

THE EDWARD J. COLLINS, JR.
CENTER FOR PUBLIC MANAGEMENT

MCCORMACK GRADUATE SCHOOL
OF POLICY AND GLOBAL STUDIES

University of Massachusetts
Boston

100 Morrissey Boulevard
Boston, MA 02125-3393

P: 617.287.4824

www.collinscenter.umb.edu

MUNICIPAL OPERATIONS AND ORGANIZATION REVIEW

Town of Washington, Massachusetts

Edward J. Collins, Jr. Center for Public Management

March 2022



Contents

- I. Executive Summary..... 2
- II. Project Overview..... 3
 - Project Purpose..... 3
 - Methods..... 3
 - Limitations 3
- III. Financial Analysis 4
- IV. Findings..... 7
 - Washington’s Strengths..... 7
 - Challenges..... 7
 - Day-to-Day Management..... 7
 - Opportunities for Shared Services 8
 - Communication..... 10
 - Information Technology..... 11
 - Recordkeeping 11
 - Long-term and Succession Planning 11
 - Other Operation and Management Challenges..... 12
- V. Recommendations..... 13
 - Hire a Town Administrator..... 13
 - Adopt Recommended Financial Policies..... 13
 - Improve Communications and Technology 13
 - Diversify Revenue Sources..... 13
 - Grants..... 13
 - Economic Development 14
 - Improve Recordkeeping Processes 14
 - Manage Day-to-Day Operations and Explore Opportunities to Share Services 14
 - Adopt Human Resources Best Practices 14
- Appendix A..... 15
 - History of Evolution to Professional Town Administration in Massachusetts..... 15
- Appendix B..... 17
 - Survey Data 17
- Appendix C..... 20
 - Interview Data..... 20

I. Executive Summary

While relatively large in land area, Washington has one of the smallest populations in Massachusetts. The Town provides a sufficient level of service to meet its community's needs, although its budget is severely constrained. As a result, Town leaders are challenged to identify additional revenue to implement municipal best practices and further improve Town operations and management.

The Collins Center was hired to review and analyze the Town of Washington's organization and operations. The Collins Center project team utilized document review, survey, and interview methods to understand Washington as a municipality. Throughout the course of the project, it was evident the Town has a truly dedicated group of employees and volunteers. The organizational culture is one of mutual support, respect, and cooperation.

Recently, the Town completed an ambitious broadband project, and, under the auspices of its three-member Select Board, has initiated other major improvements, including a revamped Town website and setting up a new shared server. The Town also has access to excellent guidance resources, such as the FY2020 audit completed by Roselli, Clark and Associates, the 2021 Financial Policy Manual from the Massachusetts Division of Local Services, and the recently adopted Town Plan. Additionally, Washington was an early adopter of the service-sharing best practice in Massachusetts, having cultivated long-term relationships with neighboring Towns to supplement municipal services.

Most of Washington's municipal operations occur on Monday evenings, when the Select Board meets and Town Hall is open to the public. Many of Washington's staff who work on Monday evenings hold similar, often full-time, positions in neighboring Towns. The only full-time employees are the highway superintendent and his two employees. The school bus driver works a 32.5-hour week, the administrative assistant to the Select Board and the transfer station operator work between 10-20 hours a week. Most other positions are paid a salary and generally work on Monday evenings.

While Washington operates on stable footing in many ways, the project team identified several areas of operation and management that present as challenges in their current form. These challenges include the absence of an administrator or other manager of day-to-day operations. There are also opportunities to share more services, maximize potential revenue sources, improve communications and technology, manage the vital service of recordkeeping, and meet town needs as discussed further in the Findings section of this report.

To address these challenges, the project team recommends that Washington hire a Town Administrator, whose roles and responsibilities would include assisting the Town with enacting the rest of the recommendations listed in this report.

The managerial issue faced by Washington is one that almost every city and town in Massachusetts has faced in the past 200 years. There was a time when Select Boards could suffice to manage a Town's general operations, but that time has passed. The increasing complexity of issues and challenges facing towns necessitates hiring a professional manager. A Town Administrator has the knowledge and skill to manage day-to-day operations, and, with fewer day-to-day management responsibilities, the Select Board will be able to focus attention on policy-setting and on developing a vision and strategy for the Town.

Washington needs a Town Administrator. The challenge will be locating funds to support the position. A grant might provide for a pilot for a shared position, although grant funding is likely to be limited to a fixed period. An operational override might be the only sustainable solution to support this necessary improvement.

II. Project Overview

Project Purpose

The Edward J. Collins, Jr. Center for Public Management (“the Center”) is a state agency dedicated to improving efficiency, effectiveness, governance, and accountability at all levels of government, with a particular focus on local and state government. The Center was hired to review and analyze the Town of Washington’s organization and operations. The core question examined was whether the Town government is organized and operates in a manner that works for its residents and staff.

