

SHERBORN GOVERNANCE TASK FORCE II
REPORT TO THE TOWN
DECEMBER 16, 2019

EXECUTIVE SUMMARY

This Executive Summary sets forth in abbreviated manner the background, findings, and recommendations of the Governance Task Force II (“Task Force”) contained in the accompanying Report to the Town.

I. Introduction and Background (Report Pp. 1-5)

The Governance Task Force II (“Task Force”) was commissioned by vote at the 2018 Annual Town Meeting. Its charge was to recommend changes to Town governance after both considering the recommendations in the DOR and Collins reports and exploring the structure of towns in Eastern Massachusetts judged to be somewhat similar in size, and well and creatively run.

Subsequently, the Town Moderator, in consultation with the Select Board, appointed to the Task Force Erin M. Carroll, Gregory M. Kennan, Coralinda Lincoln, Adam T. Page, and Addie Mae Weiss. The Task Force elected Ms. Lincoln as Chair at its first meeting on June 19, 2018.

The Task Force conducted extensive research into the governance of the Town and similarly-situated towns in Massachusetts. This research mainly consisted of:

1. Review of relevant documents, including academic and governmental studies, and warrant articles resulting from the earlier Task Force.
2. Interviews with Town officials, including the heads or representatives of all or nearly all boards, departments, commissions, and committees.
3. Research on other towns, including benchmarking demographic, organizational, and financial data; examination of other towns’ websites and publications; interviews with other towns’ personnel; and research into information compiled or published by the Commonwealth.
4. A town-wide survey, to which 486 responses were received (a 14% response rate).

II. Results of Research and Development of Action Plan (Report Pp. 5-6)

Based on our interviews with Town officials, the academic studies, research into the practices of similarly-situated towns, and the town survey, the Task Force noted approximately a

dozen themes that, if addressed, would materially improve the governance of the Town of Sherborn.

Measures to address four of these were adopted at the 2019 Annual Town Meeting. Additional issues that did not rise to the level of consideration at Town Meeting, but could be addressed by the Select Board, were described in a letter to the Select Board dated July 29, 2019. Finally, a number of other themes are summarized in the Task Force's final report for consideration by appropriate officials or a future committee like our Task Force.

III. 2019 Town Meeting Warrant Articles (Report Pp. 6-12)

The Task Force proposed four articles for consideration at the Annual Town Meeting held on April 23, 2019. All received overwhelming endorsement by both the Select Board and Advisory Committee and were approved at Town Meeting.

The four articles were:

Town Administrator as IT Manager — Article 19. Article 19 gave the Town Administrator (TA) the authority and scope to act as the Town's Information Technology Manager. Broad IT oversight will now be coordinated in one central place. The Town can then develop a comprehensive IT strategic plan that will reduce obstacles to information flow, improve work efficiency, facilitate system sharing among departments, implement town-wide data security practices, begin systematic virtual file storage, consolidate budgeting, maximize bulk purchase savings, and position us for development of a common database and resident portal (which was overwhelmingly favored by Town residents in the Task Force's February 2019 survey).

Human Resources Expertise — Article 20. Article 20 gave the TA, who already serves as the Human Resources Director, the authority to delegate some or all of the HR Director's functions to a qualified human resource professional when necessary or appropriate. While most personnel situations can be handled in house, some would benefit from the expertise and efficiency of an outside HR specialist. If the situation is particularly urgent, the TA no longer will have to wait for Select Board authorization to engage an outside consultant. This article streamlined and clarified the TA's authority to independently take that action. Also, resolution of some situations tends to be time-consuming and use of a specialist will free the TA to focus on other responsibilities.

Appointed Treasurer — Article 21. Numerous reasons justify the change to an appointed Treasurer. Since candidates for elected office in Sherborn must be Sherborn residents, the universe of potential candidates is limited. Moving to an appointed Treasurer will cast the widest possible net for qualified applicants adding non-residents and campaign-shy residents to the pool. Appointment also will

promote the best practices of hiring – verification of qualifications, vetting of references and thorough interviews.

Appointment will allow closer monitoring of job performance and, if there is a problem, appropriate action — remediation or removal — can be taken immediately, without waiting for the next election. Succession planning is facilitated by allowing a non-resident assistant to succeed to the position in the event of a vacancy. Appointment will coalesce the Finance Department under the leadership of the Finance Director to allow for more effective establishment of departmental goals based on overall Town needs and priorities.

Quarterly Tax Payments — Article 22. Quarterly tax billing will address annual cycles of cash shortage by smoothing cash flow throughout the year with approximately one-quarter of revenue due three months earlier in the fall and one-quarter of revenue due three months earlier in late winter. Smoother cash flow will reduce the need to budget the cost of short-term external borrowing, such as was necessary in the first quarter of FY 2020 at a cost of nearly \$9,000 to the Town. Smoother cash flow will also reduce reliance on the stop-gap measure of borrowing from reserved funds to cover operating expenses. The Town also can benefit from six months' additional interest income.

Quarterly billing will relieve the current pressure the Assessors feel to set the tax rate as early as possible and give them more time to complete their work and assure its accuracy. Importantly, earlier receipt of revenues will eliminate the current need to rely on voluntary early payment of the first tax installment before November 1st in order to cover cash flow needs.

IV. Recommendations to the Select Board (Report Pp. 12-14)

A number of other desirable improvements may be accomplished by the Select Board or other Town boards or committees without the need for a by-law amendment or other action at Town Meeting. These were set forth in a letter to the Select Board dated July 29, 2019. The recommendations included:

Goal-Setting. The Select Board should set and make public annual goals (or other periods as appropriate) and publicly report on progress at appropriate intervals. This will provide transparency to the Town, help set Town priorities, and improve coordination among Town departments, boards, and committees. The Select Board should require or encourage all Town departments, boards, and committees to engage in similar goal-setting processes.

Mentoring Volunteer Committees. The Select Board, as the largest appointing authority of committees, should mentor and establish by its example a system of common expectations to maximize the efficiency of and participation in all volunteer committees. We also suggest that volunteer committees be grouped

by general area of concern and divided by five with each Select Board member “adopting” and advising a group or groups, so as to improve coordination among committees with related subject-matter responsibilities.

Continuous Improvement. Interviews with town officials, discussions with similar towns, and survey responses from residents and employees suggest that the Town of Sherborn has both an appetite and a potential to become better at continuously improving itself. We recommend that the Select Board leverage its unique Town leadership position to establish a culture of continuous improvement in a crawl, walk, run approach.

Town Hall Office Hours. Uncoordinated office hours among Town Departments and the lack of extended hours to accommodate residents who work is a source of significant frustration to residents. In addition, for the numerous transactions that involve visits to more than one Town office, lack of common opening hours impedes efficient completion of those transactions as well as more generally creating obstacles to interdepartmental coordination. The Select Board should make reform of Town Hall office hours a priority. Doing so will enable greater efficiency within Town Hall and contribute mightily to resident service satisfaction.

Credit Cards. There is overwhelming evidence that the Town of Sherborn could improve its connectivity with both residents and non-residents through the allowance and implementation of credit cards as a payment option for various permits, programs, taxes, and licenses. Payment by credit card was favored by respondents to the Task force survey and is consistent with how the majority of financial transactions are conducted today. Nearly 90% of Massachusetts towns with a population of less than 10,000 accept credit card payments via an online portal.

V. Recommendations for Future Actions (Report Pp. 14-17)

Finally, the Task Force wishes to suggest the following long-term actions that we believe Town officials should begin to consider now for implementation at an appropriate future date.

Planning for Transition to an Appointed Combined Treasurer/Collector. It is only a matter of time before the Town transitions, as have the majority of similarly-situated towns, to an appointed, combined Collector/Treasurer position. To ease the future transition, the Town should design and implement a plan for the change. Among other things, integration of software systems under the authority granted to the Town Administrator under 2019 Warrant Article 19 should be a high priority.

Periodic Re-Constitution of a Governance Task Force. Undoubtedly, there are other areas of Town governance that a Governance Task Force could

address and enhance. However, the present Task Force does not believe that a committee like it should be an ongoing, shadow Town committee or kitchen cabinet. Instead, the Town should consider reconstituting a new Governance Task Force every three to five years.

Periodic Re-Surveying. The Town Survey provided much useful information regarding Town residents' perceptions of their Town, its government, and their expectation on how Town government best could serve their needs. Significant amounts of the information gathered also would be useful as a baseline to which developments over time can be compared. Therefore, the Task Force recommends re-surveying the Town at appropriate periodic intervals, as many of the themes of the survey will have ongoing relevance to the future governance of the Town. We recommend using identical questions wherever possible, so the town may find patterns and trends in citizen sentiment. In fact, the main value in this original survey may be as a baseline for future surveys, to identify whether and how changes are improving the residents' experience – or not.

Rural and Traditional Does Not Have to Mean Backward. Maintaining the small-town charm of Sherborn, in particular personal interactions with Town officials, is and should be a salutary goal. However, most residents today are used to online, electronic transactions and also want to obtain or provide information in the most efficient, least time-consuming way possible. An inability to conduct transactions quickly and efficiently is viewed by many with frustration and dissatisfaction rather than as an aspect of quaint, rural charm. The modern approach should not be foregone in the false pursuit of quaintness. There is no necessary incompatibility between the two visions of the Town.

