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Center for Resilient Metro-Regions

West Stockbridge Operational and Organizational Assessment

Monday, December 8, 2025



The [Center for Resilient Metro-Regions at the University of Massachusetts, Amherst](#) teamed with J Tab Consulting to help West Stockbridge consider options for improved organizational and operational governance, in both the short and the long term.

The analysis included:

- Analysis of town bylaws, regulations, and town meeting actions, home-rule state legislative actions, job descriptions, personnel manual, annual reports, and the town website.
- Key personnel interviews with
 - Andrew Krouss, Select Board Chair
 - Kathleen Keresey, Select Board
 - Marie Ryan, Town Administrator
 - Nicole Miller, Police Chief
 - Curt Wilton, DPW Director
 - Elaine Markham, Town Accountant
 - Ronni Barrett, Town Clerk
 - Bob Salerno, Finance Committee Chair
 - Dana Bixby, Planning Board Chair
 - David Evans , Conservation Commission Chair
 - C. Randolph Thunfors, Zoning Board of Appeals Chair
- Exploration of different approaches based on the consultant’s experience and peer communities
- Presenting findings to the Select Board

The **Center for Resilient Metro-Regions (CRM)** is embedded in Landscape Architecture and Regional Planning (LARP) at the **University of Massachusetts-Amherst**. CRM’s mission is to support communities, with work ranging from including organizational analysis, strategic planning, climate resilience, housing, equity, economic development, placemaking, and more. CRM’s projects and publications have been studied and adopted throughout the United States and the world. **Wayne Feiden, FAICP**, directs CRM and brings over four decades of management and planning experience.

As a subdivision of state government, municipal procurement from CRM is exempt from MGL Chapter 30B Procurement (Section 1 (3) and 1 (4)).

J Tab Consulting is owned by Jennifer Tabakin. Jennifer has over twenty-five years of experience in town and city management, public administration, urban planning, and construction management.

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Executive Summary and Approach

West Stockbridge has much to be proud of in their town government.

- Dedicated and friendly staff, elected, and appointed board members
- Reasonable property tax burden, especially for a community with a small amount of commercial and industrial taxpayers.

Property Tax Burdens for FY2025 (average single family home)

| West Stockbridge | Average 4 abutting Mass. towns | State-wide ranking |
|------------------|--------------------------------|---------------------------|
| \$6,460 | \$6,388 | 174 of 351 municipalities |

- An easily accessible regulatory structure with zoning, wetlands, and other bylaws, and subdivision and wetlands regulations, with the bylaws codified into a single code.

There are, of course, opportunities to make improvements. This report is designed to identify multiple opportunities for the town to consider, not to advocate for one particular solution.

Some of these items are easy to implement, “low hanging fruit,” and some are more complex and will take much longer. Most communities begin with the easy projects.

We identified six theme areas that would benefit from a town focus.

First, there are several easy opportunities to **improve accountability** and ensure that government is delivering on the town’s needs. The town has inherited a complex set of internal guidance documents, from job descriptions to policies to performance systems, which are not always consistent and do not always serve today’s governance needs.

Second, there are several options for how to improve the day-to-day **management and staff organization** to improve service delivery and ensure proper oversight. Every past decision on how to structure the management of the town’s daily operations had a compelling logic for its time, but those decisions are not necessarily the most efficient or productive for today’s needs. There are opportunities to rethink some aspects of the town’s organizational structure.

Third, West Stockbridge has made enormous strides at identifying what services should be provided at the town level and where some kind of shared or regional services are most appropriate. There are additional opportunities for **shared services**, several of which are already being examined.

Fourth, there are opportunities for increased **community visibility**, both to serve West Stockbridge residents and businesses and to make the town desirable for economic and tax based development the town is seeking to attract.

Fifth, prioritize investments which **reduce the town’s legal exposure** where small investments can reduce costs.

Finally, because the opportunities for good **governance** evolve, there are some long-term opportunities that might be worth considering.

West Stockbridge Legal Structure and Governance

With an aging residential population, an aging workforce, increased housing costs, new challenges in attracting skilled staff and dedicated board members, aging infrastructure and climate change, changes are coming to West Stockbridge. There are both opportunities and challenges from new technologies and from expectations that local government can solve these challenges with few new state and federal resources. Town government needs to evolve to meet these needs.