The Center’s project team was interested in finding out which aspects of the Town government are working well, and which could use improvements.

The project team used document review, a survey, and one-on-one interview methods to understand the operations and organization of Washington. There were 40 survey respondents. Interviews were conducted via Zoom due to the ongoing pandemic.

Methods

The project team reviewed Washington documents including the new and old Town website, budgets, annual reports, Town newsletters, an audit report, Commonwealth of Massachusetts Division of Local Services (DLS) reports, the Town Plan, and contracts and agreements. Using Qualtrics software, the team surveyed Town staff and board/committee members, some of whom are also residents, on several organizational and operational topics. The survey data then informed the questions the project team asked stakeholders in one-on-one follow-up discussions. This report is a culmination of those methods.

Limitations

The project did not include a deliberate component to measure resident opinions. While some staff and all board members are residents, there was no comprehensive attempt to gauge Washington resident opinions regarding municipal operations and organization. This report was focused on the organization and operations of the Town government; citizen surveys were beyond the project scope. A review of the Town Plan provided some insight on residents’ concerns and priorities.

III. Financial Analysis

The project team reviewed the Town’s finances. In addition to conversations with current and former Finance Committee members, the project team reviewed the 2020 audit of municipal finances by Roselli, Clark and Associates, information available on the Town’s website, the 2019 Town Report, and information extracted from the DLS database accessed via their website. All data contained in the tables that follow was compiled from the DLS database.

The Town’s finances determine its ability to provide services at levels deemed appropriate by the Select Board and the eligible voters of the community. While Washington is far from its **levy ceiling**, it is quickly approaching its annual **levy limit**. In fact, Washington is within \$50,000 of its levy limit, leaving very little room to fund new initiatives without seeking a Proposition 2 ½ override vote.

Table A. Similarly Sized Towns in Berkshire County – Levy Limits, Capacities, and Ceilings

Municipality	Total New Growth Applied to Levy Limit	Debt Excluded on the DE-1	Maximum Levy Limit	Excess Levy Capacity	Levy Ceiling	Override Capacity
Alford	5,183	121,525	1,918,206	342,490	7,503,411	5,706,730
Florida	10,638	0	2,928,489	37	4,548,266	1,619,777
Hancock	7,856	0	2,546,482	1,573,264	8,110,149	5,563,667
Peru	31,626	0	2,323,614	414,901	2,604,684	281,070
Sandisfield	26,284	0	3,437,839	142,326	6,386,652	2,948,813
Savoy	13,499	0	1,614,823	506,863	1,923,543	308,720
Tyringham	28,815	0	1,645,948	183,456	5,440,818	3,794,870
Windsor	30,977	172,125	2,211,927	447,130	3,355,128	1,315,326
Washington	20,939	107,389	1,459,572	47,081	2,379,534	1,027,351

As shown in Table A, except for Florida, Washington is closest to reaching its **levy limit** with only \$47,081 in excess levy available. This means that Washington cannot assess much additional tax levy income without a Proposition 2 ½ override. Washington is one of three comparable communities that have passed a debt exclusion to fund capital needs. None of the communities have passed an operating override. In addition, like its peer group, very little new revenue is raised via new growth in taxable property (\$20,939).

Table B. below provides additional illustrative comparisons of the finances of communities in Berkshire County with population between 300 and 1,000.

Table B. Similarly Sized Berkshire County Towns - Sorted by Average Single Family Tax Bill

Municipality	2020 Population	FY 2022 Single Family Tax Bill	2019 DOR Income Per Capita	2020 EQV Per Capita	Land Area	Population Density	2018 Total Road Miles
Hancock	757	807	14,993	426,576	35.67	21	28.5
Florida	694	1,501	20,909	262,310	24.36	28	47.49
Savoy	645	2,585	29,941	117,658	35.85	18	55.13
Windsor	831	2,873	29,663	148,367	34.99	24	76
Sandisfield	989	3,654	19,338	242,504	51.81	19	92.05
Tyringham	427	3,748	22,311	502,962	18.65	23	27.32
Peru	814	3,904	23,886	123,564	25.92	31	38.68
Washington	494	4,080	32,996	173,902	37.98	13	51.51
Alford	486	4,193	33,770	575,897	11.5	42	17.6
<i>Average</i>	705	2,908	24,351	299,980	29.84	26	47.85

Table B shows that communities with smaller populations tend to have higher average residential tax bills. Note that all three of the towns with populations under 500 have some of the highest average residential tax bills. Washington’s population density is half of the average of all comparable communities, yet it has higher-than-average total miles of roadway. These roads are maintained by fewer households and therefore contribute to the higher-than-average tax bill. In fact, Washington’s average residential tax bill is the second highest of the communities shown. Only Alford, with a similarly small population size, has a higher average residential tax bill.

