an existing portal, have access to payroll information, as well as accrued sick, vacation and personal leave days.

Idea #407 requests that accrued leave days be added to the town employee electronic paystubs (school employees can currently access this information through a School Department portal). This also is in high demand by employees. Currently, each town department has its own method for tracking sick, vacation, and personal leave days. This ranges from independent tracking systems (Fire Department, Police Department, School Department) to excel spreadsheets. The Belmont Municipal Light Department is the only entity that currently provides this information on employee pay documents.

Standardizing tracking and reporting among departments will create more accountability and transparency to the process, as well as eliminate misunderstandings or loss of data due to turnover or other issues. Although no detailed analysis was done, this, too, is expected to increase efficiency and free up administrative personnel for more value-added activities.

Costs to Add Leave Days to Paystubs

For departments without independent systems, the MUNIS module will need to be reconfigured to take into account the terms in each collective bargaining contracts. Departments often have employees spread across several of these contracts and the contract terms can vary. Nonetheless, certain departments are more straightforward and could be used as a beta site for the reconfiguration.

The standardization of accrued leave day tracking by all departments will necessitate an analysis of the cost/benefit and process involved to either merge existing stand-alone systems used by the

Fire Department, Police Department and School Department or allow these systems to communicate with the MUNIS module.

There will likely be additional MUNIS consulting costs around the actual conversion. It is assumed that BMLD's expertise and experience will help mitigate some of the town department costs.

Timesheet Submission and Entry into Payroll

Currently, departments submit manually prepared payroll to the Treasurer on the Wednesday prior to the payroll period. The Treasurer's office reenters the data into the payroll system. As noted in the 2011 DOR review, the method of payroll submission is duplicative (paper preparation reinput electronically) and the timing of submission (Wednesday instead of Friday before the pay period) is structured such that vacation and personal leave days are recognized after they are taken.

Converting to Department electronic timesheets will reduce the amount of time the Treasurer's office needs to prepare payroll, which would in turn allow for later transmission of the payroll so that accrued days can be accurately reflected. In addition, some efficiencies may also be gained in the Departments.

The "cost" to change these practices will primarily be the time and effort on behalf of the Treasurer, Town Accountant, and various Department heads.

Converting to Bi-weekly Payroll

Currently, most Town employees are paid weekly and a majority of school employees are paid biweekly. Reducing the number of pay periods again improves efficiency and frees up employees for other more value-added tasks.

Most towns, including Arlington, Lexington, and Watertown, pay town employees on biweekly basis. This will require collective bargaining.

Recommendations

Belmont's payroll systems are long overdue to be overhauled and updated to reflect current practices, reduce expenditures and increase efficiency and department accountability. The Town Treasurer believes that the total cost savings in his office will be the hard costs of \$3,200. A separate review of just one of the five recommendations conservatively projects \$15,000 per year savings in time and dollars. Adoption of all the recommendations can be expected to result in larger savings and efficiencies.

The SCIG supports the 2011 recommendations made by the Massachusetts Department of Revenue to streamline and upgrade the current payroll systems, including the following

1. Convert from paper paystubs to electronic paystubs. This is standard practice and will increase efficiency for the Treasurer's office and the School Finance Department, reduce recurring costs, and enhance employee satisfaction. This is not a collective bargaining issue.
2. Print accrued personal leave on the electronic paystub. This will require standardizing the methods for reporting vacations and leave and will also require additional work to reflect

accruals per each union contract and/or to coordinate with existing public safety leave accrual systems. This is not a collective bargaining issue.

3. Initiate electronic submission of payroll by departments to eliminate duplicative paper submission and electronic reentry by Treasurer’s office. This will streamline the process and reduce errors in transmission. This is not a collective bargaining issue.
4. Change the submission and approval date for payroll timesheets to Friday instead of the following Wednesday. This will eliminate the current practice of post-dating vacation and personal leave (i.e., recognizing personal leave when taken and not in a subsequent period). This is not a collective bargaining issue.
5. Convert all weekly payroll to bi-weekly to further reduce the time and effort spent on payroll and increase efficiency in the Treasurer’s office. This is a collective bargaining issue.

Next Steps

- Seek funding and support, if possible, to cover the costs of transitioning to a new system. Collins Center and MAPC may have grant opportunities. Otherwise, self-funding would be reasonable.

Task	Primary Lead	In Cooperation With	Notes	Estimated Timetable
Convert from paper to electronic paystubs	Town Treasurer	Town Administrator, School Department Finance, Town Accountant	Does not require collective bargaining	Within 6 months
Standardize departmental reporting of sick, vacation and personal leave days; format to be compatible with payroll	Town Administrator	Town Treasurer, Town Accountant	Does not require collective bargaining	Six months to one year
Update payroll to accept personal leave days	Town Treasurer	Town Accountant	Does not require collective bargaining	Six months to one year
Initiate electronic submission of payroll by departments	Town Treasurer	Town Administrator, Department Heads	Does not require collective bargaining	Within 6 months
Change submission of payroll timesheets to Friday	Town Treasurer	Town Administrator, Department Heads, School	Does not require collective bargaining	Within 6 months

		Department Finance		
Convert all weekly payroll to bi-weekly	Town Administrator, School Committee (for any weekly payroll)	Town Treasurer, Department Heads, Town Accountant	Requires collective bargaining	

Further Reading

- MA DOR Local Services 2011 Town of Belmont Financial Management Review
<https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

IDEA #344 – IMPROVE CAPITAL PROJECTS

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

How might the town improve the efficacy and efficiency of capital projects and expenditures? How do other municipalities, including in other states and of a variety of population and budget sizes and structures, succeed at this type of management? This is of particular interest for projects and expenses that do not rise to the level of requiring their own, dedicated temporary building committee.

Other ideas included in this report

- None

Idea intent

There has been general agreement that having both a building committee and an Owner's Project Manager (OPM) overseeing large building projects has been an effective way to manage significant capital projects. The intent of this idea is to apply similar oversight on capital projects that are smaller than those that require a building committee.

Weighted Final Score: 37

(Financial Impact: 2, Operational Impact: 2, Time Scale: 3, Ease of Implementation: 2)

Background Information

Under Massachusetts General Law

(<https://malegislature.gov/Laws/GeneralLaws/PartI/TitleXXI/Chapter149/Section44A%201~2>),

any construction project that has a budget of \$1.5m or more requires the services of an independent owner's project manager. "The duties of the owner's project manager shall include, but need not be limited to, providing advice and consultation with respect to design, value engineering, scope of the work, cost estimating, general contractor and subcontractor prequalification, pursuant to section 44D 1/2 or 44D 3/4 when applicable, scheduling, construction and the selection, negotiation with and oversight of a designer and a general contractor for the project, ensuring the preparation of time schedules which shall serve as control standards for monitoring performance of the building project, and assisting in project evaluation including, but not limited to, written evaluations of the performance of the design professional, contractors, and subcontractors."

In Belmont, the hiring of an owner's project manager (OPM) depends on how the project is being managed. Historically, when Belmont has needed to build a new building/facility or undertake major renovations to an existing building/facility, Belmont Town Meeting has created a temporary building committee, with members appointed by the Town Moderator. In these cases, the building committee hires the OPM. For projects where no building committee has been

created, the Facilities Director typically hires the OPM. For projects below the \$1.5m threshold, the Facilities Director typically oversees the project without an OPM.

Belmont has a significant backlog of outstanding capital projects. Requests from Town departments typically total between \$3m and \$5m, while the available funds were \$1.5m in FY22. The role of the Capital Budget Committee is to select which of the potential capital projects to propose each year for approval by Town Meeting.

Recommendations

- Because the available funds for capital projects each year are tightly limited by available funds, every action that might save money or make projects more efficient should be considered.
- The hiring of a purchasing agent, referenced in ID 2, would likely result in improvements in efficiency in capital projects.

Next Steps

- Continue using OPM for qualifying projects.

Further Reading

- <https://www.massschoolbuildings.org/building/team/opm/FAQs> - FAQ on OPM role in school building projects
- <https://www.belmont-ma.gov/belmont-high-school-building-project/faq/who-is-the-owner%E2%80%99s-project-manager-and-what-is-their-job> - information on the OPM role in the Belmont Middle and High School building project

IDEA #346 – GET MORE COLLINS CENTER HELP

Report Status: Fully Reviewed

Researched by: Paul Rickter

Idea Text

Go back to the Collins center for more help

Other ideas included in this report

- 169 – Community Compact for Collins Center assistance

Idea intent

The intent of the idea appears to be that the town would benefit from further resources provided by the Edward J. Collins, Jr. Center for Public Management at UMass-Boston. Belmont has previously received assistance in financial modeling from the Collins Center.

Weighted Final Score: 57

(Financial Impact: 2, Operational Impact: 4, Time Scale: 4, Ease of Implementation: 5)

Background Information

The Edward J. Collins, Jr. Center for Public Management at University of Massachusetts Boston (<https://www.umb.edu/cpm>) was created in 2008 to provide resources for state and local government in Massachusetts. The Collins Center "is dedicated to improving efficiency, effectiveness, governance, and accountability at all levels of government."

The Baker administration has created a Best Practices Program (<https://www.mass.gov/best-practices-program>), in which the commonwealth signs an agreement with a municipality, in the form of a Community Compact. By signing the Community Compact, a municipality commits to implement at least one best practice to improve governance. Belmont signed its Community Compact in 2018.

By signing the Community Compact, Belmont has been able to access grant funding for Collins Center resources. Previously, as documented in Idea #169, the Belmont Financial Task Force II has made extensive use of the resources of the Collins Center, including consultation and development of a detailed financial planning model for Belmont. Further resources are available for use by Belmont leaders.

Recommendations

- Because of the Community Compact, Belmont remains eligible for grant-funded resources from the Collins Center. Belmont leadership is using these resources and this should continue based on needs/priorities versus available Collins Center resources.
- In coming years, areas that might be addressed with help from the Collins Center include how to do priority-based budgeting and how best to manage the capital budget process

Further Reading

- **Collins Center Brochure**
http://websites.networksolutions.com/share/scrapbook/69/690852/Collins_Center_Brochure_2015.pdf
- **Belmont Community Compact**
<https://www.mass.gov/files/documents/2018/02/08/Belmont%20Compact.doc>

IDEA #353 – ELIMINATE ALL UNNECESSARY DEPARTMENTS

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Eliminate all departments that are not absolutely needed. Wants are different than needs.

Other ideas included in this report

- 19 - Determine core services required by residents

Idea intent

This idea implies that there are departments providing services that are not needed by the town. We are abstracting this concept to suggest that the town design and implement a process to assess the degree to which our current services are meeting needs and adjust the services accordingly.

Weighted Final Score: 40

(Financial Impact: 5, Operational Impact: 0, Time Scale: 1, Ease of Implementation: 1)

Background Information

The Town currently offers many services, some of which the town is mandated to provide.

Recommendations

It is not in the scope of the SCIG effort to gather the information necessary to evaluate the priorities of town and how well the existing services meet those priorities. That said, the town should work to better understand the current and long-term needs of residents and use those to inform an updated Comprehensive Master Plan.

Next Steps

- The Select Board should direct the appropriate body in town – such as the Vision 21 Implementation Committee or the Master Plan Refresh Committee – to gather community input to better understand the priorities of all residents, not just those who have time to volunteer & attend meetings, then use that input to set priorities and associated goals, then make plans to reach them.
- These priorities can also be used as part of an evaluation of the functions and services in Town and/or as part of a priority-based or programmatic budgeting approach.

Further Reading

- Vision 21 Implementation Committee Report: 2014 Town Wide Survey
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/vic_priorities_and_progress_final_0_0.pdf
- Belmont Comprehensive Master Plan 2010-2020
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/file/file/comp_plan_final_0.pdf

IDEA #358 – BUILD A SOCCER BUBBLE

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

Build a soccer bubble on a Grove Street playground. Similar to the Bedford Edge. You can rent it all year round and make a boat load of money. Big revenue generator and also good for recreation.

Other ideas included in this report

- None

Idea intent

Create income from renting a sports center in town year round

Weighted Final Score: 57

(Financial Impact: 5, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

In northern states with long winters, outdoor facilities have a limited season. Some communities have joined with private-sector partners who provide additional investment to convert facilities to accommodate indoor use in the winter months. The following is a typical example:

A city leased an existing five-court outdoor tennis complex to a private partner for 10 years, with two successive five-year options to extend the lease. The lessee paid the city 5 percent of gross revenue. The developer constructed an air-supported structure over the courts and built a permanent support building. The partner had exclusive use of the courts for a 32-week winter season and erected and dismantled the structure at the beginning and ending of each season. The city had exclusive use for the 20-week summer season.

The remarkable creativity that characterizes many partnerships is indicative of the changing role of a recreation manager. No longer is this person limited to being an administrator who is given tax funds to deliver services. Rather, the manager's role has transitioned and expanded to that of a public-sector entrepreneur who is given a relatively small allocation of tax funds and is expected to use them to leverage additional funds from partners to deliver desired programs and facilities.

Current bubble indoor centers:

- [The Edge Sports Center](https://theedgesportscenter.com/)
<https://theedgesportscenter.com/>
- [Compete Indoor Sports](https://competeindoorsports.com/)
<https://competeindoorsports.com/>

Recommendations

- Estimates on revenues for a turf field to be used for Soccer, lacrosse, football, field hockey, and baseball is approximately \$700,000. This would be at \$350 per hour for 2,000 hours Approximately 20 hours a week for 5 months at 5 sports.
 - Contact the Edge in Bedford, owned by Fusco, Michelle Palumbo, Taylor Shean, and Brian DeVellis
 - The town should get a solid quote and timing of bubble system that can be put up and taken down \$10-32 per sf depending on site work required
 - The bubble should be run as a business in town and pay for itself and create revenue to the town
- This would fall under the parks department for upkeep and management by the rec department for online rental and scheduling.

Next Steps

- Create a budget and test sensitivity of revenue and rental rates. Market study of available bubble space and who rents the space.
- Evaluate potential locations, such as one of the new fields being created at the High School vs. Grove St. vs. other park. If done when a field is actively being redeveloped (instead of adding to existing field) there should be significant cost savings.

Further Reading

Dome providers:

- [Multi-Sport Dome Projects - The Farley Group](#)
- [Building a Dome: Understanding the Basics \(thefarleygroup.com\)](#)
- [How Much Does a Sports Dome Cost? Find Out! - Yeadon Domes](#)

IDEA #360 – CONSOLIDATION OF TOWN POLLING LOCATIONS

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

Can we consolidate our polling locations? Belmont is a relatively small-town area-wise. Can we have 2 precincts vote together? With more voters taking advantage of mail-in voting, the foot traffic per day is relatively low. We could save money on poll workers, police officers, etc.

Other ideas included in this report

- None

Idea Intent

Cost savings by decreasing the number of polling locations in Town and reducing the staffing costs associated with the seven polling places the Town currently utilizes.

Weighted Final Score: 14

(Financial Impact: 1, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 0)

Background Information

I discussed this idea with our present Town Clerk, Ellen O'Brien Cushman. She provided the following comments:

The State election laws require us to staff our elections with a minimum number of election workers, six people per precinct and a Police officer for each voting location. The election workers are fixed. Co-locating precincts can reduce the number of Police officers required inside the polling place, however increasing the number of voters who will be accessing a polling location creates traffic and parking challenges and tangles that may require the Police officer instead to be deployed outside to ensure safe passage for voters. This worry is especially the case if we are adding more voters, more cars more traffic at our Schools, the only locations large enough to handle multiple precincts. We already use three of them. The State's guidance about voting locations is to keep them within or immediately adjacent to the precinct geography as can be seen with the two precincts voting at the Beech Street Center. The voting location is right between and adjacent to two precincts. To consolidate any additional precincts would mean adding more voters voting and traffic to our schools.

A suggestion was made in the past to have all of Belmont voting precincts vote at one location, of course that could only be Belmont High School. We examined what it would take to make that work. The Field House was the only room large enough to hold all of Belmont's 8 voting precincts (the number is governed by the Federal Census decennial data, not the Town's opinions). The requirement to protect the flooring of the Field House means that the custodial staff must lay down the wooden plank flooring, and it apparently takes at

least 1 or 2 days to do it and the same to remove it, rendering the Field House unusable by school classes and teams for a week each election. Then the question of parking comes up – where will the voters park? There are 17,000 voters in Belmont who have the right to choose when they will cast their ballot in person on Election Day, so we need to make sure that we have adequate and safe access to the polls, parking, etc. Vote by Mail was not enabled by the Legislature this year, so in person voting is what’s available unless a voter qualifies for one of the three reasons allowed for Absentee voting, and convenience is not one of them. At the old Belmont High School, there were limited parking areas, all located at the east end of the building, away from the Field House. Voters would have to be able to walk 800 or more feet to get to the Field House entrance. We therefore decided that we’d need to employ the Belderbus running routes around the BHS facility from the time workers arrive to when they finish, from 6 AM to 10 PM, or it’s a considerable walk from the parking area. Would school be in session for each of these elections or cancelled? If cancelled, could voters enter the building and walk through it, out of the weather to get to the Field House? There is an Annual Town Election in April and biennial primaries in September and State Elections in November in even number years, then of course, the Presidential Primary and State/Presidential Election. The School Committee has not authorized the closing of schools on all of these other elections, and that’s their right. There are people in Town who want us to remove our voting from our schools – that’s not physically possible because Belmont doesn’t have any other large locations with available parking.

In the end, we’d have 17,000 voters voting in the BHS Field House or our schools, but how do the voters get there? Belmont doesn’t have any across town bus service or transportation service for voters to get to their polling place. Many voters walk to their neighborhood polling location, some drive. Even at the High School, many voters would need to take a bus into Harvard Square and another one out to Concord Avenue but then still walk the considerable distance to get to the Field House if they are physically able to do it. For the other schools, that are not on any bus line, that’s a different, greater barrier. Is that easier and more available than walking down the street?

So in the end, you may have decreased some costs, certainly you’ve added others and made voting access much more difficult for a large % of Belmont voters. In an age where we should all be worried about attempts to suppress voter participation, I lean full in the direction of keeping Belmont’s voting accessible to Belmont’s voters. The Town Clerk’s office and the Board of Registrars of Voters continue to examine alternatives as they present themselves – rest assured that we understand that free elections and voting are about more than cost.

Recommendations

Based on the Town Clerk’s feedback above, which concludes that any savings from consolidating polling locations would likely be offset by other cost increases and decreased quality of service, no further action is warranted at this time.

Further Reading

- [Town of Belmont, Fiscal Year 2022 Budget Book – page 142](https://www.belmont-town.com/files/2022/02/Budget-Book-2022-23.pdf)
[https://www.belmont-](https://www.belmont-town.com/)

ma.gov/sites/g/files/vyhlif6831/f/uploads/fy22_town_administrators_budget_recommendation_-_2021.04.15_-_no_override.pdf

IDEA #363 – CHARGE INTERNATIONAL STUDENTS TUITION TO ATTEND BELMONT SCHOOLS

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Are we able to charge tuition to international students? What percentage of ELL costs is driven by International Students? Belmont is a very popular spot for visiting Professor's and those attending local Universities in Cambridge. Are they paying more? Can we charge more to help offset costs? If we can but by doing so that makes the Town less appealing and the families choose other locations that also helps the budget by reducing the student population.

Other ideas included in this report

- None

Idea intent

New revenue/budget savings

Weighted Final Score: N/A (illegal)

Background Information

It is illegal to charge tuition to attend public schools regardless of nationality:

<https://www.mass.gov/service-details/attorney-generals-advisory-regarding-equal-access-to-public-education-for-all>; https://www.mass.gov/files/documents/2018/11/13/ag-advisory-on-equal-access-to-education-3-2-17_0.pdf

“It is critical that all school districts and officials in the Commonwealth ensure that all children residing in their jurisdictions have equal access to public education by: (1) allowing children to enroll and attend school without regard to race, national origin, or immigration or citizenship status; (2) avoiding information requests that have the purpose or effect of discouraging or denying access to school on the basis of race, national origin, or immigration or citizenship status; and (3) protecting all students from bullying and harassment on the basis of race, national origin, or immigration or citizenship status.”

Recommendations

- No further recommendations.

Next Steps

- None

Further Reading

- None

IDEA #364 – CORI CHECKS

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Does the town have to pay for each CORI? My husband has to get a separate CORI for aftercare, school, basketball, soccer, and baseball. Can there be a common database that organizations can share so we don't have to pay for every CORI?

Other ideas included in this report

- None

Idea intent

Reduce costs and hassles to residents required to get CORI checks.

Weighted Final Score: 0 (ruled out)

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

CORI checks are performed at the State level and not under the purview of the Police Department. Police departments are allowed to run CORI checks for official police business only. Each individual organization is responsible for obtaining CORIs for its programs; per Massachusetts Section 172H, “any entity or organization primarily engaged in providing activities or programs to children 18 years of age or less, shall obtain all available criminal offender record information from the department prior to accepting any person as an employee, volunteer, vendor or contractor. Any entity or organization obtaining information under this section shall not disseminate such information for any purpose other than to further the protection of children”.

Recommendations

This idea was ruled out as CORI checks are mandated and processed by the State.

Next Steps

- None

Further Reading

- <https://www.mass.gov/massachusetts-criminal-offender-record-information-cori>

IDEA #366 – SELLING ADVERTISING ON TOWN-OWNED BILLBOARDS

Report Status: Fully Reviewed

Researched by: Mark Paolillo

Original Idea as Submitted

The Town could sell advertising on billboards or e-billboards along Route 2 if allowed or along commuter routes through town, and also on sports facilities.

Other ideas included in this report

- None

Idea Intent

Revenue generation through the selling of advertising placed on billboards or sports facilities under the Town's control.

Weighted Final Score: 37

(Financial Impact: 3, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 3)

Background Information

Route 2 is a 12-mile-long state highway under the control of the state of Massachusetts. Route 2 runs the entire length of the Northern Tier of Massachusetts beginning at the New York border and ending near Boston Common in Boston. Belmont has no ownership rights over Route 2 and therefore could not install any billboards along the Route, on which it could sell advertising.

The Town of Belmont presently has a sign bylaw, which was rewritten by the Planning Board and approved by Town Meeting in 2017. The reason the Planning Board elected to rewrite the existing sign bylaw was because the residents in the community were getting more vocal about what they believed was an aesthetic problem for the Town.

The following specific wording in the bylaw below discourages or restricts billboard type signage in the Town [emphasis added]:

The Sign Bylaw states:

5.2.1 Intent and Purpose

It is recognized that signs perform important functions in the community and are essential for the public safety and general welfare, such as communicating messages, providing information about goods and services available, and providing orientation. **It is further recognized that because of their potential impact on the visual and perceptual environment, signs must be regulated** in order to:

- a) prevent hazards to vehicular and pedestrian traffic;

- b) **prevent conditions which have a blighting influence;**
- c) provide for easy recognition and legibility of all permitted signs and other uses in the immediate vicinity;
- d) **preserve the amenities and visual quality of the Town and curb the deterioration of the community environment;** and
- e) conserve energy.

It is the intent of this Section 5.2 to **protect property values, create a more attractive business climate, enhance and protect the physical appearance of the community, provide a more enjoyable and pleasing community and to encourage appropriate uses of land.**

5.2.3 General Requirements

- a) Movement. **No sign shall contain** any visible movable or moving parts (except for the hands of a traditional analog type, i.e., non-digital clock whose face does not exceed 36 inches in diameter), any moving, **flashing, or animated lights, or any automatically changing written or pictorial matter or message.**
- b) Illumination. **No sign shall be illuminated between the hours of 10:00 p.m. and 6:00 a.m.** unless the premises on which it is located are legally open for business ...

5.2.4 Prohibited Signs

The following sign types shall not be permitted, constructed, erected, or maintained:

- a) **Any sign that advertises or calls attention to any commercial activity, business, product, or service that is not produced, sold, carried, or conducted on the premises upon which the sign is located.** No such sign shall remain in place or on vacated premises for more than 90 days from the date the vacancy commenced or commercial activity or service ceased, unless otherwise permitted by this By-Law;

Naming rights policies are currently under review and consideration by the Select Board, School Committee, and the Board of Library Trustees.

Recommendations and Next Steps

The Select Board, School Committee, and the Board of Library Trustees should adopt a naming rights policy, which would allow a corporation, individual, or other entity to make a donation that provide a right to name a facility, part of a facility, a location, a town program, or event. See Idea #34 – Naming Rights.

Further Reading

- [Town of Belmont Sign Bylaw - page 7](https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/section_5_3.pdf)
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/section_5_3.pdf
- [Putting Public Assets to Work, June 2021, Government Finance Officers Association \(GFOA\)](https://www.gfoa.org/putting-public-assets-to-work-urban-wealth-funds)
<https://www.gfoa.org/putting-public-assets-to-work-urban-wealth-funds>
- [Rethinking Local Government Revenue Systems, October 2021, Government Finance Officers Association](https://www.gfoa.org/how-will-rethinking-revenue-approach-this-challenge)
<https://www.gfoa.org/how-will-rethinking-revenue-approach-this-challenge>

IDEA #373 – EXPLORE CAREER VOCATIONAL AND TECHNICAL EDUCATION OPTIONS

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Explore regional vocational and technical education options

Other ideas included in this report

- 347 - Provide better vocational/technical options

Idea intent

Since leaving the Minuteman Tech regional school district Belmont's students have been left with uncertain options for vocational/technical education. This idea suggests that we explore the current options and identify potential alternatives.

Weighted Final Score: 27

(Financial Impact: 0, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 2)

Background Information

Students from Belmont seeking Career, Vocational and Technical Education (CVTE) options work with the School Department to identify where they can apply, typically in 8th grade. Access to slots at Minuteman are now limited – for the '21-'22 school year, eight incoming 9th graders applied and one was accepted. At least two families moved to other Minuteman member district towns specifically to get access to the Minuteman programs.

For more detail on Belmont's decision to leave the Minuteman District, please see *Idea #177: Withdraw from the Minuteman Regional District*.

To provide these students with opportunities, the school department maintains relationships with Medford Vocational Technical High School and Cambridge Rindge School of Technical Arts.

For '21-'22, across grades 9-12 there are 37 total Belmont students at Minuteman (29 of whom are in grades 11 or 12, having enrolled before Belmont left the district), and five are enrolled in Medford's program (all 9th and 10th graders). Due to increased demand for space from its own residents, no students from Belmont are currently enrolled in Cambridge's program.

The number of incoming 9th grade students expressing interest in CVTE was lower than usual this year, perhaps due in part to the excitement of the new Belmont 9-12 building opening, but the expectation is that demand will return to higher levels in the future, aligning with a regional trend of increased demand for CVTE.

Recommendations

- The consequence of leaving the Minuteman district has left some students and their families without access to suitable alternatives for vocational and technical education. The town should continue working to strengthen and perhaps formalize our existing agreements with other nearby CVTE options and continue to seek out additional options to service Belmont students interested in CVTE.
- One key problem with Minuteman was the funding structure for in-district communities, and this problem's root is at the state level. To fix this problem and give more students access to vocational/technical education opportunities, the town or its representatives at the state level might advocate for changes to vocational and technical education districting, funding, and tuition policies, work to reform the Minuteman district.
- The number of Belmont rising 9th graders applying to CVTE programs is somewhat lower than in the past, perhaps because of the newly opened Belmont High School. The new school offers some programs that may meet some of the interests of students who may otherwise have applied to dedicated CVTE programs. With this in mind, Belmont may be able to meet the needs or more students by expanding the programming offered at BHS to include more courses like robotics, programming, engineering, and the like. Such an expansion might also reduce the number of students who feel like BHS isn't a fit for them, leaving more space in dedicated programs available for those for whom BHS is truly not a fit.

Next Steps

- The School Department to continue maintaining and building our existing relationships and agreements with nearby options for CVTE, including Minuteman.
- The School Department should seek out additional CVTE options for Belmont Students.
- The Town should monitor for potential state-level reforms to regional CVTE districts and ask our State Representative and State Senator to advocate for those reforms.
- The School Committee and School Department should assess the possibility of expanding course offerings that may meet the needs & interests of some Belmont students who are not able to access dedicated CVTE programs.