Communication and Information. Communication issues are significant, pervasive, and pressing, and were frequently observed in the academic studies, our interviews with Town officials, and in our citizen survey. Efforts to improve communication with citizens and stakeholders would be useful and appreciated. We recommend that the Town appoint a Communications Team to assist in enhancing and facilitating communications and information flow among Town departments and between the Town and its citizens. The Team should have expertise in communications, public relations or outreach, and/or related technology fields. It should be geared toward actually implementing, with Town employees, incremental, practical solutions in the short term.

Educating citizens on the structure and operations of Town government would have many positive effects, among them increasing the level of satisfaction with the Town and potentially improving the level of volunteerism so necessary to the ongoing governance and life of the Town. The Task Force survey revealed a very substantial appetite among citizens for materials informing them about "How Sherborn Works." Producing such materials would be a worthwhile exercise. The Library or Community Center Foundation might be encouraged to

hold a program explaining how town government operates, as was held in Dover in early November 2019.

VI. Conclusion

It has been an honor and a privilege to serve on the Task Force. We sincerely hope that our efforts have achieved the objectives set out for us and that we have contributed to the ongoing, outstanding quality of life in our Town.

Respectfully submitted,

Governance Task Force II
Coralinda Lincoln, Chair
Erin M. Carroll
Gregory M. Kennan
Adam T. Page
Addie Mae Weiss

REPORT TO THE TOWN

I. Introduction and Background

A. History of the Task Force

The Governance Task Force II (“Task Force”) was commissioned by an affirmative vote on Warrant Article 23 at the 2018 Annual Town Meeting:

To see if the Town will vote to allow the Town Moderator (after consultation with the Board of Selectmen) to appoint a taskforce entitled Governance Task Force II, of five registered voters, to recommend changes to the Town By-Laws dealing with governance after both considering the recommendations in the DOR and Collins reports and exploring the structure of towns in Eastern Massachusetts which they judge to be somewhat similar in size, and well and creatively run. Preferably each of the task force members will have competency/experience in one or more of the following areas: organizational structures, finance, and human resources. Further, that the task force report back to the Town within nine months, such report to include draft warrant article for the Town to consider at a subsequent Town Meeting, or take any other action relative thereto.

Acting in accordance with the Town Meeting vote, Town Moderator Mary Wolff, after appropriate consultation with the Select Board, appointed the following members:

Coralinda Lincoln. Town resident since 1976. Former Town Moderator, Advisory Committee Member and Chairperson, Affordable Housing Committee Member, and Focus II Chairperson.

Addie Mae Weiss. Town resident since 2005. Current Planning Board Member and Housing Partnership Chair.

Erin M. Carroll. Town resident since 2009. Former Friends of the Sherborn Library Board Member. Executive recruiter with expertise and focus in asset management.

Adam T. Page. Town resident since 2011. Current Library Building Committee Member.

Gregory M. Kennan. Town resident since 1997. Current Sherborn Energy Committee Member and former Conservation Commissioner. Attorney with expertise in regulatory law.

At the initial meeting of the Task Force on June 19, 2018, its members elected Corey Lincoln Chair.

B. Task Force Methodology

A fundamental principle agreed upon early in the process was that the Task Force should, to the maximum extent possible, concentrate on the position or function and not on the occupant of the position. Our job was to evaluate the structure of Town government, not the performance of any person within Town government.

1. Review of Relevant Documents

The Task Force began its work, in accordance with its charge, by reviewing earlier reports and documents relevant to the governance of the Town. These included:

Report Relative to the Organization and Operations of the Town of Sherborn, Massachusetts, Edward J. Collins, Jr. Center for Public Management, November 2011 (“Collins Report”);

Town of Sherborn - Financial Management Review, Massachusetts Department of Revenue Division of Local Services / Technical Assistance Section, May 2012 (“DOR Report”);

Strategic Management Solutions letter to TA David Williams, October 5, 2016; and

Warrant articles resulting from the first Governance Task Force.

2. Interviews with Town Officials

A significant early activity of the Task Force in the latter half of 2018 was to interview all major Town department heads and committee chairpersons about their responsibilities and functions — what worked well for them, what did not work well, and what changes would help them perform more effectively and efficiently. In an effort to impose structure and some degree of systematic consistency among interviews, a common interview format was used (see Appendix 1), but departures from or expansions upon the format occurred as the interviewer deemed appropriate.

The Town officials interviewed were:

David Williams, Town Administrator
Chuck Yon, Select Board Chair
Paul DeRensis, Select Board Member
Jeannie Guthrie, Select Board Administrative Assistant
Mary Wolff, Town Moderator
Sharon McPherson, Finance Director
Heidi Doyle, Treasurer

Nancy Hess, Collector
Wendy Elassy, Director, Assessor's Office
Carole Marple, Town Clerk
Richard R. Thompson III, Chief, Police Dept.
Erron Kinney, Chief, Fire Dept.
Sean Killeen, Director, CM&D
Steve Leahy, Advisory Committee Chair
George Morrill, Select Board Member and Advisory Committee past chair
Darryl Beardsley, Board of Health Chair
Ellen Hartnett, Board of Health Staff
Michael Lesser, Conservation Commission Chair
Kristina Gallant, Recreation Dept.
Gino Carlucci, Town Planner
Karen Juhl, Council on Aging
Mary Moore, Library Trustees Chair
Andrew Keough, Superintendent, Dover-Sherborn Board of Education
Kate Potter, Sherborn School Committee

Various issues emerged from the Task Force's interviews of Town officials. A significant number of issues, however, recurred throughout the interview process. These included:

Information Technology

- Digitizing records
- Digitizing maps
- Availability of town data
- Reducing paper storage
- Data security
- Connectivity department-department and town-resident
- Active web site master
- Centralized system administrator
 - Training
 - Trouble shooting

Human Resources

- Issue mediation and resolution

Too Many Committees

- Overlapping responsibilities
- Duplicative Town staff attendance
- Infrequent meetings, unclear purpose, resulting in loss of volunteer interest

Communication/Education

- Proactive sharing of important topics through modern communication channels
- Increased internal and external transparency
- Resident understanding of how town works
- Encourage resident involvement

Quarterly Tax Payments

On-Line Payments
Convenience of credit cards

Office Hours

Staff Succession Planning

Accountability

Resource restraints

3. Research Other Towns

Part of the express charge to the Task Force was to recommend changes “after . . . exploring the structure of towns in Eastern Massachusetts which they judge to be somewhat similar in size, and well and creatively run.” The Task Force undertook this part of its charge by identifying the ten smallest towns in Middlesex County (of which Sherborn ranks third): Ashby, Dunstable, Sherborn, Carlisle, Boxborough, Lincoln, Stow, Shirley, Ayer, and Littleton.

The Task Force then conducted research into how these town handled various topics of interest or were characterized in light of various issues raised in the academic studies or in the interviews with Sherborn town officials. The research consisted of exploring town web sites and the web sites of other governmental entities such as the Department of Revenue; interviewing officials and/or employees of these other towns; and researching other sources.

From this research, as well as additional fact-finding during the course of our work, the Task Force compiled substantial data on other town’s structures and operations and how they compared to and contrasted with Sherborn in various characteristics. Among the data are a comprehensive compilation of government structure of all 170 towns in Massachusetts with population under 10,000, listing characteristics such as their populations, whether the Collector and Treasurer are elected or appointed, whether taxes are billed quarterly or semi-annually, whether the town accepts credit cards for payments, and other data. This compilation provides a wealth of useful benchmarking information, which the Town should take into account in other areas of decision-making beyond what was covered by our Task Force. The compilation, *Data from Massachusetts Towns with Population Under 10,000*, is attached as Appendix 2.

4. Town Survey

Led by Adam Page, the Task Force undertook a survey of Town residents regarding issues and themes identified in the interviews of officials both in Sherborn and other towns as well as our research of the published materials such as the Collins and DOR reports. 486 of 3521 residents over 18 years of age (at 14%, a relatively high response rate) responded on a range of topics. The

results are available on the Town web site¹ and are summarized in Appendix 3. We note that while the distribution of responses to a given question may appear to be a “normal” bell curve ranging from positive to negative, the town may want to aim higher than a net neutral response. Readers are encouraged to consider what response profile the town should aspire to achieve, when reviewing the actual results.

The highlights of the survey results included:

Citizens were generally neutral to positive in reporting their overall satisfaction with the quality of service and government of the Town (question 5).

However, respondents tended to be neutral to negative in their views of how well the Town government shares information with citizens (question 6).

Citizens also were neutral to negative in their opinion of how well the Town continuously improves itself to meet resident’s needs (question 13).

The responses to the question, “How satisfied are you with the Town’s use of your tax dollars?” formed close to a bell curve (question 19).

However, responses to “How satisfied are you with the town’s long term financial planning and oversight of the budget” skewed considerably toward the neutral-to-negative (question 20). Further, decidedly neutral-to-negative responses were given to a question concerning how well departments and committees coordinate with one another to execute that plan and achieve the Town’s goals (question 21).

The responses to the question, “How well does the Town leverage technology and human resources?” were overwhelmingly neutral-to-negative (question 22).

Responses varied across the spectrum concerning how well residents understand the structure and operations of Town government (question 29). However, citizens indicated overwhelmingly that they were “likely” or “very likely” to read, watch, or listen to something that explained “How Sherborn Works” if it were available (question 30).

II. Results of Research and Development of Action Plan

Based on our interviews with Town officials, the academic studies, research into the practices of similarly-situated towns, and the town survey, the Task Force noted approximately a dozen themes that, if addressed, would materially improve the governance of the Town of Sherborn.