The basic structure of West Stockbridge is determined by:

- Dozens, if not hundreds of state statutes (e.g., MGL Chapter 39 Municipal Government, MGL Chapter 40 Powers and Duties of Cities and Towns, MGL Chapter 41 Officers and Employees of Cities, Towns, and Districts, and many other statutes).
- Home Rule Petitions filed by the Town and approved by the state legislature.
- Town Meeting warrant articles.
- Town Meeting adopted bylaws and board adopted regulations

West Stockbridge has been thoughtful about governance, sometimes responding to specific needs with home rule petitions to the state legislature. These efforts have been one-offs, identify a problem and find a solution. For example:

- Selectboard can appoint associate (alternate) members to Conservation Commission (Acts 2008 c.156).
- Request for Planning Board alternate member (2025 Town Meeting home rule petition).
- Town Clerk transitioning from elected to appointed position in 2028.
- Mobile home park rent control (Acts 2013, c. 53).

West Stockbridge does not have its own legislative charter spelling out and differences from the structures outlined in state statutes. The Home Rule Petitions approved by the state legislature, however, do allow the town to customize its structure to meet its own needs, including such things as authorization of alternative board members to serve in a member's absence.

At a minimum, we recommend two immediate initial steps:

- Determine whether the current organizational structure serves town needs, tweaking the structure by bylaw, rules changes, and Home Rule Petitions when necessary to create immediate improvements and not wait for long-term governance changes.
- Compile documentation (bylaws, home rule acts, town meeting actions such as accepting the Conservation Commission or creating the town administrator position) so it is all in one place and easily accessible on-line (as part of West Stockbridge's electronic regulatory code <https://ecode360.com/WE3861> or elsewhere on the town website). Bylaws are already in ecode but many of the other documents listed here are not. Compile all documents spelling out government structure for clarity. While not a Charter, this compilation will clarify the

rules governing administrative structures.

Town meeting authorized the creation of a Town Administrator, for example, but that warrant article is not readily available to the Town Clerk and it can only be found by searching all annual reports or identifying the year of that action. Making that warrant article available on the town’s website would clarify any limits to the Select Board’s authority to assign management tasks to the Town Administrator.

After those initial first two steps that provide immediate benefits, we recommend:

- Undertake a comprehensive community-engaged process to explore the long-term desired governance structures (e.g., what committees should be appointed, what appointed). This process could evolve into a Charter committee if necessary, but no assumption need be made that a Charter will be the outcome of the process.
- After that process, West Stockbridge would have a mandate for more comprehensive governance changes, if needed:
 - Adjust bylaws and rules of procedure supplemented by Legislative Home Rule petitions when necessary. If all of the governance documents are in one place, it effectively can serve the same function as a Charter, providing a clear view of how governance works in one place. If that approach does not provide the clarity desired
 - West Stockbridge can draft, subject to Town Meeting approval, a proposed Town Charter and request State Legislature approval. There are **no** actions recommended in this report that would **require** a charter change and it is not worth exploring the process until a governance structure process determines that a town charter is necessary. The benefit of adopting a formal charter, however, is that it allows the ultimate customization of government organizational structures in ways that are not otherwise allowed by state statutes.

Beyond the scope of this study longer term options worth considering for the future, include:

- Reduce board overhead. Because of declining community volunteers and increasing technical skills necessary to serve, explore whether the Zoning Board of Appeals and Planning Board should merge, which would require a home rule petition or charter change. This approach has worked for Devens and other communities have discussed this approach.
- Improve community participation. Explore moving the general town election (but not Town Meeting, which approves the budget) from the spring to November Election Days. While the benefits are greatest in even numbered years with national elections, lowering the cost of holding elections and holding them on dates with higher turnout, holding local elections on election day also creates consistency for voters. The majority of towns still hold their municipal elections in the spring, but several towns and most cities hold them in November.

| Election | # of voters | Registered | Turnout |
|-------------------------------|-------------|------------|--------------|
| Spring 2025 – Town election | 107 | 1,171 | 9.3% |
| Fall 2024 – National election | 941 | 1,173 | 80.2% |

Accountability and Governance (Short Term)

Several human resource and other changes can improve the clarity, consistency, and especially the accountability of West Stockbridge government. To ensure that the changes are a success, start with a structured or moderated staff workshop for feedback and then build consensus on policy changes with review, comments, and Select Board and Town Counsel approval. (See discussion of human resource responsibilities in Town Management and Staff Organization.)