Further Reading

- Medford Vocational & Technical High School
<https://www.mps02155.org/schools-2/medford-vocational-technical-high-school/>
- Minuteman Regional Technical and Vocational School
<https://www.minuteman.org/>
- Rindge School of Technical Arts
<https://rsta.cpsd.us/>

IDEA #378 – SUPPLEMENTAL TAX ASSESSMENT ON NEW CONSTRUCTION

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Idea Text

Implement new state law SUPPLEMENTAL TAX ASSESSMENT ON NEW CONSTRUCTION allowing assessors to update tax assessment of substantially improved homes when granted an occupancy permit rather than wait for next Jan 1 revaluation.

Other ideas included in this report

- None

Idea intent

The turnaround time between when a parcel receives its occupancy permit from new construction to the January 1 new assessment date prohibits the Town of Belmont from receiving tax revenue of its fair market value until some months later. Enacting the guidelines set forth in the Informational Guideline Release (IGR) No. 21-12 is an opportunity to receive the increase in tax revenue from new growth ahead of the January 1 revaluation date.

Weighted Final Score: 57

(Financial Impact: 4, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 5)

Background Information

In May 2021 the MA Bureau of Municipal Finance Law published an Informational Guideline Release (IGR) No. 21-12 concerning MA G.L. c. 59, § 2D titled Supplemental Tax Assessment on New Construction. These guidelines provide cities and towns pertinent information to implement pro rata tax assessments on parcels whose value has increased by over 50%, excluding value of land, upon issuance of an occupancy permit following new construction or improvements. The statute applies automatically and requires no further action by the Town of Belmont to enact.

Recommendations

- The Belmont Assessors Office implement prorated tax assessments on qualifying parcels immediately.
- The Belmont Assessors Office identify current qualifying parcels (those issued or soon to be issued occupancy permits) and conduct the necessary assessments for valuation update and proceed with issuance and collection of pro-rated taxes.
- The Belmont Assessors Office devise a process to identify and track future qualifying parcels prior to next January 1 tax assessment deadline and be prepared to conduct the necessary assessment once occupancy permit has been issued.

Next Steps

- Communication of IGR 2021-12 was sent to the Board of Assessors on July 25, 2021 to the Assessor's Office to seek status of implementation. The SCIG committee met with the Board of Assessors on November 19, 2021. Implementation is expected in FY22.
- The Select Board should request periodic check ins with the Board of Assessors for status of implementation.

Further Reading

- <https://nerej.com/new-construction-may-be-subject-to-pro-rata-taxation-by-richard-conti>

IDEA #381 – CANCEL 7-8 PORTION OF 7-12 SCHOOL

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

“SCI-110 Cancel the middle school portion of the school building project and update the 15-year school enrollment projection.

Current 2021-22 enrollment data shows that a net of 199 students from the class of 2022 through the class of 2032 have left Belmont Public Schools since the 2019-20 school year, spread across all grade levels.

There was no recovery within these cohorts for 2021-22 enrollment. In fact the classes of 2028 (rising 6th graders) and 2029 (rising 5th graders) showed further enrollment drops.

The class of 2033 (rising first graders where school is mandatory) is only 277 students and the class of 2034 (incoming kindergarteners) is only 266 students, 80% of the historical average.

This data suggests that a “new normal” has been established in the preference between public and private schooling with our citizens.

The extra facility is no longer needed.”

Other ideas included in this report

- None

Idea intent

This idea suggests that, given recent changes in school enrollment, the Town should cancel the rest of the 7-12 school project because it is no longer needed.

Weighted Final Score: 0

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

Context: In 2018, Belmont voters approved a \$295 million debt exclusion to fund the replacement of the then-current 9-12 Belmont High School. With this approval the Town also accessed matching funds from the Massachusetts School Building Authority, up to \$82 million in reimbursements for eligible costs of the construction.

The project was designed to achieve two primary aims:

1. Replace the failing BHS building, built in 1970.
2. Increase the student capacity of schools across the district to accommodate a surge in student enrollment.

Since 2018, the project has moved ahead on schedule with the 9-12 portion of the school opening in September 2021 followed swiftly by the demolition of the old Belmont High School building and the onset of constructing the new wing for grades 7-8, slated to open in September 2023.

Student Enrollment

The design process for the project required the town to engage with a demographer to study and project the likely enrollments going forward. This study projected the increases in enrollment would likely continue until 2025. In March of 2020, the worldwide pandemic changed patterns of school enrollment worldwide as parents grappled with anxiety and frustration over how schools, including Belmont Public Schools, chose to manage the pandemic.

There have indeed been drops from the enrollment levels projected, but even these reduced enrollments continue to exceed the designed capacity of every school building in the district other than the new 9-12 wing.

The town studied many alternatives to the 7-12 configuration currently being built, and all analyses indicated that these alternatives would cost more and also carry an additional burden of additional years of construction activity distributed throughout the town.

What if the Town wanted to cancel the 7-8 wing?

Even if the construction of the 9-12 portion of the project was enough, by itself, to address the broader overcrowding issues across the district, the Town can't simply cancel the 7-8 portion of the project.

Locally, votes and approval of town bodies, including a town-wide vote, approved the 7-12 plan with a significant majority (76.2% of voters in favor). At the state level, the Massachusetts School Building Authority is subsidizing over \$80 million of the project *as approved*. This subsidy is for the cost for the whole 7-12 project, so canceling a significant portion of the project would put some, or even all, of the state subsidy at risk, potentially including money we have already spent.

The Town Treasurer offered his perspective on this matter: "Any major change to this project at this point would impact the MSBA reimbursement and probably cost the Belmont Tax Payor."

Recommendations

- None

Next Steps

- None

Further Reading

- Massachusetts School Building Authority Website
<https://www.massschoolbuildings.org/>
- Belmont Middle and High School Building Committee
<https://www.belmont-ma.gov/Belmont-Middle-and-High-School-Building-Committee>

- MSBA Project Scope and Budget Agreement, which outlines the basis for their reimbursement
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/pages/belmont_hs_project_scope_budget_8.29.18.pdf
- 2015 School Enrollment Study
https://www.belmont-ma.gov/sites/g/files/vyhlif6831/f/u116/smma_belmont_enrollment_study_12-7-2015.pdf
- “Landslide! Debt Exclusion For New 7-12 School Passes By More Than 3 To 1 Margin”
<http://belmontonian.com/schools/landslide-debt-exclusion-for-new-7-12-school-passes-by-more-than-3-to-1-margin/>

IDEA #382 – DATA-GUIDED DECISION MAKING

Report Status: Fully Reviewed

Researched by: Norma. Massarotti

Original Idea as Submitted

Implement a tool via the use of a document/template (one pager) to guide data driven decision making and discussion where possible in Belmont Town Government. This practice will facilitate better decision making and improved discussion as it will equip the Select Board and other meeting participants with a concise and complete view of key facts/assumptions pertaining to the discussion topic or decision to be made. This practice will also allow for a more structured and efficient discussion for the Select Board and other meeting participants as the tool/format will be standard, all information/inputs will be outlined with supporting documents embedded

Other ideas included in this report

- None

Idea intent

Use written facts, metrics, and data to guide decision making. This will enable better (more informed, more efficient, financially supported) decision making and discussion.

Weighted Final Score: 46

(Financial Impact: 1, Operational Impact: 4, Time Scale: 3, Ease of Implementation: 5)

Background Information

There are losses (time and money) in Belmont's decision-making process and discussion of issues or topics as: some discussion is only verbal making recollection challenging for going discussions; key pertinent information to guide making the decision is limited and not always accurate and available; financial metrics and impact of the recommendation is not always available; options, where they exist, are not always identified, assessed and presented as part of the recommendation; and how a decision (or project) fared is not always documented or understood from an evolution standpoint to measure performance vs. plan and to learn from experience to guide future changes to how we make decisions.

Evaluation

Evaluation was made through listening in on various public Select Board meetings, review of online Capital Budget FY2022 book request forms, review of the Community Preservation Committee funding applications and its project statuses report at the Town annual meeting along with input from SCIG committee members and Town Administrator.

Recommendation

SCIG recommends that Town of Belmont shift to more data guided decision making which can be facilitated using a structured approach (where it makes sense) to a discussion requiring a decision, especially one that impacts the Town’s financials.

Discussion leaders or topic owners are guided and trained to present issues or decisions using the following framework:

- State the issue or decision required to be made
- Explain what caused the issue or why we need to make this decision
- Define what options/alternatives exist for consideration and what the associated costs are (what is the data source supporting the cost estimates?); are there supporting financials that have been vetted?
- Involve/seek the input from key stakeholders
- Which option is being recommended and why? What are the tradeoffs?

A template can be developed to guide the discussion owner on how to think through the issue assessment and the outline for discussion and can be tailored accordingly.

Concept Only – data may not be accurate but is being used to illustrate the concept

Date	April 15, 2021	
Project Name	Fuel Underground Storage Tanks	
Belmont SPOC	name	email, phone number
Resident SPOC	name	email, phone number
Issue Statement (This was first written in 1Q21 and has not been updated) Or Decision Required:	Town of Belmont is not in compliance with double wall specification for underground tanks (they are single wall) thus needs to replace tanks. Town recommendation/plan has been to pursue above ground tanks which residents in the neighborhood oppose and believe that other options have not been adequately vetted with supporting documentation. Additionally, cost is double vs. what was originally estimated. Residents are asking town to place installation of above ground tanks on hold and to adequately assess options for review with town residents.	
Purpose of Tanks	Supply/Source of Fuel for all town owned vehicles (logistics/convenience vs. cost)	
Original Cost Estimate (August 2019)	\$524K (2 Tanks, above ground)	ROI =
Revised Cost Estimate (March 2021)	\$1.0 MM	ROI =
Actual Cost:		ROI =
To date Consulting Fees:		
Annual Consumption by fuel type:	Diesel	Gas

Current Capacity/Configuration:	
Proposed Capacity/Configuration:	2 x 6000-gallon tanks (one diesel, one gasoline)
Options	
Option A: Current Location, below ground (Option A usually most resembles what is in place today)	Duplicate what is in place while meeting current code/regulations
Option B: Current Location, above ground	Replace with above ground (this is what was being recommended)
Option C: Use local gas stations Do we even need tanks in Belmont	Do we even need our own tanks?
Option D: etc.	
Option E: Hybrid/Other	
Recommended Next Steps	
Align on charter/options	May 1
Gather/document inputs	Jun 1
Review with BOS/Neighbor SPOC	Before Jun 30
Align on Recommendation	July 15
Begin Implementation	August 1
Meetings Held	
Public	Date

- This concept one pager would be used in discussions / meetings and not all sections necessarily apply to every topic
- The form can be tailored to the topic
- Move away from high level PowerPoint slides and try to keep all pertinent data concisely summarized in a living document.

Next Steps

- Culture change shift starts at the top. The Select Board and School Committee should obtain buy-in by from Town Administrator, School Superintendent, Department Managers, Capital Budget Committee Chairs and Community Preservation Committee Chair
- Choose a few topics (issues/decisions) by department or committee that lend to utilizing this approach and seek the assistance of SCIG to tailor/populate the template with the best data available. Refine as progress is made.
- Identify who will help with the financial support to calculate any financial metrics (e.g., ROI) and provide that guidance. Or give users the formulae and inputs required via an excel spreadsheet
- Share concept in forums with other towns and cities and look to reapply best practices.
- Seek IT support to later, after some learning, to help with data gathering, report generation, KPI Key Performance Indicators (KPI) reporting, etc..

Further Reading

- None

IDEA #383 – TOWN RENTAL SITES POSTED ON WEBSITE

Report Status: Fully Reviewed

Researched by: Vicki Amalfitano

Original Idea as Submitted

The Beech Center should be rented out more in the evenings and on the weekend to paying clients. What is being done to capitalize on this resource?

Other ideas included in this report

Several ideas were submitted (see below) on rental of town facilities.

- 398 – Develop and publish a fee schedule to encourage the rental of Town facilities, rooms, fields for evening and weekend use. Require payment of a custodian as part of fee to protect town assets.
- SCIG: Create a website or online resource for renting town owned space (buildings, open spaces/fields, pools) for events/functions. Users could schedule a rental and pay fees for the rental.

Idea intent

Rental of Town Facilities for New Revenue

Weighted Final Score: 57

(Financial Impact: 3, Operational Impact: 4, Time Scale: 3, Ease of Implementation: 4)

Background Information

The town has many assets – meeting rooms, fields, other facilities – which could be rented out for fees as new sources of revenue. There is a precedent with fields and other athletic facilities. The SCIG Subcommittee on Revenue, Expenses and Town Services evaluated this as a Quick Win because it can be implemented without layers of approval and operationally can be implemented in under six months.

Recommendations

- A static town webpage should be created that lists the rooms and other facilities available for rent, their costs, and who should be contacted to make a rental.

Next Steps

- Create a list of town facilities suitable for rental
- Request a fee structure from each Town Department responsible for the facility
- Post the list of assets on the Town website as RENTALS, with the contact information.

Further Reading

- Other towns are doing this; see information for Arlington
<https://www.arlingtonma.gov/i-want-to/rent-a-town-property>

IDEA #384 – BIKEWAYS TO SCHOOL

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Idea Text

Parking for the new high school and traffic at the Chenery are huge concerns right now. The new high school and middle school will have more students and teachers and far fewer parking spots. Let's encourage students (and adults) to bike to these schools by creating wide bike lanes on certain side streets or by designating certain side streets as bike-only during rush hour. We could also add Citibike-style stands along these routes and at the high school to provide and hold bikes when not in use. The schools could also enact policies rewarding students for biking or walking to school. This would reduce the need for parking, traffic congestion, transportation (bussing) costs, carbon emissions, etc.

Other ideas included in this report

- None

Idea intent

This idea is to reduce parking and traffic through promoting bicycling and pedestrian access to Belmont schools.

Weighted Final Score: 23

(Financial Impact: 0, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

Belmont has a Transportation Advisory Committee whose charge is:

The role of the Transportation Advisory Committee is to evaluate and make recommendations to the Select Board about the improvement of the safety of the public ways in Belmont for pedestrian, bicycling, and vehicle traffic.

Recommendations

- The Transportation Advisory Committee should review the idea.

Next Steps

- None

Further Reading

- Transportation Advisory Committee
<https://www.belmont-ma.gov/transportation-advisory-committee>

IDEA #385 – EXPLORE REGIONALIZING/CONSOLIDATING LIBRARY SERVICES

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

Explore possibilities around regionalizing library services and/or consolidating library services within town (e.g., between schools and public library).

Other ideas included in this report

- 12 - Regionalize library with Watertown and Arlington
- 244 - Share resources between school and public library
- 306 - Merge with another/other towns. Library, DPW, recreation, health

Idea intent

The intent of this idea appears to be that the town would realize cost savings or efficiencies by regionalizing library services with other municipalities and/or consolidating the Belmont Public Library with the Belmont Public School libraries.

Weighted Final Score: 37

(Financial Impact: 3, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 3)

Background Information

The Belmont Public Library (BPL), founded in 1868 and currently housed in a building constructed in 1965, hosts an average of 1000 visitors per day and lent out about 600,000 collection materials in the last reporting year, 2018. It is ranked 12th in the State for number of circulated items. Among neighboring communities, the public libraries of Watertown, Cambridge, Arlington, and Lexington each exceed Belmont in number of circulated items, meaning that five of the twelve most used libraries in the state include or border Belmont.

Municipality	Library Branches	Circulation	Budget	Staff FTEs
Arlington	2	795,435	\$2,780,558	34
Belmont	1	595,286	\$2,348,616	27
Cambridge	7	1,755,061	\$10,849,501	97
Lexington	1	955,448	\$2,760,202	38
Waltham	1	485,364	\$2,916,605	31
Watertown	1	708,219	\$3,034,893	35

Source: Massachusetts Board of Library Commissioners, mblc.state.ma.us, all data 2018

Along with all these neighboring libraries the BPL is a member of the Minuteman Library Network (MLN). The MLN provides for its 36 member libraries resources including library software and access to materials in the collections of other libraries. With their Belmont library cards, Belmont residents have access to other member libraries in the MLN. Membership in the MLN is contingent on maintaining minimum levels of budget and service hours at each local library.

The Belmont Public Schools (BPS) library program has an FY22 budget of \$271,000 and a staff of 5.68 FTEs, which include one full-time librarian at each of the Belmont High School and Chenery Middle School and part-time library aides at each of the four elementary schools and the High School. This compares to the FY22 Belmont Public Library (BPL) budget of \$2,276,000 and a staff of 24.5 FTEs. The BPL provides resources and assistance to the BPS libraries as needed, but they are separate operations. Combining municipal and school libraries is rare in Massachusetts, partly because the certification and licensure requirements for school librarians are different from those for librarians at municipal libraries. The City of Worcester, with its "One City, One Library" program, appears to be the sole example in Massachusetts of combining municipal and school libraries.

In addition to the idea of merging the library with other municipalities, a related idea suggested also merging the Department of Public Works, the Recreation Department, and/or the Health Department with other municipalities. For reference, here are the FY22 budgets and staff FTEs for these three departments:

Department	FY22 Budget	FY22 FTEs
DPW	\$7,439,000	24.9

Recreation	\$1,030,000	15.2
Health	\$605,000	5.5

Recommendations

- On regionalizing library services:
 - The Belmont Public Library should take advantage of all available opportunities within the Minuteman Library Network and should remain a member of the MLN. The MLN already provides many of the advantages that could be gained by regionalizing libraries.
 - The Belmont Public Library should pursue all possible creative ways to partner with neighboring libraries, including any idea that might realize cost savings or efficiencies in operations.
 - Efforts at merging Belmont into the service area of another municipal library is likely to be challenging because of the likely lack of interest among potential merger partners. Shifting the circulation demands in Belmont to one or more surrounding libraries would likely swamp those already busy libraries.
 - Meanwhile, creating a combined library system with another municipality (a multi-community library system with a local branch remaining in Belmont) seems unlikely also because of the difficulty in finding a willing partner. And even if a municipality agreed to such an arrangement, the budget savings from such a merger are likely to be limited, because all branches would still need to be staffed and opportunities to reduce redundant staff after the merger would likely be limited because of the increased workload in the combined library system.
- On merging town and library operations:
 - The Belmont Public Library and Belmont Public Schools should continue to work collaboratively as opportunities arise.
 - The Belmont Public Library and Belmont Public Schools should consider a reorganization that moves the six (and seven when the Upper Middle School opens) school libraries into the BPL organization if this change leads to budget savings, efficiencies in operation, and/or service improvements. However, the fact that such a merger is rare in Massachusetts is notable. Learning from the example of Worcester would be wise.
- On regionalizing other departments:

- The Belmont Town Administrator should consider whether there are opportunities to share resources with neighboring municipalities in departments such as DPW, Recreation, or Health – if such a change would lead to budget savings, efficiencies in operation, and/or service improvements.

Further Reading

- Belmont Public Library
<https://belmontpubliclibrary.net/>
- Minuteman Library Network
<https://www.minlib.net/>
- Massachusetts Board of Library Commissioners - library statistics
<https://mblc.state.ma.us/programs-and-support/library-statistics/index.php>
- Massachusetts School Librarian Association - Certification and Licensure as a School Librarian
<https://www.maschoolibraries.org/certification--licensure.html>
- Worcester Public Library - One City, One Library
<https://mywpl.org/?q=one-city-one-library-0>

IDEA #391 – ALLOW HOTELS AND B&BS IN BYLAWS

Report Status: Fully Reviewed

Researched by: Brian Antonellis

Original Idea as Submitted

Write bylaws enabling hotels and bed & breakfasts in Belmont. In recent years, there have been two instances in which developers have proposed hotels, and were rejected in part because our bylaws did not address hotels.

Hotels would create local jobs, bring consumers and other businesses into the area, potentially host restaurants and events, and generally boost the local economy. Obviously, they would increase tax revenues as well.

Other ideas included in this report

- None

Idea intent

Clarity Zoning and by laws to allow areas for hotels and set up rooms tax

Weighted Final Score: 43

(Financial Impact: 3, Operational Impact: 2, Time Scale: 2, Ease of Implementation: 3)

Background Information

Massachusetts has a state room occupancy excise tax rate of 5.7%. Depending on the city or town, a local option room occupancy tax and other taxes and fees may also apply. The room occupancy excise tax applies to room rentals of 90 days or less in hotels, motels, bed and breakfast establishments, and lodging houses. Beginning July 1, 2019, the room occupancy excise also applies to short-term rentals of property for 31 days or less. For all types of rental accommodations, if the total amount of rent is less than \$15 per day, no tax is due. Generally, the room occupancy excise is collected and paid to DOR by a person or business called an operator. As of July 1, 2019, new rules require an intermediary or other agent collecting rent to file returns and pay taxes to DOR.

DOR Code	Municipality	Current Rooms Tax Rate	Current Rooms Tax Effective Date	Pending Rooms Tax Rate	Pending Rooms Tax Effective Date	Short-term Rental Community Impact Fee Rate	Short-term Rental Community Impact Fee Effective Date	Short-term Rental Professionally Managed Option	Short-term Rental included within 2-3 Family Home	Cape & Islands Water Protection Fund Tax Rate	Cape & Islands Water Protection Fund Effective Date
002	Acton	4.00%	7/1/1986								
010	Arlington	6.00%	1/1/2010			3.00%	1/1/2020	Y	Y		
026	Belmont										
155	Lexington	6.00%	7/1/2010			3.00%	10/1/2021	Y	Y		
314	Watertown	6.00%	1/1/2010								
317	Wellesley	4.00%	7/1/1986								
344	Winchester										

Recommendations

- Establish a Rooms Tax and short-term rental community fee similar to neighboring towns e.g., Arlington, Watertown, and Lexington. (see Idea #271)
- Establish zoning for limits on the scale and type of hotels we want in town and locations where they will not be a detriment to the town. Hotel developers should know locations they will not have risk of not being able to develop as long as they are within code.

Next Steps

- Identify locations and work to write new town bylaws.

Further Reading

- [Room Occupancy Excise Tax | Mass.gov](#)
- [Room Tax & Impact Fee Effective Dates & Rates \(state.ma.us\)](#)
- [Local Options Relating to Property Taxation, CPA, Meals and Room Occupancy | Mass.gov](#)

3.3 Schedule of Use Regulations

USES	DISTRICTS							
	SR-A,B,C,D	GR	AH	LB I	LB II	LB III	GB	PL
<u>ACCESSORY USES</u>								
Home occupation (see §3.4.2)	Y	Y	Y	Y	Y	Y	Y	N
Lodging and Boarding								
➤ for daily or weekly periods	SP	SP	SP	Y	Y	Y	Y	N
➤ for longer periods only	Y	Y	N	Y	Y	Y	Y	N

1.4 Definitions and Abbreviations

In this By-Law, the following terms shall have the following meanings, unless a contrary meaning is required by the context or is specifically prescribed.

Accessory Building - A building devoted exclusively to an accessory use as herein defined, and not attached to a principal building by any roofed structure.

Accessory Dwelling Unit – A dwelling unit which is incidental to the use of the principal structure on the same lot and located in a Historic Accessory Building pursuant to a Special Permit issued under Section 6.11 of this By-Law.

Note: §1.4 was amended by Article 32 at the 2009 Annual Town Meeting.

Accessory Use - An activity incidental to and located on the same premises as a principal use conducted by the same person or his agent. No use (other than parking) shall be considered “accessory” unless functionally dependent on and occupying less land area than the principal use, except for institutional (religious or educational uses) parking lots used by others, with owner’s consent, not conducting business within such institution.

Note: §1.4 was amended by Article 30 at the 2009 Annual Town Meeting.

Lodging and Boarding - Rental of not more than three rooms without separate cooking facilities, as an accessory use within a dwelling, if not resulting in more than four unrelated persons being accommodated on the premises.

1.3 Basic Requirements

Any building or structure hereinafter erected, reconstructed, altered, enlarged, or moved or any use of premises hereinafter established, altered or expanded in the Town of Belmont shall be in conformity with the provisions of this By-Law, with the following exceptions:

- certain nonconforming buildings, as provided in Section 1.5;
- certain aspects of agricultural, educational, and religious uses, as provided in Massachusetts General Law, Chapter 40A, Section 3.

Any use not specifically or generically enumerated in a district herein shall be deemed prohibited.

SECTION 3. USE REGULATIONS

3.1 General Requirements

No building structure shall be erected, altered or used and no premises shall be used for any purpose or in any manner other than as regulated by Section 3.2, Interpretation, and as permitted and set forth in Section 3.3, Schedule of Use Regulations, herein and in accordance with the following notation:

Y	(Yes)	- Use Permitted
SP	(Special Permit)	- Use allowed under a Special Permit by the designated Special Permit Granting Authority.
<i>Note: §3.1 was amended by Article 28 at the 2006 Annual Town Meeting</i>		
SPS	(Special Permit: Size)	- Use permitted, except requiring a Special Permit if new construction, additions or alterations result in more than 5,000 square feet gross floor area in any one or more business uses (as categorized in Section 3.3) on a lot or set of contiguous lots in the same ownership at any time subsequent to June 1, 1987, except for individual additions or alterations increasing floor area in business use on the lot or set of lots by less than 10%.
N	(No)	- Use Prohibited

Uses permitted and uses allowed on Special Permit shall be in conformity with all the density and dimensional regulations and any other pertinent requirements of this By-Law.

IDEA #393 – REDUCE COSTS TO THE SCHOOL DISTRICT OF PROVIDING MEALS TO STUDENTS

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Schools should charge meals according to price. Students who have financial need should apply for a grant. Reduce excess food waste and packaging.

Other ideas included in this report

- 396 – Meals for students should be charged standard meal prices. People who throw the food away without eating need to charge a recycling cost.
- 264 – Provide hot meals; save our cafeteria employees from bagging snacks and hire SPED students to accomplish those repetition tasks. Increase of student morale would be increased if they knew they could choose a soup that costs less than bagged food!

Idea intent

Increase student fees for meals and/or recycling costs; increase employee efficiencies by eliminating or outsourcing repetitive, time-consuming tasks.

Weighted Final Score: 4

(Financial Impact: 0, Operational Impact: 0, Time Scale: 1, Ease of Implementation: 0)

Background Information

Since 2021, the USDA has funded all meals for public school students and reimbursed the public-school districts for any/all meals. School meal budget is a revolving account that covers the costs of food service, including salary staff, food, supplies, and capital costs (e.g., refrigerators). Because it is a separate revolving account, school food services have no impact on the town budget.

The district is always looking to increase efficiency and recycling while reducing the amount of waste. During the pandemic, some of the packaging has increased to meet health and safety requirements. This is not the long-term standard, however.

The district does not employ students to work in food services. Staff who work in the Food Services Department are members of the AFSME union and are paid from the self-sustaining revolving account.

Recommendations

- Investigate how lunch aides, who are Unit D members, could be covered by the revolving budget rather than paid from the general account.

- Considering how the revolving fund be used to reimburse the school district for equipment that was purchased for the new MS/HS cafeteria through the MSBA program?

Next Steps

- Schools should consult with the Town on recycling/composting programs.

Further Reading

- Black Earth composting at Schools
<https://blackearthcompost.com/schools/>

IDEA #395 – OPEN HOUSE OF BELMONT HIGH SCHOOL

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Idea Text

With the moving of BHS, I propose to open the old site to the public during summer.

Revenue will be generated by taking admission fee of \$5. In there, people can walk around, take pictures etc. If student volunteers are possible, there can be a night concert and fun fair event held there in summer. I am sure a lot of Belmont residents are graduates there and they want to take the chance to go inside before moving. Moreover, there are a lot of things that will be left after moving, sell the chairs, tables, cabinets, art supplies, science supplies to organization or town residents.

Other ideas included in this report

- None

Idea intent

This idea was to monetize the existing Belmont High School in memoriam prior to its demolition.

Weighted Final Score: 03

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 1)

Background Information

Belmont High School was turned over to Skanska, the contractor of the new Belmont High School, on July 2 for demolition. It is not possible nor safe to have any events near the property during demolition and construction.

Recommendations

- None

Next Steps

- None

Further Reading

- <https://www.wickedlocal.com/story/belmont-citizen-herald/2021/06/24/belmont-high-surplus-furniture-and-equipment-up-grabs-july-2/5333682001/>

IDEA #400 – RESIDENCY CHECKS FOR STUDENTS

Report Status: Fully Reviewed

Researched by: Meg Moriarty

Original Idea as Submitted

Put practices in place to check the residency of every student in Belmont public schools every year and make nonresidents pay pro-rated tuition to the Town for every month of the school year the child is enrolled but not living in Town. If we are overenrolled for our schools, why are children of teachers allowed to go to Belmont Schools? If this is an entitlement for the teachers then it should also be an entitlement for the children of the DPW, Accounting, Community Development etc.