¹ <https://www.sherbornma.org/governance-task-force-ii/files/results-gtf-ii-survey-february-2019>

Measures to address four of these, we believed, were appropriate to be placed before the Town as warrant articles at the 2019 Annual Town Meeting. All were adopted. Five more did not rise to the level of consideration at Town Meeting, but could be addressed by the Select Board. The Task Force brought these to the attention of the Select Board in a letter dated July 29, 2019 (Appendix 4). A number of other themes are summarized in this final report for consideration by appropriate officials or a future committee like our Task Force.

III. 2019 Town Meeting Warrant Articles

The Task Force proposed four articles for consideration at the Annual Town Meeting held on April 23, 2019. All four received overwhelming endorsement by both the Select Board and Advisory Committee, and all were approved by the Town's citizens at Town Meeting.

A. IT Manager — Article 19

1. The Amendment as Adopted

The amendment was adopted at Town Meeting as set forth in the published warrant article as follows:

To see if the Town will vote to amend Chapter 3, Section 6.2 of the General By-laws, Power and Duties of the Town Administrator, to add “information technology manager” to the Town Administrator’s existing responsibilities, and, for such purposes, to insert the following new subsection (h) and re-letter the remaining subsection accordingly:

The Town Administrator, or the Town Administrator’s designee, shall serve as the Information Technology Manager for all Town departments, except the Schools and Library, with responsibility and authority to ensure information technology connectivity between Town departments, promote information technology efficiency, and improve overall workflow;

or take any action relative thereto.

2. Importance of the Change

The most frequently mentioned frustration in our town hall and committee interviews was information technology inefficiency. The Town has incompatible systems between, and even within, some departments, which prevent direct sharing of data. For example, the Collector’s Office was on a different, incompatible system from the other financial departments. This interferes with work flow, necessitates duplicative effort (such as duplicative data entry), and increases the possibility of errors. Departments make IT decisions in isolation, and may not coordinate with other potential users of the same technology. Some departments use more cutting-

edge technology while others are considerably behind the curve. There are no town-wide data security standards and practices. The Town does not use systematic digital filing to replace overflowing paper files and ease over-crowded offices. In short, the Town has failed to reap the benefits of a coordinated and comprehensive IT strategic plan.

3. Objectives of the Article

Article 19 gave the Town Administrator (TA) the authority and scope to act as the Town's Information Technology Manager. Broad IT oversight will be coordinated in one central place. The Town can then develop a comprehensive IT strategic plan that will reduce obstacles to information flow, improve work efficiency, facilitate system sharing among departments, implement town-wide data security practices, begin systematic virtual file storage, consolidate budgeting, maximize bulk purchase savings, and position us for development of a common database and resident portal (which was overwhelmingly favored by Town residents in the Task Force's February 2019 survey).

4. Implementation and Future Implications

Article 19 was proposed with important and specific objectives: "to ensure information technology connectivity between Town departments, promote information technology efficiency, and improve overall workflow." Town officials, and particularly the TA and budget overseers such as the Select Board and Advisory Committee, must be conscious of the scope and extent of authority now vested in the TA to accomplish these objectives.

The TA's authority over IT for the Town (other than schools and the library) now supersedes and replaces the authority of individual departments and officials. While the Task Force fully expects that the TA will take the preferences and recommendations of individual Departments into account in making IT-related decisions, the intent of the by-law is that town-wide interests take precedence over the interests of individual departments, and that the TA, not individual departments, is the decisionmaker when it comes to IT implementation and budgeting, *even in the case of elected town officials*. This reform is simultaneously additive and subtractive. It adds to the authority of the TA and diminishes the authority of individual departments over IT implementation and budgeting. The TA's authority should be exercised to achieve the stated objectives of the By-law, and, in the event of conflict between those objectives and the preferences of individual departments, the TA's authority should prevail. The efforts and authority of other responsible Town officials, including budget overseers, may need to be brought to bear to accomplish these objectives.²

As discussed at the Select Board meeting on October 10, 2019, efforts led by Finance Director Sharon McPherson are underway to integrate the Town's financial software to eliminate duplicative data entry, improve access to such information across departments, and facilitate the transition to quarterly billing as the Town's citizens have chosen under Article 22 below. This is a progressive and proactive response to the improvements implemented by the 2019 Town Meeting votes. Projects like these should be encouraged and expanded.

² For example, IT budgeting should be done by the TA on a Town-wide basis, not by individual departments.

B. HR Expertise — Article 20

1. The Amendment as Adopted

The amendment was introduced at Town Meeting by motion as follows:

I move favorable action and that the Town vote to amend Chapter 3, Section 6.2 of the General By-laws: Power and Duties of the Town Administrator, to authorize the Town Administrator, acting as the Town's Human Resources Director, to delegate to a qualified human resources professional, any or all of the functions specified in said Section 6.2(e), and for such purposes, to insert at the end of the introductory paragraph of Section 6.2(e): “, *and may delegate to a qualified human resources professional any or all of the following functions.*”

2. Importance of the Change

The resolution of human resource issues was another concern frequently mentioned in our interviews. Article 20 gave the Town Administrator, who already serves as the Human Resources Director, the authority to delegate some or all of the HR Director's functions to a qualified human resource professional when necessary or appropriate. Prior to the amendment, the TA had to seek authorization from the Select Board to engage an outside professional. In addition, HR issues may be time consuming, distracting the TA from other responsibilities.

3. Objectives of the Article

While most personnel situations can be handled in house, some would benefit from the expertise and efficiency of an outside HR specialist. This is especially appropriate in a small-town setting when the involved parties want assurance of complete neutrality. The TA occasionally must recuse him or herself. If the situation is particularly urgent, the TA no longer will have to wait for Select Board authorization to engage an outside consultant. This article streamlines and clarifies the TA's authority to independently take that action.

Also, resolution of some situations tends to be time-consuming and use of a specialist will free the TA to focus on other responsibilities.

C. Appointed Treasurer — Article 21

1. The Amendment as Adopted

The amendment was adopted at Town Meeting as set forth in the published warrant article as follows:

To see if the Town will vote, pursuant to M.G.L. Chapter 41, Section 1B, to make the elected office of Treasurer an appointed office, such office to be appointed by the Select Board for a term not to exceed three years; provided,

however, that such change shall not take effect unless approved by the voters at the 2020 Annual Town Election, and further, that any incumbent holding office at the time of acceptance will serve out the remainder of the elected term; or take any other action relative thereto.

2. Importance of the Change

Town Treasurer is a highly skilled position that executes many complicated legal requirements, but does not make public policy. It is closely regulated and audited. While Sherborn's population has not grown significantly, technologies, financial options and state mandates have increased exponentially and continue to do so. Performing the duties of Treasurer has become increasingly complex. Our town was no longer well served by a structure from a simpler time.

Because elected Town officials must be Sherborn residents, the potential pool of applicants is limited. In addition, prior to the amendment, a non-resident assistant was trained at Sherborn's expense, but was ineligible to step into the Treasurer's position should it become vacant. A non-resident assistant seeking advancement had no choice but to go to another town. In so doing, that person necessarily took away with him or her the training and institutional knowledge acquired while on the Town of Sherborn payroll. This "brain drain" phenomenon recently manifested itself with the departure of Assistant Town Collector Lisa Lynch, a competent and respected employee, who left to assume an appointed Collector/Treasurer position in another Massachusetts town.

3. Objectives of the Article

Numerous reasons exist justifying a change to an appointed Treasurer.

First, candidates for elected office in Sherborn must be Sherborn residents. In the past, qualified Sherborn residents have been willing to seek election as Treasurer, but the Town cannot assume that will always be the case. It is better to be proactive than find ourselves with no viable candidates within the town. Moving to an appointed Treasurer will cast the widest possible net for qualified applicants adding non-residents and campaign-shy residents to the pool.

Appointment will promote the best practices of hiring – verification of qualifications, vetting of references, and thorough interviews.

Appointment will allow closer monitoring of job performance. A process exists for removing elected financial officials who have demonstrated serious failures, but the process does not address lesser deficiencies. Appointment will allow job performance to be evaluated by a supervisor at shorter intervals and, if there is a problem, appropriate action -- remediation or removal -- can be taken immediately, without waiting for the next election.

Appointment will facilitate succession planning, by allowing a non-resident assistant to succeed to the position in the event of a vacancy.

Appointment will coalesce the Finance Department under the leadership of the Finance Director to allow for more effective establishment of departmental goals based on overall Town needs and priorities.

Although the issue of converting the Treasurer to an appointed position had been considered and defeated twice before, the Task Force reviewed, listened, and deep-dived into similar towns looking for best practices that could help Sherborn move forward in continuous improvement. Appointment of the Treasurer continued to emerge as a best practice. Seven of the ten smallest Middlesex County towns have appointed Treasurers or Treasurer/Collectors. The Collins, DoR, and Strategic Management reports all advised moving to appointment.

Sherborn is a small town trying to strike a balance between adapting to modern needs and retaining the best of traditional character. We must maximize efficiency and effectiveness of the first in order to maintain the second. Change is always challenging. But when there are sound reasons to change, refusing to do so chokes innovation and stops improvement dead in its tracks.

4. Implementation and Future Implications

The change must be approved by voters at the 2020 town election. Even at that point, however, the change does not become effective until the incumbent Treasurer's term expires. The Treasurer was re-elected in May 2019; her term will expire in the spring of 2022.