Washington’s revenue is constrained. The ability to generate additional revenue is based on three core factors:

- The annual 2.5% increase in the tax base allowed by Proposition 2 ½
- Annual state aid
- Local receipts generated from various sources, including permit fees, motor vehicle excise tax, etc.

Slight changes in state aid or local receipts can adversely impact balancing the Town’s budget. For example, within the last couple of years, the State’s payment in lieu of taxes (PILOT) to the Town was

cut by nearly 30 percent, or \$30,000. A revenue reduction of that amount is a significant loss for a community the size of Washington.

Table C provides a snapshot of Washington’s tax classification compared to the same communities of similar size in Berkshire County. Nearly 94 percent of Washington’s property tax is derived from residential properties. Unlike the Towns of Florida and Hancock, which have a significant commercial or industrial tax base, Washington’s budget is almost completely funded by residential taxes. The Town Plan prepared by the Berkshire Regional Planning Commission outlines the many factors that contribute to difficulties diversifying Washington’s tax base.

Table C. Similarly Sized Towns in Berkshire County – Percentage of Revenue from Residential Taxes

Municipality	Total Assessed Value	Residential % Total Value	CIP % of Total Value
Alford	300,136,431	97.69	2.31
Florida	181,930,658	35.61	64.39
Hancock	324,405,952	57.04	42.96
Peru	104,187,370	86.48	13.52
Sandisfield	255,466,098	85.69	14.31
Savoy	76,941,700	91.68	8.32
Tyringham	217,632,700	91.76	8.24
Washington	95,181,347	93.83	6.17
Windsor	134,205,108	87.29	12.71
<i>Average</i>	199,363,252	79	21

Washington is facing a structural deficit. While not unanimous, there was a strong consensus from interview participants that, for existing service levels to remain constant or improve, the Town will likely need an override of Proposition 2 ½. One-time revenue sources, such as the American Rescue Plan Act of 2021 (ARPA) funding, are not a fix for ongoing operating costs. Such funding sources provide a good source of revenue for capital purchases or building and vehicle repairs, but not for general operating purposes.

A proposition 2 ½ override is sure to face significant scrutiny and debate. However, a thorough analysis of Washington’s budgetary constraints shows that Washington has done an exemplary job of managing its small budget. There is no fat to trim and moving forward with plans to improve services will likely require an override.

IV. Findings

Washington's Strengths

As noted in the financial analysis, Washington has done an exemplary job of providing core services despite major budget constraints. Many study participants noted that, due to committed and qualified staff, elected officials, and volunteer board and committee members, Washington is able to meet the basic needs of the community. The project team found that, in general, Washington staff and board members report a good level of cooperation. The culture of Town Hall is reportedly one of civility.

Also worth noting, the dedication and skills of the elected Select Board, particularly the chair, was mentioned often both in the survey and the interviews. The current chair frequently spends close to 40 hours per week on matters facing Washington, from the smallest to the largest. The former chair of the Select Board was also recognized for his dedication to the Town.

Another significant strength is the Town's recent completion of a comprehensive broadband infrastructure project, ensuring robust internet access to all community members. This will impact the town for years to come – particularly in the areas of economic development and resident recruitment.

In addition, Washington has recently received a review of its financial policies from the State. The next step is for the Town to implement the recommendations contained in the report.

The Town also engaged the Berkshire Regional Planning Commission to provide a strategic comprehensive Town Plan. That Plan lays out steps to improve housing and economic development opportunities to grow the community's population and tax base.

Finally, the monthly newsletter, Washington Tracks, is an exceptional communication tool. Run by volunteers, the newsletter includes an update from the Select Board. The newsletter is sent to every mail recipient in Town, and it covers a variety of topics. It is a great model for small-town outreach and communication.

Challenges

Day-to-Day Management

Under its current organization, there is no chief administrator to manage the day-to-day operations of the Town. Some interview subjects indicated they thought operation management was the role of the Select Board, although, traditionally, elected board members weigh in as a board on policy and budgetary matters. No one Select Board member has the power or authority to make decisions on personnel or budgetary matters. Additionally, it is not reasonable to expect volunteer board members to manage day-to-day municipal operations. The level of detail and expertise required to run a modern-day municipality, even one the size of Washington, exceeds what should be expected of part-time laypeople

such as Select Board members. (See Appendix A: History of Evolution to Professional Town Administration in Massachusetts – Edward J. Collins, Jr. Center for Public Management).

The project team found many challenges that are best addressed by a professional Town Administrator, including improving the flow of information and communication among staff, setting standards for communications with the community, adopting fiscal and human resources policies, applying for and administering grants, overseeing the budget and spending, fostering team engagement and cohesion, and serving as a resource to answer questions from staff or troubleshoot. Ideally, an administrator would work as close to full time as possible, thus becoming the go-to resource for residents.