Other ideas included in this report

- None

Idea intent

Ensure that all students in Belmont Public Schools are residents of Belmont.

Weighted Final Score: 37

(Financial Impact: 1, Operational Impact: 0, Time Scale: 4, Ease of Implementation: 5)

Background Information

In order for a child to be registered as a Belmont Public School student, the child must actually reside in the town of Belmont (Massachusetts General Law Ch.76, Section 5). Certain documents are required to be presented at time of registration to the school where the child will attend including a proof of residency in the town of Belmont. The residency of every student is checked at the time of registration.

In the case that the Belmont Public Schools investigates and finds that a student is not a resident of Belmont, the family may be required by law to repay any tuition or educational costs due to the Belmont Public Schools for the education of the child. (Massachusetts General Law Ch. 76, Section 5)

In Belmont, as in many public school districts, there is an exception to the residency policy (SC Policy 5001). The District has negotiated with the Belmont Education Association (BEA) 27 seats for children of teachers who do not live in Belmont. These seats are divided between contracts with two BEA units: Unit A is granted up to 22 seats and Unit B up to 5 seats. These seats are decided by a lottery and once a child is assigned a seat, he/she may remain in BPS through grade 12. Given that the 27 seats span across 13 grades, they do not equate to an FTE and the cost to educate these students in the District is not significant. However, when the classes are overcrowded, these additional students may contribute to that overcrowding. Any changes to the number of seats available to Unit A and B teachers/staff would require collective bargaining.

It is likely that some Belmont residents who teach in other public-school Districts choose to educate their children in those districts and this may offset the 27 seats for children of non-resident BEA members. There is no automatic state mechanism through DESE to obtain this information. These students are not part of the out-of-district (OOD) count, which only include SPED students.

By law, the receiving school is required to notify Belmont that the student is enrolled in a different district. Belmont Public Schools has an individual in the Central Office who performs this function and is diligent in providing this information to other districts; however, many other schools are not doing so. To be proactive, the Central Office reaches out to the private schools in the area and to a few other communities where Belmont students have attended in the past to see if any of our residents are attending there currently. Even so, the numbers are likely underestimated and not specific to children of teachers who take advantage of union contracts that provide for non-resident seats.

This is not currently negotiated into the contracts of Town Union employees (DPW, Police, Fire, etc.). These unions negotiate with the Town separately from the Schools and BEA.

Recommendations for the School Committee

- Assess the frequency of resident checks and ensure that this is being done often enough to ensure all students attending BPS are residents of Belmont. Consider updating the information on the website with the frequency of checks for full transparency to the community.
- Consider limiting/not expanding the number of seats for non-resident children of BEA teachers/staff in contract negotiations.

Recommendations for the Select Board

- We do not recommend negotiating seats in BPS for children of non-resident unionized Town employees.

IDEA #403 – LONG-TERM CAPITAL FINANCIAL ANALYSIS

Report Status: Fully Reviewed

Researched By: Anne Helgen

Original Text as Submitted

It is time that the Town uses a financial model to analyze and compare projects on even footing. The yearly committee report describes the process of talking to departments and developing a list in the end it seems that the requested projects that are on the list the longest get funded regardless if it's in the best financial interest of our residents.

I recommend that the Town should develop a financial model that includes purchase/ lease costs and operating costs over time, financing costs, at least 10 years, to derive an IRR or the like to allow a true financial return for the residents. There will be projects that are absolutely required but for projects where discretion is permitted, a real financial comparison is a required responsibility of the Town and allows the Town to create a list of projects in order of the highest return to the lowest.

Other ideas included in this report

- #392 Long-Term Planning for Capital

Idea intent

Financial models for capital decisions can result in better allocation of resources and potential cost savings

Weighted Final Score: 57

(Financial Impact: 3, Operational Impact: 4, Time Scale: 4, Ease of Implementation: 3)

Background Information

This idea is more appropriately evaluated as part of the process undertaken by the Long-Term Capital Planning Group, particularly with respect to item # 4 of its charge: "Ensure that clear guidelines are in place to properly review capital requests ensuring that full life-cycle costs and funding are considered."

There is expected to be a by-law change in the warrant for the 2022 Annual Town Meeting combining the Long-Term Capital Planning Committee and the Capital Budget Committee, and changing the composition and charge of the committee. The new committee will be called the Comprehensive Capital Planning Committee.

Recommendations

The SCIG fully endorses the idea of using a financial model to compare capital purchases, understand financial cost/return to residents and help prioritize purchases.

The full suggestion as received via the SCIG web portal was forwarded to the Long-Term Capital Planning Group on 7/27/21 and receipt acknowledged by the Chair.

Next Steps

Long Term Capital Committee/Comprehensive Capital Planning Committee to develop process evaluating and prioritizing capital purchases.

Further Reading

- Charge of the Long-Term Capital Planning Committee
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/capital_planning_committee_charge12_0.pdf

IDEA #404 – RENT OR SHARE EQUIPMENT INSTEAD OF PURCHASING

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

1. I am wondering if costs could be reduced by using rental equipment or sharing equipment with near by communities for items that are not needed on a daily or weekly basis or year-round. For example, Town Meeting recently approved \$85,000 for a lawn mower. How long does this last? Could it be shared with Lexington or Watertown, for example?
2. Regional planning: I know some of this has been done already, but I am wondering if purchasing items including computers, vehicles, etc. as a consortium would give us better buying power.
3. The old barn by Rock Meadow: Could this be renovated for rental for perhaps artists, a toddler play space, a non-profit, or small business? It sits empty and the area around it is an eyesore.
4. Allow more commercial development on Pleasant Street, Waverly Square, the Belmont Street commercial area, and Trapelo Road.

Thank you.

Other ideas included in this report

- None

Idea intent

Note that this idea originates from a set of four ideas that were submitted together. The other three ideas in this set are duplicates and have been researched in the following three ideas: ID 2 (Regional planning), ID 36 (Rock Meadow barn), ID 107 (Commercial development). The intent of the idea covered here appears to be to realize cost savings by reducing the purchasing of equipment that can instead be rented, borrowed, or shared with other municipalities.

Weighted Final Score: 33

(Financial Impact: 2, Operational Impact: 0, Time Scale: 2, Ease of Implementation: 4)

Background Information

Belmont departments require a variety of equipment to perform tasks. Purchasing of equipment, especially high-cost items, is paid for through the Belmont Capital Budget. Particularly high-cost items, such as fire pumpers and ambulances, are paid for by building up funds over multiple years until they are sufficient for purchasing the vehicle. The Capital Budget in Fiscal Year 2022 is \$1.5 million and that budget increases by 2.5% annually. Each year, requests to the Capital Budget Committee are in the range of \$3 to \$5 million. All Capital Budget expenditures are voted by Belmont Town Meeting.

Because of the limitations of the Capital Budget, saving money by renting equipment or sharing it with neighboring municipalities would appear to provide cost saving opportunities. Depending on circumstances, leasing or sharing equipment is a practical alternative that makes significant sense. Currently in Belmont, some equipment, such as snow removal equipment, is leased. In addition, in the event of a heavy snowfall, additional snow removal is handled by private contractors hired by the town. Before proposing a purchase of equipment, the Capital Budget Committee assesses whether the equipment could be leased, borrowed, or shared with other municipalities.

Challenges exist that can make it difficult for sharing of equipment with other municipalities. For example, the Capital Budget Committee recently evaluated whether it would be possible to share a snow blower with another town. Snow blowers are pieces of equipment that are needed for limited periods of time, but snowstorms happen in neighboring communities at the same time, so negotiating the sharing of equipment that's needed simultaneously in both communities presents a significant challenge. There is also the constant reality of any resource sharing idea: any sharing of resources with other communities is dependent on finding a community that is a willing partner for that sharing.

Recommendations and Next Steps

- Town departments and the Capital Budget Committee should always evaluate the available rental or sharing alternatives before purchasing any piece of equipment. If practical alternatives exist that save money, they should be pursued instead of purchasing.
- Limitations can prevent practical alternatives to purchasing, so there will always be times when purchasing is the sole practical option for acquiring some equipment.
- The hiring of a purchasing agent, referenced in Idea #2, would help identify opportunities for sharing equipment through networking with purchasing agents in neighboring municipalities.

Further Reading

- Belmont Capital Budget Committee
<https://www.belmont-ma.gov/capital-budget-committee>
- Belmont FY22 Multi-year Capital Plan
https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/tab_13_-_multi_year_summary_-_11x17_double_sided.pdf

IDEA #409 – YOUTH COORDINATOR POSITION

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Many efforts for Children are duplicated in this town, specifically programming for Children. In my tenure in Belmont (only 6-7 years) I've seen the PT Youth Coordinator position which reports to the Health Director turn over 4-5 times. Why does this service exist in this way and report to the Health Director? The funds would be better used by the Library for a new Children's Librarian, or by the Rec Department who also focus on children's programming. The next time this position is vacant it would be good to review.

Other ideas included in this report

- None

Idea intent

Consolidate or eliminate Youth Coordinator position to reduce expenditures.

Weighted Final Score: 46

(Financial Impact: 1, Operational Impact: 4, Time Scale: 3, Ease of Implementation: 5)

Background Information

Belmont's Youth Commission was established under Massachusetts General Laws, Chapter 40, Section 8E to identify and assess youth and family challenges and needs and to facilitate opportunities to meet those needs in conjunction with local, state, and federal resources. The charge of the Youth Commission includes educational and recreational program development, community service, collaboration with town personnel (e.g., the School Resource Officers, School guidance counselors) and organizations (e.g., Belmont Wellness Coalition, etc.) and developing peer leadership and team building skills among Belmont's youth, as well as accessing opportunities and resources at the state and federal level. The members of the Commission are appointed by the Select Board for 3-year terms. Currently, there are seven members of the Youth Commission, including several high school students, who meet monthly to plan activities and outreach. Under Chapter 40, 8E, the Youth Commission appoints the Youth Coordinator, who is responsible for the execution of Youth Commission activities. The Youth Commission has not charged fees for its programs and events.

Currently, the Youth Coordinator position is a part-time position, with administrative oversight provided by the Health Department Director. As of January 2022, the Youth Coordinator position has been vacant for over eight months. The FY22 budget for Youth Commission activities and the Youth Commission is \$27,886.

As of July 1, 2022, the Youth Coordinator position will be moved under the umbrella of the Recreation Department as a full-time program coordinator. The position will continue to work

with the Youth Commission part-time on Commission initiatives and will assist the Recreation Department with youth recreation and adult education programs (previously run by the School Department), marketing, social media, and other events. The intent is that the shared resources will streamline services, eliminate overlap and duplication of efforts, and provide support for expanded revenue-producing recreation programming. At the same time, the position will enhance opportunities for the youth coordinator, hopefully reducing turnover. The new job description is currently under development.

Salaries and wages will be covered by a transfer of \$25,000 from the Health Department budget to the Recreation Department budget, with the remainder to be funded by the Recreation Revolving Account. This account will include revenues and expenditures from contracted recreation programs as well as salaries and wages allowed under MGL Ch 53 ½. The goal is to fully fund this position out of the Revolving Account over the next several years. The Recreation Department expects that current and expanded adult programming (previously run by the School Department) and incremental fee-based programming will justify the increase in hours. Overall, the Recreation Department is moving towards a self-funding model, however, pandemic limitations and reduced access during the BMS construction have slowed progress towards this goal. In FY21, Recreation expenditures were \$754,000 and revenues were \$464,000. The FY21 budget was affected by the pandemic, which restricted FY21 summer camp attendance and closed the pool, both net operating revenue-producing programs in a normal year. The revenues also do not include \$170,000 in special revenue fund balances that will be returned to the town at the end of FY22.

Recommendations

The previous Youth Coordinator position will be reallocated from the Health Department to the Recreation Department (one FTE). The consolidation of the Youth Coordinator position into Recreation should be reviewed at the end of FY22 to determine if the expected efficiencies are realized.

The charge of the Youth Commission and its interaction with other departments—particularly Recreation, is convoluted and needs to be clarified.

- MGL Ch. 40, Section 8E (below) appears to direct youth commissions to carry out programs “in conjunction with” state and federal agencies.
- The Select Board charge of the Commission (see below) appears to be much broader and does not mention coordinating with state and federal agencies as a primary goal. The activities listed potentially overlap with Recreation, the Schools, and other volunteer community service organizations. It is unclear whether this is a community service organization, a leadership organization, a support for at-risk children/teens, an advocacy group, a purveyor of activities and programs, or a disseminator of information. It is also unclear what age groups or sector the Commission serves.
- The Mission Statement states that the Commission provides leadership in the areas of youth, families and the community wellness and expands its programming to families and community. This is somewhat different from the charge, which directs the Youth Commission to “assess the needs of Belmont’s youth and provide for those needs”.

Next Steps

The Select Board and Town Administrator should:

1. Review and rewrite the charge of the Youth Commission to clearly identify the purpose and role of the Commission and its programs, especially in relation to the Recreation Department.
2. Amend the Youth Commission charge to remove appointment of the Youth Coordinator from such charge.
3. Direct the Youth Commission to make a presentation to Town Meeting in order to educate residents on its mission and accomplishments. This report should include detail on programs, community service, coordination with state and federal programs, and other relevant information.
4. Conduct a review of the consolidation of the position at the end of FY22 to determine if the expected efficiencies have been realized.

Further Reading:

Youth Commission-MA General Laws Chapter 40, Section 8E:

A city or town which accepts this section may establish a youth commission, hereinafter called the commission, for the purpose of carrying out programs which may be designed or established to meet the opportunities, challenges, and problems of youth of said city or town and in conjunction with any similar or related programs of any agency of the commonwealth or any agency of the federal government. It shall keep accurate records of its meetings and actions and shall file an annual report which shall be printed in the case of towns in the annual town report. The commission may appoint such clerks and other employees as it may from time to time require. The commission shall consist of not less than three nor more than twenty-one members. In cities the members shall be appointed by the mayor, subject to the provisions of the city charter, except that in cities having or operating under a plan D or plan E form of city charter, said appointments shall be by the city manager, subject to the provisions of the charter; and in towns they shall be appointed by the selectmen, excepting towns having a manager form of government, in which towns appointments shall be made by the town manager, subject to the approval of the selectmen. When a commission is first established, the terms of the members shall be for one, two or three years and so arranged that the terms of approximately one third of the members will expire each year, and their successors shall be appointed for a term of three years each. Any member of a commission so appointed may, after a public hearing, if requested, be removed for cause by the appointing authority. A vacancy occurring otherwise than by expiration of a term shall in a city or town be filled for the unexpired term in the same manner as an original appointment. Said commission may receive gifts of property, both real and personal, in the name of the city or town, subject to the approval of the city council in a city or the selectmen in a town, such gifts to be managed and controlled by the commission for the purposes of this section.

Select Board's Charge of the Youth Commission:

https://www.belmont-ma.gov/sites/g/files/vyhlf6831/f/uploads/youth_commission_charge.pdf

Excerpt: Description: The Board of Selectmen appoints members to the Youth Commission. It was established to create programs as well as give advice on behalf of the youth of Belmont. The

execution of the program is the responsibility of the Youth Service Coordinator, assisted by members of the Commission adult and student counters. The Youth Services program is administered by the Youth Commission. The Youth Coordinator will receive administrative oversight by the Director of the Health Department.

The Youth Commission is established pursuant to section 8E of Chapter 40 of the Massachusetts General Laws. The Commission also operates as a “permanent appointed board” pursuant to Article 3 of the General By—Laws.

Activities: The Youth Commission will assess the needs of Belmont’s youth and provide for those needs, to the extent possible, with funded resources and by working cooperatively with other agencies, town departments and residents. Activities have some of the following goals:

1. Fill voids that exists due to early release, evening, weekend or vacation times.
2. Develop and implement quality programs as well as give advice on behalf of the Town’s youth, by both public and private agencies.
3. Provide Community service, especially to the Town’s elders.
4. Make available team building and peer leadership skills and encourage youth to take a leadership role in the community.
5. Offer educational experiences not provided by the Schools.
6. Offer recreational experiences not provided by the Recreation Department.
7. Work with other agencies in Town to identify needs and fulfill these requirements by asking available community service opportunities.
8. Collaborate with other entities in Town including but not limited to Belmont Wellness Coalition (Wayside), Outreach Worker, School Resource Officer, School Guidance Counselor, etc. to identify and provide support for at-risk students.
9. Facilitate opportunities for and access to resources on local, state and federal levels.
10. Create a sense of permanency of action and continuity of purpose for all youth activities.

Youth Commission Mission Statement from the Town of Belmont website, Youth Commission tab:

Mission Statement: The Belmont Youth Commission provides leadership in the areas of youth, family and community wellness by:

- Identifying and addressing youth and family needs;
- Advocating for youth and family interests;
- Partnering with older youth and family service agencies;
- Developing and implementing quality programs and services; and
- Educating and communicating with the public regarding youth and family issues

IDEA #410 – REBUILD THE LIBRARY

Report Status: Fully Reviewed

Researched by: Paul Rickter

Original Idea as Submitted

The Library - Money spent on a failing building

The Public Library needs to be rebuilt. This project has been requested since 1999. Many other projects have come up, been approved, been built, and forgotten... in the time that the Library has been on the docket.

The Major Capital Projects Working Group committed to 4 projects a few years ago, 3 of them were completed, and only the Library remains.

Near 17,000 Belmont residents use the library regularly. With a daily attendance average over 900 it is the most heavily used building in Town. The Library Foundation has received over \$1.65m in donations thus far, and that campaign is only gaining more and more traction ahead of a formal announcement later this calendar year.

The building systems are failing rapidly, and 6 figures are spent annually to maintain the building.

Other ideas included in this report

- None

Idea intent

The idea is to replace the existing library building, with its many costly maintenance issues, with a new building. While this would likely require a debt exclusion to be approved by voters, constructing a new library building would significantly reduce or eliminate capital budget requests for repairs to the building.

Weighted Final Score: 41

(Financial Impact: 0, Operational Impact: 9, Time Scale: 2, Ease of Implementation: 1)

Background Information

The current Belmont Public Library building at 336 Concord Ave was constructed in 1965. In recent years, maintenance of the building has become a major challenge due to outdated and worn-out systems. Needed repairs in the next six years are expected to cost over \$12 million, which would exceed the available funding in the Belmont Capital Budget, which funds all capital projects in the town, not just the library. A more comprehensive project to repair all building issues as well as changes required by building codes and the Americans with Disabilities Act, but without addressing space and program needs, has been estimated to be \$23.7 million.

In 2016, a feasibility study was conducted that concluded that the building is not suited for renovation and a new building should be constructed instead. In 2017, Belmont Town Meeting

voted to create a Library Building Committee. The Library Building Committee studied the current building's infrastructure and usage, and gathered input from community members. In 2019, the Library Building Committee and the architects of the project presented design plans for a new library building that they propose on the site of the current building. The proposed design was estimated in September 2021 to cost approximately \$35.9 million.

The Belmont Library Trustees have identified some sources of funding for the project, but most of the funding is expected to require a debt exclusion to be approved by Belmont voters, with an anticipated vote in November 2022. The state of Massachusetts has a program that provides grants to municipalities to help fund public library building projects. However, due to money currently available, the frequency of grant awards, and the size of the current waiting list for these grants, Belmont could not expect to receive grant funding until 2035 at the earliest, a date which is far past the point when building systems will fail.

Recommendations

- The considerable building issues and the inadequacy of the Capital Budget to cover the expenses involved make it clear that a building solution is needed urgently.
- Constructing a new library building would provide the best solution for the town, solving the building issues and providing the community with a new resource.
- A new library building could be expected to offer modest income opportunities in the form of meeting room rentals.

Next Steps

- The Library Building Committee evaluate the new library design with an eye on the following issues:
 - Accommodation for residents' needs for more outdoor "work" space
 - Proposed parking spaces and whether they will be sufficient for the larger building
 - Review of design with Disability Access Commission to ensure all public spaces are welcoming and accessible for all
 - Review of the need for large meeting spaces in the new building in light of current availability of meeting spaces in Town and School buildings
 - Posting availability of meeting spaces online, as proposed in ID 383.
- The Library Building Committee and Select Board determine how and when to finance construction of a new library.

Further Reading

- Belmont Library Foundation information on current building condition
<https://belmontlibraryfoundation.org/our-new-library/our-library-building-is-failing/>
- About the Library Building project
<https://belmontpubliclibrary.net/about/building-committee/>
- Presentation to Belmont Select Board on October 4, 2021
<https://belmontpubliclibrary.net/wp-content/uploads/2021/10/October-4-Deck-Final-Version.pdf>

- Belmont Library Foundation frequently asked questions
<https://belmontlibraryfoundation.org/our-new-library/frequently-asked-questions/>
- Massachusetts Board of Library Commissioners construction grants
<https://mblc.state.ma.us/programs-and-support/construction/construction.php>

IDEA #411 – CREDIT CARD FEES

Report Status: Fully Reviewed

Researched by: Anne Helgen

Original Idea as Submitted

Pass all transaction fees to the bill payer when payment is made by credit card or other forms that charge the Town of Belmont a transaction fee.

Other ideas included in this report

- None

Weighted Final Score: 0

(Financial Impact: 0, Operational Impact: 0, Time Scale: 0, Ease of Implementation: 0)

Background Information

Credit card companies charge fees on amounts charged. The payment processor that Belmont uses adds these fees at the time of payment, increasing the total amount. Belmont still receives 100% of the bill amount due from the payor. The credit card company collects the amount due to the Town plus the fee from the payor, remits the amount due to the town and retains the fees charged. The fees do not flow through Belmont town fund accounts.

Recommendations

All credit card fees are charged and collected by the credit card company, therefore this idea was ruled out. Also, see Idea #45 regarding Online Payments.

Next Steps

- None

Further Reading

- None

IDEA #412 – MODERNIZE TOWN WEBSITE

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Create a modern website with integration into social media platforms like Facebook and Twitter so that residents can stay informed of news and events. The Town has to do a better job of reaching out to residents and communicating with them in ways residents access information, which is social media, and not visiting a website from 1995.

There should also be a daily digest of that day's and upcoming meetings, events, news, and other important information. Such a notification can be posted to the town website, emailed to those who have subscribed to it through the town website, posted on an official town Facebook account and Twitter handle. Get with the modern times and stop living in the stone age (pre-2000).

Other ideas included in this report

- None

Idea intent

This idea is to create a revamped Town of Belmont website that facilitates dissemination of information, such as events, news, and meetings, directly to the residents of Belmont via social media channels. Although information is posted to the Town's website, the Town is reliant on residents to visit it. This idea would bring Belmont news directly to the residents via social media versus relying on the residents having to frequent the website to check for new or updated information.

Weighted Final Score: 43

(Financial Impact: 1, Operational Impact: 6, Time Scale: 2, Ease of Implementation: 3)

Background Information

On March 16, 2020, the Belmont Select Board approved the formation of a Website Renewal Committee consisting of nine members from the public, representatives from Town government and various Belmont committees, serving a 1-year term with the following charge:

Purpose:

The Belmont Website Renewal Committee will be a temporary working group created by the Select Board to conduct a comprehensive review of Belmont's public facing Town website(s). As we move further into the 21st century, more and more services are moving online while more and more residents embrace an "online" and "mobile first" approach to obtaining information and transactional business. "Web pages" cannot remain static but must serve as the "front door" for wired communities like Belmont.

Objectives:

1. The Belmont Website Renewal Committee will study use patterns and public sentiment about the Town's current web site
2. The committee will interface with Town departments to understand how they use the current web site and identify opportunities for making more information and services available to residents online
3. The committee will prepare a summary report on existing operation of current website.
4. Based on the review the committee should recommend one of the following:
 - a. Keep the current website (CIVIC PLUS)
 - i. If modifications and updates are needed define those
 - b. Host the website internally
 - i. Identify resources needed for this
 - c. Go out to bid for a new vendor
5. If C is recommended, the committee should create the RFP and assist in evaluating the vendors.

Recommendations

- Pursue creation of a new town website in accordance with the recommendations and next steps from the Website Renewal Committee. A modern functional website is required to implement other ideas submitted to the Structural Change Impact Group concerning communication, efficiency, transparency, and resident satisfaction.
- The following recommendations were forwarded to the Website Renewal Committee:
 - The Website Renewal Committee consider social media integration as a means of reaching the residents of Belmont directly and assess the capabilities to do so from perspective vendors.
 - The Website Renewal Committee consider inclusion of visual and interactive data capabilities such that Town budget and financial data can be searched, filtered, charted, and displayed to provide residents with richer and enhanced interaction. (see Idea #38)

The Website Renewal Committee consult with Belmont departments and Select Board on what type of information can be disseminated via social media, the frequency of posts, and identify the responsible person overseeing creation and approval of social media posts.

- Website Renewal Committee should also consider integration with a “311” system (see Idea #221)

Next Steps

- The Select Board set a timeline for producing a final report and an implementation plan from the Website Renewal Committee and plan for implementing the new website as proposed.

Further Reading

- Town of Arlington 2021 Website & Communication Survey Results
<https://www.arlingtonma.gov/home/showdocument?id=57036&t=637594516322561555>

IDEA #413 – DLS RECOMMENDATIONS ON FORM OF GOVERNMENT

Report Status: Fully Reviewed

Researched by: Aaron Pikcilingis

Original Idea as Submitted

Follow the 2011 DOR DLS Recommendation that the town form a committee to evaluate the form of Belmont's government and consider the development and adoption of a town charter.

Other ideas included in this report

- None

Idea intent

The 2011 report from the Massachusetts Department of Revenue (DOR) Division of Local Services (DLS) makes several recommendations regarding the town's approach financial management and this idea suggests that we explore which recommendations, if any, should be implemented.

Weighted Final Score: N/A

Background Information

This report is incomplete -- the SCIG did not have time to perform a full evaluation of the recommendations included in the report, although there are individual SCIG reports on some of the specific recommendations.

In 2011 the Belmont Board of Selectmen asked Massachusetts Department of Revenue, Division of Local Services (DLS) to perform a "...financial management review of the town." DLS's 24-page report can be found here: <https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

From the report's introduction:

"The purpose of this review is to assist Belmont officials as they evaluate the town's financial management. In reviewing the existing financial management, we have focused on: (1) the town government structure in the context of the duties and responsibilities of financial officers; (2) the degree of coordination and communication that exists between and among boards, officials and staff involved in the financial management function; (3) the performance of financial operations in such a way as to maximize resources and minimize costs."

The report draws two key conclusions:

- "...all that we researched and observed confirm that the town's financial management practices are sound."

- Conversely: “That being said, we are nonetheless compelled to put forward comments on the structure of government in Belmont. It is entirely decentralized in a way that runs counter to proven organizational models for contemporary municipal government and it is generally at odds with practices in AAA peer towns.”

Regarding this second conclusion, the report makes a number of specific recommendations, including a “...primary recommendation is that the town form a ‘blue ribbon’ study committee and charge it with exploring the merits of adopting a town charter.”

The report notes that the process of charter review is more effective than piecemeal efforts that do not account for the interdependencies through our government. As part of this charter review, the report makes three specific recommendations:

1. “We recommend that the town empower the town administrator with appointing authority and budget control.”
2. “We recommend that the town create consistency between the budget processes as specified in its by-law and as followed in practice.”
3. “Reconsider changing the treasurer/collector to an appointed position.”

The report includes details and rationale for each of these recommendations and a summary for each department.

Finally, the report offers additional recommendations:

4. “We recommend the board of selectmen review the status of all volunteer committees it appoints.”
5. “We recommend that the town modify the membership of the audit committee...” to include residents.
6. Several recommended changes to the personnel systems.
7. “We recommend that the treasurer/collector establish his own account for the deposit of all amounts collected by the deputy collector and that the town process the deputy collector’s service fees through the warrant.”
8. “We recommend the treasurer/collector contact the assessors about abating motor vehicle excise determined to be uncollectible.”
9. “We recommend that the treasurer/collector pursue foreclosure options.”
10. “We recommend that the assistant treasurer/collector review the current multiple spreadsheet applications with the IT department and/or the private auditor.”
11. “We recommend that the town upgrade the existing system or purchase and implement a new CAMA system to allow the assessing staff to more efficiently analyze market trends and review the uniformity and equity of all property values.”