D. Quarterly Tax Payments — Article 22

1. The Amendment as Adopted

The amendment was adopted at Town Meeting as set forth in the published warrant article as follows:

To see if the Town will vote to accept the provisions of M.G.L. Chapter 59, Section 57C, for the purpose of establishing a quarterly tax payment system for the Fiscal Year beginning July 1, 2020, and continuing thereafter; or take any action relative thereto.

2. Importance of the Change

The Town has cash flow issues at a number of points during the fiscal year. A disproportionate number of bills come due shortly after the beginning of the fiscal year on July 1st. Under the semi-annual system, that is precisely the time when available cash is lowest because the first tax payment is not due until November 1. A lesser cash shortage occurs in early spring because the second tax payment is not due until May 1. In the first quarter of FY 2020, the Town was forced to borrow \$1.8 million in short-term notes, at a cost of nearly \$9,000 in interest and borrowing costs, plus the time expended by the Treasurer and other Town officials. The Treasurer has advised that without quarterly billing, such short-term borrowing would be inevitable in the future. Quarterly billing likely will obviate the need to incur short-term debt.

The semi-annual system also puts a strain on other Town departments. At the Advisory Committee hearing on proposed warrant articles, one Advisory member, a former member of the Board of Assessors, described how the pressure to finalize tax bills made the Assessors feel rushed to complete the job and how, if additional time were afforded them to finalize tax bills under a quarterly system, they would feel they had time to do a more careful, thorough job.

3. Objectives of the Article

Article 22 changed the Town from a semi-annual to a quarterly property tax billing system effective in FY 2021. Quarterly tax billing will address these annual cycles of cash shortage by smoothing cash flow throughout the year with approximately one-quarter of revenue due three months earlier in the fall and one-quarter of revenue due three months earlier in late winter. Smoother cash flow will reduce the need to budget the cost of short-term external borrowing and will also reduce reliance on the stop-gap measure of borrowing from reserved funds to cover operating expenses. The Town also will benefit from six months' additional interest income.

In a quarterly tax system, the first two bills, due August 1 and November 1, are estimated amounts; the second two bills, due February 1 and May 1, are adjusted once the tax rate has been set. This will relieve the pressure the Assessors have felt to set the tax rate as early as possible and give them more time to complete their work and assure its accuracy.

Importantly, earlier receipt of revenues will eliminate the current need to partially rely on voluntary early payment of taxes before November 1st in order to cover cash flow needs. While the willingness of citizens to pay their taxes early is admirable, it is not prudent financial practice to assume that such cash always will be forthcoming. The need for \$1.8 million in short-term borrowing early in FY 2020 demonstrates the shortcomings of relying on voluntary early payments.

An owner's total property tax bill for the fiscal year will not increase under quarterly billing system compared to semi-annual billing. The article intentionally delayed the start date of quarterly billing one year out, to Fiscal Year 2021, so that seasonal income earners can plan well in advance, and to allow the Collector and other affected offices time to make the transition.

More than half of residents indicated in our on-line survey that their property taxes are paid by their mortgage lenders from escrow accounts. For them, nothing will be different. But — importantly — the Town, rather than the mortgage lender, will benefit from any interest earned.

For those who pay directly to the Town we believe that tax rate reduction from reduced short-term borrowing costs and potential interest income for the Town will likely offset the investment income an individual taxpayer would forgo by earlier payments.

Commercial billing services have advised us that the most cost-effective way to handle quarterly property tax billing is make two mailings, each with two bills in one envelope. Then the extra expense of quarterly billing is essentially 1) the cost of printing, not mailing, additional bills and 2) the cost of processing additional payments. Using data provided by the Collector's office, we estimate that the additional expense of quarterly property tax bills is \$587 per year. Contrast

that with the \$9,000 in short-term borrowing costs incurred in 2019 and the six months' additional interest income earned by the Town. Quarterly tax billing clearly is cost effective. Any confusion about the transition and how the new system will work can be mitigated by a robust public information campaign.

Quarterly tax billing is recommended by the Massachusetts DoR, Collins Institute and Municipal Management Services. All of the 10 smallest Middlesex County towns, except Sherborn, are quarterly property tax billers. 114 of the 170 Massachusetts towns with populations under 10,000 bill quarterly (68%), and 85% of all Massachusetts towns bill quarterly.

4. Implementation and Future Implications

Planning for the transition has begun. A working group that includes all affected Departments is evaluating upgrades to or replacements of billing and payment systems. The Town Administrator, in his role as town-wide IT Manager, is involved. The Town should look to the Department of Revenue for guidance and should take advantage of any technical assistance the DOR may offer. The Task Force is aware of at least one DOR guidance document, Fiscal Year 2020 Tax Bills — Quarterly Payment System, Informational Guideline Release (IGR) 19-4³, that specifically addresses quarterly tax billing.

IV. Recommendations to the Select Board

A number of other desirable improvements may be accomplished by the Select Board or other Town boards or committees without the need for a by-law amendment or other action at Town Meeting. These were set forth in a letter to the Select Board dated July 29, 2019, a copy of which is Appendix 4 to this report. The Task Force here provides a summary of the recommendations in the July 29 letter.

A. Goal-Setting

The Select Board should set and make public annual goals (or other periods as appropriate) and publicly report on progress at appropriate intervals. This will provide transparency to the Town, help set Town priorities, and improve coordination among Town departments, boards, and committees. The Select Board should require or encourage all Town departments, boards, and committees to engage in similar goal-setting processes.

B. Mentoring Volunteer Committees

The level of citizen involvement in town government was a general issue mentioned by various Sherborn stakeholders – volunteer committees, town office holders, town staff and resident respondents to the survey – during our research. The difficulty of finding qualified volunteers willing to serve on committees was a specific concern. We urge the Select Board, as the largest appointing authority of committees, to mentor and establish by its example a system of common

³ <https://www.mass.gov/files/documents/2019/04/26/igr2019-4.pdf>

expectations for all volunteer committees to maximize the efficiency of and participation in all volunteer committees. We also suggest that volunteer committees be grouped by general area of concern and divided by five with each Board member “adopting” a group or groups, so as to improve coordination among committees with related subject-matter responsibilities. Then, make contact with committee chairpersons, advise where needed, reinforce common expectations, review annual reports, and keep the Select Board apprised of committee activities and issues.

The Task Force believes that the Select Board’s implementing such a mentoring or liaison program will help improve communication and coordination between the Select Board and other town boards, and among the other boards themselves. Lack of communication and coordination among Town boards was an issue cited in various of our interviews of Town officials and in the Town-wide survey. Improving coordination and communication, we believe, is a principle for which the Select Board can and should set the tone for the rest of Town government.

C. Continuous Improvement

Interviews with town officials, discussions with similar towns, and survey responses from residents and employees suggest that the Town of Sherborn has both an appetite and a potential to become better at continuously improving itself. The evidence ranges from strong support for new services, to employee statements about workplace improvements, to committee leaders recognizing a need to streamline the work done by time-crunched volunteers. These opportunities are not isolated to any one area, such as technology; rather they exist across the operation of the town. We recommend that the Select Board leverage its Town leadership unique position to establish a culture of continuous improvement in a crawl, walk, run approach.

D. Town Hall Office Hours

Coming to Town Hall to conduct business is a primary point of contact between residents and their local government. Uncoordinated office hours among Town Departments and the lack of extended hours to accommodate residents who work is a source of significant frustration to residents. One-third of survey respondents stated that extended Town office hours would be “very valuable.” In addition, for the numerous transactions that involve visits to more than one Town office, lack of common opening hours impedes efficient completion of those transactions as well as more generally creating obstacles to interdepartmental coordination. The Select Board should make reform of Town Hall office hours a priority. Doing so will enable greater efficiency within Town Hall and contribute mightily to resident service satisfaction.

E. Credit Cards

Throughout our research across other Towns within the Commonwealth, as well interviews with Sherborn town officials and employees, and the survey of residents, there is overwhelming evidence that the Town of Sherborn could improve its connectivity with both residents and non-residents through the allowance and implementation of credit cards as a payment option for various permits, programs, taxes, and licenses. Payment by credit card was favored by respondents to the Task force survey and is consistent with how the majority of financial transactions are conducted

today. Nearly 90% of Massachusetts towns with a population of less than 10,000 accept credit card payments via an online portal.

V. Recommendations for Future Actions

Finally, the Task Force wishes to suggest the following long-term actions that we believe Town officials should begin to consider now for implementation at an appropriate future date.

A. Planning for Transition to an Appointed Combined Treasurer/Collector

The Task Force believes that it is only a matter of time before the Town transitions, as have the majority of similarly-situated towns, to an appointed, combined Collector/Treasurer position. To the extent that the Town can take steps now to anticipate that change, it will ease the transition. The Town should design and implement a plan for the change. Among other things, integration of software systems under the authority granted to the Town Administrator under 2019 Warrant Article 19 should be a high priority.

B. Periodic Re-Constitution of a Governance Task Force

This is the second Governance Task Force, the first having done its work in 2013-15. Both Task Forces were constituted to address perceived needs for improvement or reform of the government of the Town, and both successfully recommended changes designed to address those needs. Undoubtedly, there are other areas of Town governance that a future Governance Task Force could address and enhance. Such a Task Force, therefore, could bring significant value to the Town.