- **Review the recently revised job descriptions** for consistency, for a look and feel that allows comparisons, and to clarify expectations, mission critical tasks, and responsibilities.
- **Keep the newly updated (2025) Fulltime Employee Benefits** up to date. Revise the **Policies and Procedures Manuals (draft 2023)** for Select Board approval. Potentially merge the two manuals into a single consolidated manual, adding any missing elements (e.g., updated time sheet reporting system) to inform staff, as a basis for performance evaluations and, if necessary, to support personnel actions.
- **Supplement the recently revised Town Administrator, Police Chief, and DPW Director contracts** by monetizing contract benefits to allow easier comparisons, e.g., time off vs salary level. Monetization creates a vehicle to compare the value of different benefits, allow flexibility to meet unique needs, ease contract negotiations, and inform stakeholders.
- **Create consistent supervision frameworks, lines of authority, performance plans, and performance evaluations** for all positions. Positions that report to both the Town Administrator and the Select Board can lack clarity of responsibilities, methods, and strategic direction. Create a framework for discussing strategic approaches, strategic direction, accountability, and communication with the Select Board and other performance indicators with the Town Administrator with a paper trail and improved communication.
- **Create a consistent framework and performance evaluation for the Select Board's supervision of the Town Administrator** and any other direct reports. Direct reports share their strategic direction and actions with the Select Board, but it is not necessarily an opportunity for process improvements.
- **Create process for requesting vacation and compensatory time leave**, providing maximum employee flexibility while ensuring department coverage.
- Incorporate an **on-line timekeeping module to the payroll system to, among other things, track leave time** (overtime, compensatory time, sick time, vacation time, personal time, and allowable unused leave time cash-outs) for accountability and disclosure. Ensure that direct supervisors are fully responsible for ensuring that employees work the hours they claim and take the leave within leave policies. Payroll reports should specify exceptions to usual hours, allowing the reviewing authority to review reports and not miss exceptions.
- **Ensure that the town addresses external audit management letters**, especially as relate to financial policies. Restore the past practice of the Town Administrator drafting a letter, for Select Board approval, responding to each recommendation. The Select Board can decide if they want the auditor to present their finding to the Board.

Town Management and Staff Organization

The Select Board could reexamine positions to address current management needs, understanding that with limited resources the need to minimize net increases in staffing FTEs:

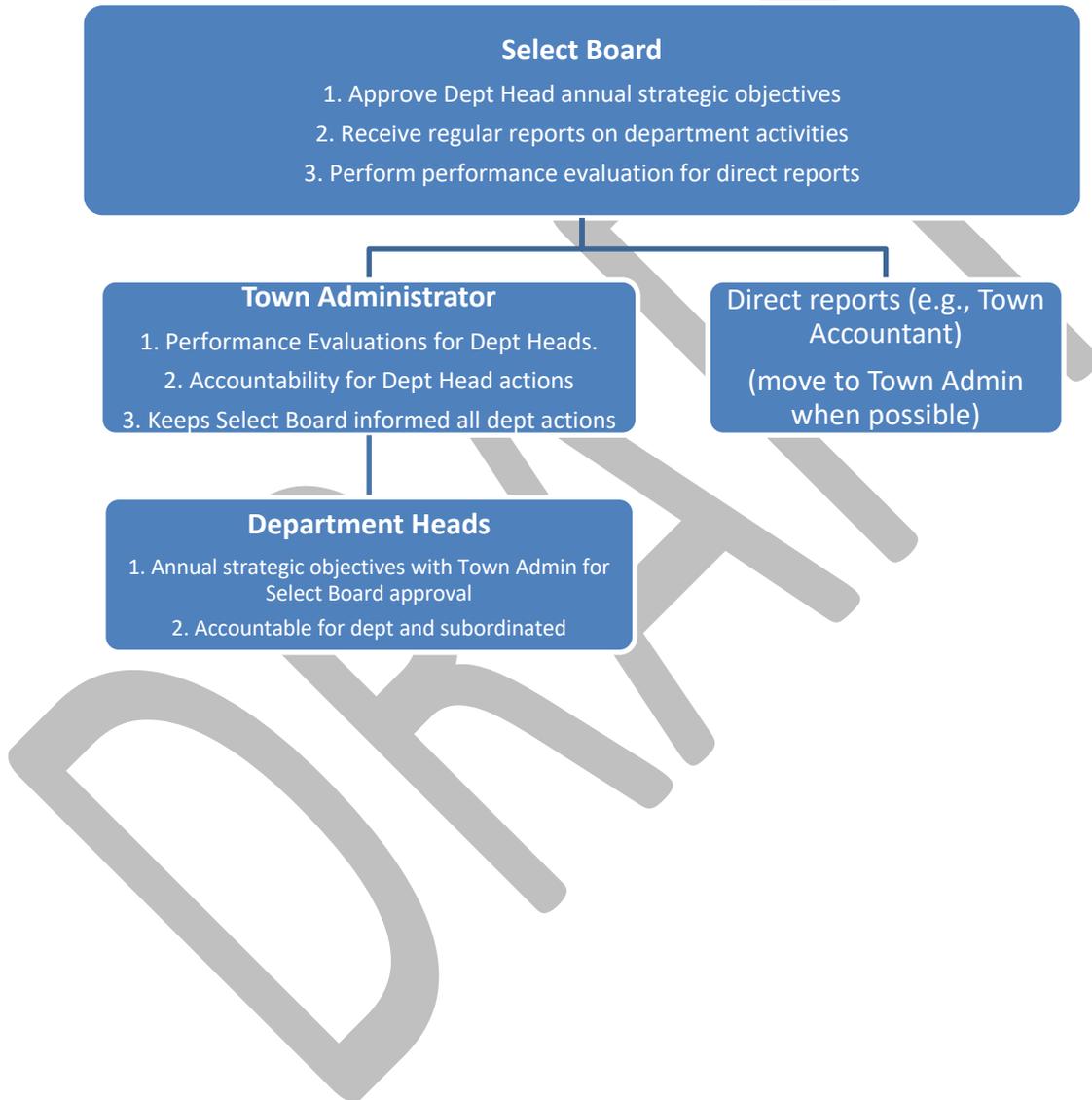
- Consider **expanding the Select Board membership** from three members to five members. This could make it harder to attract enough board members, but it would allow greater diversity of membership, more sharing of work responsibilities, and allow two select board members to meet without violating open meeting requirements.
- The management needs for a **Town Administrator** position have grown more complex requiring an improved delegation of duties. Especially in the absence of a separate Human Resources director, grant writer, and planner, current practices are limiting critical management opportunities.
- There is a need for an increased focus on **Human Resources**. That work is currently partially covered by the Town Administrator and partially unmet. Overlapping options include:
 - Hire a part time Human Resource director or specialist.
 - Assign Human Resources responsibilities to the **Town Administrator**, a common approach in many small towns.
 - Hire a consultant to assist with HR functions, especially 1) one-time, non-repeating functions outlined in Accountability and Governance (Short Term) and 2) assisting the Select Board in annual Town Administrator goal setting and performance reviews.
- The duties of **Assistant Town Clerk** being assigned to the Town Administrator is practical way to benefit from her particular skill set that the Town Administrator brings to the job, but the town might want to consider whether these duties compromise the Town Administrator's focus on mission critical work.
- With the planned 2028 change of **Town Clerk** from an elected to an appointed position, this is the time to think about how the position will evolve and if there are economies of scale merging the Town Clerk and Assistant Town Clerk positions or if it is better to have a part-time town clerk and a part-time administrative assistant. The Town Clerk's hours could be increased accordingly using the Assistant Town Clerk stipend.
- During the **Town Clerk transition** process, adopt clearer document management, retention and disclosure policies, integrate improved technology into the department operations to ease searches, backup, and public disclosure.
- With the planned 2026 retirement of the **Director of Public Works** this could be a time to think about whether that position should be refilled as it is now or whether the management duties should be separated from the field public works and contract supervision and oversight responsibilities. The Town Administrator serves as the Chief Procurement Officer but could delegate defined purchasing authority to DPW.
- **Grant writing** is currently split between the Town Administrator, the Director of Public Works and perhaps others. This could be a time to rationalize how those responsibilities should be distributed. Relatively few grants have been applied for or received.
- **Planner and Conservation** support for the Planning Board and the Conservation Commission is very limited. This could be the time to think about how provide that support.