Recommendations

The Structural Change Impact Group did not have time to evaluate the potential impact or feasibility of these recommendations, but recommends that the Select Board follow the key recommendation of a “blue ribbon” committee to pursue the possibility of adopting a Town Charter, which would trigger a charter review process to help evaluate many of the other recommendations included in the report.

For more information about a charter review process, see Idea #216.

Next Steps

The Select Board should devise a charge and appoint a Charter Review committee to review the Town’s governance.

Further Reading

- Department of Revenue, Division of Local Services 2011 Report: Town of Belmont Financial Management Review:
<https://www.mass.gov/doc/belmont-financial-management-review-august-2011/download>

IDEA #415 – CONTACT INFORMATION FOR BELMONT BOARDS AND COMMITTEES

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Create group mailing lists and post email to town website for the various boards and committees so that residents can contact them more easily. Currently the board/committee pages just list members and offers no way to contact them.

Other ideas included in this report

- None

Idea intent

This idea is to provide citizens communication access to members of a Belmont board or committee to raise their concerns or give feedback. Since the Town of Belmont website only lists names of its members and does not provide contact information, email nor phone number, citizens cannot communicate in a direct way.

Weighted Final Score: 37

(Financial Impact: 0, Operational Impact: 2, Time Scale: 4, Ease of Implementation: 5)

Background Information

A directory of approved contact information for elected officials can be found as a link on the Town Clerk website, or directly at <https://www.belmont-ma.gov/town-clerk/pages/directory-of-elected-officials-public-contact-information>. For non-elected committees, residents can obtain a contact list from the Town Clerk's office or the Town Administrator's office.

Currently, there are several boards and committees using a shared group email address either provided by the Town or a private mailbox.

Select Board (selectboard@belmont-ma.gov)

According to the Town Administration Office, Select Board members and Town Administration Office staff have access to the mailbox itself, but The TA Office filters out the junk mail and forwards the pertinent emails to the Select Board members @belmont-ma.gov email addresses as well as any personal email addresses that they prefer.

School Committee (sc@belmont.k12.ma.us)

Emails to the School Committee's group email automatically forwards to the School Committee members @belmont-ma.gov email addresses.

Belmont Middle and High School Committee (bhs-bc@belmont-ma.gov)

According to the [BMHSC Contact Us webpage](#), emails to the BMHSC's group email are sent to the committee Chair. According to the Town Administration Office, emails to the BMHSC's group email automatically forwards to committee members Bill Lovallo, Pat Bruschi, John Phelan, and Patrice Garvin.

Belmont Human Rights Commission (belmont.hrc@gmail.com)

The committee uses a private Gmail mailbox.

Using a Town provided group email address with all committee members having access poses a security risk since Belmont hosts its email on the Town's network and the Information Technology director would need to be able to guarantee that the network is not compromised. Those with direct access to email boxes can delete and forward any email from that box and, depending on the permission level, those with access to the email box can send emails from that box. However, with the [@belmont-ma.gov](mailto:belmont-ma.gov) email addresses, all emails are archived as soon as it clears the Town firewall and cannot be deleted or altered from the archive. A group email address is also an opportunity to violate the Open Meeting Law forbidding sharing of emails with a quorum of the committee. Doing so would constitute as deliberation on a topic, in which such deliberation would not be open to public view. Furthermore, there is an additional task of updating the shared mailbox access as committee's turnover.

While committees can use a private (Gmail, etc.) group email address to serve the same purpose, it places the burden for public record keeping onto the committee. Although this is no different than committee members using personal email addresses for committee correspondence, the private group mailbox requires committees to self-manage the mailbox so that new members have access and previous members have access revoked.

The most feasible approach is for a sole member of a committee to have access to its official Town-owned email address. This person would share the email message content with fellow members in accordance with Open Meeting Law. The committee could choose this contact person (wouldn't have to be the chair).

Recommendations

While this idea is not revenue producing or mitigating a Town cost, providing committee member contact information achieves the goal of greater transparency for the residents of Belmont.

Next Steps

- Discuss with Town Administration Office and Information Technology department on establishing a process for creating a shared mailbox for each board and committee, either with all members having access or a single member depending on the logistics of mailbox upkeep.
- Post the Town Clerk's contact list for non-elected committees on the appropriate committee's website.
- The Town Clerk will post appropriate training and guidance.

- Post an aggregated Town Clerk's contact list for all non-elected committees as a directory on the Town Clerk's website similar to [Directory of Elected Officials - Public Contact Information](#).

Further Reading

- None

IDEA #416 – APPOINT MEMBER TO BOARD OF ASSESSORS

Report Status: Fully Reviewed

Researched by: Matthew Gasbarro

Original Idea as Submitted

Have an appointed member from the Select Board serve on Board of Assessors for more transparency.

Other ideas included in this report

- None

Idea intent

The intent is that having a member of the Select Board serve on the Board of Assessors would increase transparency as the Select Board member is able to speak on behalf of citizen concerns more readily.

Weighted Final Score: 27

(Financial Impact: 0, Operational Impact: 4, Time Scale: 2, Ease of Implementation: 2)

Background Information

[Belmont's bylaw § 40-210: Board of Assessors](#) has no enacted language and is marked as “reserved”. Per Belmont Town Clerk Ellen O’Brien Cushman, who researched the history back to 1859 Town Meeting records and noting that Belmont Town Meeting at that time was Open Town Meeting and the Annual Town Meeting also included the Town Election of officers:

- March 28, 1859 Article 2 – Election of Town Officers.
- Five members of Board of Assessors were voted into office to serve for one year.

- March 16, 1860 Article 2 – Election of Town Officers.
- Three members of Board of Assessors were voted into office to serve for one year.

- March 6, 1882 Article 2 – Election of Town Officers.
- Term of members of Board of Assessors and vote into office for three-year terms.

From MA law Ch. 41 Sec. 24 “Assessors; number; method of selection; tenure”:

There shall be one, three, five, seven or nine assessors in every city and one, three or five assessors in every town. The assessors in every city and town shall be elected or appointed as otherwise provided by law; but as nearly one-third of their number as may be shall be elected or appointed annually, each to hold office for three years and thereafter until his successor is duly elected or appointed. As soon as may be after such annual election or appointment, the assessors of every city and town shall organize by choosing one of their number as chairman and another as secretary or clerk of their board. None of the foregoing provisions shall apply to

the city of Boston. In no city or town, including Boston, shall an assessor hold the office of collector of taxes or deputy collector of taxes, whether said deputy is appointed under the provisions of section thirty-seven of this chapter or section ninety-two of chapter sixty.

Belmont's Board of Assessors is comprised of three members serving a three-year term with only one position up for election each year. The law states that members of the Board of Assessors may not also serve in the role of tax collector but provides no other restriction in additional town positions.

Since the government of Belmont is a town, MA law requires 3 or 5 members to the Board of Assessors. Therefore, a member of the Select Board cannot be simply appointed. Changes to the composition of the Board of Assessors would require Belmont to modify the Board of Assessors bylaw which necessitates a warrant at Town Meeting and subsequent vote.

It should be noted that in the January 15, 2020 video [Transitioning Government: Elected to Appointed](#) posted to the Massachusetts Division of Local Services YouTube channel, the Massachusetts Division of Local Services recommends that the Assessor position, as well as the Treasurer and Collector positions (one in the same role in Belmont) be an appointed position rather than an elected one. See idea 216 – Appoint All Positions.

Recommendations and Next Steps

- Belmont should consider updating its bylaw governing the Board of Assessors to clearly state the mandate, composition, general and role-based duties, office hours and other language as needed.
- Pursue the Massachusetts Division of Local Services recommendation to transition the Board of Assessors elected positions to appointed ones by the appropriate Belmont board or a new Town charter review committee.

Further Reading

- Idea #216 – Appoint All Positions Except Select Board and Moderator, which includes a full bylaw and charter review.
- Idea #413 – Department of Local Services Recommendations on Form of Government
- <https://malegislature.gov/Laws/GeneralLaws/PartI/TitleVII/Chapter41/Section24>
- [Town of Belmont By-Law § 40-210: Board of Assessors](#)
- MA Towns with appointed Board of Assessors:
 - [Town of Lexington](#)
 - [Town of Amherst](#)
 - [City of Woburn](#)
 - [City of Gloucester](#)

APPENDIX A – IDEAS STILL TO BE CONSIDERED

The SCIG wasn't able to fully assess the following ideas. These merits of these ideas have not been evaluated and should be considered in future work. In the Matrix (XLS file), these have a status of "Open: To Be Explored".

Idea #	Submitted Text
43	Phase out revenue stream from Belmont Light; taxpayers shouldn't overpay for electricity
47	Adopt performance pay for teachers
49	Convert all non-union salary increased to merit-based. Eliminate step increases and create merit pool.
57	Identify schools in cities and towns in Massachusetts and other high-performing states which have moved away from the step and lane system, and do an in-depth study on their systems and performance
91	Evaluate current fees charged for extra-curricular activities, rentals, etc.
100	Work more closely with and join our state legislators to lobby for changes at the state level in the current pension system and for additional healthcare reform to more effectively manage our burgeoning Other Post Employment Benefit (OPEB) Liability.
232	Look at expanding use of solar panels that could generate revenue. Install solar canopies in town-owned parking lots and other open spaces, including the DPW lot. This can be done with no capital investment by the town. Belmont Light could purchase the electricity generated by the solar canopies at guaranteed rates for future cost savings.
264	Provide a Hot Meal high school that saves our cafeteria employees from bagging snacks . Hire Special Needs students to accomplish those repetition tasks. Increase of student morale would be increased if they knew they could chose a soup that costs less than bagged food !

<p>265</p>	<p>Determine whether the Town can benefit from early adoption of flood mitigation infrastructure by taking advantage of pilot programs and other incentives early, rather than bear the full cost later.</p> <p>Obviously while the town is critically financially strapped it is likely no one will want to hear about a growing need to build new expensive infrastructure. But there might be cost savings available from getting in early. If everyone will need to make these investments eventually--and investors know that--there might be the chance to tap into incentive or pilot programs available to early adopters. For instance, Eversource is running a pilot program for geothermal community investment, because they want to keep their digging, drilling and pipe laying expertise in demand in a future green economy. Flood mitigation involves pits and pipes too (and may combine with geothermal). Maybe they could be talked into pilot program type project. Google X/Alphabet also funds speculative green technology. The Mass Water Resource Authority gives grants for storm water management --- they funded the Alewife project, for instance. I'm sure there is more like this---especially with the Biden Administration pushing such investments. There are incentives and pilot programs to be had for towns that are willing to be ahead of the curve. So if the investment will have to be made eventually, there may be large cost saving to be won from early awareness.</p>
<p>274</p>	<p>Install solar canopies in town-owned parking lots and other open spaces, including the DPW lot. This can be done with no capital investment by the town. Belmont Light could purchase the electricity generated by the solar canopies at guaranteed rates for future cost savings. The MBTA and several other Massachusetts towns, schools, and companies have done this recently.</p>
<p>296</p>	<p>Town Hall and DPW workers would continue to have a shortened workday on Fridays in the summer, but the (unworked) afternoon hours would not be paid.</p>
<p>302</p>	<p>In 2006, the town hired Noresco, an energy services company, to implement energy conservation measures on all town/school buildings at no cost (through performance-based contracting), saving the town \$125K every year since then. It's time to rehire Noresco to do phase 2 of the energy conservation measures.</p>
<p>310</p>	<p>Expanding upon the electric, autonomous transport idea for Belmont, the Transportation Committee and other interested residents should organize a SCRUM with Mr. Mark Fagan of HKS to understand how Belmont can prepare and drive a transition to electric, autonomous transport.</p> <p>Companies involved in this emerging ecosystem include Motional (Boston-based), Waymo, Tesla, Cruise, and Zoox. Boston has also worked closely with the World Economic Forum and Boston Consulting Group to look at the impact of rapid autonomous vehicle adoption for downtown Boston and its impact on traffic, travel times, etc. That report is called "Reshaping Urban Mobility with Autonomous Vehicles Lessons from the City of Boston."</p>

<p>320</p>	<p>Delete digital files after specified time to save on energy/computing power storage. SCI-63 The Covid era has led to a proliferation of recorded zoom town committee hearings. It may seem small at first, but every recorded and saved 2 hour video is part of a real data hog in the aggregate, requiring a lot of energy and computing power to store them. My recommendation is to have the Select Board adopt a town-wide policy requiring the deletion of videos after an agreed amount of time. I would suggest a four or six month maximum storage policy. After that, the recorded digital file would be deleted and the public would have access to minutes officially adopted, same as we had pre-Covid zoom era. I expect that Belmont would save money as well as reduce its energy footprint, with money savings coming from less contractual hosting costs paid to whatever company (AWS?) hosts our various municipal websites.</p>
<p>323</p>	<p>The Town should subsidize and encourage water usage reductions by residents. This can be achieved with the installation of dual-flush toilets, or conversion of existing toilets to dual-flush with the installation of a new dual-flush valve. Such valves sell for ~\$25 and can decrease water usage by up to 15%.</p>
<p>328</p>	<p>When an employee from the police or fire department decides to retire, there is often a lag time of manning reinforcement that requires already depleted platoons to be supplemented by overtime. Civil Service is the new boogie man to blame for these lag times and increased costs.</p> <p>In reality, sick time is often being used by the retiring party at the end of their career because the town has refused to reward the employee's several decades career of health and reliability after the employee accumulates thousands of hours of unused sick time.</p> <p>For example, 2000 hours of sick time paid to the employee at 15% of their hourly regular compensation ~\$30/hour would be about \$9000 (a pretty nice little gold watch). This figure, opposed to the 2000 hrs at time and a half (\$100,000) is about \$91,000 difference almost every time an employee retires.</p>
<p>359</p>	<p>Get rid of the Belmont Light. There is no need for a municipal company. Get Nstar to manage this. Much cheaper that way.</p>
<p>361</p>	<p>Offer a early retirement incentive to the senior Town Employees. These employees cost the most and some pay the least into the pension system. These high cost employees can be replaced with lower cost employees who will have less sick time, vacation time, and lower cost benefits.</p>
<p>389</p>	<p>I got chatting with the owner of Belmont Pharmacy and he suggested you reach out to him about the cost of prescription drug coverage for town employees. He may be able to provide prescription drugs at a better cost.</p>
<p>401</p>	<p>Hold a Belmont Vehicle showroom rodeo at one of the big parking lots in town. Have every Town-owned vehicle parked there for the weekend and label each with uses and year, mileage .</p> <p>Require every vehicle that is paid for by The Town (all departments) to be obviously labeled as a Town vehicle and do not allow the vehicles to be taken home nightly</p>

417	It seems that our budget woes stem from having different town bodies negotiate with various unions and there is no top level strategy for desired outcome in terms of COLA increases, benefits and spending. From earlier town presentations, there are numerous annual budget increases exceeding the 2.5% tax levy increase. Are there firm stances taken in negotiations to cap spending increases to 2.5%. Is each union negotiation held to same end goal of capping spending? Is there top leadership ensuring an overall and near-equal negotiation strategy with each union, especially when performed by different bodies (Select Board with police/fire/DPW, School Committee with teachers).
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APPENDIX B – FUNCTIONS OF A SCIG WORKING GROUP

***Important Note:** the following guidelines were adopted by SCIG in March 2021 and were the framework for the evaluation of submitted ideas. The rubric changed subtly during subsequent meetings and the final rubric and formula is toward the beginning of this report.*

Functions of a SCIG Working Group

Adopted 2021/03/25

Purpose: This document outlines the basic processes for individual SCIG working groups to use to evaluate ideas for controlling costs, generating revenue, and/or improving service delivery in the town of Belmont.

Overview: steps for evaluating ideas assigned to a working group:

1. Confirm that this idea is properly assigned to this group
2. Perform initial evaluation
 - a. Rule Out
 - b. Update
 - c. Initial Evaluation
3. Where appropriate, perform in-depth evaluation
4. Report out at full SCIG meetings & update matrix with scores

Process Details:

1. Confirm that this idea is properly assigned to this group
 - If not: refer idea back to the SCIG chair for reassignment
2. Initial Evaluation
 - Rule out: Confirm that conditions haven't changed; that the reasons this was previously not done are still valid
 - Update: For completed ideas and ideas in progress, provide a brief update on the status of the idea, its impact to date, important details about implementation (e.g. lessons learned), and a status update on progress in implementation (where applicable)

- Initial Evaluation: Purpose: to generate a baseline score and determine if an idea merits further investigation
 - Identify Stakeholders
 - Identify any major impediments that may prevent this idea from being implemented
 - Find out if any group(s) in Town already working on it
 - Develop rough estimates of impact and implementation process
 - Generate a preliminary score
 - Working group vote on whether to perform an in-depth evaluation for this idea

- 3. In-depth evaluation: Purpose: To provide more detailed & accurate estimates of impact, implementation, considerations, etc.
 - Develop detailed estimates of impact
 - Seek out possible pitfalls, stumbling blocks, etc.
 - Meet with and gather input from Department Heads, Town Boards, and Town Committees that would be impacted
 - If feasible, develop high-level implementation plan
 - Generate a final score based on this in-depth information

- 4. Periodically, report out at full SCIG meetings & update matrix with scores

Scoring Rubric

Financial Impact	Label	An estimate of how much total revenue/savings this idea will create, using a ten-year planning horizon. (If recurring, estimate the total impact over the first 10 years. If the duration is shorter than 10 years, estimate the total impact.)
0	No impact or negative impact	Costs/Loses Money

1	Very small impact	\$0-\$100k
2	Little impact	\$100k-\$250k
3	Some impact	\$250k-\$1m
4	Medium impact	\$1m-\$5m
5	Big impact	> \$5m
Y/N	Recurring?	
Operational Impact		An estimate of this idea's potential to impact efficiency, quality, or progress on town goals (e.g. equity, transparency, etc.)
0	No impact or negative impact	Replaces one system with another of equal or worse quality
1	Little impact	Modest improvement to efficiency or quality
2	Some impact	Moderate improvement to efficiency or quality
3	Medium impact	Significant improvement to efficiency <u>OR</u> quality
4	Big impact	Significant improvement to efficiency <u>AND</u> quality
Ease of implementation	Label	An estimate of how easy or difficult this idea will be to implement. Below are examples to help estimate, but these are not hard rules.
0	Impossible	Ideas that are prohibited by state or federal laws
1	Very difficult	Complicated by local laws AND contracts; has complicated prerequisites; requires TMM AND town-wide approval

2	Difficult	Complicated by local laws OR contracts; requires TMM 2/3 vote OR requires TMM vote AND town-wide vote
3	Medium	Requires political will; has up-front capital requirements; requires a TMM or town-wide vote
4	Easy	Leg-work, Select Board vote
5	Very easy	Simple paperwork
Time Scale	Label	An estimate of how long it will take for impacts to be delivered, after the decision is made to pursue it.
1	VERY long	5 or more years
2	Long	3 to 5 years to complete
3	Medium	1 to 3 years to complete
4	Short	6 months to 1 year to complete
5	Immediate	Less than 6 month to complete

Scoring & Weighting of Categories

Financial Impact	Operational Impact	Implementation	Time
40%	30%	15%	15%

Formula

We will weigh the normalized scores for each category by the above percentages using the following formula: $Score = (f/5 * .4) + (p/4 * .3) + (i/5 * .15) + (t/5 * .15) * 100$

Note/Reminder: The final rubric and formula were updated and are presented at the beginning of this report.

APPENDIX C – COMPENSATION PLAN FOR NON- UNION POSITIONS

The following is a 2014 report produced by Human Resources Services, Inc., on behalf of the Town.



Compensation Services

Non-Union Positions

For the Town of Belmont, MA

FINAL REPORT

Submitted by: Human Resources Services, Inc.

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SDO CERTIFIED

March 17, 2014

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Human Resources Services, Inc.

9 Bartlet Street, Suite 186

Andover, MA 01810

Phone: 978-474-0200

March 17, 2014

Mr. David Kale, Town Administrator
Ms. Diane Crimmins, Human Resources Director
Town of Belmont
Town Hall
455 Concord Avenue
Belmont, MA 02478

Dear Mr. Kale, Ms. Crimmins and Town Officials,

Human Resources Services, Inc. (HRS) is pleased to submit this final report to the Town of Belmont, MA providing an update and validation of Belmont's compensation plan for non-union positions. The study represents approximately 50 position titles.

Our methodology, findings, and recommendations are outlined in this report. If we can answer any questions, please do not hesitate to contact us at 978-474-0200 or via e-mail at hrsconsulting@comcast.net. Thank you for the opportunity to have been of service to the Town once again.

Sincerely,

Sandy

Aleksandra E. Stapczynski
President

TOWN OF BELMONT, MASSACHUSETTS COMPENSATION ANALYSIS AND PROPOSED PAY PLAN FOR NON-UNION POSITIONS - FINAL REPORT

I. Introduction

The Town of Belmont, Massachusetts engaged Human Resources Services, Inc. (HRS) to determine the compensation market competitiveness for non-union positions within its municipal workforce. This report focuses on the analysis and findings related to the Town's general compensation for these positions. HRS reviewed approximately fifty (50) classified non-union position titles. Additional positions were surveyed for benchmark purposes; however, only the non-union positions are included in the proposed compensation plan. These findings relate to Belmont's current Non-Union Classification Plan structure developed by HRS. For this analysis, HRS did not conduct a comprehensive job analysis, job description review, and complete classification review. The scope of this study was shaped by the Town's interest in understanding and comparing its non-union pay structure to other similar organizations. As the economy continues to improve and other organizations look to raise their salaries and wages, the Town found it necessary to review its own compensation program to ensure that it is competitive in order to attract and retain the necessary talent to provide services.

II. The Salary Survey

To measure the pay rates among the Town's local government competitors for these positions, HRS distributed custom survey documents to comparable municipalities jointly identified by the Town of Belmont and Human Resources Services, Inc. This survey document was designed to collect information regarding specific components of pay rates including, minimum salary/wages, maximum salary/wages, number of hours per workweek, and number of weeks per work year. The custom survey instrument included job summaries for all positions being studied. These job summaries guided survey respondents to ensure appropriate matches to the Town's positions. Respondents were asked to provide information for those jobs that represent

a best match to their municipal positions. As needed, follow-up calls were made to the comparable communities. Sometimes it is difficult to find exact positions from other comparable communities. However, in general, if 70 percent of the duties and responsibilities are the same, then the position is a good match for market analysis purposes. HRS also utilized its own databases, other surveys, and municipal compensation publications to receive additional data and information. Additional survey information was collected from the comparable communities regarding policies on salary plans and policies on cost of living increases.

In order to provide valid and accurate data, positions in Belmont were compared to similar position in the local municipal market area since many workers are recruited from the local municipal market area, and these organizations provide the best source of comparability. All organizations surveyed are municipalities within a 25 mile radius. Other municipalities are always the major source of comparative data for such a study. HRS made every effort to ensure sufficient and accurate data for this analysis. The fifteen surveyed municipalities included: *Andover, Arlington, Bedford, Burlington, Concord, Lexington, Needham, Reading, Sudbury, Watertown, Wayland, Weston, Wellesley, Westwood, and Winchester*. The municipality's size, socioeconomics, suburban environment, population, form of government, equalized valuation per capita, municipal budget, tax rate, and location were all major factors in selecting the comparable communities for this analysis. There was a balance between the richer and less rich communities that were included as benchmarks; primarily to find good matches for positions that were not easily found in some communities.

The consultant team met with the Human Resources Director and Town Administrator and other town staff to review a draft report and to review the market data collected and discuss its meaning. An initial analysis of the market data involved reviewing the average, median, range, 75th percentile and 90th percentile. A comparison was then made to current Belmont salaries and wages. It was determined that for purposes of this analysis and development of an updated compensation plan,

Belmont should be compared to the 75th percent of market. In understanding the decision to select the 75th percent of market; it is important to understand the history and the background of the Town of Belmont workforce and the uniqueness of many of its positions. Positions in the Town were matched to positions in the survey based on the *function of the job* rather than simply considering title. Market matches were reviewed by the Town to confirm agreement on the jobs being matched. For example, the Director of Community Development has a large and complex department; the Human Resources Director is also the Labor Relations Manager, and the DPW Director is also the Recreation Director. These are just a few of the anomalies in Belmont. Its departments and position structures are in many cases lean and rather unique. This provided an added challenge for the consultant team in collecting and analyzing comparative market data. To that end, it was determined that the 75th percent of market should be considered in developing the pay structure for the non-union positions.

All of the comparative data is FY-14 information and detailed on the attached pages. Most of the data was collected during September and October of 2013. If certain communities had not yet settled FY-14 salaries, the most current salary information available was used for the purposes of this analysis. Certain data may have been annualized for comparison purposes only. Please note that this is not an indication of the FLSA status of exempt or non-exempt, but rather an easier way to compare data from communities. When looking at the market data charts, please note that in each cell the top number indicates the minimum salary range for each position and the bottom number indicates the maximum salary range for each position. Most communities have pay ranges, while others only have actual salaries for each position.

For each position analyzed, data points were collected from the labor market. The data points indicate the amount of salary information for each position surveyed. In some instances: (1) the community did not have a comparable position; or (2) the consultants determined that the position was not comparable to the position in Belmont. HRS used professional discretionary judgment when comparing positions to the

comparable data. If there was less than four data points of salary information for a position, HRS has made note of this and recommends using other similar-type positions in the sampling as benchmark comparables. While this market analysis and information provides the Town with benchmark salary data to set the parameters for compensation decisions, the client must also consider the “uniqueness” of certain positions in the Town, as well as the Town’s ability to pay. For example, the Highway Division Manager is a unique position in Belmont, and the Town views the incumbent more as an assistant department head rather than a division head. The Highway Division Manager position assists in providing daily oversight and management for a large town department.

III. Meeting with Local Officials

The consultant team met with the Human Resources Director to review the market data collected and discuss its meaning. When reviewing or developing pay plans, a variety of policy decisions need to be made by the municipality. For example: How competitive does the Town want to be with regard to compensation? How does the Town currently compensate its employees, longevity or merit? Should the new pay plan reflect current practices, or is there a need for a different approach? What should the percentage spread be from minimum to maximum in the pay scale? The resulting compensation plan should reflect the Town’s pay policies, the comparative market analysis and the financial ability of the Town to pay at a given level.

It was the Town’s desire to stay with a wide pay range system with min, mid and max, and provide additional growth on the pay plan based on performance. This system will continue to provide the town with the most flexibility with placing employees.

IV. The Proposed Compensation Plan

The proposed compensation plan is attached to this report. There are two salary schedules; one for staff and for management, which is the Town's current structure. The total increase from minimum to maximum within each grade is *approximately 42% percent*. The consultants found that overall the entry levels for the Town's current pay structure were consistently low as compared to the market. Therefore, it was necessary to increase the entry levels for the pay plan overall. Realistically, employees would not be hired at these lower rates, and hiring employees beyond the grade mid-point is not a good personnel practice. At the other end of the pay scale, it was discovered that many employees were "maxed-out", or falling at or near maximum grade range. Therefore, the ranges needed to be adjusted to the market and to provide some job growth. Comparative data was considered to set the grade parameters. The slightly wider pay range can provide more flexibility to managers in determining employees' pay. It sets parameters to work within, which is directly tied to the market. In general the pay ranges were developed utilizing the salary market data and targeting *approximately* the 75th percent of market at the upper end of the ranges.

The proposed compensation plan is based on fiscal year 2014 compensation data. Therefore it has been adjusted to reflect FY-2015 wages. This is a base salary plan and does not include compensation for longevity, merit, or other compensation. It is up to the Town to determine its ability to pay with regards to implementation of this proposed compensation plan. At a minimum, those employees falling below the grade range should be brought into the entry level of the grade ranges. It is also up to the Town to consider any additional cost-of-living adjustment to the plan.