However, the present Task Force does not believe that a committee like it should be an ongoing, shadow Town committee or kitchen cabinet. Elsewhere in this report we have noted the issue with the abundance of Town committees. Further, making this Task Force permanent may lead to a staleness of thought and operations.

Instead, the Town should consider reconstituting a new Governance Task Force every three to five years. This would allow any reforms initiated by the previous Task Force to take effect for a long-enough period of time to be evaluated and modified if necessary. Leaving a space of several years also will result in a new committee bringing fresh perspective and energy to whatever issues may be current.

C. Periodic Re-Surveying

The Town Survey provided much useful information regarding Town residents' perceptions of their Town, its government, and their expectation on how Town government best should serve their needs. Much of the information gathered also would be useful as a baseline to which developments over time can be compared. Therefore, the Task Force recommends re-surveying the Town at appropriate periodic intervals, as many of the themes of the survey will have ongoing relevance to the future governance of the Town. We recommend using identical

questions wherever possible, so the town may find patterns and trends in citizen sentiment. In fact, the main value in this original survey may be as a baseline for future surveys, to identify whether and how changes are improving the residents' experience – or not.

D. Rural and Traditional Does Not Have to Mean Backward.

One of the advantages of living in Sherborn is its rural, small-town atmosphere. Many residents enjoy personal interactions with Town officials and employees such as stopping by the Clerk's or Collector's office to obtain information or effect a transaction. Maintaining that kind of small-town charm is and should be a salutary goal.

However, many residents today are used to online, electronic transactions and also want to obtain or provide information in the most efficient, least time-consuming way possible. These citizens do not want to: (1) travel to Town Hall, (2) visit two or more different offices, (3) during limited windows of time when the offices are open, and (4) write physical checks, to conduct seemingly routine transactions such as obtaining dog licenses or Farm Pond stickers or signing up for swim lessons. An inability to conduct such transactions quickly and efficiently is viewed by many with frustration and dissatisfaction rather than as an aspect of quaint, rural charm. A single registration and payment portal was deemed "very valuable" by approximately 275 out of 447 respondents to the Town survey (question 15). The modern approach should not be avoided in the false pursuit of quaintness. "We've always done it this way," when it stands in the way of progress, can be a significant source of dissatisfaction for residents. There is no necessary incompatibility between the two visions of the Town.

E. Communication and Information

Based on our research, the Task Force believes that there are significant, pervasive, and pressing issues with communication and dissemination of information in the Town. Communication issues were frequently observed in the academic studies, our interviews with Town officials, and in our citizen survey. These issues included both information flow between areas of Town government as well as between Town citizens and government. Respondents to the Town survey were neutral to negative in their views of how well the Town government shares information with citizens (question 6) and in how well citizens understand the structure and operations of Town government (question 29).

The Task Force believes there is an asymmetry between how town citizens get information about Town government and how such information is provided. Local news like the Dover-Sherborn Press and Hometown Weekly are valuable but their coverage is limited. The Council on Aging commendably has begun to include a regular article on Town government in its *LINK* publication, but it has limited space and a limited publication schedule. Only a small percentage of dedicated citizens will proactively review Town board agendas for items of interest. Moreover, the Town web site currently is limited to Town government information and is not a comprehensive or coordinated source of information about other community events and information of interest. Other information channels, such as Nextdoor Sherborn, are neither comprehensive nor universally accessed by Town citizens, and their format is not conducive to

conveying information with a level of objectivity and detail appropriate for informed citizen decision making.

Other towns have developed mechanisms to convey information to their citizens in an effective and organized manner. For example, the Town of Shirley has an official Communications Committee, a volunteer committee appointed by the Board of Selectmen, the mission of which is “To keep the Town of Shirley informed, engaged, foster community spirit, and relay non-partisan information to help residents make informed decisions. The Communication Committee manages Shirley's official website and social media channels, distributes a monthly e-newsletter, and advises Town boards and committees on communication issues as needed.”⁴ In Boxborough, the Community and Social Services Coordinator is responsible for publication of the Boxborough Bee, a newsletter containing town, community, and school news and event information.⁵ The Lincoln Board of Selectmen publishes a newsletter of six to twelve pages approximately every two to three months with items of interest to the town, schools, and community.⁶

Communications issues were cited to us numerous times during our research from among a wide range of Town officials, departments, and citizens. The Task Force believes that efforts to improve communication with citizens and stakeholders would be useful and appreciated by Town officials and citizens alike. We therefore recommend that the Town appoint a Communications Team to assist in enhancing and facilitating communications and information flow among Town departments and between the Town and its citizens. The Team should have expertise in communications, public relations or outreach, and/or related technology fields. It should be geared toward actually implementing, with Town employees, incremental, practical solutions in the short term.

A useful comparison can be made to the 2017 effort of the Town of Wellesley to improve civic engagement. Through a Community Compact agreement, the town partnered with the Massachusetts Office of Municipal and School Technology to develop a strategy that would potentially increase community engagement. The effort resulted in a thirty-eight page report⁷ with numerous recommendations, including short-term measures such as enhancing the town-wide calendar to be more inclusive of events happening across the community and creating a resident informational guide. Longer-term recommendations included a “partial centralization” organizational approach to communications and engagement, enhanced communications training for town departments, exploring use of social media such as Twitter and Facebook, and “tactfully introducing” new communications technology to the community.

Another area the Town should look into is the creation of a single household portal where routine and recurring transactions may occur and information may be obtained. These would include such recurring interactions as annual dog registrations, obtaining assessment information, completing the annual census form, etc. A secure, intuitive, consolidated online access to one’s

⁴ <https://www.shirley-ma.gov/communication-committee>

⁵ <https://www.boxborough-ma.gov/community-services-coordinator/pages/boxborough-bee-newsletters>

⁶ <http://lincolntown.org/DocumentCenter/Index/26>

⁷ <https://www.mass.gov/files/documents/2018/02/09/Wellesley%20Citizen%20Engagement.pdf>

resident data was perceived as “very valuable” by more than a majority of survey respondents (question 16). The website of the Town of Lincoln appears to allow citizens to create an account to customize the user experience; a banner at the top of the town web site states: “Create an Account - Increase your productivity, customize your experience, and engage in information you care about.”⁸

The Task Force also believes that educating citizens on the structure and operations of Town government would have many positive effects, among them increasing the level of satisfaction with the Town and potentially improving the level of volunteerism so necessary to the ongoing governance and life of the Town. The Task Force survey revealed a very substantial appetite among citizens for materials informing them about “How Sherborn Works” (question 30). Producing such materials — through the Communications Team described above or the efforts of a citizen or citizens with training in public relations or educational materials — would, in the Task Force’s opinion, be a very worthwhile exercise. Historically, the Sherborn League of Women Voters published a booklet explaining the basics of Sherborn town government entitled “Know Your Town.” This provided citizens a valuable resource that increased knowledge and awareness and enhanced civic engagement. The Sherborn Library or Community Center Foundation might be encouraged to hold a program explaining how town government operates, as was held in Dover in early November 2019.

VI. Conclusion

It has been an honor and a privilege to serve on the Task Force. We sincerely hope that our efforts have achieved the objectives set out for us and that we have contributed to the ongoing, outstanding quality of life in our Town.

⁸ <http://www.lincolntown.org/>

APPENDICES

1. Interview Framework Template.
2. *Data from Massachusetts Towns with Population Under 10,000.*
3. Results of February 2019 Citizen Survey, March 11, 2019.
4. Governance Task Force II, Recommendations to the Select Board, July 29, 2019.

Appendix 1

Interview Framework Template

Governance Task Force II – Interview Framework

How long you have been in position?

Are you elected or appointed?

Whom do you report to?

Are you full or part time?

Generally describe the work you do.

What works well?

What do you see as a problem?

Do you have any suggested fixes?

What resources could you use to do your job better?

What committees do you need to interact with in order to do your job?

Appendix 2

Data from Massachusetts Towns with Population Under 10,000

Data from Massachusetts Towns with Population under 10,000

Sherborn Governance Task Force II 2018-19

KEY

T	Treasurer
C	Collector
FinD	Finance Director
Clerk	Town Clerk
Ta	Treasurer, appointed
Te	Treasurer, elected
Ca	Collector, appointed
Ce	Collector, elected
T/C	Combined position
A/E	Treasurer, appointed; Collector, elected
E/A	Treasurer, elected; Collector, appointed
Semi-annual*	Preliminary semi-annual tax bills (flexible mailing/due date)
?	Unknown