- **Town Hall public hours can be adjusted and Public Assistance/Counter support responsibilities formalized** to better meet community needs. Currently, support is provided by whatever department happens to be open. This could be the time to formalize a schedule of whom is responsible for providing assistance when. That schedule could include having all departments offering open counter hours, potentially on Thursday evening to serve many residents and part-time residents as well as providing better coordination between departments. In return, there could be benefits of closing town hall to the public during some daytime hours, perhaps all day on Friday, allowing staff meetings, consistency for part-time staff, and other benefits.
- **Ask the Finance Committee and Town Accountant to document financial processes and quarterly reviews of town finances and trends** to support the Select Board and Finance Committee in predicting trends, capital improvement requests, addressing outside audit management letters, exploring tax title properties, and other items beyond the existing financial framework. In the long term, financial management should be coordinated by an expanded Town Manager position or a Finance Director position. Any system would involve routine consultation and information gathering with the Finance Committee Chair, Tax Collector, Town Treasurer, Town Accountant, Town Assessor, Town Administrator/Manager, and DPW Director.
- **Merge the Treasurer and Tax Collector positions**, a common approach in Massachusetts as a Finance Director, potentially with Town Accountant oversight while maintaining the Town Accountant’s direct reporting to the Select Board. This would require that Town Meeting votes to authorize its treasurer to act as collector (as allowed under MGL C. 41, Section 1).
- **Document all financial operating policies** defining separation of duties, setting financial objectives for annual planning, and defining summary financial reports and an annual recap on the revenue estimates vs actuals and planned vs actuals to the Finance Committee and the Select Board.
- **Evolve the Town Administrator into a Town Manager.** There is not a legal distinction between positions. Rather it is a continuum of responsibilities with Town Administrators administering tasks assigned by the Select Board while a Manager has more oversight and management responsibilities. West Stockbridge is in the middle, with the administrator having some supervisory responsibilities but the position is not defined in practice as a manager. This approach would require training, a clear performance plan and expectations, and increased salary once performance outcomes are achieved. This could allow a phased approach, increasing responsibilities with growing expertise.



- **Hire a Town Manager**, absorbing management duties and partial funding from retiring DPW Director position.
 - Town Administrator could provide support given the enlarged duties.
 - DPW Director position would be downgraded to the public works supervisor level.

- Empower public works supervisors, who are critical for long term DPW stability if the DPW director position ends.
 - Grant writing and overall management would be part of position.
 - With the right person, part-time planning functions could be part of the job.
 - Seasoned and skilled town managers command a significantly higher salary than town administrators, creating budget tradeoffs that have to be considered.
- **Clarify the supervision framework**



Shared Services (Medium Term)

West Stockbridge already benefits from sharing services with other municipalities and regional entities. Shared services currently include, for example:

- The existing **shared Fire Department Chief** with Stockbridge.
- The existing **contract for ambulance services** with Richmond during their service hours.
- The **Tri-Town Connector** transit, coordinated by Great Barrington with services in cooperation with Egremont, Monterey, Stockbridge and West Stockbridge.
- The Combined **Richmond/West Stockbridge Council on Aging**.
- Share the West Stockbridge **village water and sanitary sewer** maintenance and capital planning with Stockbridge.
- Implementation and expansion of the current plan for **shared Fire and EMS services** with Stockbridge.

Additional opportunities include:

- **Shared police services** or offer fee for services with Richmond and potentially Alford (neither of which has their own law enforcement and contracts out for those services)
- **Shared veterans agent** opportunities. West Stockbridge has its own veterans agent, using the same agent hired independently by multiple other towns (Egremont, Great Barrington, Mount Washington, New Marlborough, Otis, and Sandisfield). As long as this arrangement works there is no need to change it, but there could be some benefits of a shared agent if the individual model no longer worked.
- **Shared animal control officer** opportunities. Like its veterans agent, West Stockbridge has its own animal control officer who has been hired independently by multiple other towns (Richmond, Stockbridge). Again, if it's not broken don't fix it, but there could be some benefits of a shared agent if the individual model no longer worked.

Community Visibility and Information Sharing

- Improve the visibility of regulations (e.g., wetlands, ZBA rules of procedure, PB rules of procedure) by putting all into e-code (which is where bylaws have already been codified) or putting all regulations in PDFs so that they are accessible from same URL as e-code.
- Ensure regulations and procedures exist to let applicants know what is coming. For example, West Stockbridge has not received a MGL 40B Comprehensive Permit for some time if ever, but the Zoning Board of Appeals should still adopt rules of procedure so that they remain in control if an application is filed. (Existing models can be used so there is very little work necessary for such steps.)
- Improve document management systems, whether electronic or hard copies to ensure:
 - Sufficient and secure storage
 - Easy retrieval can be completed within statutory limits. With the current physical records and limited electronic records, some public records requests that other towns have received would be extremely difficult and time consuming.
 - Simpler record keeping (for example, Planning Board, Conservation Commission, and Zoning Board of Appeals files could be merged filed by address to minimize overlap)
 - Annual requests to the Massachusetts Supervisor of Public Records to destroy records that are no longer required by statute. This provides the opportunity, but not a requirement, that the town can destroy obsolete records and for space reasons.
 - Index Town Meeting warrants, Special Permits, and other permanent records so that they are available for searching other than by knowing the date of the Town Meeting (e.g., index by subject, location).
 - Scan records with OCR and enable search functions (e.g., Google search)
- Consider fiscal disclose tools to detail every expenditure (i.e., every check that is issued) outside of Town Meeting warrants, in addition to the existing summary reporting. Many larger communities (the Commonwealth and many cities) use Open Checkbook systems (e.g., <https://www.opencheck.net/>) to publish this information online in real time. This is, however, far less common and often unnecessary for small towns.
- Ensure that all departments (e.g., Town Clerk) can access state websites they need. Many Commonwealth sites require two-factor or multifactor authentication (2FA or MFA) for access, www.mass.gov/info-details/multifactor-authentication-mfa-for-mymassgov (Internet **plus** cell phone with text or authenticator app. Good security practice is never to rely on someone else's phone or computer for access.
- Select Board hold annual meeting to define their strategic goals and management and operational priorities that they and Town staff prioritize. This would complement existing goal setting by The Visioning Committee, the Planning Board (through the Master Plan) and the Finance Committee (for financial goals).