V. Findings and Recommendations

In general, the Town's non-union pay scale has fallen below market levels at the minimum, midpoint and maximum levels. The proposed pay plan attached to this report will assist the Town to reach market competitive pay levels for the vast majority of its employees as well as to broaden the structure to allow for more room within pay ranges for employee growth. There are some positions, though, that are below market average,

particularly at the entry level ranges. Our study results indicate that for the Town of Belmont to maintain a competitive edge, an update of the salary schedule to better reflect the market is essential. HRS received sufficient and extensive data for this analysis.

In closing, the following is a summary of our preliminary findings and recommendations for the Town's consideration:

1. The salaries/wages of the positions significantly below market average need to be brought into line with the market. Salary adjustments need to be made to these positions as soon as possible in order to avoid turn-over or poor moral. Also, as employees separate from the Town, these positions may be difficult to fill at the current pay ranges.
2. Continue using a pay range system for the non-union positions. Expanding the pay/grade structure to include a Grade 23 level will provide a pay range that is more in line with the market for the positions of Police Chief, Fire Chief, Community Development Director, and DPW Director. It will also assist in eliminating salary compression at the upper levels.
3. When placing the employees on the new proposed compensation plan, at a minimum, incumbents should be placed at or above their closest pay rate in order to not cut anyone's pay.

4. The average COLA adjustments have been between 2 – 2.5%.
5. Overtime policies and their application vary by organization. This analysis did not include a comparison of positions with regard to overtime. Further analysis by the Town may be needed and considered in this area.
6. The Town's compensation administration plan must be flexible to be effective. It must provide for ease of adjustment to economic forces, labor market supply and demand, and internal organizational changes. It can and should be altered to meet changing conditions in the future. Since both Belmont and the labor market are dynamic and subject to constant change, it should not be expected that this analysis and proposed compensation plan will provide solutions to all salary problems, nor will it eliminate the need for mature judgment in the administration of salaries. It does, however, provide a snapshot of the labor market and parameters to work within so most salary matters can be handled at this time.
7. For Belmont, the positions regarded as the most "hard to recruit/retain" continue to be concentrated in the areas of information technology, finance, public works, and certain administrative positions. For some of these positions, a more competitive approach may be needed with regard to compensation when vacancies occur.
8. To maintain morale and a sense of fairness, HRS recommends the Town not reduce the compensation level of any current employee. If an employee's current salary falls above the maximum of the recommended grade range, the Town should maintain the employee's salary above the maximum for the grade until the employee retires or separates from the Town. This is called "red-circling" a position. New employees can be hired at the appropriate lower pay rate. HRS recommends a single administrative policy be adopted and subsequently applied in all cases.

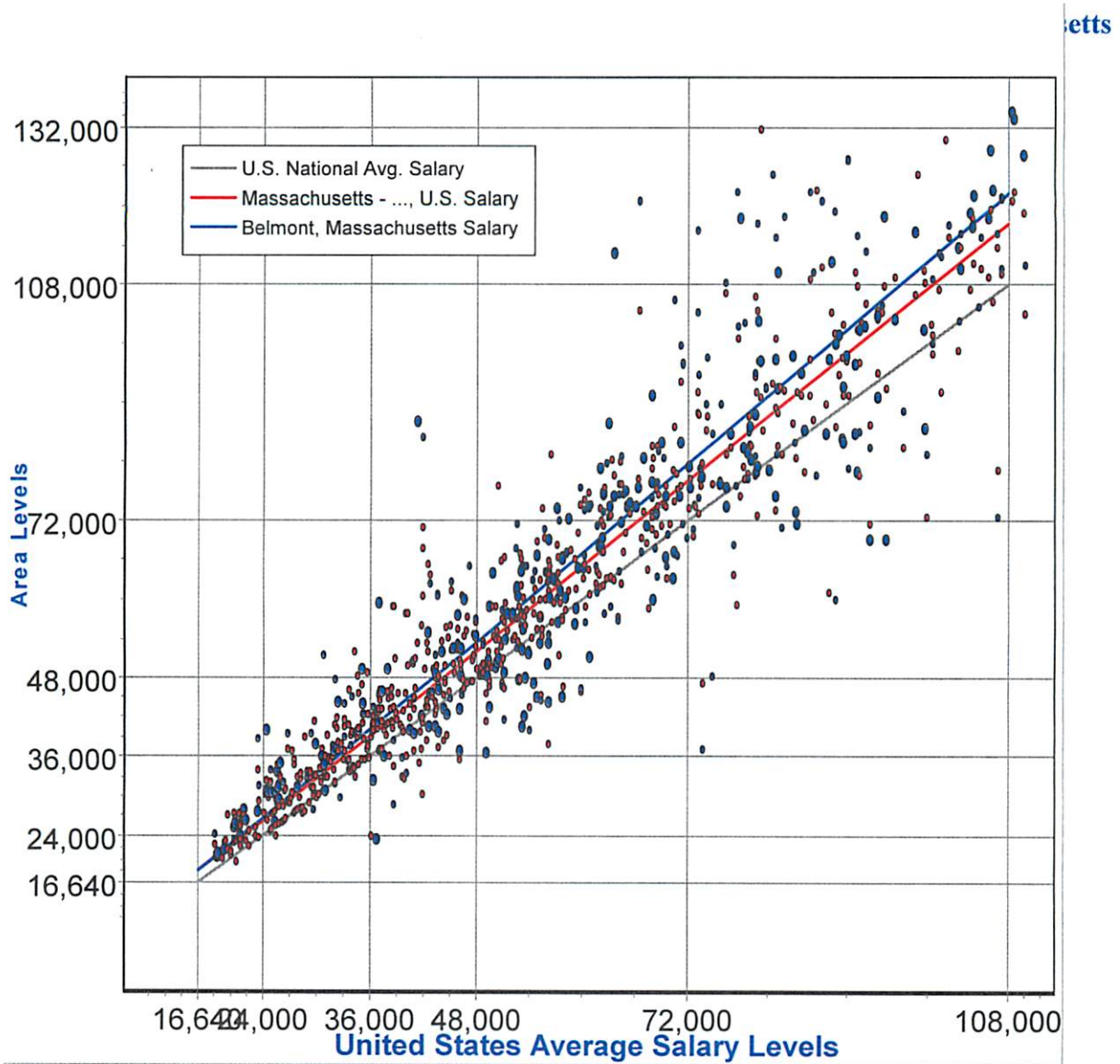
9. Whenever a vacancy develops, it is a good time to automatically review the position. This may involve a job analysis and updating the job description and reviewing the market for the particular position.

ATTACHMENTS

Mass. Town/City	EQV/Per Capita (2012)	Population (2010)	Income Per Capita (2010)	Operating Budget (rounded) (2010)	Average Tax Bill (2012)	Distance in Miles (approx.)	Form of Government (MMA)
Andover	\$219,659	33,201	\$69,120	\$147M	\$7,967	25	TM/Selectmen
Arlington	\$175,702	42,844	\$43,414	\$144M	\$6,842	2	TM/Selectmen
Bedford	\$220,167	13,320	\$52,676	\$80M	\$7,963	12	TM/Selectmen
Burlington	\$201,983	24,498	\$35,843	\$122M	\$4,536	14	TA/Selectmen
Concord	\$304,209	17,668	\$103,066	\$89M	\$11,802	12	TM/Selectmen
Lexington	\$274,113	31,394	\$86,260	\$200M	\$10,906	7	TM/Selectmen
Needham	\$281,849	28,886	\$80,902	\$145M	\$8,416	13	TM/Selectmen
Reading	\$159,675	24,747	\$42,071	\$91M	\$6,458	15	TM/Selectmen
Sudbury	\$232,765	17,659	\$98,133	\$90M	\$11,205	14	TM/Selectmen
Watertown	\$169,115	31,915	\$35,554	\$116M	\$14.68/R	3	TM/Council
Wayland	\$238,829	12,994	\$139,900	\$74M	\$10,529	10	TA/Selectmen
Wellesley	\$349,289	27,982	\$134,245	\$152M	\$12,198	11	Exec.Dir./BOS
Weston	\$497,724	11,261	\$281,236	\$87M	\$16,921	7	TM/Selectmen
Westwood	\$253,270	14,618	\$96,045	\$73M	\$9287	18	TA/Selectmen
Winchester	\$269,213	21,374	\$87,306	\$101M	\$9,839	5	TM/Selectmen
Belmont	\$226,958	24,729	\$65,808	\$104M	\$10,359	-	TA/Selectmen

Refer to DOR Division of Local Services webpage, *Communities at a Glance*, for more detailed statistics per community; EQV may vary *slightly* from MMA data listed above. <http://www.mass.gov/dor/local-officials/local-information-technology/at-a-glance-community-reports.html>

Geographic Assessor
Human Resources Services, Inc.



Currency: 1.00 United States Dollar = 1.00 United States Dollars

Data as of: January 01, 2014

Printout: February 13, 2014 8:11 pm

Questions Contact:

Human Resources Services, Inc.

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 Patent No. 6,862,596 and 7,647,322
 ERI Economic Research Institute
 Human Resources Services, Inc.

Position Title by functional area	Belmont FY14		Data Points	Average	Median	75th Perc.	90th Perc.	% Diff. Avg.
ACCOUNTING								
ASSISTANT TOWN ACCOUNTANT	58,898 82,457		10 11	51,764 66,534	51,250 65,975	53,257 69,512	56,370 80,748	14% 24%
ACCOUNTING/COMPUTER TECHNICIAN	35,721 49,900		4 4	39,471 52,971	41,158 52,807	43,194 55,675	43,234 56,952	-9% -6%
TOWN ACCOUNTANT	73,978 103,569		11 12	74,514 98,291	71,521 97,921	81,901 107,406	86,580 111,957	-1% 5%
CLERK II - ACCOUNTS PAYABLE	32,030 38,438		12 12	38,635 48,919	36,851 48,038	41,248 51,612	45,149 54,264	-17% -21%
ASSESSING								
ASSESSING ADMINISTRATOR	73,978 103,569		14 15	68,170 91,896	68,166 89,560	71,540 97,634	76,556 104,412	9% 13%
PT OFFICE ASSISTANT	25,144 35,201		12 12	35,690 44,532	35,496 45,456	38,233 47,306	39,903 48,221	-30% -21%
BUILDING & FACILITIES								
DIRECTOR OF FACILITIES MANAGEMEN	77,043 107,801		4 4	87,298 123,665	88,226 122,280	89,163 132,949	89,359 136,286	-12% -13%
BUILDING & FACILITIES MANAGER	73,978 103,569		11 11	71,690 99,531	64,164 85,947	86,378 117,061	89,490 131,095	3% 4%
COMMUNITY DEVELOPMENT								
ASST COMMUNITY DEVELOPMENT DIR (Insufficient Data)			1 1	66,754 86,375	66,754 86,375	66,754 86,375	66,754 86,375	
ADMINISTRATIVE SECRETARY	30,227 41,925		8 8	40,167 51,855	40,705 51,116	43,194 55,616	43,440 57,636	-25% -19%
COMMUNITY DEVELOPMENT DIR	86,036 120,451		10 11	76,145 102,987	78,492 98,490	83,350 108,273	86,378 121,671	13% 17%
COUNCIL ON AGING								
COUNCIL ON AGING DIRECTOR	67,934 95,108		13 14	60,440 78,318	62,102 80,174	65,726 84,197	68,353 88,845	12% 21%
COA VOLUNTEER COORDINATOR	35,721 49,900		3 3	44,106 57,081	50,328 64,096	50,332 64,609	50,334 64,917	-19% -13%
ADMINISTRATIVE ASSISTANT 1	34,813 41,778		9 9	40,010 51,743	40,313 51,137	43,172 54,966	43,690 57,890	-13% -19%
FIRE								
ASSISTANT FIRE CHIEF	70,956 99,340		4 6	71,565 91,246	72,712 94,251	74,006 95,623	75,751 96,237	-1% 9%
FIRE CHIEF	86,036 120,451		10 12	89,803 120,653	89,418 118,771	93,614 123,282	95,345 134,625	-4% 0%
ADMINISTRATIVE ASSISTANT 1	34,813 41,778		10 10	40,379 52,215	40,274 51,600	42,547 56,822	45,527 58,416	-14% -20%
HEALTH								
ASSISTANT HEALTH DIRECTOR	61,919 86,688		2 2	62,062 85,511	62,062 85,511	65,300 86,343	67,243 86,842	0% 1%
HEALTH DIRECTOR	77,043 107,801		13 14	70,613 92,916	68,721 93,552	76,323 96,688	76,693 99,687	9% 16%
PUBLIC HEALTH NURSE	40,985 57,377		7 7	52,883 69,813	53,742 69,484	54,096 71,135	58,034 75,399	-22% -18%
SANITARIAN	46,838 65,575		6 6	50,969 69,375	50,036 69,839	52,992 72,962	55,800 74,149	-8% -5%
SOC WORK/ COOR YOUTH & FAM SV	52,854 73,995		7 8	49,464 62,938	44,923 59,813	50,913 64,704	60,076 75,457	7% 18%
ANIMAL CONTROL OFFICER	43,816 61,343		7 7	40,856 53,812	40,878 53,407	42,104 56,343	45,252 59,238	7% 14%
HIGHWAY/PUBLIC WORKS								
BUSINESS MANAGER DPW	58,898 82,457		7 8	58,979 79,082	60,041 77,988	61,799 84,085	64,884 93,386	0% 4%
DPW DIRECTOR	86,036 120,451		14 15	88,765 118,665	89,418 119,137	94,823 123,392	96,494 135,408	-3% 2%
HIGHWAY DIVISION MANAGER	77,043 107,801		9 9	64,008 82,944	64,164 81,220	68,538 87,175	69,245 90,936	20% 30%
RECYCLING COORD	43,603 61,043		4 4	45,937 61,794	46,396 59,029	50,784 66,901	55,507 75,152	-5% -1%
STREET OPENING COORDINATOR (Insufficient Data)	52,854 73,995		1 1	63,002 78,682	63,002 78,682	63,002 78,682	63,002 78,682	-16% -6%
				13				

Position Title by functional area	Belmont FY14		Data Points	Average	Median	75th Perc.	90th Perc.	% Diff. Avg.
HUMAN RESOURCES								
HUMAN RESOURCES DIRECTOR	80,000 112,031		12 14	75,354 99,966	74,822 103,228	80,276 110,417	85,850 115,696	6% 12%
ADMINISTRATIVE ASSISTANT II	35,721 49,900		8 8	39,907 52,455	40,359 52,064	41,203 56,823	42,298 57,842	-10% -5%
HUMAN RESOURCES ASSISTANT	40,985 57,377		11 11	45,026 59,893	43,622 58,331	49,006 64,883	50,708 66,689	-9% -4%
INFORMATION TECHNOLOGY								
GIS DATABASE ADMINISTRATOR	55,871 78,226		10 10	56,195 73,931	55,962 72,543	58,562 77,510	59,555 81,055	-1% 6%
INFORMATION TECH SPECIALIST II	49,588 69,763		5 5	47,794 63,634	47,921 64,028	48,867 64,096	49,748 68,273	4% 10%
INFORMATION SYSTEMS MANAGER	64,941 90,918		13 14	74,691 100,552	76,323 95,827	80,660 116,248	85,925 120,927	-13% -10%
INFORMATION TECH SPECIALIST I	52,854 73,995		5 5	54,713 70,266	54,418 69,181	56,338 72,185	57,216 72,614	-3% 5%
LIBRARY								
LIBRARY ASSISTANT	27,788 38,903		6 6	31,896 40,490	31,415 40,209	34,010 42,632	37,065 46,674	-13% -4%
PRE-PROFESSIONAL LIBRARIAN	39,392 47,270		3 3	36,662 45,835	36,719 45,630	39,946 50,298	41,881 53,099	7% 3%
LIBRARY DIRECTOR	73,978 103,569		14 15	77,351 102,548	77,681 96,694	80,578 109,133	84,555 120,657	-4% 1%
PARKS AND CEMETERY								
PT ASSISTANT	27,788 38,903		8 8	33,328 42,817	32,289 39,721	33,490 43,366	37,653 49,395	-17% -9%
REC, PARKS & CEMETERY MGR	73,978 103,569		13 14	68,047 90,275	68,538 87,179	71,521 96,783	78,793 107,705	9% 15%
PLANNING								
ECONOMIC DEVELOPMENT MANAGER	77,043 107,801		3 3	60,345 76,330	60,041 75,231	61,532 76,957	62,426 77,992	28% 41%
PLANNING COORDINATOR	64,941 90,918		8 8	69,163 89,611	69,281 87,389	73,310 94,825	78,276 99,360	-6% 1%
POLICE								
ASSISTANT POLICE CHIEF	70,956 <i>(Insufficient Data)</i>		1 1	70,442 106,256	70,442 106,256	70,442 106,256	70,442 106,256	1% -7%
CROSSING GUARDS	10.92 <i>(Insufficient Data)</i>		1 1	25,476 34,722	25,476 34,722	25,476 34,722	25,476 34,722	
PARKING CONTROL OFFICER	25,144 35,202		5 5	33,668 42,668	30,346 37,783	37,029 47,084	40,985 53,805	-25% -17%
POLICE CHIEF	86,036 120,451		10 12	89,803 120,844	89,418 118,771	93,614 123,652	95,345 134,773	-4% 0%
RESERVE PUBLIC SAFETY DISPATCHER	19.64 <i>(Insufficient Data)</i>		1 1	16.70 22.36	16.70 22.36	16.70 22.36	16.70 22.36	18% 5%
TECHNICAL ASSISTANT	43,816 61,343		2 2	57,004 73,091	57,004 73,091	60,219 76,918	62,148 79,214	-23% -16%
PUBLIC SAFETY DISPATCHING								
PUBLIC SAFETY OPERATIONS MGR	61,919 86,688		0 0					
PUB SAFETY COMMUNICATION SPVS	52,854 73,995		6 6	42,573 54,651	41,418 53,145	44,213 57,945	47,555 61,428	24% 35%
RECREATION								
RECREATION SUPERVISOR	51,458 61,753		3 3	47,288 66,354	46,110 68,382	49,478 69,136	51,498 69,588	9% -7%
FIELD HOUSE SUPERVISOR	30.02 <i>(Insufficient Data)</i>		0 0					
SPECIAL NEEDS PROGRAM COORD	23.30 <i>(Insufficient Data)</i>		1 1	24.52 30.63	24.52 30.63	24.52 30.63	24.52 30.63	-5% -24%
SELECTMEN								
ASSISTANT TOWN ADMINISTRATOR	73,978 103,569		10 10	84,509 112,539	86,996 110,039	89,641 122,580	94,073 135,226	-12% -8%
BUDGET ANALYST	49,588 69,763		5 5	51,705 71,651	50,328 71,835	53,757 74,830	56,280 75,177	-4% -3%
ADMINISTRATIVE COORDINATOR	43,603 61,043		9 9	48,404 62,565	50,328 65,918	53,028 67,321	53,943 68,383	Human Resources Services, Inc. -2%

Position Title by functional area	Belmont FY14		Data Points	Average	Median	75th Perc.	90th Perc.	% Diff. Avg.
PUBLIC INFORMATION SPECIALIST	43,603		2	54,407	54,407	62,827	67,879	-20%
	61,043		2	69,669	69,669	81,046	87,871	-12%
TOWN CLERK								
ASSISTANT TOWN CLERK	58,898		11	44,029	42,608	46,154	52,689	34%
	82,457		12	57,479	56,435	57,809	68,094	43%
WATER								
WATER DIVISION MANAGER	73,978		9	66,282	68,538	68,674	71,617	12%
	103,569		10	84,395	83,492	87,086	96,700	23%

Position Title by functional area	Belmont FY14	Andover	Arlington	Bedford	Burlington	Concord	Lexington	Needham	Reading	Sudbury	Watertown	Wayland	Weston	Wellesley	Westwood	Wincheste	Other Ma Towns
ACCOUNTING																	
ASSISTANT TOWN ACCOUNTANT	58,898 82,457	63,434 80,748	52,846 68,382	43,551 56,617		55,585 83,847	49,358 65,975	53,352 68,621		49,653 64,983	61,032	52,972 70,403	49,018 55,195		47,866 56,074		
ACCOUNTING/COMPUTER TECHNICIAN	35,721 49,900	43,172 54,966	39,144 50,648				43,261 57,803										32,305 48,467
TOWN ACCOUNTANT	73,978 103,569	78,751 107,328	85,050 122,900	64,292 88,402	78,128 101,646	70,442 106,256	88,973 112,437	71,521 89,550	86,580 107,640		94,195		65,726 76,194		68,674 85,764	61,519 87,182	
CLERK II - ACCOUNTS PAYABLE	32,030 38,438	46,631 59,370	34,987 45,255	36,346 46,342		35,553 49,932	40,713 54,400	33,579 42,530	36,719 45,630	35,992 47,100	42,853 48,975		45,404 51,137		36,982 43,316	37,855 53,039	
ASSESSING																	
ASSESSING ADMINISTRATOR	73,978 103,569	76,080 96,777	76,760 110,921	64,292 88,402	78,128 101,646	70,442 106,256	54,724 86,113	71,521 89,560	71,546 88,979	67,611 85,189		68,721 91,362	65,727 76,194	64,310 98,490	63,002 78,682	61,519 87,182	
PT OFFICE ASSISTANT	25,144 35,201	39,977 50,865	36,540 47,301	37,897 48,320		31,351 44,031	34,453 46,064	29,757 37,673	33,364 41,496				42,032 47,322		36,982 43,316	33,794 47,207	32,887 35,945
BUILDING & FACILITIES																	
DIRECTOR OF FACILITIES MANAGEMENT	77,043 107,801	83,250 113,464						89,054 111,591					87,397 131,095	89,490 138,510			
BUILDING & FACILITIES MANAGER	73,978 103,569	58,747 79,700	62,108 80,360	81,001 115,426		55,985 85,947		53,352 68,619		90,676 118,695	64,164 79,479	85,358 111,538	87,397 131,095	89,490 138,510		60,313 85,473	
COMMUNITY DEVELOPMENT																	
ASST COMMUNITY DEVELOPMENT DIR (Insufficient Data)			66,754 86,375														
ADMINISTRATIVE SECRETARY	30,227 41,925	43,172 54,966	36,413 47,117			40,989 57,564	43,261 57,803	36,114 45,767	40,421 50,232				43,856 49,394			37,113 52,000	
COMMUNITY DEVELOPMENT DIR	86,036 120,451		93,555 135,190	64,292 88,402		80,660 121,671	83,400 105,386	76,323 95,623	85,580 107,640	83,199 108,905	92,682	63,072 83,842		64,310 98,490		67,059 95,031	
COUNCIL ON AGING																	
COUNCIL ON AGING DIRECTOR	67,934 95,108	68,538 87,175	62,108 80,366	60,163 81,220	62,102 80,796	59,426 89,640	47,921 64,028	71,521 89,560	59,124 73,515	67,611 85,189		66,732	65,726 76,194	42,030 63,370	63,002 78,682	56,443 79,982	
COA VOLUNTEER COORDINATOR	35,721 49,900	50,336 64,096	50,328 65,122														31,654 42,024
ADMINISTRATIVE ASSISTANT 1	34,813 41,778	43,172 54,966		36,346 46,342		38,404 53,933	43,261 57,785	36,106 45,767	40,404 50,232				45,404 51,137		40,313 47,211	36,684 58,310	
FIRE																	
ASSISTANT FIRE CHIEF	70,956 99,340		83,111		72,387 94,174	63,921 96,419		73,036 83,388			94,327					76,914 96,055	
FIRE CHIEF	86,036 120,451	87,413 119,137	93,555 135,190	85,051 121,197	88,172 116,415	89,863 135,554	88,973 112,437	129,535	95,219 118,404		115,976		93,633 108,548		96,481 120,493	79,670 114,956	
ADMINISTRATIVE ASSISTANT 1	34,813 41,778	46,631 59,370	40,235 52,062	36,346 46,342		38,404 53,933	43,261 57,785	36,106 45,767	40,404 50,232				45,404 51,137		40,313 47,211	36,684 58,310	
HEALTH																	
ASSISTANT HEALTH DIRECTOR	61,919 86,688	68,538 87,175				55,585 83,847											
HEALTH DIRECTOR	77,043 107,801	76,080 96,777	76,760 110,921	64,292 88,402	72,387 94,174	63,921 96,419	79,301 100,200	76,323 95,623	65,052 80,886	76,423 92,930	92,682	68,721 91,362	65,726 76,194	64,310 98,490	68,674 85,764		
PUBLIC HEALTH NURSE	40,985 57,377	63,434 80,745	54,434 70,435				53,757 71,835	53,334 68,603	53,742 66,846							50,984 69,484	40,496 60,742
SANITARIAN	46,838 65,575	58,247 74,700	48,160 62,317			47,107 71,057	47,038 73,597	53,352 68,621					51,911 65,959				
SOC WORK/ COOR YOUTH & FAM SV	52,854 73,995	68,538 87,175	54,434 70,435	47,391 62,793				42,608 56,796	44,441 55,244		58,402				43,917 51,433	44,923 61,223	
ANIMAL CONTROL OFFICER	43,816 61,343	48,239 61,418	40,235 52,062	36,030 45,977			43,261 57,785	40,878 53,407						36,400 54,900	40,947 51,138		
HIGHWAY/PUBLIC WORKS																	
BUSINESS MANAGER DPW	58,898 82,457	63,434 80,745		60,163 81,220			53,757 71,835	60,041 75,231	59,124 73,515		92,681		49,273 62,395			67,059 95,031	
DPW DIRECTOR	86,036 120,451	87,413 119,137	93,555 135,190	85,051 121,197	88,172 116,415	89,863 135,554	88,973 112,437	98,738 123,718	95,219 118,404	56,905 71,698	113,124	85,358 111,538	93,633 108,548	96,500 149,450	96,481 120,493	86,843 123,065	
HIGHWAY DIVISION MANAGER	77,043 107,801	68,538 87,175	56,612 73,253	60,163 81,220		63,921 96,419		71,531 89,565	65,052 80,896		64,164 79,479		57,415 72,728		68,674 85,764		
RECYCLING COORD	43,603 61,043		48,160 62,317	58,655 80,652											44,632 55,741		32,302 48,464
STREET OPENING COORDINATOR (Insufficient Data)	52,854 73,995														63,002 78,682		
3/14/2014							16										Human Resources Services, Inc

Position Title by functional area	Belmont FY14	Andover	Arlington	Bedford	Burlington	Concord	Lexington	Needham	Reading	Sudbury	Watertown	Wayland	Weston	Wellesley	Westwood	Wincheste	Other Ma Towns
HUMAN RESOURCES																	
HUMAN RESOURCES DIRECTOR	80,000 112,031	119,784	76,760 110,921	60,163 81,220	72,387 94,174	70,442 106,256	79,301 100,200	76,323 95,623	65,052 80,886	83,199 108,905	80,945	89,345 116,903	71,808 83,245	73,320 112,880	86,144 107,582		
ADMINISTRATIVE ASSISTANT II	35,721 49,900	43,796 56,550	41,656 53,897	39,242 50,034		41,053 57,642		36,106 45,767	40,404 50,232						40,313 47,211	36,684 58,310	
HUMAN RESOURCES ASSISTANT	40,985 57,377	50,708 66,689	52,593 68,052		48,748 63,266	41,053 57,642	43,622 57,309	42,608 56,796				38,866 50,710	49,263 62,395	44,100 66,500	40,947 51,138	42,784 58,331	
INFORMATION TECHNOLOGY																	
GIS DATABASE ADMINISTRATOR	55,871 78,226	63,434 80,745	56,338 72,900	51,656 68,445	53,155 69,156	55,585 83,847	52,689 70,398	53,352 68,621	59,124 78,515				58,816 74,495		57,801 72,185		
INFORMATION TECH SPECIALIST II	49,588 69,763	50,336 64,096			44,741 58,208	47,107 71,057	47,921 64,028		48,867 60,782								
INFORMATION SYSTEMS MANAGER	64,941 90,918	87,413 119,137	85,050 122,900	64,292 88,402	72,387 94,174	80,660 121,671	62,329 97,623	76,323 96,623		77,037 93,671	84,642	63,072 83,842	71,808 83,245	77,410 119,190	86,144 107,582	67,059 95,031	
INFORMATION TECH SPECIALIST I	52,854 73,995	54,418 69,181	56,338 72,900	51,656 68,445				53,352 68,621							57,801 72,185		
LIBRARY																	
LIBRARY ASSISTANT	27,788 38,903	39,977 50,695	29,250 37,847					33,579 42,570						34,153 42,653		27,769 37,844	26,649 31,331
PRE-PROFESSIONAL LIBRARIAN	39,392 47,270	43,172 54,966							36,719 45,630								30,095 36,910
LIBRARY DIRECTOR	73,978 103,569	87,413 119,137	85,050 122,900	68,793 94,590	72,387 94,174	80,660 121,671	83,400 105,386	76,323 95,623	78,702 97,851	80,330 101,212	94,072	74,110 96,694	78,448 90,944	73,320 112,880	76,914 96,055	67,059 95,031	
PARKS AND CEMETERY																	
PT ASSISTANT	27,788 38,903		33,345 43,145			31,351 44,031	46,352 61,913	29,757 37,673	30,342 37,733		33,227 39,711				33,925 39,731	28,324 38,601	
REC, PARKS & CEMETERY MGR	73,978 103,569	68,538 87,175	76,760 110,921	60,163 81,220	66,377 86,358	80,660 121,671	79,301 100,200	71,521 89,560	59,124 73,515		77,409	70,251 91,662	57,415 72,729	64,310 98,490	68,674 85,764	61,519 87,182	
PLANNING																	
ECONOMIC DEVELOPMENT MANAGER	77,043 107,801							60,041 75,231						63,022 78,682			57,973 75,076
PLANNING COORDINATOR	64,941 90,918	76,080 96,777	66,754 86,375	64,292 88,402	72,387 94,174	55,585 83,847	83,400 105,386						71,808 83,245		63,002 78,682		
POLICE																	
ASSISTANT POLICE CHIEF (Insufficient Data)	70,956 99,340					70,442 106,256											
CROSSING GUARDS (Insufficient Data)	10.92 15.27															25,476 34,722	
PARKING CONTROL OFFICER	25,144 35,202	37,029 47,084	27,478 35,681				43,622 58,286		30,346 37,783						29,866 34,507		
POLICE CHIEF	86,036 120,451	87,413 119,137	93,555 135,190	85,051 121,197	88,172 116,415	89,863 135,554	88,973 112,437	131,015	95,219 118,404		116,786		93,633 108,548		96,481 120,493	79,670 114,956	
RESERVE PUBLIC SAFETY DISPATCHER (Insufficient Data)	19.64 23.55																16.70 22.36
TECHNICAL ASSISTANT	43,816 61,343	63,434 80,745	50,573 65,437														
PUBLIC SAFETY DISPATCHING																	
PUBLIC SAFETY OPERATIONS MGR	61,919 86,688																
PUB SAFETY COMMUNICATION SPVS	52,854 73,995	50,477 64,177	39,882 49,711	38,053 49,051									39,437 50,549		44,632 55,741		42,954 58,679
RECREATION																	
RECREATION SUPERVISOR	51,458 61,753		52,845 68,382											46,110 69,890			42,908 60,790
FIELD HOUSE SUPERVISOR (Insufficient Data)	30.02 30.02																
SPECIAL NEEDS PROGRAM COORD (Insufficient Data)	23.30 23.30														24.52 30.63		
SELECTMEN																	
ASSISTANT TOWN ADMINISTRATOR	73,978 103,569	87,413 119,137	93,555 135,190	68,793 94,590	72,387 94,174	89,863 135,554	88,973 112,437	98,730 123,728	86,580 107,640				85,706 99,356			73,092 103,585	
BUDGET ANALYST	49,588 69,763		50,328 65,122		57,962 75,409	47,107 71,057	53,757 71,835							49,370 74,830			
ADMINISTRATIVE COORDINATOR	43,603 61,043	54,406 69,178	50,328 65,122			46,917 65,918	50,379 67,321	37,874 47,977	48,867 60,782	40,011 52,380			53,941 68,184	Human Resou	ces Corp, Inc.		