Sources: Massachusetts Department of Revenue, Town websites

TOWN	COUNTY	POPULATION	TREASURER COLLECTOR	ELECTED/ APPOINTED	TAX BILLS	CREDIT CARDS
Adams	Berkshire	8,260	T/C	E	Semi-annual	✓
Alford	Berkshire	495	T/C	?	Semi-annual	✓
Ashburnham	Worcester	6,181	T/C	A	Quarterly	✓
Ashby	Middlesex	3,209	Te Ce	E	Quarterly	✓
Ashfield	Franklin	1,729	Ta ?	A/	Quarterly	✓
Avon	Norfolk	4,490	T/C	A	Quarterly	✓
Ayer	Middlesex	7,913	Te Ce	E	Quarterly	✓
Barre	Worcester	5,464	T/C	A	Quarterly	✓
Becket	Berkshire	1,768	Ta Ca	A	Quarterly	✓
Berkley	Bristol	6,584	T/C	E	Quarterly	✓
Berlin	Worcester	2,979	T/C	E	Semi-annual	✓
Bernardston	Franklin	2,111	T C	?	Semi-annual*	✓
Blackstone	Worcester	9,092	T/C	E	Quarterly	✓
Blandford	Hampden	1,256	Ta Ce	A/E	Quarterly	✓
Bolton	Worcester	5,133	Ta Ca	A	Quarterly	✓
Boxborough	Middlesex	5,173	T/C	A	Quarterly	✓
Boxford	Essex	8,203	T/C	A	Quarterly	✓
Boylston	Worcester	4,476	T/C	A	Quarterly	✓
Brewster	Barnstable	9,947	T/C	?	Semi-annual	✓
Brimfield	Hampden	3,723	T/C	E	Quarterly	✓
Brookfield	Worcester	3,400	Ta Ce	A/E	Quarterly	✓
Buckland	Franklin	1,872	T/C	A	Quarterly	✓
Carlisle	Middlesex	5,107	T/C	A	Quarterly	✓
Charlemont	Franklin	1,245	T C	?	Quarterly	?
Chatham	Barnstable	6,138	T/C	A	Semi-annual	✓
Cheshire	Berkshire	3,177	Ta Ce	A/E	Semi-annual	✓
Chester	Hampden	1,365	T? Ce	?/E	Quarterly	✓
Chesterfield	Hampshire	1,249	Te Ce	E	Quarterly	✓
Chilmark	Dukes	916	Te C?	E/?	Semi-annual*	✓
Clarksburg	Berkshire	1,670	T/C	A	Quarterly	✓
Cohasset	Norfolk	8,342	T/C	A	Quarterly	✓
Colrain	Franklin	1,654	Ta Ca	A	Semi-annual	✓
Conway	Franklin	1,885	T/C	A	Semi-annual	✓
Cummington	Hampshire	873	Te Ce	E	Semi-annual	✓
Dalton	Berkshire	6,689	Ta Ca	A	Quarterly	?
Deerfield	Franklin	5,047	T/C	A	Semi-annual	✓
Dighton	Bristol	7,312	T/C	E	Quarterly	✓
Douglas	Worcester	8,683	T/C	A	Quarterly	✓
Dover	Norfolk	5,887	T/C	A	Quarterly	✓
Dunstable	Middlesex	3,390	T/C	A	Quarterly	✓
East Brookfield	Worcester	2,187	T C	?	Semi-annual*	✓

TOWN	COUNTY	POPULATION	TREASURER COLLECTOR	ELECTED/ APPOINTED	TAX BILLS	CREDIT CARDS
Eastham	Barnstable	4,923	C/T	A	Semi-annual	✓
Edgartown	Dukes	4,297	Ta Ce	A/E	Quarterly	✓
Egremont	Berkshire	1,216	T/C	A	Quarterly	✓
Erving	Franklin	1,786	Te Ce	E	Semi-annual	✓
Essex	Essex	3,633	T/C	A	Quarterly	✓
Florida	Berkshire	737	?	?	Semi-annual	?
Freetown	Bristol	9,097	T/C	A	Quarterly	✓
Georgetown	Essex	8,517	T/C	A	Quarterly	✓
Gill	Franklin	1,493	Te Ce	E	Semi-annual*	?
Goshen	Hampshire	1,070	Ta Ca	A	Quarterly	✓
Gosnold	Dukes	77	?	?	Semi-annual	?
Granby	Hampshire	6,339	Te Ce	E	Quarterly	✓
Granville	Hampden	1,620	Te Ce	E	Semi-annual	✓
Great Barrington	Berkshire	6,918	T/C	A	Semi-annual	✓
Groveland	Essex	6,683	T/C	A	Quarterly	✓
Hadley	Hampshire	5,340	Te Ce	E	Quarterly	✓
Halifax	Plymouth	7,761	T/C	E	Semi-annual	✓
Hamilton	Essex	8,146	T/C	A	Quarterly	✓
Hampden	Hampden	5,197	Te Ce	E	Quarterly	✓
Hancock	Berkshire	713	?	?	Semi-annual	?
Hardwick	Worcester	3,008	? C	?	Quarterly	✓
Harvard	Worcester	6,568	T/C	A	Quarterly	✓
Hatfield	Hampshire	5,293	Te Ce	E	Quarterly	✓
Hawley	Franklin	331	Ta Ca	A	Quarterly	?
Heath	Franklin	699	Ta Ca	A	Quarterly	✓
Hinsdale	Berkshire	1,977	T/C	A	Semi-annual	✓
Holland	Hampden	2,502	Te Ce	E	Quarterly	✓
Hopedale	Worcester	5,951	T/C	A	Quarterly	✓
Hubbardston	Worcester	4,523	T/C	A	Quarterly	✓
Huntington	Hampshire	2,181	T/C	A	Quarterly	✓
Lancaster	Worcester	8,111	T/C	A	Quarterly	✓
Lanesborough	Berkshire	3,011	Ta Ca	A	Quarterly	✓
Lee	Berkshire	5,848	T/C	A	Semi-annual	✓
Lenox	Berkshire	4,996	T/C	A	Quarterly	✓
Leverett	Franklin	1,853	? C	?	Quarterly	?
Leyden	Franklin	717	Ta Ca	A	Quarterly	✓
Lincoln	Middlesex	7,292	T/C	A	Quarterly	✓
Littleton	Middlesex	9,404	Ta Ca	A	Quarterly	✓
Manchester	Essex	5,330	T/C	A	Quarterly	✓
Marion	Plymouth	5,064	T/C	A	Quarterly	✓

TOWN	COUNTY	POPULATION	TREASURER COLLECTOR	ELECTED/ APPOINTED	TAX BILLS	CREDIT CARDS
Mattapoissett	Plymouth	6,216	T/C	A	Quarterly	✓
Mendon	Worcester	5,962	T/C	A	Quarterly	✓
Merrimac	Essex	6,715	Ta Ca	A	Quarterly	✓
Middlefield	Hampshire	529	Ta Ca	A	Quarterly	✓
Millis	Norfolk	8,110	T/C	A	Quarterly	✓
Millville	Worcester	3,223	T/C	A	Quarterly	✓
Monroe	Franklin	120	C/Clerk	E	Semi-annual	✓
Monson	Hampden	8,754	Ta Ca	A	Quarterly	✓
Montague	Franklin	8,312	T/C	E	Semi-annual*	✓
Monterey	Berkshire	953	Te Ce	E	Quarterly	✓
Montgomery	Hampden	860	T C	?	Quarterly	✓
Mount Washington	Berkshire	164	Te Ce	E	Semi-annual	?
Nahant	Essex	3,469	T/C	A	Semi-annual	✓
New Ashford	Berkshire	224	T C	?	Semi-annual	✓
New Braintree	Worcester	1,022	C/Clerk	?	Quarterly	✓
New Marlborough	Berkshire	1,490	Ta Ca	A	Quarterly	✓
New Salem	Franklin	998	? C	?	Quarterly	✓
Newbury	Essex	6,916	T/C	A	Quarterly	✓
North Brookfield	Worcester	4,749	Ta Ca	A	Quarterly	✓
Northfield	Franklin	3,008	T/C	A	Semi-annual	✓
Oak Bluffs	Dukes	4,689	T/C	A	Quarterly	✓
Oakham	Worcester	1,922	?	?	Quarterly	?
Orange	Franklin	7,703	Ta Ca	A	Quarterly	✓
Orleans	Barnstable	5,858	T/C	A	Quarterly	✓
Otis	Berkshire	1,583	T C	?	Quarterly	✓
Paxton	Worcester	4,866	T/C	A	Quarterly	✓
Pelham	Hampshire	1,328	T/C	?	Quarterly	✓
Peru	Berkshire	844	T/C	A	Semi-annual	?
Petersham	Worcester	1,246	Te Ce	E	Semi-annual	?
Phillipston	Worcester	1,734	T? Ce	?/E	Quarterly	✓
Plainfield	Hampshire	650	Ta Ca	A	Semi-annual	?
Plainville	Norfolk	8,956	T/C	A	Quarterly	✓
Plympton	Plymouth	2,893	T/C	A	Quarterly	✓
Princeton	Worcester	3,461	T/C	A	Semi-annual	✓
Provincetown	Barnstable	2,980	Ta Ca	A	Semi-annual	✓
Richmond	Berkshire	1,438	T/C	A	Quarterly	✓
Rochester	Plymouth	5,439	Ta Ce	A/E	Semi-annual	✓
Rockport	Essex	7,162	T/C	A	Semi-annual	✓
Rowe	Franklin	387	Ta C?	A/?	Semi-annual	✓
Rowley	Essex	6,193	T/C	E	Quarterly	✓