Select Board members are laypeople who are not necessarily equipped to run day-to-day operations, nor is it appropriate for them to do so. Washington has benefited from two successive Select Board chairs who committed to volunteering significant hours to fill gaps in the operations and management of the Town. That model is unsustainable and precarious – it relies on the chair having good intentions, excellent management skills, and plenty of spare time. In any community the pool of residents willing and able to take on that workload and do the work well is small. Given that the current workload of the chair is equivalent to a full-time job, it is unreasonable to expect municipal operations management from an essentially volunteer position.

The project team recognizes that, if Washington pursues the addition of an administrator position, there will need to be clarity about the division of functions between the administrator, the Select Board, and the administrative assistant. An administrator cannot and should not supplant clerical assistance or be expected to do clerical work.

Organizations are made stronger by sharing a mission and outlook. While Washington's employees may work during different hours, by sharing a centralizing position, there will be ways to ensure all staff are working towards the same goal.

While a significant majority of employees, elected officials, and board/committee members expressed strong support for the creation of a Town Administrator position, there were a few participants who did not support the idea. One had worked in another town that had a Town Administrator and did not find additional value to having the position. Another suggested increasing both the number of Select Board members and their salaries, so the additional members could share the duties of the current chair.

The current chair volunteers more than 30 hours per week, performing administrative tasks instead of setting policy. The project team maintains that the level of knowledge and workload required for an administrator is beyond the scope of a Select Board. Additionally, many participants noted that burn out is an issue, particularly for the volunteer and elected positions with significant workloads. Burn out is the result of the expectation that volunteer or minimally-compensated elected officials perform full time work.

Opportunities for Shared Services

Washington currently participates in many formal and informal shared-service arrangements. From its experiences with schools, library service, fire and ambulance services, the Town is no stranger to sharing

resources across Town lines. The project team explored additional domains in which sharing services could be appropriate. While a brief overview follows, the project team recommends considerable study prior to the pursuit of these additional shared services. It is worth noting that many survey and interview participants were amenable to sharing more services, if Washington were to receive its fair share of those services.

Building Department

The Building Department appears to be ripe for a discussion about sharing services with a neighboring Town, particularly one that already utilizes online permitting. It is the project team's understanding that the inspector already works for multiple towns, so it may be possible to formalize the arrangement.

Many study participants noted that both residents and Town staff have difficulty communicating with the Building Department. From not knowing how to contact the building inspector, to an opaque permitting process, to internal concerns about other departments not being briefed on building projects, there are ample opportunities for improvement. A formalized shared-services agreement that includes online permitting can help improve both communication and the efficiency of the permitting process.

Police Department

Passed in 2020, comprehensive police reform legislation is expected to have a significant impact on Massachusetts' smallest communities, particularly communities with part-time officers who will have the same training and certification requirements as full-time officers. While the police chief does not anticipate police reform effecting Washington, the actual impacts are not yet known, and the transition needs further research. It is important to keep the legislative changes in mind when probing the suitability of additional shared services. Additionally, Washington does not have a records management system for the Police Department, and its sole cruiser is near the end of its life cycle. Both issues could be explored during shared services discussions.

Public Works

Public works services usually make up a significant portion of municipal spending, and Washington is no exception. Many survey respondents noted the Highway Department needs more staffing and equipment. Respondents also noted the high quality of services provided by the Highway Department. Given that the costs of equipment and labor will only increase over time, exploring the feasibility of sharing public works services with a neighboring town is advisable.

Potential Revenue Sources

Grants

As previously noted, Washington is near its levy limit. State and Federal grant opportunities are available to incentivize local communities to adopt best practices and to enhance funding for critical projects. Grant applications, administration, and reporting take significant time and attention. As Washington currently operates, grant applications typically fall to the Select Board chair. The highway superintendent also devotes time to grant applications and filing for reimbursement, which limits the time he can spend on other critical duties.

Fees and Fines

Currently Washington has very few commercial properties. In addition to commercial real estate taxes, commercial ventures can contribute to the tax base through meal taxes, rooms taxes, and marijuana

excise taxes. The Town Plan outlines many paths to improving the Town's finances, all of which should be thoughtfully pursued.

Additionally, the project team recommends that Washington complete a review of the Town's fees and fines. For example, Washington generally does not charge the nominal fees most municipalities charge for Town services, such as accessing the transfer station or filing permits.¹

According to DLS, "a fee is an amount charged for a service to the individuals who use or benefit from it," and a fee may be imposed if it passes a three-prong test:

- It is for a particular service that benefits the person paying the fee
- The person has the choice to pay the fee (i.e., they can opt out of receiving the service and not pay the fee)
- The fee can be used to compensate the government for providing the service, but not to raise revenue.²

Under these criteria, there are opportunities to impose fees for services that currently do not charge fees (e.g., accessing the transfer station) and to review fees to ensure that the fee underwrites the cost of providing the service (e.g., building inspections and disposal of certain solid waste items).

