

Belmont Financial Organization Structure Review

Public Presentation on Process & Key Recommendations

August 3, 2022

EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT

JOHN W. McCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES
UNIVERSITY OF MASSACHUSETTS BOSTON

Overview of the Collins Center for Public Management

Mission Statement

The Collins Center is dedicated to improving the efficiency, effectiveness, governance, responsiveness, and accountability of public sector organizations, with a particular focus on local and state governments.

Our Expertise

- Cross-disciplinary team of consultants with decades of experience working in municipal, regional, and state governments
- Consult on all aspects of public governance and management
- The Collins Center brings expertise in:
 - Data, management, and financial analysis
 - Organizational structures and facilitation of change
 - Sensitivity to local history and control and issues of representation and equity

Overview of the Collins Center for Public Management

Steps Taken in the Process

- Met with the Town Administrator to review stated objectives;
- Gathered data, including:
 - Town bylaws;
 - Capital plans and requests;
 - Collective bargaining agreements;
 - MA Department of Revenue Division of Local Services (DLS) 2011 Report;
 - Local election results;
 - Financial management statements;
 - Prior fiscal year budgets;
 - OPEB actuarial reviews;
 - Recent classification/compensation plan;
 - Relevant personnel job descriptions;
 - Current municipal organization chart;
 - Conducted interviews with personnel and elected/appointed officials;
 - Developed a list of comparable peer municipalities; and
 - Compared municipal practices to best practices (MGFPA and MMA).

Interview List

<u>Title</u>	<u>Individual</u>	<u>Collins Center Associate(s)</u>	<u>Confirmed Date</u>	<u>Interview Status</u>
Town Administrator	Patrice Garvin	Stephen	Confirmed	Complete
Town Treasurer/Collector	Floyd Carman	Stephen & Joanne	Monday, November 15 @ 12:20pm	Complete
Assistant Treasurer/Collector	Michael Trainor	Joanne	Monday, November 15 @ 12:40pm	Complete
Town Accountant	Glen Castro	Stephen & Joanne	Monday, November 15 @ 12pm	Complete
Assistant Town Accountant	Donna Tuccinardi	Joanne	Monday, November 15 @ 1pm	Complete
School Superintendent	John Phelan	David & Joanne	Tuesday, December 7 @ 12pm	Complete
School Financial Director	Tony DiCologero	David & Joanne	Tuesday, December 7 @ 1pm	Complete
Chair, Board of Assessors	Bob Reardon	Joanne	DECLINED	Declined
Chair, Select Board	Adam Dash	Stephen, David, & Joanne	Thursday, January 20 @ 11:30am	Complete
Member, Select Board	Roy Epstein	Stephen, David, & Joanne	Thursday, January 27 @ 1pm	Complete
Member, Select Board	Mark Paolillo	Stephen, David, & Joanne	Monday, January 31 @ 12pm	Complete
Chair, Capital Budget Committee	Anne Marie Mahoney	Stephen & David	Thursday, December 2 @ 12pm	Complete
Chair, Warrant Committee	Geoff Lubien	Stephen & David	Thursday, December 2 @ 1pm	Complete
Town Moderator	Mike Widmer	Stephen & David	Thursday, December 2 @ 2pm	Complete
Assessing Administrator	Daniel Dargon	Joanne	Monday, January 10 @ 3pm	Complete
Chair, School Committee	Amy Checkoway	David	Wednesday, January 19 @ 12pm	Complete
Chair, Long Term Capital Committee	Jenny Fallon	Stephen & David	Thursday, January 6 @ 2pm	Complete
Chair, Financial Task Force	Tom Caputo	Stephen & David	Tuesday, February 1 @ 8am	Complete
President, CFRB	Dawn MacKerron	Team	Thursday, February 22 @ 1:30pm	Complete

Key Recommendations

- Follow DLS guidelines and established best practices during the annual budget process, which includes reaching consensus on all financial forecasts and the development of an annual financial cycle which identifies individual and board/committee responsibilities and a clear timeline for major aspects of the process;
- Create an organization that is more centralized through Select Board policy, bylaws, special legislation, and Massachusetts General Law; and
- Clearly define and strengthen the powers and duties of the Select Board and Town Administrator through Select Board policy, bylaws, and/or special legislation.



Q & A

Thank you!

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