Legal Exposure

Reducing legal exposure, and saving potentially expensive Town Counsel and court time, is one of the most effective ways to reduce town costs:

- Minimize legal expenses using Town Counsel to review but not draft documents that do not require particular legal expertise (e.g., zoning, full time employee benefits, personnel manuals, and job descriptions).
- Appoint all board members as Special Municipal Employees (the default under the conflict of interest law is that they are considered municipal employees) allowing board members to act on behalf of others before boards other than the boards on which they serve.
- Reduce exposure to Americans with Disabilities Act claims by documenting personnel and public accessibility grievance policies and a priorities list and action plan. Although ADA Transition Plans are only required for communities with 50 or more employees, a plan can reduce legal challenges and increase likelihood of MOD ADA grants. For example, if there is a complaint about a facility not being accessible (e.g., a sidewalk ramp), showing town actionable priorities shows that West Stockbridge is making reasonable progress.
- Ensuing tracking of staff leave and cash-out of unused leave balances, in accordance with the Full Time Employee Benefits, discussed elsewhere, can reduce legal exposure to the town or unwarranted leave payouts.
- Ensure IT equipment ensures off-site and secure electronic storage of public records (cloud storage), instead of investing in more vulnerable on-site storage, except where privacy requirements do not legally allow such storage.
- Train board members (e.g., the Citizen Planner Training Collaborative provides low cost training, <https://masscptc.org/>) to ensure an understanding of proper procedures and reduce expensive legal challenges. (Such training would be mandated if Senate Bill 1432, currently pending before the General Court, passes.)

Conclusion and Action Plan

West Stockbridge has the opportunity to improve operations and organizational structures. This report provides a menu of options for the Select Board to consider.

Many of the options are easy to implement and, if the Select Board wants to pursue that approach, the Board and town staff can move forward with only minimal resources and no Town Meeting approval. Moving forward on these items allows rapid progress and can build momentum for any more complex actions.

For some options there are multiple paths forward that will require more consideration, study, and consensus building. Some options offered may not fit with West Stockbridge's successful consensus culture and should be discarded after careful consideration (for example, perhaps the open checkbook option is not needed at this time).

Some of the options will require additional time and internal or external support. Some of the work can be done by Select Board, the Town Administrator, other town staff, and town volunteers. Some, because of time constraints and/or the need for additional expertise could be done by some combination of consultants (e.g., Center for Resilient Metro-Regions and other consultants), Berkshire Regional Planning Commission assistance, and Human Resources director (if the position was created in the long term) working with the Select Board and staff.

Action Plan

| Legal Structure and Governance | Timeline | Responsible Party |
|---|---------------------|--|
| Assess current organizational structure | <6 months | Select Board in consideration of this report |
| Compile documentation in one place | <6 months | Town Clerk and Town Administrator |
| Longer-term community engaged process | 2 year ² | Appoint ad-hoc committee |
| Bylaw, rules, and home rule petition or Draft charter | 1-3 years | Select Board and ad-hoc committee |
| Consider ZBA/Planning Board merger | +3 years | ZBA, Planning Board, ad-hoc committee |
| Change municipal election dates | +3 years | Ad-hoc committee |
| Consultant roles: <i>The decision making and convening needs to be town-driven. The Center for Resilient Metro-Regions, Town Counsel, and/or other consultants can assist at key points.</i> | | |

| Accountability and Governance | Timeline | Responsible Party |
|--|-----------|------------------------------------|
| Review job descriptions | <6 months | Town Administrator with consultant |
| Merge/expand benefits and polices | <6 months | Town Administrator with consultant |
| Monetize contract benefits | <1 year | Town Administrator with consultant |
| Create consistent supervision framework | <1 year | Consultant |
| Leave request and timekeeping module | <1 year | Town Administrator |
| Respond to audit management letters | <1 year | Town Administrator and Accountant |
| Consultant roles: <i>The majority of work should be done by the Town Administrator, consistent with their current responsibilities. The Center for Resilient Metro-Regions, Town Counsel, and/or other consultants can assist at key points and especially are needed to formalize the Town Administrator review framework.</i> | | |