It is worth noting that the Town Plan did explore charging a fee for using the transfer station and that residents opposed the proposed fee. Any review of fees must explore the tradeoffs. For example, as one interview subject stated, charging fees to access the transfer station would likely result in more dumping in conservation lands.

It is not clear if Washington has accepted MGL Chapter 40, Section 21D in its general bylaws (it is cited in the Zoning Bylaw). MGL Chapter 40, Section 21D gives local authorities the ability to assess non-criminal fines for violations of local regulations and bylaws. This potential source of revenue should be explored.

As noted previously, the draft Town Plan goes into detail on other means of improving economic development in the Town, which would help relieve some budgetary constraints. A few other ideas that arose during this project include continuing to lobby the State to reinstate its full former PILOT funding³, renting out Town facilities, and recruiting film production through the Massachusetts Film Office.

Communication

As it is currently organized, the Town government lacks official, centralized communication channels. While Washington Tracks is an exemplary newsletter, it does not take the place of having a means for the Town to communicate official messages to the community, particularly on matters that require immediate attention.

¹ The Wetlands Protection Act requires collecting a fee for Notice of Intent filings (310 CMR 10.03(7)), the first \$25 of which goes to the municipality. Municipalities have the option of charging additional fees.

² Division of Local Services, February 2016. [User Fees](#).

³ For more information on local municipalities' issues with the PILOT program, see ["The Impact of the State Owned Land PILOT and Solar Taxation Policies on Municipalities," Office of the State Auditor, Division of Local Mandates, December 2020.](#)

Survey and interview responses indicated there are issues with finding staff contact information and staff responding in a timely manner. These issues were noted by staff who struggle to communicate with colleagues as well. Most participants expressed that they eagerly anticipated the new website launch as one communication tool. Many also cited the need for standardized email addresses and the lack of full-time staff as hindering communications.

Information Technology

As noted above in the Strengths section, Washington's broadband project has great technological potential, particularly as an economic driver. The next steps are to improve the technology utilized by the Town government.

Many of the software applications used for municipal operations need improvement or upgrades. An online permitting system could address some of the issues concerning transparency and viewing an application's status in the queue. Development of a universal email domain for town employees would help with communication both internally and externally.

The Town would benefit from simplified processes as well. Interviews indicated that current processes are not the most time efficient. Scanning of invoices that can be paid when staff is in office was mentioned as a specific example. The lack of a shared storage drive is an impediment to information gathering and sharing. Ideally, all departments should be on the same server with access to critical files if they are needed outside of the Monday evenings that Town Hall is open. Additionally, standardized naming conventions and policies about read-only access, may alleviate some of the recordkeeping concerns that are discussed below.

Recordkeeping

It became apparent during the document review process that Washington is having difficulty fulfilling its duties for keeping official records for the Town. The General Bylaws could not be located, only one Annual Report (2019) was available on the Town's website, many survey participants noted that property records (building, septic, etc.) were missing or misfiled, and others noted that property record cards contain inaccuracies or are missing important information. These recordkeeping lapses reflect insufficient staffing levels (only one department, the Select Board, has clerical support); a lack of standard operating procedures and expectations for recordkeeping; and the lack of shared technology, including a shared server and electronic files. Additionally, official minutes were not posted in a timely manner.

Long-term and Succession Planning

Washington gets by with barebones staffing, but the lack of redundancy makes Washington more susceptible to derailment due to employee turnover. A town administrator could assist with planning for the long term and ensuring that each department develops standard operating procedures for regular activities. The Town would also benefit from a long-term plan for the backlog of records and materials.

An administrator would also be a useful presence on the ground, checking in with employees to understand their career goals and paths so they can plan for known retirements or career advancements.

Other Operation and Management Challenges

Human Resources

Washington's Human Resources functions are quite informal. Under current operations, the town treasurer is tasked with managing human resource matters on top of the treasurer duties, though the position lacks the official capacity to conduct evaluations or disciplinary procedures. The Select Board attempts to perform yearly evaluations for staff, though those evaluations occur in an open public meeting, which is suboptimal for all involved.

Further, the Roselli, Clark & Associates audit reports that timesheets were not consistently complete, requisite forms were missing, and there were no records that staff had received mandatory State ethics training. Some of these issues could result in fines or other liabilities.

Each position, whether part- or full-time, should have a clear job description that is updated regularly. Interview data indicates that some staff members are not clear on their roles and responsibilities.