TOWN	COUNTY	POPULATION	TREASURER COLLECTOR	ELECTED/ APPOINTED	TAX BILLS	CREDIT CARDS
Royalston	Worcester	1,269	Ta Ca	A	Semi-annual*	✓
Russell	Hampden	1,787	T/C	?	Semi-annual	✓
Rutland	Worcester	8,402	T/C	A	Quarterly	✓
Salisbury	Essex	8,695	T/C	A	Quarterly	✓
Sandisfield	Berkshire	917	T/C	A	Semi-annual	?
Savoy	Berkshire	680	?	?	Semi-annual	?
Sheffield	Berkshire	3,204	T/C	A	Quarterly	✓
Shelburne	Franklin	1,856	? C	?	Quarterly	✓
Sherborn	Middlesex	4,281	Te Ce	E	Semi-annual	
Shirley	Middlesex	7,337	Ta Ce	A/E	Quarterly	✓
Shutesbury	Franklin	1,776	Ta Ca	A	Quarterly	✓
Southampton	Hampshire	6,082	T/C	E	Quarterly	✓
Southborough	Worcester	9,941	T/C	A	Quarterly	✓
Southwick	Hampden	9,690	T/C/Clerk	A	Semi-annual	✓
Sterling	Worcester	7,941	T/C	A	Quarterly	✓
Stockbridge	Berkshire	1,948	T/C	?	Semi-annual	✓
Stow	Middlesex	7,088	T/C	A	Quarterly	✓
Sturbridge	Worcester	9,465	FinD/T/C	A	Semi-annual	✓
Sunderland	Franklin	3,674	T/C	A	Semi-annual*	✓
Sutton	Worcester	9,204	T/C	A	Quarterly	✓
Templeton	Worcester	8,168	T/C	A	Quarterly	✓
Tisbury	Dukes	4,117	T/C	A	Quarterly	✓
Tolland	Hampden	492	T/C	E	Semi-annual	?
Topsfield	Essex	6,494	T/C	A	Quarterly	✓
Townsend	Middlesex	9,408	T/C	A	Quarterly	✓
Truro	Barnstable	2,009	T/C/Clerk	A	Semi-annual	✓
Tyringham	Berkshire	327	Ta Ce	A/E	Semi-annual*	✓
Upton	Worcester	7,701	T/C	?	Quarterly	✓
Wales	Hampden	1,878	Te Ce	E	Quarterly	✓
Ware	Hampshire	9,888	T/C	A	Quarterly	✓
Warren	Worcester	5,179	T C	?	Quarterly	✓
Warwick	Franklin	768	Ta Ca	A	Semi-annual	?
Washington	Berkshire	535	Ta Ce	A/E	Semi-annual	✓
Wellfleet	Barnstable	2,751	Ta Ca	A	Semi-annual	✓
Wendell	Franklin	869	Te Ce	E	Semi-annual*	✓
Wenham	Essex	5,139	T/C	A	Quarterly	✓
West Boylston	Worcester	7,855	T/C	A	Quarterly	✓
West Bridgewater	Plymouth	7,048	T/C	?	Quarterly	✓
West Brookfield	Worcester	3,771	Te Ce	E	Quarterly	✓
West Newbury	Essex	4,490	FinD/T/C	A	Quarterly	✓

Appendix 3

Results of February 2019 Citizen Survey

Governance Task Force II

Results of February 2019 Citizen Survey

March 11, 2019

Goal of the survey was to gather Citizens' input on key topics

Approach

- Based questions on DOR/Collins Reports, interviews and analysis
- Kept survey as short as possible to encourage completion
- Used SurveyMonkey – low cost, repeatable, built-in reporting
- Incorporate results into findings, and sharing with town

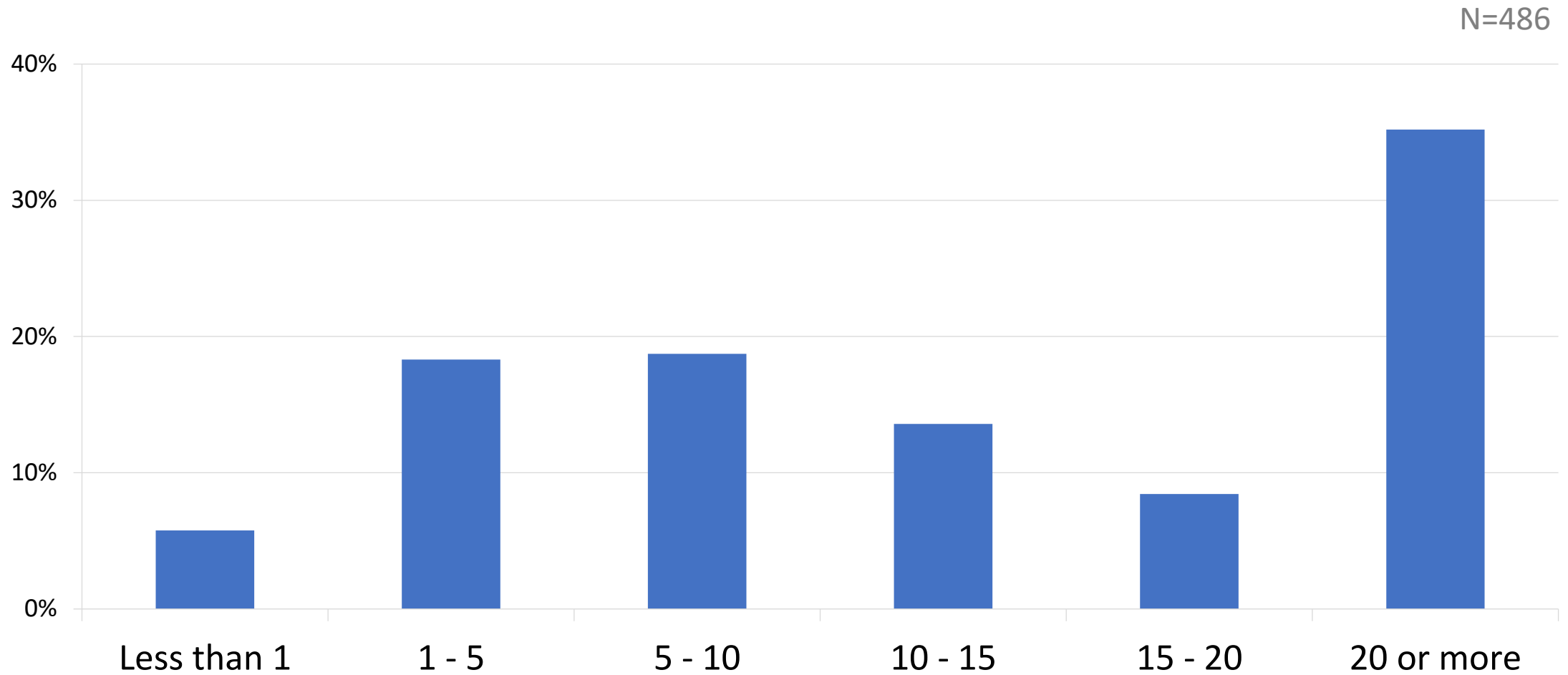
Results

- 14% response rate (486 of 3521 residents over 18yrs)
- Quantified Citizens' sentiment on 31 questions
- Gathered over 500 comments (responses not replicated here)
- Added town employee survey (41 responses to nearly identical questions)

Recommendations

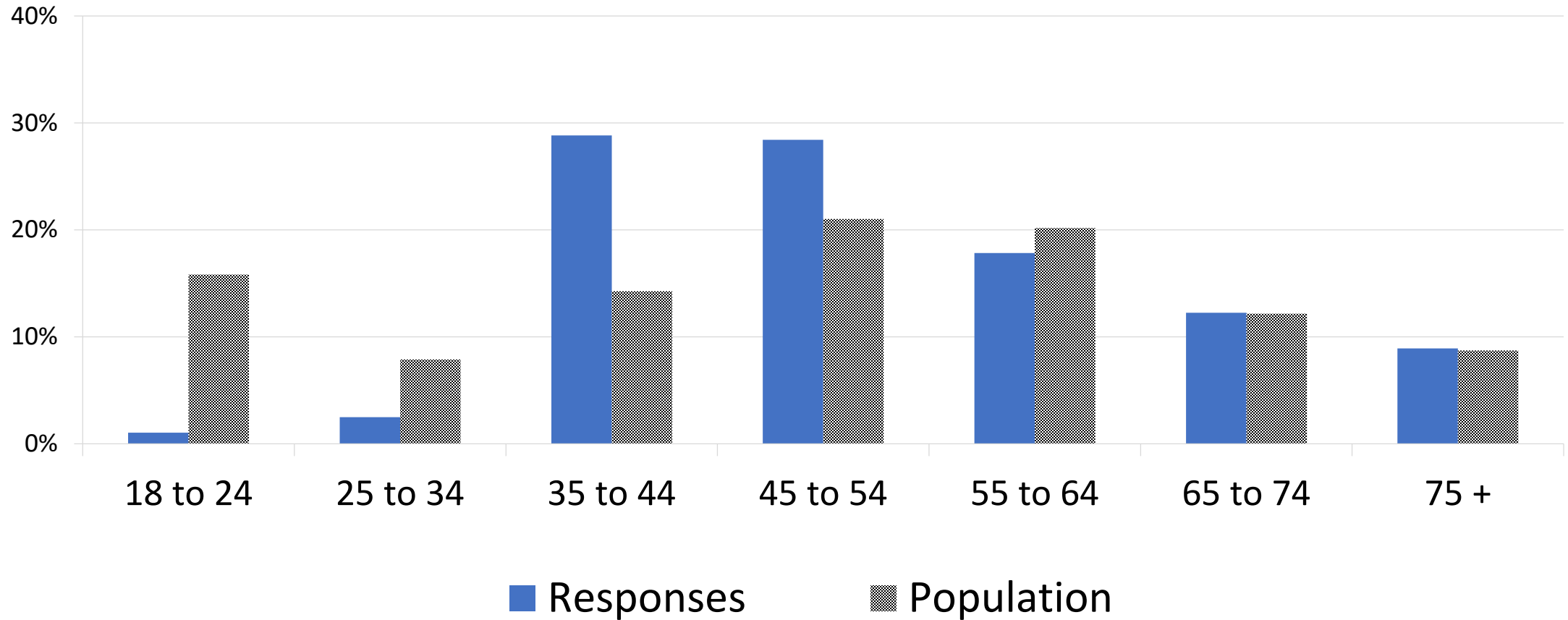
- Compare results to your expectation, not a bell curve
- Use these results as a baseline, and repeat survey for insight into trend