Position Title by functional area	Belmont FY14	Andover	Arlington	Bedford	Burlington	Concord	Lexington	Needham	Reading	Sudbury	Watertown	Wayland	Weston	Wellesley	Westwood	Wincheste	Other Ma Towns
PUBLIC INFORMATION SPECIALIST	43,603 61,043		71,247 92,422												37,567 46,916		
TOWN CLERK																	
ASSISTANT TOWN CLERK	58,898 82,457	54,418 69,181	40,429 52,314			41,053 57,642	52,689 70,398	42,608 56,796	44,441 55,244	41,803 54,713	51,180	38,142 50,781		38,080 57,120	47,866 56,074	42,785 58,310	
WATER																	
WATER DIVISION MANAGER	73,978 103,569	68,538 87,175	56,612 73,253	60,163 81,220		70,442 106,256		76,315 95,638	65,052 80,896		76,055		68,542 86,817		68,674 85,764	62,204 70,874	

Human Resources Services, Inc.

Individual Position Profile

Labor Relations Manager

Estimated Survey Mean Annual Total Compensation

All Incumbent Average: \$105,126

Years Of Experience	10th Percentile	Survey Mean	90th Percentile
14	109,893	122,496	136,773
7	95,385	105,126	116,141
5	91,613	100,611	110,777

Specifications

Prepared For: **Town of Belmont, MA**

Area: **Massachusetts - Statewide, U.S.**

Industry: **Government - City Support Services**

Industry Codes: **eSIC: 9104, NAICS: 921100, usSEC: 9721**

Organization Size: (Data reported by years of experience)

Planning Date: **February 13, 2014**

Database as of: **January 1, 2014**

Annualized Salary Trend: **1.90%** (Adjustment: 0.16%)

eDOT: 166.167-034

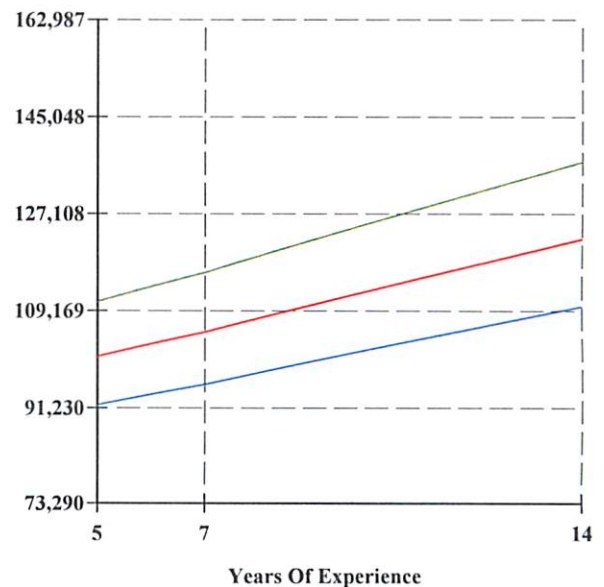
SOC: 113121

Printout Date: February 13, 2014

ERISA File:

(items in bold affect salary estimates)

Annual Total Compensation Graph



Questions Contact:

() -, FAX: () -

Human Resources Services, Inc.,

Human Resources Services, Inc.

Individual Position Profile

Facilities & Building Manager

Estimated Survey Mean Annual Total Compensation

All Incumbent Average: \$82,983

Years Of Experience	10th Percentile	Survey Mean	90th Percentile
14	78,150	90,862	105,070
7	68,392	79,257	91,393
5	65,041	75,259	86,669

Specifications

Annual Total Compensation Graph

Prepared For: **Town of Belmont, MA**

Area: **Massachusetts - Statewide, U.S.**

Industry: **Government - City Support Services**

Industry Codes: **eSIC: 9104, NAICS: 921100, usSEC: 9721**

Organization Size: **(Data reported by years of experience)**

Planning Date: **February 13, 2014**

Database as of: **January 1, 2014**

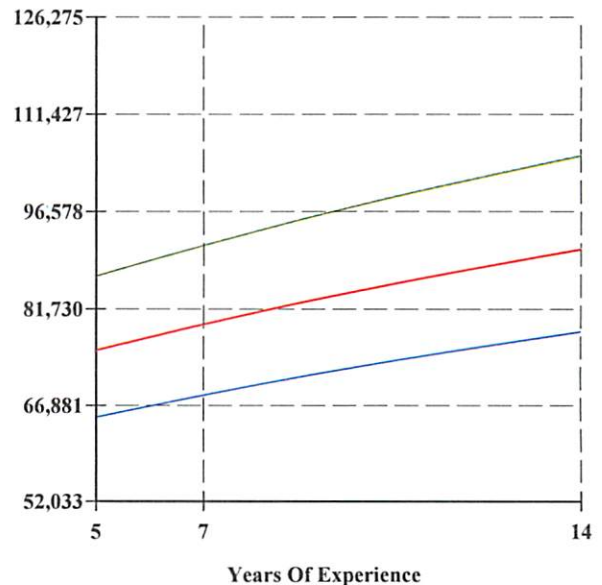
Annualized Salary Trend: **1.90%** (Adjustment: 0.16%)

eDOT: 187.167-190

SOC: 113011

Printout Date: February 13, 2014

ERISA File:



(items in bold affect salary estimates)

Questions Contact:

() -, FAX: () -

Human Resources Services, Inc.,

PROPOSED CLASSIFICATION PLAN

Grade	Position
S-1	None
S-2	None
S-3	Office Assistant
S-4	Library Assistant
S-5	Administrative Secretary
S-6	None
S-7	Accounting/Computer Technician
S-7	COA Volunteer Coordinator
S-7	Administrative Assistant II
S-8	Animal Control Officer
S-8	Technical Assistant
S-9	Human Resources Assistant
S-9	Public Health Nurse
S-9	Sanitarian
S-10	Budget Data Management Analyst
S-10	IT Specialist II
S-10	Public Information Specialist
S-10	Administrative Coordinator Selectmen's
S-10	Recycling Coordinator
S-11	Social Wrk/Coord.of Youth & Family Svcs
S-11	Street Opening Coordinator
S-11	Public Safety Communications Supervisor
S-11	IT Specialist I
S-12	GIS and Database Administrator
M-13	Assistant Town Clerk
M-13	Assistant Town Accountant
M-13	DPW Business Manager
M-14	Assistant Health Director
M-14	Public Safety Operations Manager
M-15	Information Systems Manager
M-15	Planning Coordinator
M-16	Council on Aging Director
M-16	Recreation Director
M-17	Assistant Community Development Director
M-17	Assistant Fire Chief
M-17	Assistant Police Chief
M-17	Assistant Town Administrator
M-18	Assessing Administrator
M-18	Town Accountant
M-18	Library Director
M-18	Buildings and Facilities Manager
M-18	Recreation,Parks + Cemetery Division Mgr
M-18	Water Division Manager
M-19	Health Director
M-19	Highway Division Manager
M-19	Director of Facilities Management
M-20	None
M-21	Human Resource Director
M-22	None
M-23	Director of Community Development
M-23	DPW Director
M-23	Fire Chief
M-23	Police Chief

PROPOSED COMPENSATION PLAN
July 1, 2014 - June 30, 2015
NON-UNION STAFF SCHEDULE

Grade Number		Minimum	Mid-Point	Maximum
S-1	Annual	25,141	30,420	35,700
	hourly	12.09	14.63	17.16
S-2	Annual	27,152	32,854	38,556
	hourly	13.05	15.80	18.54
S-3	Annual	29,325	35,483	41,642
	hourly	14.10	17.06	20.02
S-4	Annual	32,037	38,764	45,492
	hourly	15.40	18.64	21.87
S-5	Annual	34,473	41,712	48,951
	hourly	16.57	20.05	23.53
S-6	Annual	37,352	45,196	53,040
	hourly	17.96	21.73	25.50
S-7	Annual	41,051	49,672	58,293
	hourly	19.74	23.88	28.03
S-8	Annual	44,176	53,453	62,730
	hourly	21.24	25.70	30.16
S-9	Annual	48,127	58,233	68,340
	hourly	23.14	28.00	32.86
S-10	Annual	50,282	60,841	71,400
	hourly	24.17	29.25	34.33
S-11	Annual	53,873	65,187	76,500
	hourly	25.90	31.34	36.78
S-12	Annual	57,555	69,641	81,728
	hourly	27.67	33.48	39.29

PROPOSED COMPENSATION PLAN
July 1, 2014 - June 30, 2015
MANAGEMENT SCHEDULE

Grade Number		Minimum	Mid-Point	Maximum
M-13	Annual	60,428	73,118	85,808
	hourly (info only)	29.05	35.15	41.25
M-14	Annual	63,211	76,486	89,760
	hourly (info only)	30.39	36.77	43.15
M-15	Annual	67,521	81,701	95,880
	hourly (info only)	32.46	39.28	46.10
M-16	Annual	69,676	84,308	98,940
	hourly (info only)	33.50	40.53	47.57
M-17	Annual	72,549	87,785	103,020
	hourly (info only)	34.88	42.20	49.53
M-18	Annual	76,859	93,000	109,140
	hourly (info only)	36.95	44.71	52.47
M-19	Annual	81,887	99,084	116,280
	hourly (info only)	39.37	47.64	55.90
M-20	Annual	87,616	106,015	124,415
	hourly (info only)	42.12	50.97	59.81
M-21	Annual	93,757	113,446	133,136
	hourly (info only)	45.08	54.54	64.01
M-22	Annual	100,348	121,421	142,494
	hourly (info only)	48.24	58.38	68.51
M-23	Annual	107,372	129,920	152,469
	hourly (info only)	51.62	62.46	73.30

APPENDIX D – DLS MEMO: LAST MILE BROADBAND PROJECT FINANCIAL GUIDANCE

The following is a memo by the Massachusetts Department of Local Services (2017) that was provided to towns that were interested in starting municipal broadband. It was received through direct communications (email) and not could not be found on their website.



DLS

DIVISION OF LOCAL SERVICES
MA DEPARTMENT OF REVENUE

Christopher C. Harding
Commissioner of Revenue

Sean R. Cronin
Senior Deputy Commissioner

TO: Local Officials in Last Mile Communities
FROM: Sean R. Cronin, Senior Deputy Commissioner of Local Services
DATE: September 2017
SUBJECT: Last Mile Broadband Project Financial Guidance

This memo provides budgeting, accounting and auditing guidance to local officials in those towns that have elected to build, own and operate municipal broadband networks and will not be using a cable or other private sector company to provide a “Last Mile Broadband” solution. In implementing this solution, the towns will spend property tax, debt proceeds and other available financial resources to design, build and operate their municipal broadband networks. The Division of Local Services (DLS) is providing this guidance because of its role in overseeing municipal taxes and finances.

Organization and Purpose of DLS Guidance

The purpose of this memo is to provide general budgeting, accounting and auditing guidance related to the design, construction and operation of the broadband network. It addresses, first, issues relating to the design and construction of the broadband system. It then addresses issues relating to the operation of the system.

DLS is issuing this guidance for towns to follow even though they may have voted to form a municipal light plant (MLP) to operate their broadband systems. Under state law, a MLP may operate broadband and other telecommunications services in addition to electric and gas utility services. However, it does not prohibit a municipality from using a different department or other organizational structure to provide those services. As you know, most MLPs were formed to provide electric and gas service and have been operating those networks for many years. These MLPs operate on a self-supporting basis and would likely have the ability to add municipal broadband services to their operations if their city or town wanted to do so. In addition, state and local oversight of their operations is well-established in state law.

However, the Department of Public Utilities (DPU) has concluded that it does not have regulatory oversight of broadband-only MLPs and therefore, there is uncertainty about what extent, if any, [G.L. c. 164](#), which governs the manufacture and sale of gas and electricity generally, applies to a broadband-only MLP. Certain sections of [G.L. c. 164](#) apply to DPU oversight of MLPs formed to provide gas and electric service, including DPU approval of certain depreciation rates. In addition, the DPU’s chart of accounts was designed for MLPs providing those services. However, DPU has determined that it cannot approve those rates for broadband-only MLPs and that its regulation of those MLPs would be inconsistent with other statutes that do not relate to DPU’s jurisdiction. As a result, any advice the DPU could provide would be based on its expertise in accounting for electric and gas MLPs and would not be relevant to broadband-only MLPs.

Supporting a Commonwealth of Communities

mass.gov/DLS
P.O. Box 9569 Boston, MA 02114-9569
(617) 626-2300

In addition, and in contrast to the situation with well established gas and electric MLPs that are self-supporting, going concerns, towns with recently formed broadband-only MLPs will be using property taxes, debt and other financial resources to pay for the design and construction of the new network. As a result, they must comply with many budgeting and reporting requirements that apply to other town capital projects generally. For example, towns where voters have approved a tax increase under a Proposition 2½ debt exclusion to pay those expenses must report the amount excluded to the DLS each year in order to set their tax rates. [G.L. c. 59, §§ 21C](#) and [21D](#). In addition, towns must report debt authorized for the network to DLS and ensure that debt service on issued debt is reported and funded in their tax rates. [G.L. c. 44, § 28](#); [G.L. c. 59, § 23](#).

We expect accounting officers and other town officials will have additional questions specific to their town's operating model. The DLS Bureau of Accounts (BOA) field representative for your town is available to answer those questions and provide other accounting and financial assistance as explained in the memo.

Accounting for Design and Construction of Broadband System

A capital project account on the ledger of the town must be used to account for revenues and expenses related to the town's design and construction of the broadband project, regardless of how the system is operated upon completion.

Debt Authorization

The town may incur debt for telecommunication system infrastructure under [G.L. c. 44, § 8\(8\)](#). Borrowing requires a two-thirds vote of the town's legislative body. The debt is a general obligation of the town. Towns planning to finance the project with debt should consult with a financial advisor and bond counsel.

Towns that begin borrowing during fiscal year 2018 should monitor the capital project account as the year-end approaches. It is important the town borrow when cash flow dictates. If a deficit in the capital project account is expected, the town should plan to issue debt before 6/30/2018 in an amount sufficient to at least cover the projected year-end deficit.

Please consult with the BOA's debt section as well as your financial advisor regarding this borrowing. The town's free cash certification will be reduced by the amount of any deficit in the capital project fund not covered by a borrowing.

Accounting for Design and Construction

All revenues and expenses associated with the design and construction of the project are recorded in a capital project account. Revenues recorded in the account may include direct grants from the Massachusetts Broadband Institute (MBI) or the Executive Office of Housing and Economic Development (EOHED) and the proceeds of any town borrowing. MBI or EOHED will disburse the grant funds directly to the town, and these funds must be recorded as revenue in the capital project account. User fees, premiums on borrowing and investment income are not reported as revenue in the capital project fund. Also, debt service payments are not reported as expenditures in the capital project fund.

When the broadband build is complete, the capital project account must be closed.

If the accounting officer needs assistance in establishing a capital project account, the officer may contact your town's BOA field representative for guidance. Also, Chapter 11, "Capital Project Funds," of the [Uniform Massachusetts Accounting System \(UMAS\) Manual](#), which begins on page 183, provides detailed accounting journal entries for the project, related grant revenues and borrowing proceeds.

Bill Payment

The project manager will submit bills for payment to the community on an agreed upon schedule. All bills must be processed using the same process as other town bills. Unless otherwise provided by the town's charter, the bills would be approved by the board or officer in charge of the project and authorized to spend appropriated, borrowed or other funds available to pay project expenses. The approved bills would then be forwarded to the accounting officer, who will review them and if approved, will place them on a treasury warrant for review and approval of the selectboard.

Debt Service Payments

The town is responsible for payment of the broadband debt service. An appropriation for the amount due and payable each year must be included in the town's annual budget and voted at town meeting. If not, the treasurer must pay any debt service from available cash and report the amount to the assessors. [G.L. c. 59, § 23](#). If the town does not fund the payment before the tax rate is set, the assessors must raise the amount in the next tax rate.

The town may need to appropriate for debt service payments before it receives any user revenues that might offset this expense and should consider that impact in developing its annual budgets.

Audit

The capital project account will be audited as part of the regular audit of the town. If the town is not required by the lender or federal grant requirements to have an audit, it should plan to have one based on best financial practice.

Accounting for Operation of Broadband System

This section explains how the town is to budget and account for the operating expenses and revenues of the broadband system. The town must use one of the following two funds to account for those expenses and revenues:

- Enterprise Fund
- General Fund.

Enterprise Fund

An enterprise fund allows communities to account separately for all financial activities associated with a broad range of municipal facilities and services. It establishes a separate accounting and financial reporting mechanism for municipal services for which a fee is generally charged to users, such as water, sewer or other services. Revenues and expenses of the service are segregated into a fund that is accounted for separately from all other governmental activities. Similar to free cash for the general fund, retained earnings are calculated for an enterprise fund.

In order to utilize an enterprise fund, the town's legislative body must accept [G.L. c. 44, § 53F½](#). If local officials have questions about how to budget and account for the town's broadband system and service in an enterprise fund, the accounting officer should contact your town's BOA field representative for guidance. Additionally, please refer to the BOA's [Enterprise Fund Manual, Informational Guideline Release 08-101](#). This guide provides a detailed explanation of enterprise funds and the budgeting and accounting procedures for implementing them.

Anticipated expenses of the broadband enterprise are appropriated in the annual town budget and included in the enterprise fund appropriations reported on page 4 of the tax rate recapitulation (tax recap). All revenues expected to be received in connection with the system, such as user fees, are accounted for as enterprise fund revenues available to support the enterprise fund expenses, including debt service appropriated as part of the town's budget, on Schedule A-2 of the tax rate recap.

General Fund

If a town does not adopt an enterprise fund as explained above, the town must use its general fund to account for all revenues and expenditures. All anticipated expenses of the broadband system are appropriated in the annual town budget and included in the appropriations reported on page 4 of the tax recap. All revenues expected to be received in connection with the system, such as user fees, are accounted for as general fund revenues available to support the budget. They would be reported as a local estimated receipt on page 3 of the tax rate recap.

Tax Rate Reporting – Debt Service

Debt Exclusion: If the town voted a debt exclusion for the broadband debt, the town must:

1. Include an appropriation for the debt service in the annual budget and report this appropriation from raise and appropriate on page 4 of the tax rate recap.
2. Report any revenues expected from user fees or other sources that were planned to offset the costs of debt service as a local estimated receipt on page 3 of the tax rate recap.
3. Include the amount of the current year's debt service in column G of Form DE-1, submitted as part of the tax rate recap. Revenues received from user fees intended to offset debt service costs may be shown in column H "Reimbursements/Adjustments." See "Funding Through Other Revenues" in Section III-B of [Annual Levy Limit Instructions](#). The amount in column I of the DE-1 will show the net increase in the levy limit of the town.

If you have any questions about this while developing your budget, please contact your town's BOA field representative for guidance.

No Debt Exclusion: If the town did not vote a debt exclusion, the town must:

1. Include an appropriation for the debt service in the annual budget and report this appropriation from raise and appropriate on page 4 of the tax rate recap.
2. Report any revenues expected from user fees or other sources that were planned to offset the costs of debt service as a local estimated receipt on page 3 of the tax rate recap.

If you have any questions about this while developing your budget, please contact your town's BOA field representative for guidance.

Frequently Asked Questions

Who owns the assets of the broadband project?

As is true for all municipalities in which a MLP, of any kind, operates, the town owns all assets acquired through appropriation or borrowing for a broadband project.

Who authorizes debt?

All debt is authorized by the town's legislative body. This is true even if the town has chosen to form a broadband-only MLP. A MLP is a municipal department and has no legal or financial ability to borrow on its own.

Who must budget for the broadband debt service?

The debt issued for a broadband project is a general obligation borrowing of a town. As such, the town must appropriate funds in its annual budget so that the treasurer can ensure that the debt service is paid as it becomes due. Revenue anticipated in connection with the broadband service is included as a revenue estimate in the town budget and on the tax rate recap, which may off-set all or part of the debt service appropriation.

If the town voted a debt exclusion for the broadband project, must it be reported on the form DE-1 of the town?

Yes. The exclusion may be adjusted by any user fees or other revenues reported in the "Reimbursements/Adjustments" column on the DE-1. See [Annual Levy Limit Instructions](#).

How does a town establish an enterprise fund for its broadband system and service?

If the town chooses to use enterprise fund accounting rather than accounting for revenues and expenses in the general fund, the legislative body of the town must vote to accept an enterprise fund for the broadband system and service under [G.L. c. 44, § 53F½](#). Please consult the [Enterprise Fund Manual](#) for sample language for the vote and implementation recommendations.

Does it matter if the town's debt authorization or debt exclusion refers to a MLP and the town budgets and accounts for its broadband system and service in its general fund or an enterprise fund?

No. The purpose of the debt being issued by the town is to design and construct a broadband system, not to account for the revenues and expenses in a particular municipal fund.

If the town formed a MLP to operate a municipal broadband service, does it have to disband the MLP in order to follow the budgeting, accounting and auditing guidance in this memo?

No. Towns are to follow these guidelines since traditional MLP accounting is unsuitable due to significant differences in the regulation and financing of MLPs operating electric and gas service and those formed solely to offer broadband service.

APPENDIX E – FUJITSU BROADBAND ANALYSIS FOR BELMONT LIGHT

Belmont, MA

Board Ready Study - Financial Pro Forma Analysis

Summary of Updates



- Reduce mainline trenching to zero; keep drop installation costs
- Reduce pole make ready expenses to zero
- Reduce brownfield make ready expenses to zero
- Reduce ISP functions associated with customer services and billing by 80% (includes staff, tier 1 help desk, OSS/BSS)

- **Objective:** Initial financial analysis into the viability of a stand-alone broadband business using a standard set of input parameters and provide go-no go decision input to customer board of directors
- **Disclosure:** The data from this analysis is considered preliminary rough-order-of-magnitude (ROM) until additional field research is completed to better estimate inputs such as take rates and costs
- **Approach:**
 - Use a standardized financial pro-forma for inputs gathered from the market assessment, customer supplied information and Fujitsu insights from past network deployments
 - Apply a Monte Carlo simulation model to understand a range of expected outcomes for key performance indicators (revenue, EBITDA, cash flow).

Executive Summary



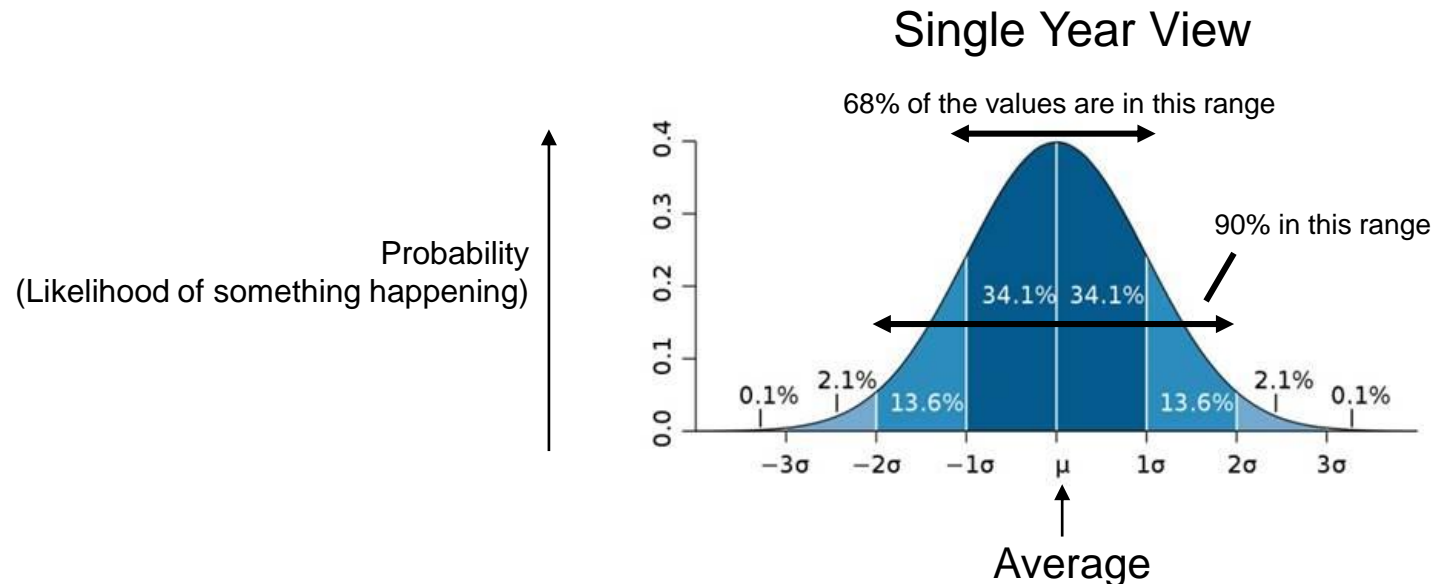
Using the middle take rate scenario (20~40%), post-construction years of operation, 90% confidence interval, Brownfield Data Center

KPI	Annual Value Range	Top Variation Contributors
Revenue	\$3.2M ~ \$4.9M	Residential take rate, tier pricing, customer-tier mix, Business take rate
OPEX	\$1.93M ~ \$2.25M Revised: \$0.88M ~ \$1.4M	Residential take rate, Churn, Business take rate
EBITDA	\$1.26M ~ \$2.68M Revised: \$2.3M ~ \$3.6M	Residential take rate, tier pricing, customer-tier mix
Construction (CAPEX)	\$27.6M ~ \$35.5M (Greenfield: \$27.7M ~ \$35.6M) Revised: \$14.3M ~ \$16.7M	Residential take rate, Business take rate
Cash Flow	-\$2.2M ~ -\$0.56M Revised: \$1.2M ~ \$2.6M	Residential take rate, tier pricing, Churn

Monte Carlo Simulation – Overview

■ What is Monte Carlo simulation?