Hours of Operation

Washington's government operations generally occur on Monday evenings when the Town Hall is open for Select Board meetings. The transfer station is open Saturdays from 8 am to 4 pm and Wednesday evenings from 5 pm to 8 pm. While some participants indicated they would like to see Town Hall open for more time, others hoped that an improved website could alleviate some of the need for more staff availability. The other factor impacting this desire is that many of part-time employees also hold full-time jobs that would prohibit them from working during the day.

However, Washington could consider developing a policy to ensure that residents' needs are met during weeks that begin with a Monday holiday, as most inquiries would be delayed for another week.

Clerical workflow

Washington has one clerical position, the administrative assistant to the Select Board. Other departments and boards are responsible for their own clerical work. This inconsistency in skills and training could be the basis for some insufficiencies in recordkeeping. An employee who excels at managing the top-level operations of a department may lack the organization, training, and skills of a clerical worker. Clarifying clerical responsibilities and standardizing expectations could improve recordkeeping. This lack of clerical support also contributes to the need for proven, intuitive software solutions.

V. Recommendations

Hire a Town Administrator

As a first step, the project team recommends that Washington hire a Town Administrator. The ideal situation would include a full-time administrator to serve only Washington, although that may not be possible given Washington's budget constraints. The next best option would be to share an Administrator position with one other municipality, preferably of similar size and circumstances. It is the project team's understanding that Washington will apply for a grant to explore hiring a shared Town Administrator across three towns. A tri-town sharing arrangement could work, but, even if it does not, the exploration will provide better information on how an Administrator position could serve Washington and whether a shared arrangement is feasible. Any step towards centralized administration and management would be more desirable than the current model, which lacks a management tier.

The following recommendations are best pursued under the direction and auspices of a Town Administrator, who would be able to prioritize the recommendations in an optimized sequence.

Adopt Recommended Financial Policies

The project team recommends adopting the financial policies recommended by DLS in the 2021 Financial Policy Manual to formalize sound budgetary and planning practices and to strengthen operations.

Improve Communications and Technology

To continue on the path toward improved municipal communication, the project team recommends setting policies and practices to facilitate communications. This includes standardized email addresses that are accessible on the new Town website; a shared, cloud-based network for staff use with filing and naming conventions; policies about turnaround time for replies and callbacks; posted hours of operation or access to staff; and standard, automatic email replies if staff members are unavailable to respond during times other than Monday evenings.

To the greatest extent possible, the Town should include in its capital planning an investment in software that can alleviate workflow roadblocks and assist employees in the absence of clerical support.

Diversify Revenue Sources

Grants

Given Washington's budgetary constraints, the project team recommends that Washington, particularly the new Town Administrator, seek and apply for as many State and Federal grants as are available and appropriate. Grant funding is critical for Washington to supplement its budget and achieve its goals. The project team recommends that grant administration be a core function of the Town Administrator.

Economic Development

The Town Administrator, along with the Capital and Town Planning Committee, should pursue all potential economic development opportunities, as laid out in the Town Plan. These efforts will diversify the revenue sources for the Town and provide opportunities for smart growth that will fit the community's needs and character.

Improve Recordkeeping Processes

Under the auspices of the Town Administrator, the Town should set policies and standard operating procedures for the proper and legal keeping of Town records, along with clarifying questions about roles and responsibilities, as well as simplified procedures as to where documents are stored and how they are managed.

Manage Day-to-Day Operations and Explore Opportunities to Share Services

The success of Washington's operations rests in the balance of good staff who generally work other full-time jobs. Making sure employees feel appreciated and supported will be a critical aspect of the Town Administrator's responsibilities. Simple best practices, such as holding staff meetings, offering one-on-one supervision, and understanding the professional goals of staff will build staff cohesion.

Additionally, a Town Administrator will be able to cultivate a network among neighboring Towns to understand their shared challenges and to find opportunities to share services and meet goals in a collaborative manner. This can include determining whether police reform will have an impact on the current operation of Washington's Police Department and whether it is feasible to share Highway Department services or equipment with neighboring communities.

Adopt Human Resources Best Practices

Human resources are a vital component of local government, as employment law at the State and Federal level continues to grow in complexity. The project team recommends including human resources as part of the Town Administrator's role. The Town Administrator would then be able to schedule and conduct regular evaluations, answer questions, ensure job descriptions are written and updated, and manage disciplinary proceedings, if necessary.

Appendix A.

History of Evolution to Professional Town Administration in Massachusetts

Edward J. Collins, Jr. Center for Public Management

For the first several centuries of the nearly 400-year history of the Massachusetts town form of government, boards of selectmen managed much of the executive function of a town without the assistance of a professional manager. Even portions not under the board's purview were typically handled by elected officials tasked with specific day-to-day responsibilities, including treasurers, collectors, assessors, clerks, and highway surveyors.

