

## SCIG REPORT – FEBRUARY 2021

### INTRODUCTION

The Town of Belmont has faced persistent budget difficulties for several decades. Over this time several efforts have studied how the town could save money and/or increase revenues, along with other budget considerations. The Structural Change Impact Group (SCIG) is the latest effort to systematically summarize past studies, gather new ideas, perform an evaluation of these options, and present the findings to the Select Board and residents.

Specifically, the Structural Change Impact Group (SCIG) has been charged by the Town of Belmont's Select Board to:

*...investigate and recommend a list of key structural changes for the Town of Belmont, which may impact its economic condition, the structural deficit challenges the Town faces, [and] on the Town[s] operational approach to delivering services to the community.*

The committee is composed of representatives from several existing town committees and at-large residents of Belmont. SCIG was asked to complete its work in approximately 12 months with the final report expected at the end of 2021.

The SCIG has met four times since December 2020. The focus of the group during these meetings has been two-fold: 1) to gather prior efforts and reports that could be summarize into this report, and 2) to outline a work plan for the remainder of the group's efforts.

### SUMMARIZING PRIOR EFFORTS AND PROGRESS

The Structural Change Impact Group reviewed several different documents in its first month. These documents got back to 2010 when Belmont created a list of possible structural and financial decisions that could improve its fiscal situation.

The following sources of information have been collected as initial input into the SCIG process:

- "Summary of Suggestions for Structural Change in Belmont" (Excel document dated March 9, 2010)
- "Final Report of the Financial Task Force" (PDF document dated January 30, 2015; this is now referred to as "Financial Task Force I")
- "Structural Impact - FTF I Recommendations" (Excel document associated with 2015 report)
- "Structural Reforms List" (Word document presented at the Select Board meeting on July 27, 2020)

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The SCIG reviewed all of these documents and summarized them into a new Excel matrix of options for further review over the coming months. This new matrix is included in Appendix A.

For this report, the SCIG conducted an initial pass through the matrix to update the status of the options. The town has made progress on the 2010 and 2015 recommendations so some of the compiled options might have already completed, in progress, or ruled out. Options that have been ruled out in the past will be considered again and included in the matrix produced by the SCIG.

The appendix contains the full matrix, but some important highlights of structural change decisions are:

- Re-designed the Town's health insurance plans
- Extended the pension full-funding due date
- Combined the Assistant Town Administrator and Recreation Director positions
- Withdrew from the Minuteman Regional School District
- Increased tax relief for seniors
  - decreased interest rate on tax deferrals
  - increased cap on tax work-off credits
- Created a sidewalk policy and adopted a Complete Streets policy
- Switched trash pickup to single stream recycling
- Adopted zoning overlays for south pleasant street to spur development
- Supported the process for development at McLean
- Required enterprise funds to pay their share of pension and OPEB

### SCIG WORK PLAN FOR 2021

The Structural Change Impact Group has laid out a work plan for the remainder of the year. The work plan culminates in a final report summarizing structural change options that could improve either the fiscal situation, delivery of town services, or both.

Importantly, the SCIG will plans several public forums to gathering new ideas and to receive other feedback and input. The first of these forums is scheduled for March 4th, 2021. We expect to have two additional public meetings over the course of 2021 as the SCIG would like to hear from as many voices as possible.

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## Structural Change Impact Group Workplan - last updated 1/24/21

What	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Deadline
Review group's charge, goals, and organization														
Develop overall work plan														
Review relevant documents (FTF1 report, recent structural actions since 2015 override, Town Administrator's list of reforms)														
Compile past recommendations, completed reforms, and efforts underway in one document														
Produce preliminary report that summarizes relevant context, prior work, trends, decisions, ongoing efforts, and next steps including some potential options to explore														1/31/2021 - likely early Feb based on late start
Discuss report with Select Board														
Set up website and electronic input form (on town site)														
Develop rubric for examining and evaluating different opportunities														
Develop plan for public forum #1														
Hold public forums to gather input														
Prioritize initial list of additional potential revenue expansion and cost mitigation opportunities to explore														
Encourage community members to share input via meetings, online form, survey, and any other modes														
Investigate options and identify new ideas via research (including looking at other towns) and consultation with key stakeholders (including town depts and committees)														
Evaluate options based on more detailed information gathered using rubric														
Compile analyses and discuss takeaways and findings														
Produce/present final report that includes: 1) review and summary of all the revenue and expense options proposed; 2) analysis of prioritized list of additional revenue expansion and cost mitigation opportunities; 3) summary of feedback and additional opportunities identified through meetings with public and departments; and 4) recommendations to the Select Board and School Committee regarding revenue expansion and cost mitigation opportunities to implement														12/31/21

**Key:**  
 Green = organizational/administrative tasks  
 Gold = reports/deliverables  
 Blue = external communications/input  
 Peach = analysis/information gathering

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The SCIG has discussed the importance of also receiving input from town employees, other town governments, and to do independent research as necessary. We expect to form working groups similar to other town committees so that the committee can progress efficiently. If these committees are formed, meeting will be posted via the Town Clerk's office.

All the input will be gathered into the existing matrix of options (see Appendix A).

The matrix provides a structure for systematically considering each option. The SCIG will review the options and rank them according the following criteria:

<b>Scoring Matrix</b>			
<b>Impact</b>		<b>Financial</b>	<b>Operational Delivery</b>
0	no impact or negative impact	Costs money	worse quality
1	No to little impact	<\$25k	Meager improvement to efficiency or quality
2	Some impact	\$25k-\$100k	Moderate improvement to efficiency or quality
4	Medium impact	\$100k-\$500k	Significant improvement to efficiency or quality
5	Big impact	>\$500k	quality
<b>Ease of implementation</b>			
0	Impossible	laws	
1	Very difficult	has complicated prerequisites; requires	
2	Difficult	requires TMM 2/3 vote OR requires TMM	
3	Medium	requirements; requires a TMM or town-	
4	Easy	Leg-work, Select Board vote	
5	Very easy	Simple paperwork	
<b>Time Scale</b>			
1	Long	2 or more years to complete	
2	Medium	1 to 2 years to complete	
3	Short	1 to 6 months to complete	
4	Immediate	Less than 1 month to complete	

The goal is not to suggest a final set of actions that the town should undertake, but instead to help provide initial guidance to the town by summarizing the input into a scoring system. Implementing any of the options is a political decision that will be decided by the Select Board or other appropriate decision body.

APPENDIX A. OPTIONS MATRIX

INSERT OPTIONS MATRIX HERE

APPENDIX B. MEMBERS OF SCIG

Vicki Amalfitano

Joe Bernard (Secretary)

Amy Checkoway

Adam Dash

Travis Franck (Chair)

Matthew Gasbarro

Anne Helgen

Mark Paolillo (Vice-Chair)

Aaron Pikcilingis

Paul Rickter