- It is an estimation/optimization approach using software that allows us to model uncertainty for input variables (cost, price, etc)
- We model uncertainty based on assumed statistical parameters and simulate up to thousands of plausible scenarios to gain insights into the range of possible outcomes for cost, profit, time, etc.
- It is common that the range of values for a KPI appears like a normal distribution curve



- Most possible values occur near the average
- 68% and 90% ranges represent confidence intervals
- 90% is read as you would expect the KPI to fall in this range 90% of the time based on the model
- Depending on appetite for risk, focus on certain confidence interval (90% is most common)

Monte Carlo Simulation – Overview

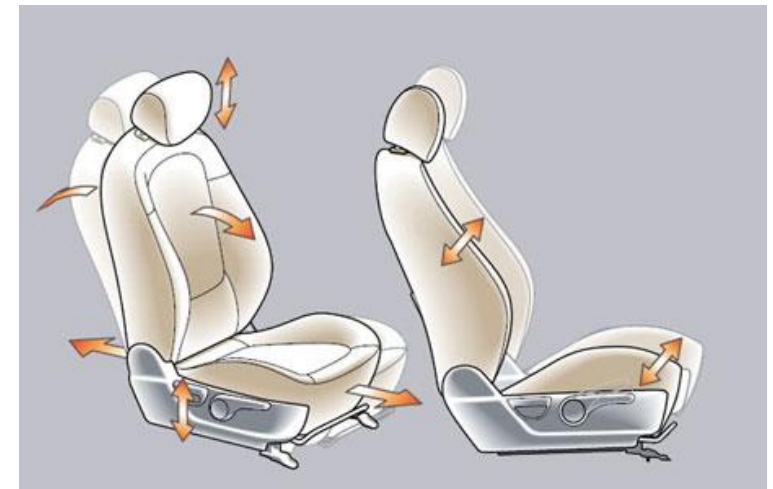
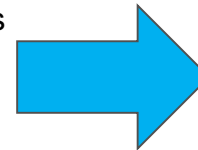
- Why is it important to use?
 - Using averages as a single representation of a variable risks making a decision based on an unlikely outcome
 - Strategically, a range of outcomes helps us to decide the overall attractiveness of a business case
 - Tactically, simulation results help us focus on better controlling key variables whose variation that contribute the most to an outcome's variation

Analogy: Discoveries from Cockpit Design

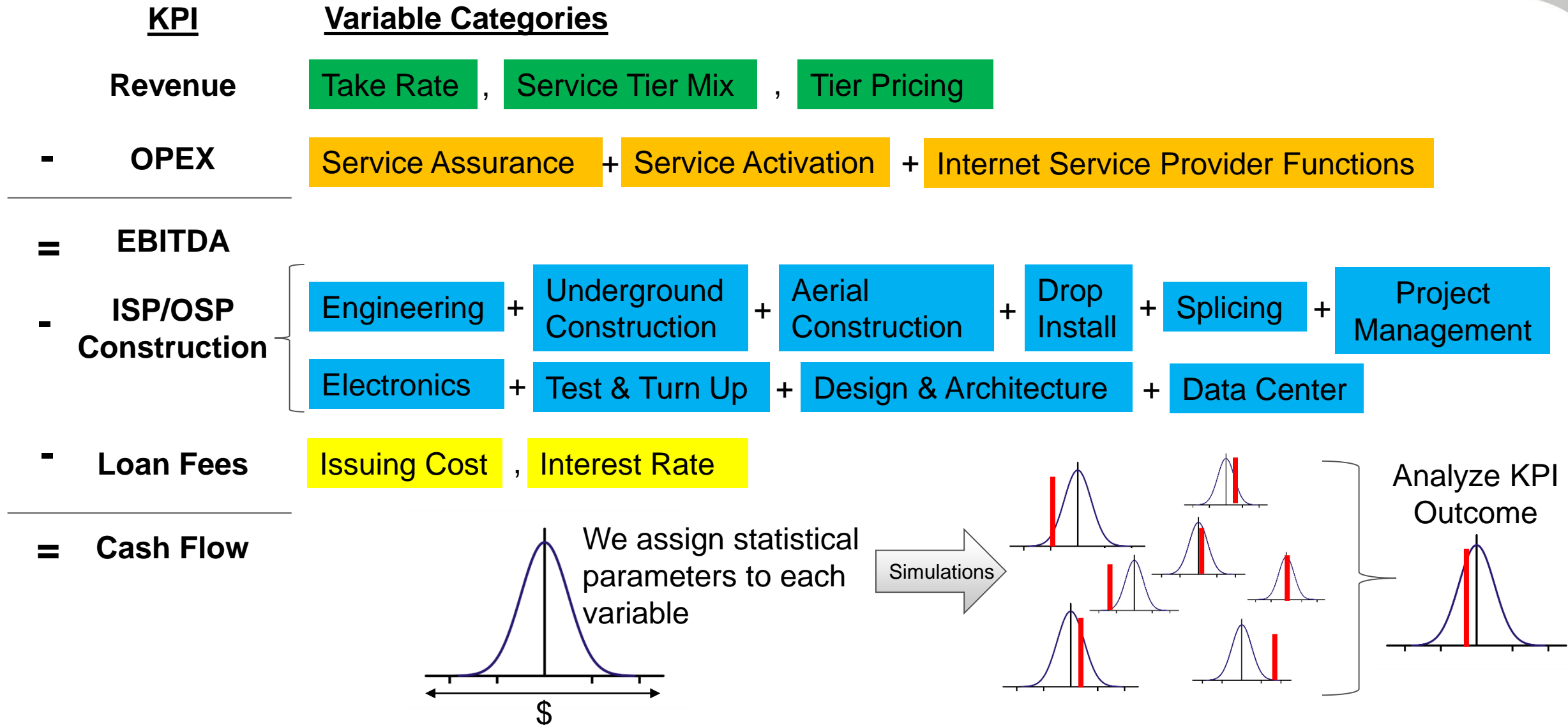


- Average pilot body measurements from 1926 used to design fighter plane cockpits in 1940's-50's
- High incidence rate of pilots crashing
- Studies eventually pointed towards cockpit configuration inadequate for pilots to reach controls
- Dozens of dimensions measured for 4,000 pilots; none fit the average measurement for all dimensions
- Cockpit needed to be suitable for 90% of people on all dimensions

Aircraft manufacturers ordered to design to a range of dimensions



Monte Carlo Simulation – Building Blocks



Scenario Overview



Main Presentation

Scenario

	1	2	3
Take Rate Range	Pessimistic	Middle	Optimistic
Data Center		Brownfield	

Take Rate Range

Data Center

Appendix

5
Middle
Greenfield

For comparison vs Brownfield Middle only

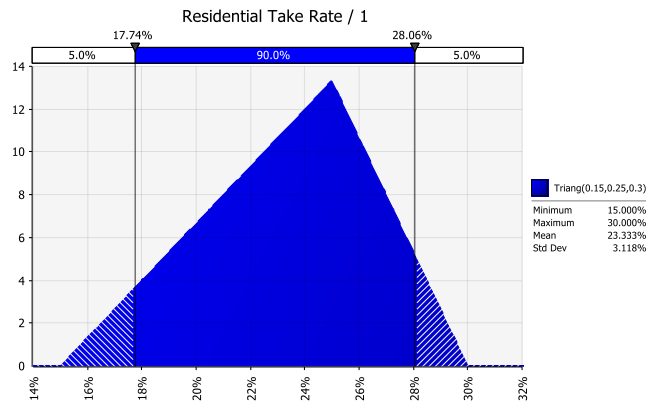
Key Parameters Used for Take Rate

Existing Verizon Fios Fiber Offering Presents Differentiation Challenge to Belmont Market Share

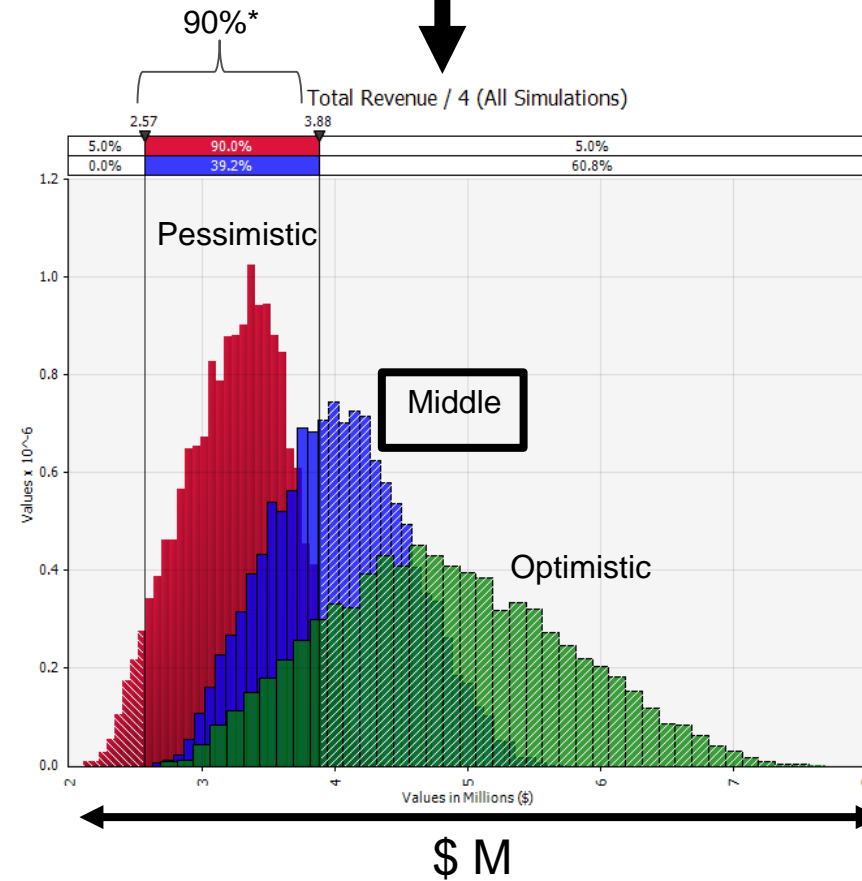


Simulation	Take Rate Scenarios		
	Pessimistic	Middle	Optimistic
Residential Min	15%	20%	20%
Residential Most Likely	25%	30%	35%
Residential Max	30%	40%	55%

 Cited in Executive Summary



(Left): Using minimum, most likely and maximum parameters, we can apply a probability distribution of take rate values. The pessimistic scenario values are shown

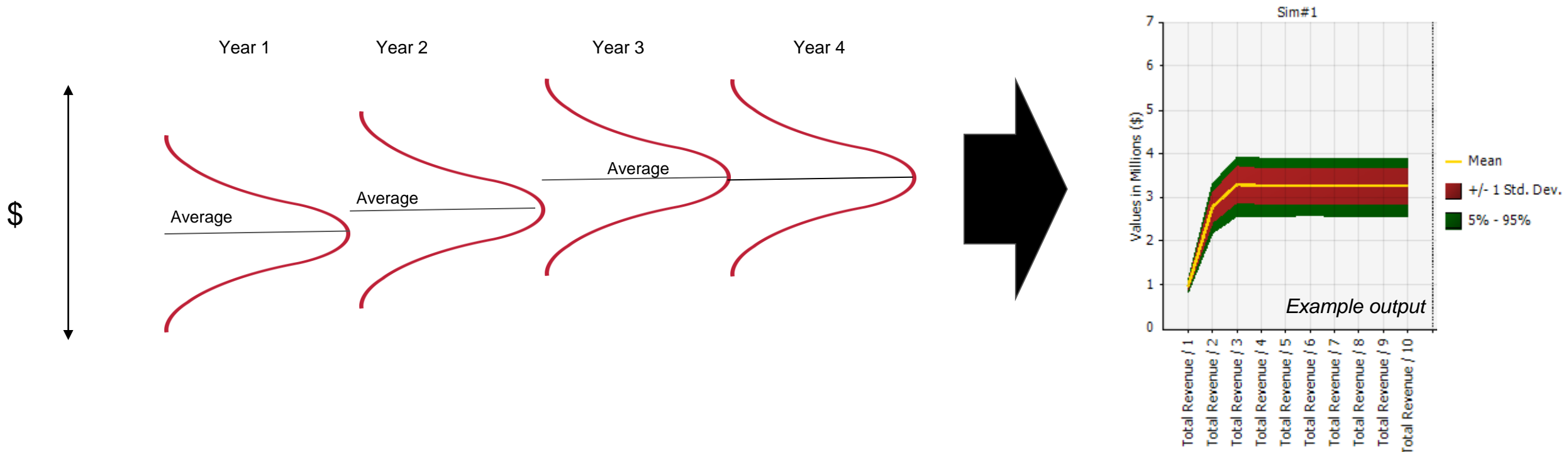


Probability Use confidence intervals* to capture range of outcomes

Key Takeaways

- Each scenario has a different min, most likely, max take rate profile to demonstrate the different risk profiles to total revenue
- Simulation pictured on right shows revenue results for year 4, the first full year of operations following completed construction
- The pessimistic scenario has a small range for revenue at a 90% confidence interval due to a smaller range between the min and max take rate
- Within each scenario, there is a list of several other key assumptions/parameters that will be applied consistently towards 10,000 simulations to gain insight into the range of outcomes

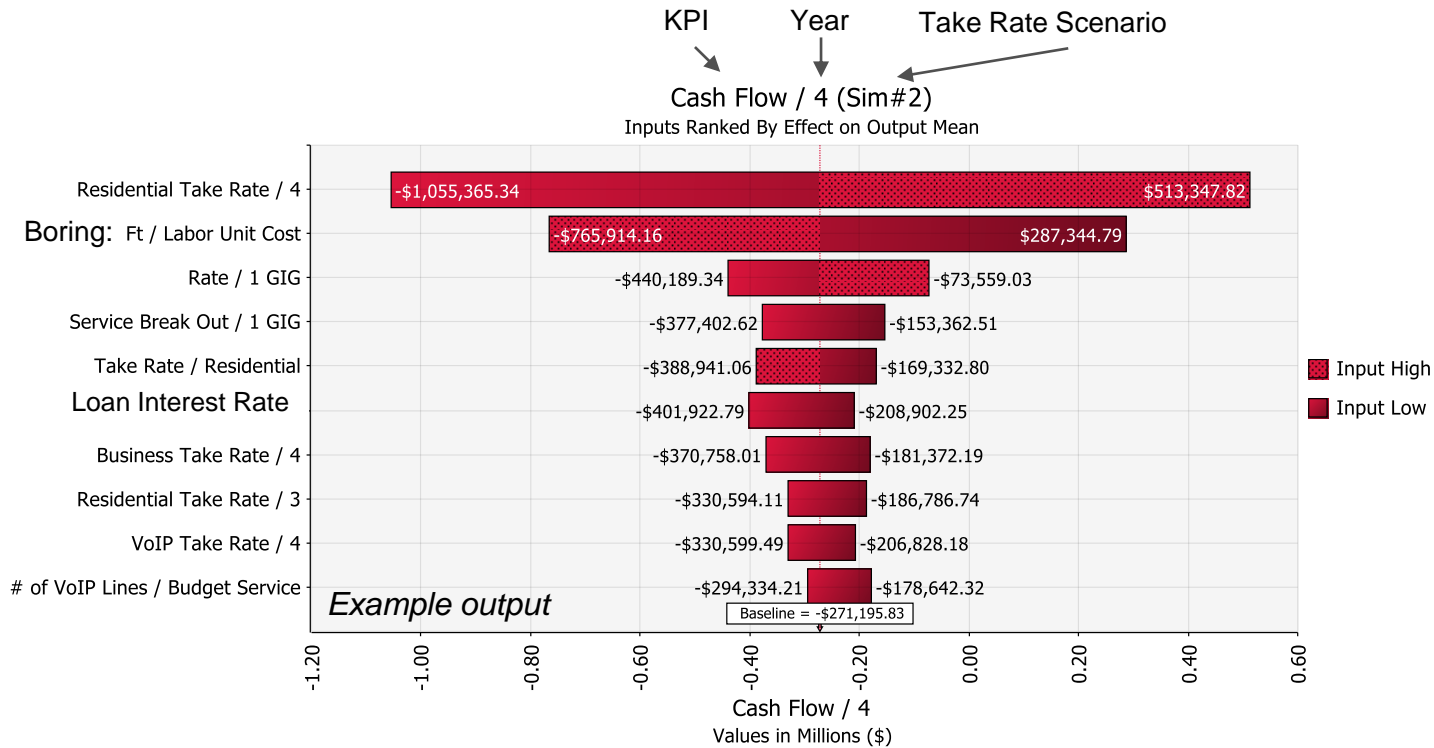
Output Analysis for a KPI



- This chart combines several probability curves into a time series
- The average value is less important to know than the range of values surrounding the average
- While the curves are centered on their mean value, use the 1 standard deviation range to understand where the expected value will be 68% of the time
- Use the 2 standard deviation range to understand where the expected value will be 90% of the time

Variation Contribution Analysis for a KPI

Introducing Tornado Charts

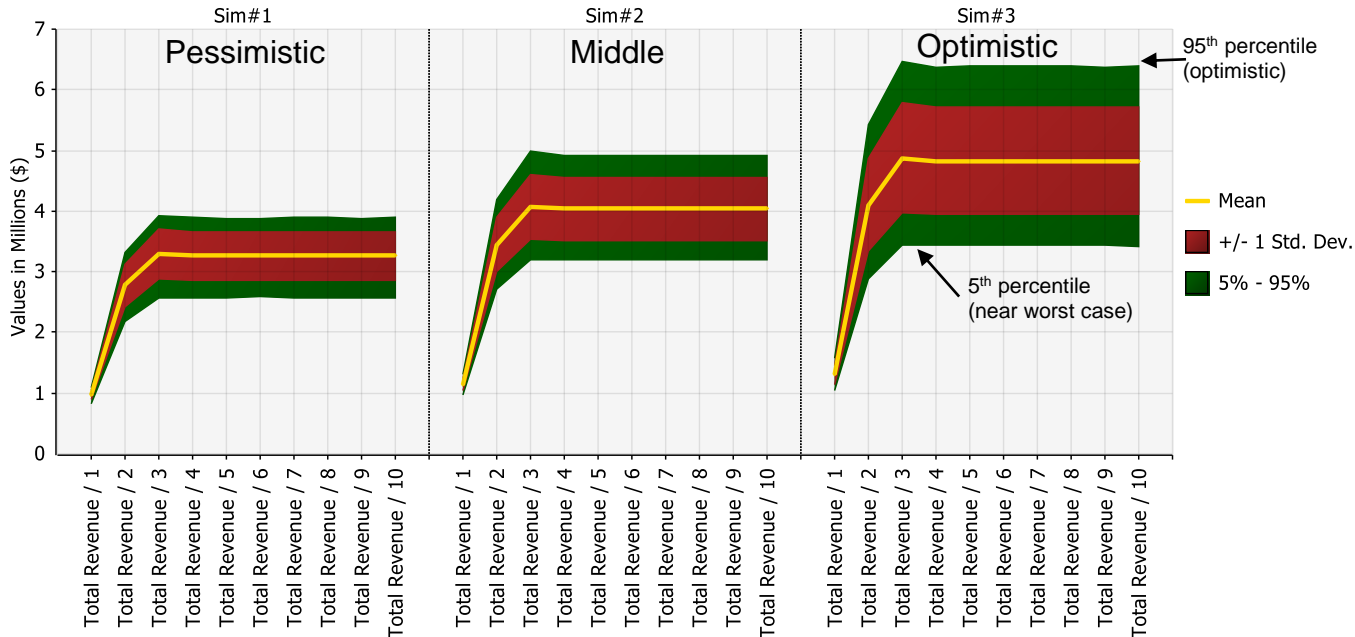


- High values for revenue-impacting variables push KPI to the right (opposite for cost-impacting variables)
- Low values for revenue-impacting variables push KPI to the left
- Focus on controlling and fine-tuning most impactful variables in further estimations and during execution

Fine-tuning the impacting variables involves high-level engineering design, site visits, vendor quotations, etc.

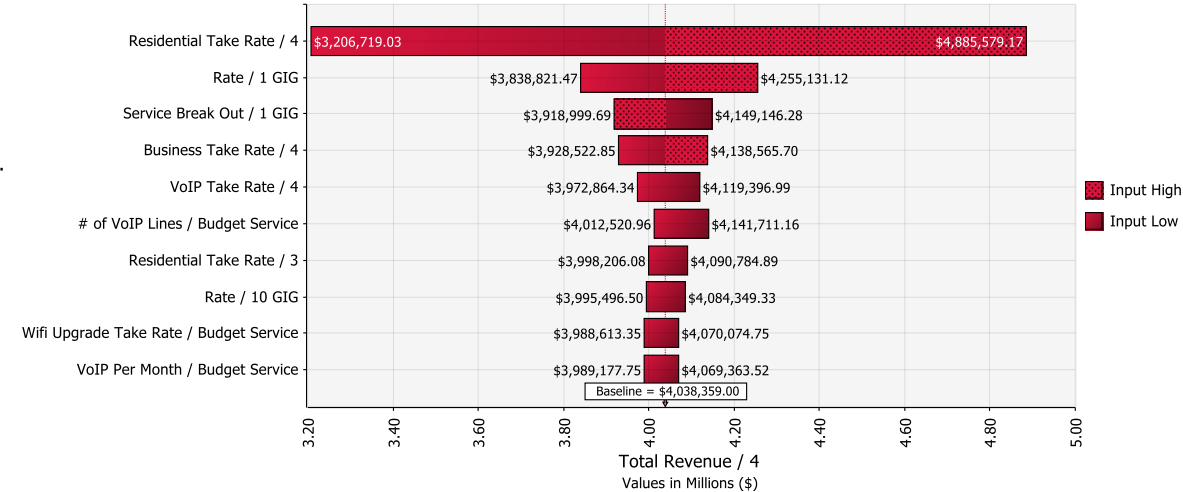
Revenue Overview – Years 1 through 10

Total Revenue / 1 to Total Revenue / 10



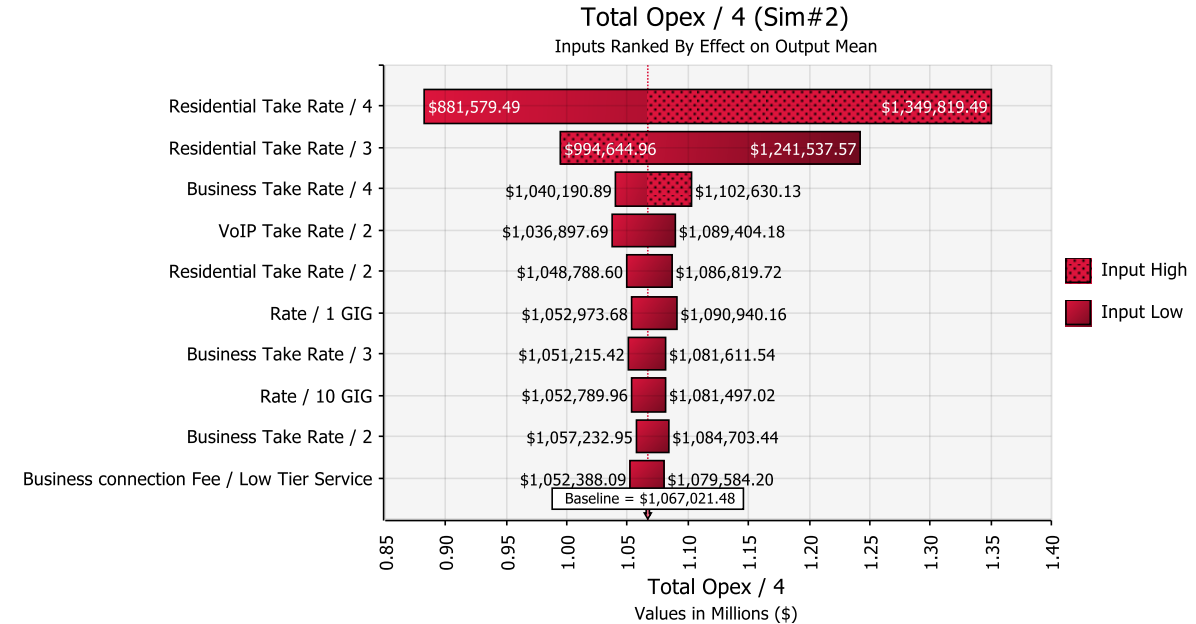
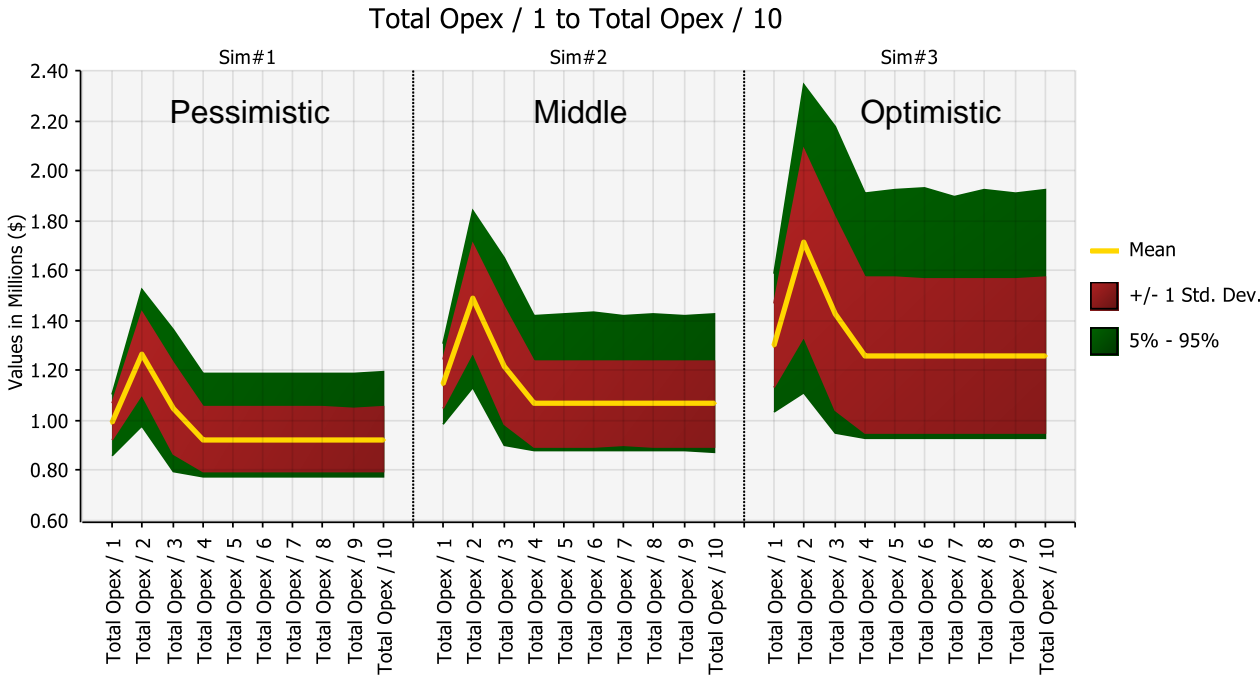
- Following construction years (years 1~3), annual revenue can vary between \$2.7M and \$6.5M (90% confidence interval), depending on the take rate scenario analyzed.
- Middle scenario of 20~40% take rate results in a range of \$3.2M and \$4.9M