This basic system of governance served Massachusetts towns well, although the business of running towns continued to evolve and grow. Eventually, towns began to recognize the need for more consistent and skilled administration. Boards saw the need for professional management of some aspects of the town's business, so that selectmen could focus on and effectively complete their most important responsibilities, including policymaking and oversight. The Town of Norwood hired the first professional administrator in the early 1900s, and many other towns followed suit in the years that followed.

The increasing complexity of issues and challenges facing towns made adding a professional manager important for two reasons: (1) by selecting an individual trained in management and knowledgeable about municipal operations, a town could be sure that the executive had the knowledge, expertise, and skills to manage the day-to-day, and (2) with fewer day-to-day management responsibilities, the board of selectmen could focus more attention on policy-setting and on developing a vision and strategy for the town.

The Massachusetts Municipal Association (MMA) handbook helps to illustrate these points. The handbook defines the legal authority of boards, which are found in numerous State laws, Town by-laws, a charter (if one exists), and special acts (if any). The basic important legal powers include:

- "The power to prepare the town meeting warrant
- The power to make appointments to town boards and offices
- The power to employ professional administrator staff and town counsel
- The power to sign warrants for the payments of all town bills
- The authority to grant licenses and permits⁴

Importantly, the board is also responsible for the town's policy and strategy. With professional administrative staff, a board can delegate day-to-day management responsibilities and the handling of lower-level issues in order to focus on policy-setting and strategy development. The MMA handbook includes the following caveat:

⁴ Ouellette, John, editor. *Handbook for Massachusetts Selectmen*. Massachusetts Municipal Association, fourth edition, pg. 3

“Sometimes, boards of selectmen misunderstand this broad policy role. They may overstep their bounds by getting involved in the daily operations of a department; or fail to set sound written policies or do long-range planning; or be too quick to try to solve problems that should be handled by the administrator, another board or town employees. There is more than enough for selectmen to do without getting bogged down in matters that are better delegated to someone else. The board’s time is best spent by concentrating on making the whole of town government work⁵.”

⁵ Ibid., pg. 4

Appendix B.

Survey Data

A survey was circulated among a selection of staff and committee members. It was not intended to be comprehensive or representative of residents' opinions. However, good qualitative data was gathered from the survey. The most notable themes were the need for centralized day-to-day management, additional staffing or support for both police and public works, and improving communications and record retention.

Forty surveys were completed. Most respondents identified as board/committee members (21), 19 respondents indicated that they live in Town, and 16 respondents were staff/employees of the Town.

Most thought that Washington's services meet the community's needs. The greatest number of respondents thought that Town Hall should be open additional hours during the week, and most suggested adding weekday evening hours.

Many survey respondents indicated that they think residents are able to communicate with staff easily and that questions are answered in a timely manner. It should be noted that the survey was offered before the launch of the new website. Most respondents indicated that internal communications appear to be working. When asked about potential causes for communication issues, respondents attributed communication errors on a lack of technology, a lack of standard contact information for staff, the part-time nature of staffing, and the fact that some staff work at different hours than their colleagues, as well as the limited number of hours the Town Hall is opened. Some indicated that expectations for communication are not clear. Interpersonal conflict was not chosen as a reason for communication issues.

An overwhelming majority of respondents indicated that there are technological solutions for communication issues. The most frequently cited solution was an improved website with links to staff contact information. Other solutions suggested by respondents included an electronic sign board, emergency and notification text capability, utilizing social media, offering Town board or committee meetings in a virtual format, and online payment and permitting software. There were non-technical solutions offered as well, including designating a staff person who can route questions to the right person for answers and establishing standards for returning calls and providing answers in a timely manner.

As far as standard government operations, survey respondents generally ranked most of Washington's operations as being on par with other Massachusetts municipalities. Four respondents ranked the transfer station operations as being far above average. Operations that 10 or more respondents ranked as being somewhat above average were managing the Town's finances, sending out tax bills, certifying free cash, responding to public safety concerns, running the transfer station, maintaining public roads, buildings, and parks, and communicating with the public on Town-related issues. Four respondents said the town ranked far below average for the keeping of property files (including building and septic plans), and seven respondents found that the Town performs somewhat below average at that task. Other Town operations that respondents felt were somewhat below average were preparing for emergencies and preparing for climate change.

Respondents were asked to rate the level of service provided by departments/boards. The Select Board received the highest mean score of 4.50 out of 5. Other departments scoring above 4 stars were the Town Clerk, Highway, Transfer Station, Town Accountant, Treasurer, and Tax Collector. The lowest mean scores were for the Building Department (3.44 out of 5) and the administrative assistant for the Select Board (3.52 out of 5).