| Town Management & Staff Organization | Timeline | Responsible Party |
|--|----------|---|
| Expand the Select Board to five members | <3 years | Select Board and Town Meeting |
| Update the Town Administrator job description and responsibilities | <1 year | Select Board |
| Consider how to improve human resources focus, in-house or with consultants | <2 years | Town Administrator with consultant or a new HR position |
| Plan for the transition from elected to appointed town clerk | <3 years | Town Administrator |
| Adopt and implement improved document management and retrieval systems | <3 years | IT director/consultant, Town Clerk, and Assistant Town Clerk |
| Plan for duties for new DPW director and appropriate position level | <1 year | DPW director, Town Administrator, Select Board |
| Identify best role for grant writing (Town Administrator, consultant, etc.) | <2 years | Select Board |
| Planning Board, ZBA, and Conservation Commission support | <3 years | Select Board |
| Town Hall public hours and public assistance | <2 years | Town Administrator with staff consensus IF coverage is provided |
| Implement formal quarterly finance reviews | <3 years | Finance Committee |
| Document all financial operating policies | <2 years | Town Administrator with Collector, Treasurer, Assessor, Accountant, and Finance Committee |
| Assign Tax Collector role to Treasurer | <2 years | Select Board, Town Administrator, Town Meeting |
| Evolve Town Administrator into a Town Manager | <3 years | Select Board, Town Administrator |
| Hire a Town Manager | <3 years | Select Board |
| Clarify the supervision framework | <2 years | Select Board and Town Administrator |
| Consultant roles: <i>The responsible party should be in-house, but for most of this work the Center for Resilient Metro-Regions, and/or other consultants can assist or lead.</i> | | |

| Shared Services | Timeline | Responsible Party |
|--|----------|--|
| Identify and expand shared services opportunities | <3 years | Select Board with Town Administrator and Finance Committee |
| Consultant roles: <i>This is regional conversation with subject matter expert consultants as appropriate.</i> | | |

| Community Visibility and Information | Timeline | Responsible Party |
|---|----------|--|
| Add regulations to bylaws in e-code | <1 year | Town Clerk |
| Expand board rules of procedures | <2 years | ZBA, Planning Board, Conservation Commission |
| Improve document indexing, retrieval, and conversation to electronic records. | <3 years | Town Clerk, Town Administrator, IT director/consultant |
| Consider fiscal disclosure tools | <5 years | Town Administrator |
| Enable secure access to websites requiring multifactor authentication | <1 year | Town Administrator |
| Hold annual Select Board goal setting | <2 years | Select Board |

Consultant roles: The decision making and convening needs to be town-driven. The Center for Resilient Metro-Regions, Town Counsel, and/or other consultants can assist at key points.

| Legal Exposure | Timeline | Responsible Party |
|---|----------|--|
| Explore alternatives to Town Counsel drafting documents | <1 year | Town Administrator |
| Appoint all board members as Special Municipal Employees | < 1 year | Select Board |
| Develop ADA Transition Plan in a streamlined version | <3 years | Town Administrator (possibly with MOD ADA grant) |
| Implement staff leave and leave balances system | <1 year | Town Administrator |
| Ensure off-site and secure electronic storage of public records | <3 years | Town Clerk, Town Administrator, and IT Director/consultant |
| Train board members | <2 years | Planning Board, ZBA, Conservation Commission |

Consultant roles: The Center for Resilient Metro-Regions, Town Counsel, and/or other consultants can assist in all of these tasks.

Appendix A. Background Materials

Roles and Responsibilities: Town Administrator and Select Board

While the Select Board holds the executive authority under Massachusetts General Law, the Town Administrator plays a critical role in administering day-to-day government functions and ensuring operational continuity across departments.

The Town Administrator is the chief administrative officer of the town, managing day-to-day operations. This position holds substantial responsibility for coordinating, implementing, and managing municipal government operations.