Total Revenue / 4 (Sim#2)
Inputs Ranked By Effect on Output Mean



- Years 4 and beyond share a similar tornado chart pattern for which variables contribute to the greatest variation in annual revenue
- Holding all other variables constant, the residential take rate variation in the year of study can impact total revenue by \$1.7M using \$4M as baseline
 - Upside: \$4.9M (40% take rate)
 - Downside: \$3.2M (20% take rate)

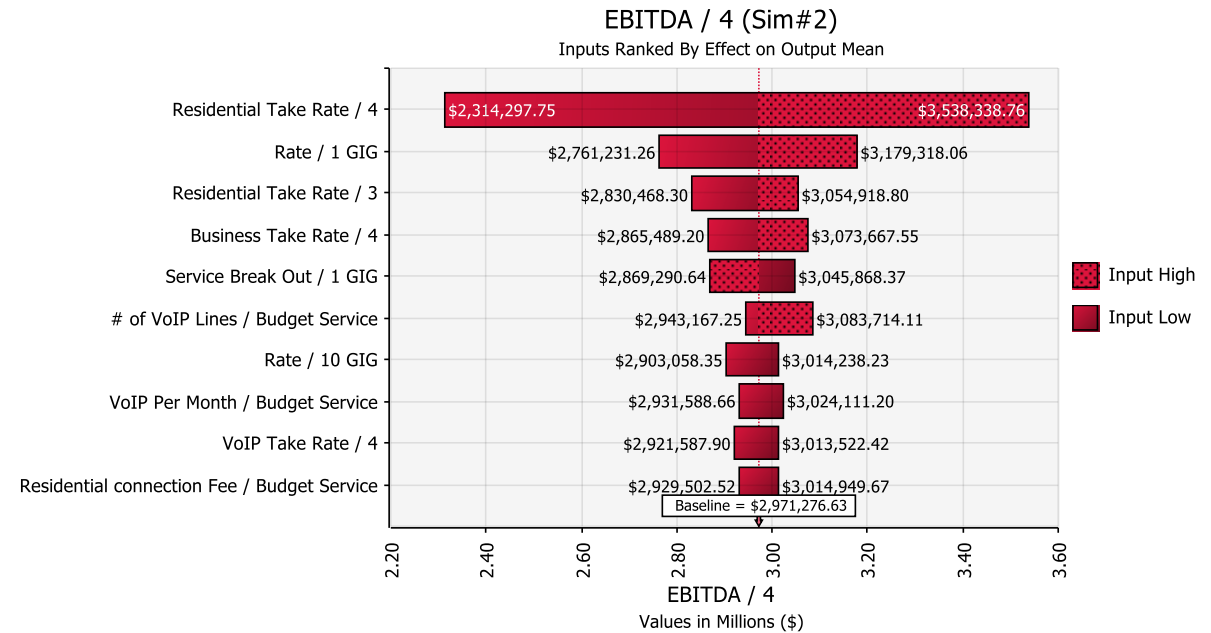
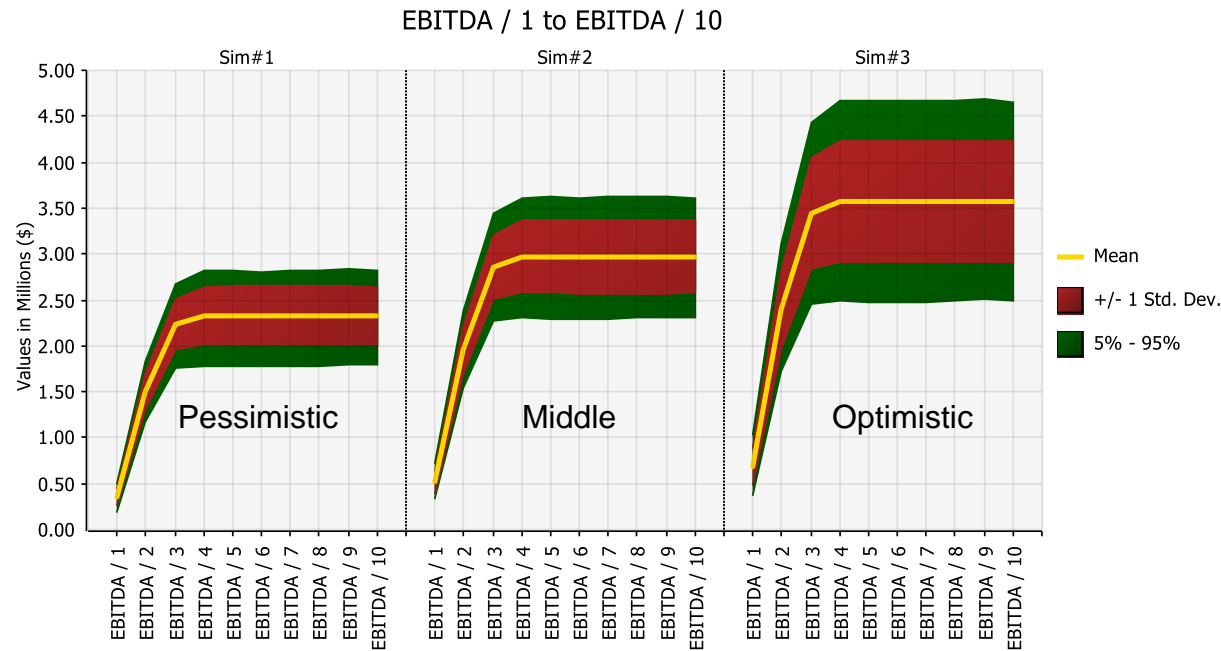
OPEX Overview – Years 1 through 10



- Pattern update: Connection costs incurred heavily during initial customer activation in years 1-3, then settling down to steady state years 4 and later
- Middle scenario: \$0.88M ~ \$1.42M per year

- Years 4 and beyond share a similar tornado chart pattern for which variables contribute to the greatest variation in annual OPEX
- Holding all other variables constant, the residential take rate variation in the year of study can impact total OPEX by ~\$400K
 - Because we are modeling a minimum amount of customer churn year to year (regardless of whether total customer counts increase or decrease), the change in take rate between year 4 and previous years impacts customer activation costs

EBITDA Overview – Years 1 through 10

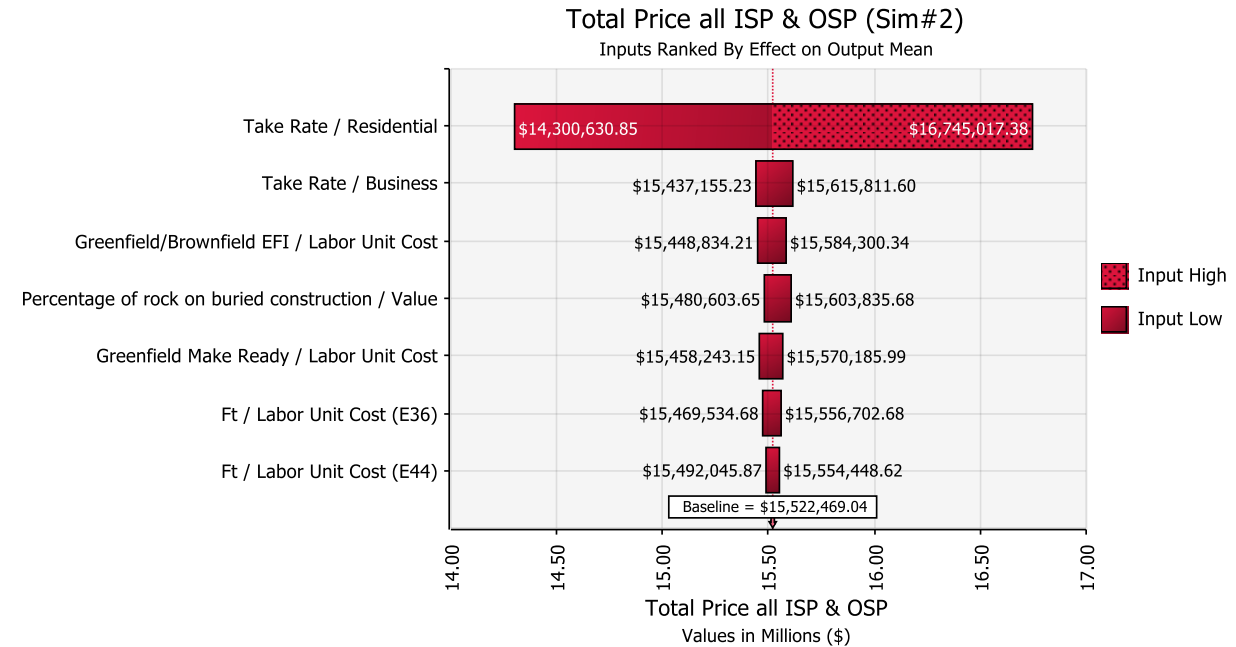
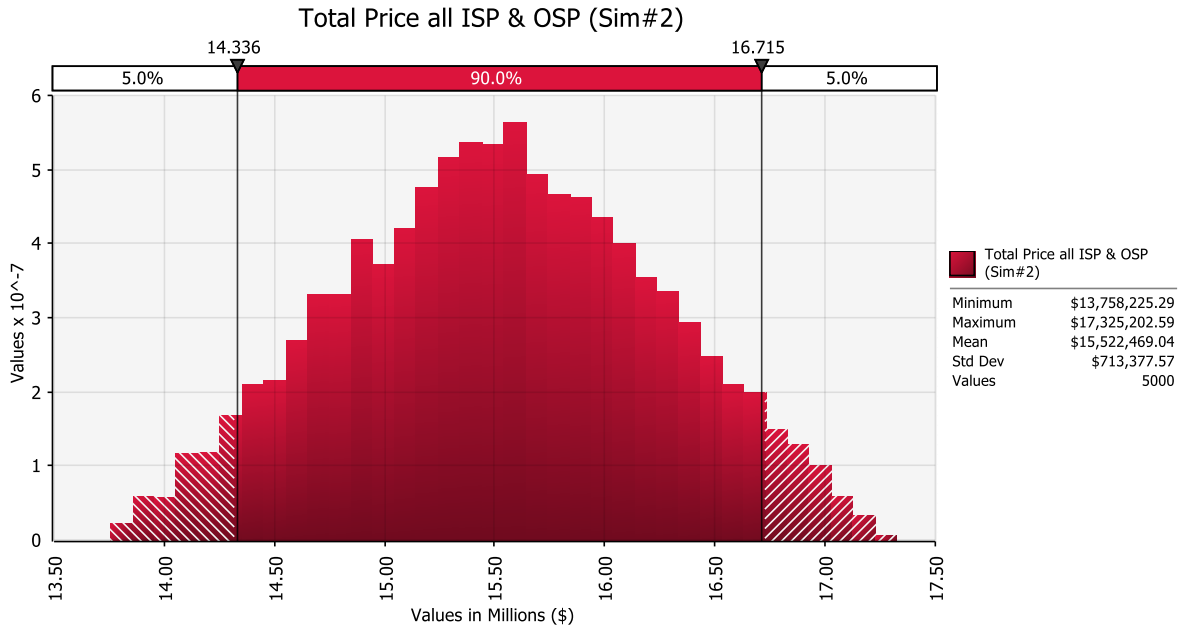


- Middle scenario: \$2.3M ~ \$3.6M per year

- Years 4 and beyond share a similar tornado chart pattern for which variables contribute to the greatest variation in annual EBITDA
- Holding all other variables constant, the residential take rate variation in the year of study can impact total revenue by \$1.2M
- The 1Gig monthly price and residential churn are the second- and third-most impactful to EBITDA variation

Construction Cost Overview

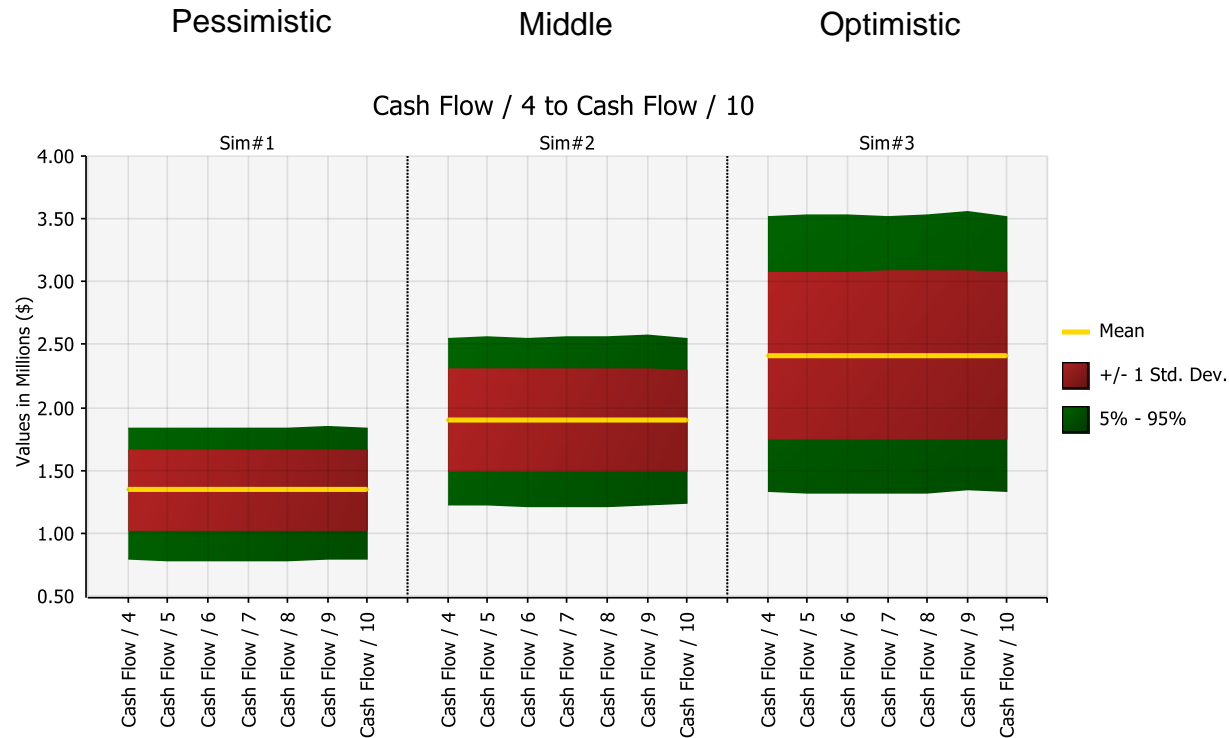
With Brownfield Data Center



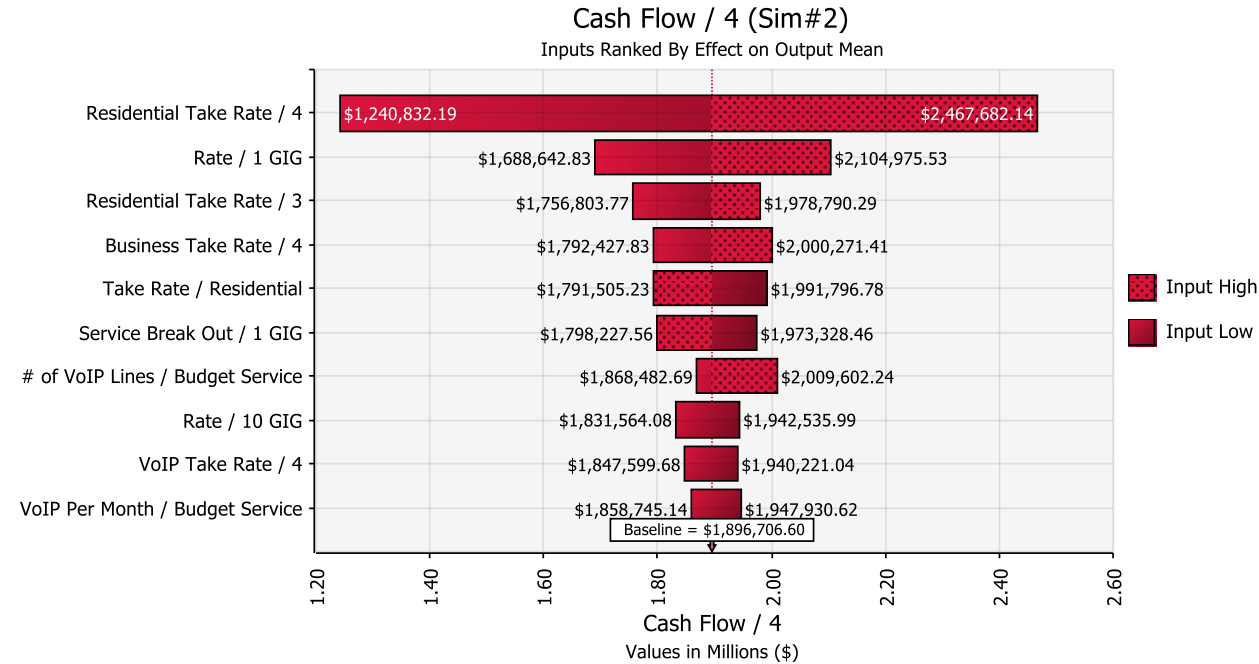
- Based on the given assumptions, construction costs for inside and outside plant will be between:
 - \$14.3M and \$16.7M (90% confidence interval)
 - \$14.7M and \$16.3M (68% confidence interval)
- Most likely, costs will occur within the 68% CI, however due to cost uncertainty, we study the tornado graph for variation contribution

- After reducing the need for trenching/boring/rock adder significantly, those cost inputs contribute to minimal variation
- Residential and business take rates are now the main driver to construction cost variation, followed by Data Center EFI (Engineer/Furnish/Install)

Cash Flow Overview – Years 4 through 10



- Middle take rate scenario ranges from \$1.2M ~ \$2.55M per year
- Updated assumptions to OPEX and CAPEX now result in 100% likelihood positive cash flow in years 4 and later



- Years 4 and beyond share a similar tornado chart pattern for which variables contribute to the greatest variation in annual cash flow
- Holding all other variables constant, the residential take rate variation in the year of study can impact total revenue by \$1.3M
- 1 Gbps pricing and residential churn contribute the next largest amount of variation to cash flow.

- Detailed assumptions & parameters
- Current competitor pricing for new customers
- Greenfield Data Center Construction Cost Results

Detailed Assumptions & Parameters



Take Rates* & Churn

Take Rate:		Minimum	Most Likely	Maximum
Residential	Residential	20%	30%	40%
	Business	25%	35%	45%
	VoIP	15%	25%	35%
Wifi Upgrade Take Rate		40%	45%	50%

VoIP Lines per Residential (80% = 1; 20% = 2)
 VoIP Lines per Business (80% = 2; 20% = 3)

Churn: Take rate varies year to year according to parameters stated above. Estimate 5% of customer count every year represent new customers (requires service activation & connection fee).

*Note: Middle take rate scenario displayed for residential

Service Tiers and Pricing

Residential Service:	Minimum	Most Likely	Maximum
Data Services Rate			
Budget Service	\$45	\$50	\$55
1 GIG	\$70	\$80	\$90
10 GIG	\$120	\$130	\$140
Service Breakout			
Budget Service	5%		
1 GIG	75%	80%	90%
10 GIG	8%		
Connection Fee			
	\$90	\$100	\$110
Wifi Upgrade Fee			
	\$4.50	\$5	\$5.50
Wifi Upgrade Take Rate			
	40%	45%	50%
VoIP Price per Month			
	\$12.00	\$15.00	\$18.00
# of VoIP Lines per Customer			
	1.0		2.0

Business Service:	Minimum	Most Likely	Maximum
Data Services Rate			
Low Tier Service	\$80	\$90	\$100
1 GIG	\$120	\$130	\$140
10 GIG	\$160	\$170	\$180
Service Breakout			
Low Tier Service	5%		
1 GIG	75%	80%	90%
10 GIG	0%		
Connection Fee			
	\$100	\$150	\$200
Wifi Upgrade Fee			
	\$4.50	\$5	\$5.50
Wifi Upgrade Take Rate			
	40%	45%	50%
VoIP Price per Month			
	\$22.50	\$25.00	\$28.00
# of VoIP Lines per Customer			
	2.0		3.0

Loan Terms

Loan:	Minimum	Most Likely	Maximum
Interest Rate	2.38%	2.64%	3.25%

Most Likely rate is 30 year treasury rate
 Loan is paid off in 20 years
 Issuing cost is 1% of loan value

	Minimum	Most Likely	Maximum
Pole Attachment Fees	\$8.30	\$14.50	\$22.00
Boring Price per Foot	\$25.00	\$38.00	\$57.00
Rock Adder Price per Foot	\$10.00	\$12.00	\$15.00
Greenfield Structure	\$73,000		
Brownfield Make Ready	\$38,000	\$63,000	\$95,000
Brownfield/Greenfield EPI	\$214,000	\$252,000	\$290,000
Greenfield Make Ready	\$31,000	\$44,000	\$63,000

Removed

Infrastructure Context

The total number of addresses with in the Project area	11324			
Combined Take Rate	40%			
	Feet	Miles		
Total number of feet to be designed for the project	889,787	168.52		
	% OH	Aerial	Underground	% IIG
Percentage OH/UG and quantity of feet to be constructed OH/UG	62%	548,775	341,012	38%
	Value			
Number of Utility Poles	4713			
Average span distance between poles	116			
% Poles requiring Communication space make ready	0%			
% Poles requiring light power make ready	0%			
% Poles requiring change outs or heavy make ready in power space	0%			
Average span distance between vaults	172			
Percentage of rock on buried construction	45%			

Total residential and business customers reported to EIA

Removed all mainline; Kept drop installation

Minimum: 20%
 Most Likely: 40%
 Maximum: 75%

Construction completion rate

- Year 1 = 38%
- Year 2 = 44%
- Year 3 = 18%

Business Model

- The Broadband business has its own dedicated staff, fleet, phones, legal entity, operations/business systems etc.
- No pole attachments
- **Reduced staff, customer service & billing expenses by 80%**
- Marketing budget is assumed to be 3% of annual revenue

Competitor Broadband-Only Monthly Pricing



Competitor Pricing / Download Speed	60 Mbps	100	150	250	300	400	1000	2000
Verizon Fios		\$40			\$60		\$80	
Comcast Xfinity (1st year)	\$30~ 35		\$45	\$55		\$65	\$75	\$300
Comcast Xfinity (after 1st year)	\$75		\$90	\$95		\$100	\$105	\$300

*Note: For new customers only; does not include rates for current customers or promotional campaign discounts

Verizon Fios 1,000 Mbps price guaranteed for 3 years

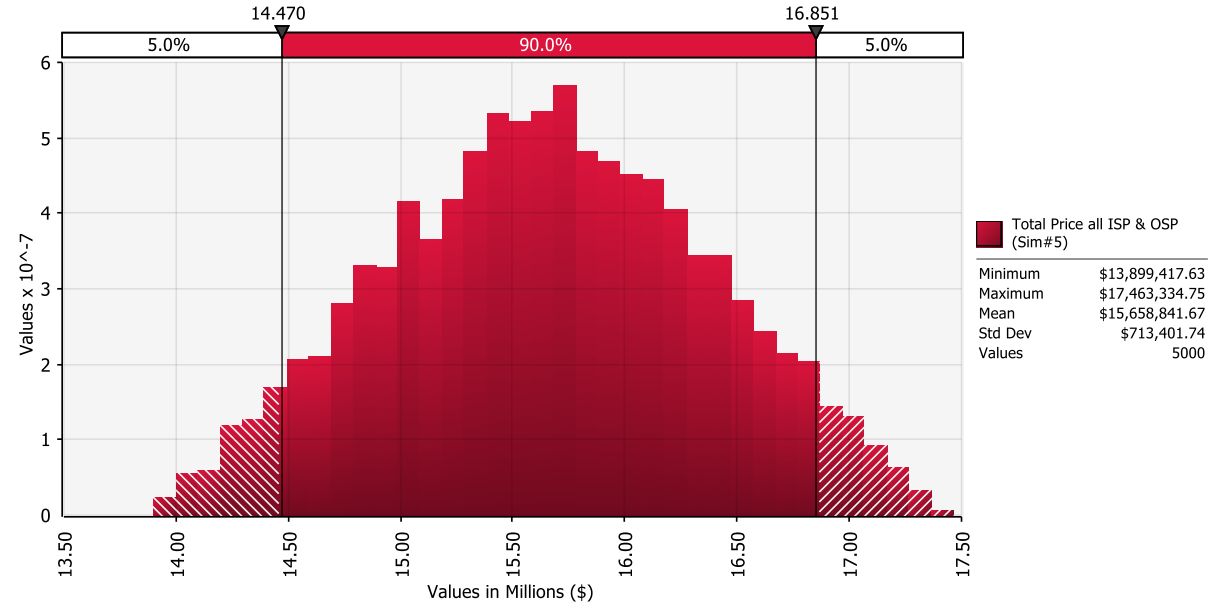
Comcast Xfinity 2,000 Mbps 2-year price lock possible

Construction Cost Overview

With Greenfield Data Center Scenario

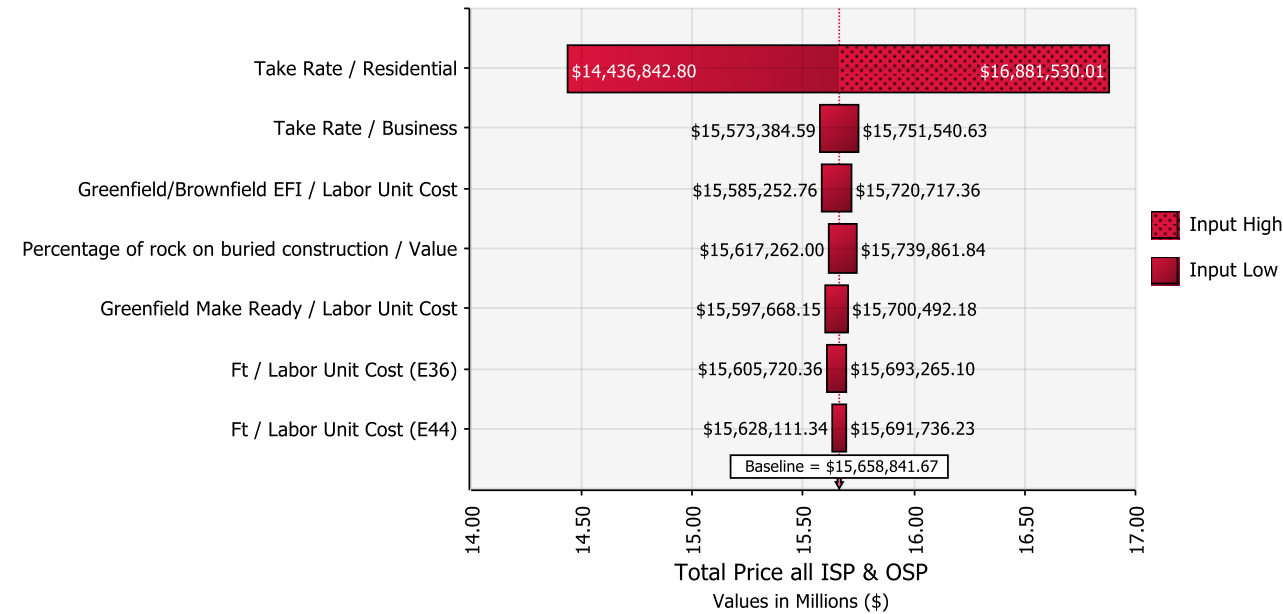


Total Price all ISP & OSP (Sim#5)



Total Price all ISP & OSP (Sim#5)

Inputs Ranked By Effect on Output Mean



- Based on the given assumptions, construction costs for inside and outside plant will be between:
 - \$14.5M and \$16.9M (90% confidence interval)
 - \$14.9M and \$16.4M (68% confidence interval)
- Most likely, costs will occur within the 68% CI, however due to cost uncertainty, we study the tornado graph for variation contribution

- Like that of the brownfield data center scenario, residential and business take rates are responsible for the majority of possible variation in construction costs, followed by data center EFI costs