The survey also asked if departments were adequately staffed. Most respondents indicated that most departments seemed to be adequately staffed. No respondents thought that any department was overstaffed. The most striking results were that 12 respondents believed the administrative assistant to the Select Board should be permitted to work more hours per week and 11 respondents thought the Highway Department needed more staff.

The survey asked respondents where they turned for questions that would typically be directed to an administrative or managerial position, including personnel matters, policies, information technology, procurement, and budgeting. Generally, respondents cited asking the Select Board, or more specifically, the chair. Most respondents ranked the answers to their questions as both timely and accurate. Staff indicated they direct human-services-related questions to the Treasurer and found the answers accurate and timely.

Respondents were asked their thoughts about sharing services with other towns, and those who responded generally appeared to be in favor of sharing. A few respondents registered concerns due to individual town “personalities” or because the concept reportedly did not work in a nearby community. When asked if there were any additional local government services that could be shared, respondents offered:

- Town Administrator
- Police
- Treasurer
- Collector
- Assessor
- Transportation and help for seniors
- Vocational education transportation
- Recreation
- Senior social activities and services
- Preparing for climate change
- Ambulance
- Building inspectional services
- School bus driver
- Transfer station

When asked about improvements that the Town could address, respondents listed:

- Better grant applications
- Coordination between boards
- Managing employees

- General oversight
- Budget control
- Policing hours
- Roads need fixing
- Select Board/chair responsible for too much
- Coordination between the building inspector, Board of Health, and Conservation Commission
- More staff for Highway Department
- More hours of operation at the Town Hall
- Online permitting/more transparent permitting process
- Timely reporting of meeting minutes
- Outdated assessing data

Staff respondents were asked if they thought that their department was equipped to provide a good level of service, and most responded either “yes” or “sometimes.” When asked what would help the Town provide better service, about half indicated that things were well run as is. Others offered the following:

- Staff
- Higher budget
- More office hours
- Better communications and better responsiveness to cross-department issues

Appendix C.

Interview Data

The data collected in the interview stage provided an in-depth understanding of Washington's municipal operations. The key themes that emerged included:

- Select Board – Many interview subjects noted that Select Board generally, and the current chair in particular, are incredible resources for the Town, but ultimately unsustainable ones. The level of participation currently required of the members of the Select Board, is conducive to burnout. One interview subject indicated that it has been a trend over time, shifting more and more work to volunteers, which leads the volunteers to burning out quicker.
- Part time employees – Washington can hire qualified employees because of the part time nature of the work. Most are employed by other municipalities and work for Washington as additional supplemental income. It is likely the Town would have a hard time finding skilled help if it switched working hours to typical work week hours.
- Communication – Many noted challenges with communication among staff and with residents finding information and answers from staff in a timely manner. As it currently operates, almost all citizen requests and questions must be answered during the small window of time the Town Hall is officially open. Many noted that the new website could help alleviate some of the issues.
- Lack of central coordination and oversight – With the absence of a managerial or administrative position, Washington lacks clear processes and workflows across departments who may need to review or be briefed on another department's work. The Town would also benefit from standardized operating procedures to ensure smooth operation and communication, particularly given the part time nature of many employee's workloads.
- Document retention, filing, and organization – Washington appears to be missing information, including regulations, bylaws, and annual reports. There are backlogs of documents in hard copy file and little to no electronic files. There is no shared network as well, though that is a goal for the Town to eventually implement.
- Grant administration and application – Many noted that while Washington employees and volunteers work hard to get grants, the application and administration of grants is quite time consuming and beyond the scope that many can handle.
- Website – Many noted they are exciting or eagerly anticipating the launch and use of the new website both from an internal perspective and to better guide residents in finding answers to their questions.
- Supervision – Many interview subjects noted that there is no centralized authority to supervise staff as well as contractors and vendors. The lack of a staff meeting to share information and answer questions was noted as well.
- Human resources – Questions arose about performance reviews and disciplinary processes. Additionally, there is no one person tasked with being the resource for HR related questions.
- Building department – Questions about accessing the inspector, understanding where an application is in the review process, and other departments being properly briefed on building projects came up during multiple interviews.

- Technology – Washington does not have a shared server, though a project to set one up is in the works. Some departments do not have access to technological products that would make their workload more manageable, including online services. Also, standardized contact information for both staff and the public to access was lacking but is in process of improvement. Individual departments noted needs for instating or improving records management or other systems.
- Hours of operation – Many cited the minimal hours the Town Hall is open as posing a problem for resident access. Others noted if there were more hours, may lose current staff. One interpretation was that the issue isn't necessarily about being open more, but ensuring staff have some availability to the public beyond the window of time that the Town Hall is open.
- Lack of funding – The Town's financial struggles came up in almost every interview. If the sky was the limit, there are certainly all kinds of solutions for the Town, but the limited funding makes prioritizing and accomplishing goals difficult.