Key responsibilities include:

- Supervising department heads and employees who do not report directly to the Select Board.
- Serving as the primary point of administrative contact for residents, businesses, and state/federal agencies.
- Ensuring all departments comply with applicable state laws, regulations, town bylaws, and Select Board policies.
- Overseeing interdepartmental communication and resolving operational issues that arise among town departments.
- Coordinating the preparation and execution of the annual operating and capital budgets.
- Serving as Chief Procurement Officer, managing contracts, purchasing, and public bidding processes.
- Administering employee benefits, insurance programs, and facilitating human resource functions.
- Preparing Select Board meeting agendas, coordinating departmental presentations, and implementing decisions made by the Board.

The Select Board serves as the executive authority of the Town and oversees the Town Administrator. While they do not manage daily operations directly, they are responsible for overseeing the performance and effectiveness of the Town Administrator and their direct reports.

- Setting annual goals and expectations for the Town Administrator and direct reports.
- Evaluating the Town Administrator's performance through formal reviews.
- Providing policy direction and strategic priorities for implementation across departments.
- Ensuring that the Town Administrator complies with the Board's decisions and legal mandates.
- Approving the hiring and termination of staff upon recommendation of the Town Administrator.
- Reviewing and approving budgets, contracts, and policy proposals developed by the Administrator.

How the Select Board Sets Policy for the Town Administrator

The Select Board sets policy and provides operational direction to the Town Administrator

through the following mechanisms:

- Adoption of written policies or directives recorded in Select Board meeting minutes.
- Annual goal-setting sessions for a shared work plan for the Town Administrator.
- Inclusion of specific budget priorities or performance objectives within the Town's budget process.
- Issuance of memos, resolutions, or formal votes to guide the implementation of programs or personnel changes.
- Weekly or biweekly meetings between the Town Administrator and the Chair of the Select Board.
- Ongoing discussions during Select Board meetings or workshops where expectations and concerns are raised.
- Email communication and direct feedback on specific issues or departmental matters.

How the Select Board Supervises Direct Reporting Departments

Police, Fire Department, Town Clerk, Treasurer, and Tax Collector—do not report directly to the Town Administrator. Instead, they are accountable to the Select Board or, in the case of elected officials, to the voters. The Select Board's supervisory responsibilities over these departments require a different approach that respects statutory independence while ensuring accountability and performance.

- Conducting regular check-ins with department heads to discuss performance, needs, and challenges.
- Requesting written or verbal reports during Select Board meetings to stay informed about departmental activities.
- Setting clear expectations and shared goals through formal directives, especially for appointed department heads.
- Reviewing departmental budgets and requiring justification for staffing, capital requests, or significant policy changes.
- Facilitating communication between departments and the Town Administrator to promote consistency in service delivery.
- Providing support and guidance while respecting the statutory independence of elected officials.
- Initiating performance evaluations, disciplinary actions, or leadership changes for appointed department heads, as necessary.

Statutory Independence

Statutory independence refers to the legal autonomy granted to certain town officials or departments by Massachusetts General Law. These positions are established by statute and operate independently of direct supervision by the Select Board or Town Administrator. Their duties and authority are defined by state law.

- Town Clerk – Oversees elections, public records, and vital statistics under MGL Ch. 41 and Ch. 51.

- Treasurer – Manages town funds and bonding activities under MGL Ch. 41 §35.
- Tax Collector – Responsible for collecting taxes under MGL Ch. 60.
- Board of Health – Operates under MGL Ch. 111 with broad regulatory authority.
- Fire Chief (in a strong chief system) – Exercises independent command authority under MGL Ch. 48 §42 or §42A.

While the Select Board may provide budget oversight and collaborate on town-wide goals, they cannot interfere with the operational or legal responsibilities of these offices. Communication, collaboration, and mutual respect are key to ensuring alignment while maintaining legal boundaries.

Select Board Responsibilities for Appointed Committees

The Select Board is responsible for appointing members to numerous standing and ad hoc committees, commissions, and advisory boards. While most committees operate with a degree of autonomy, the Select Board plays a critical oversight role to ensure that these bodies align with the town's overall governance objectives and operate effectively.

- Establishing or confirming the mission and scope of each appointed committee.
- Appointing qualified, representative, and engaged individuals to serve on committees, with attention to diversity of perspectives and experience.
- Issuing formal charges or objectives to ad hoc committees and periodically reviewing their progress.
- Ensuring that committees operate within the bounds of Open Meeting Law, Conflict of Interest Law, and applicable town policies.
- Providing training or onboarding resources for new committee members, especially regarding public records, ethical conduct, and roles/responsibilities.
- Encouraging regular communication between committees and the Select Board, including requesting annual or project-based updates.
- Reviewing committee performance and structure periodically to determine whether changes in membership, scope, or existence are warranted.
- Ensuring timely disclosure of public information and accessibility of committee meetings and minutes.