1. How many years have you been a resident of Sherborn?



2. What is your age?*

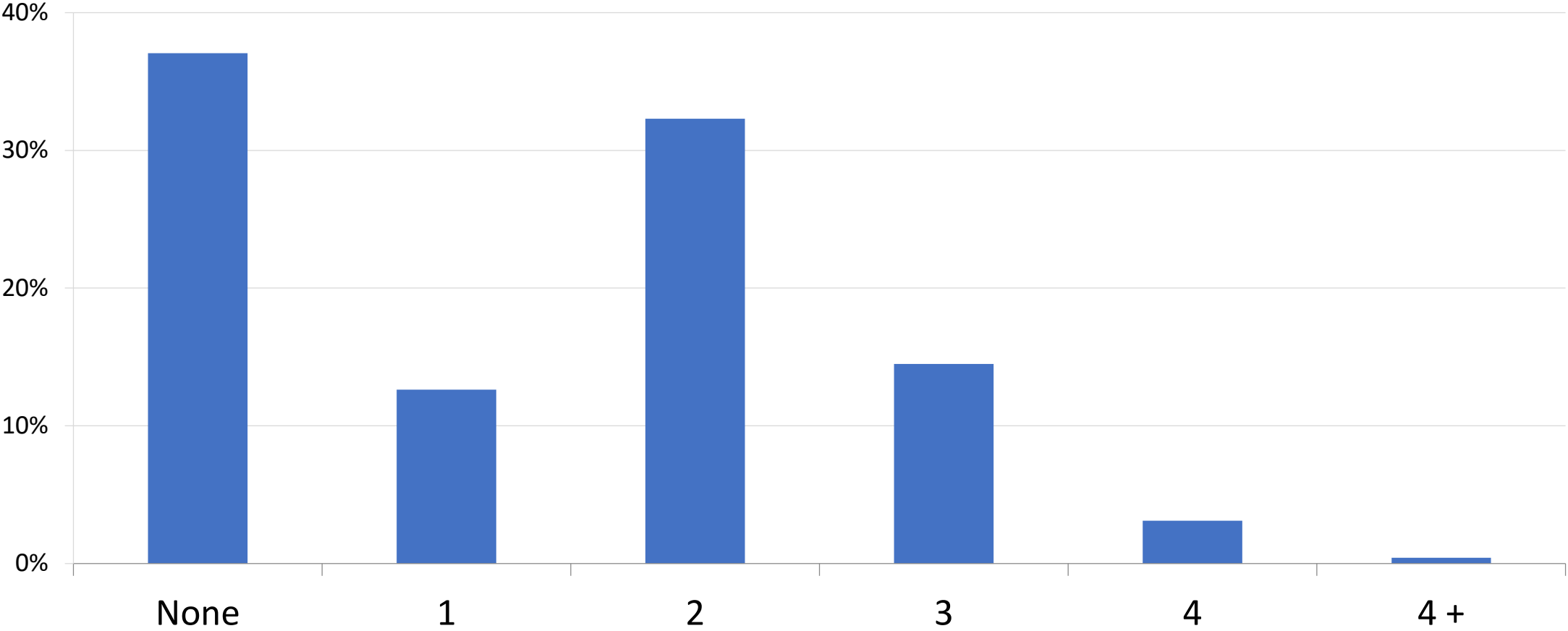
N=482



* Population data provided by Jacklyn Morris on 1/29/19

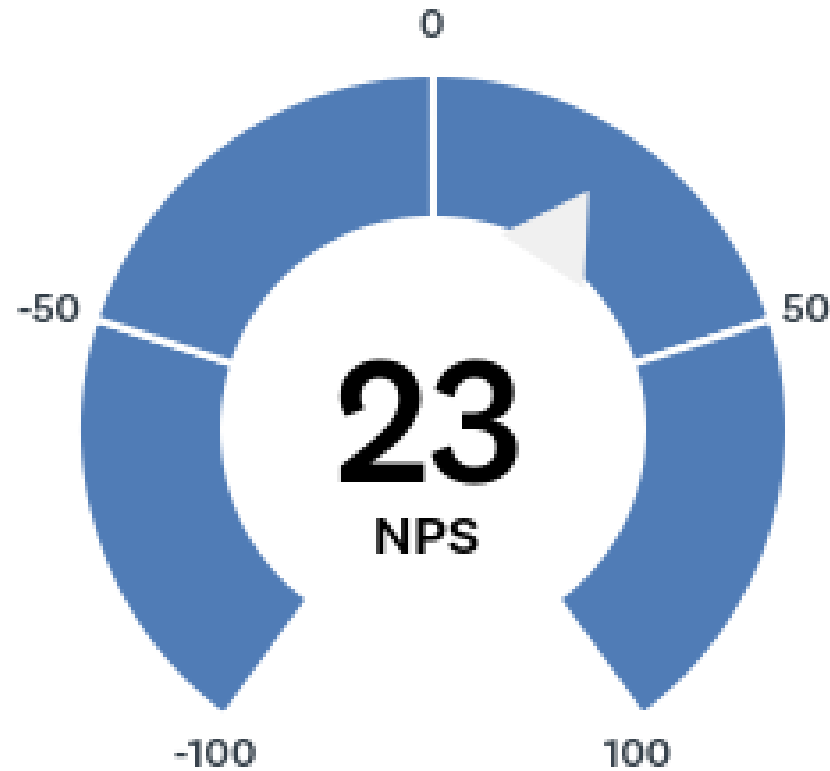
3. How many children are you parent or guardian for and live in your household (aged 17 or younger only)?

N=483



4. How likely is it that you would recommend Sherborn as a place to live to a friend or colleague? (Net Promoter Score*)

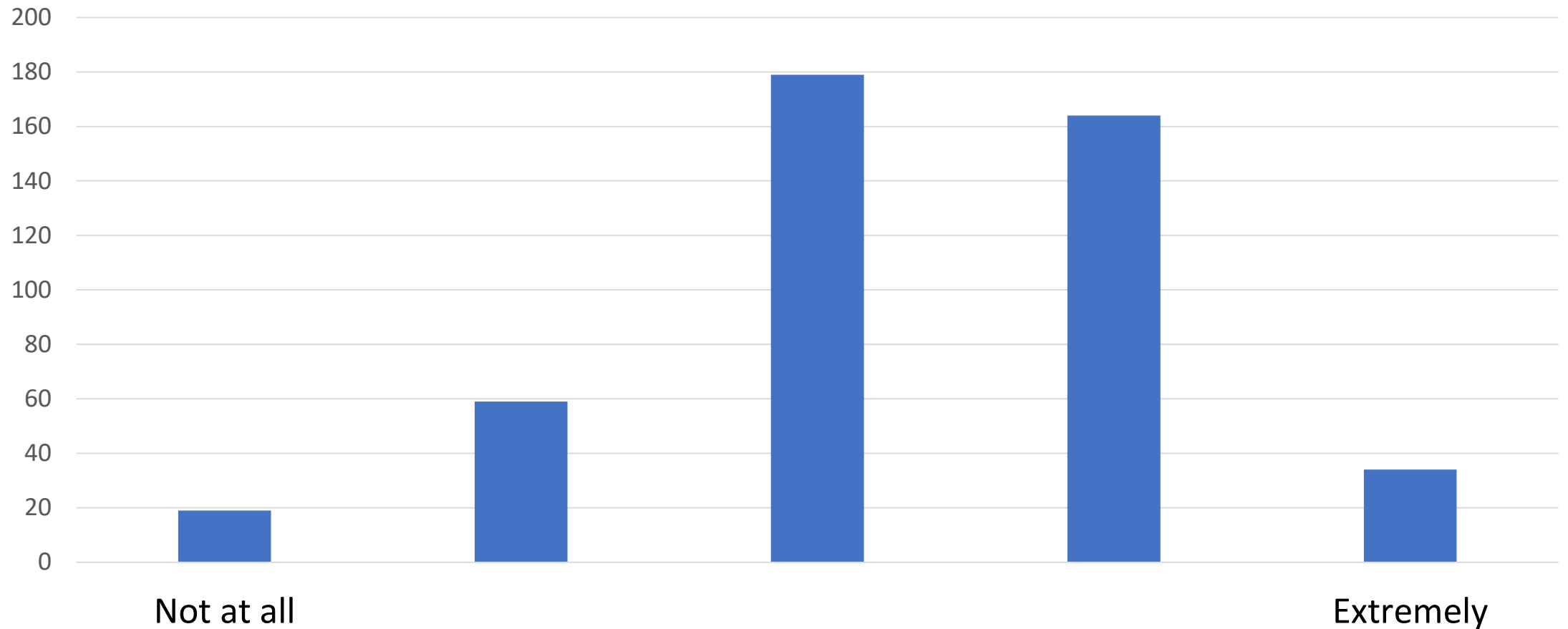
N=475



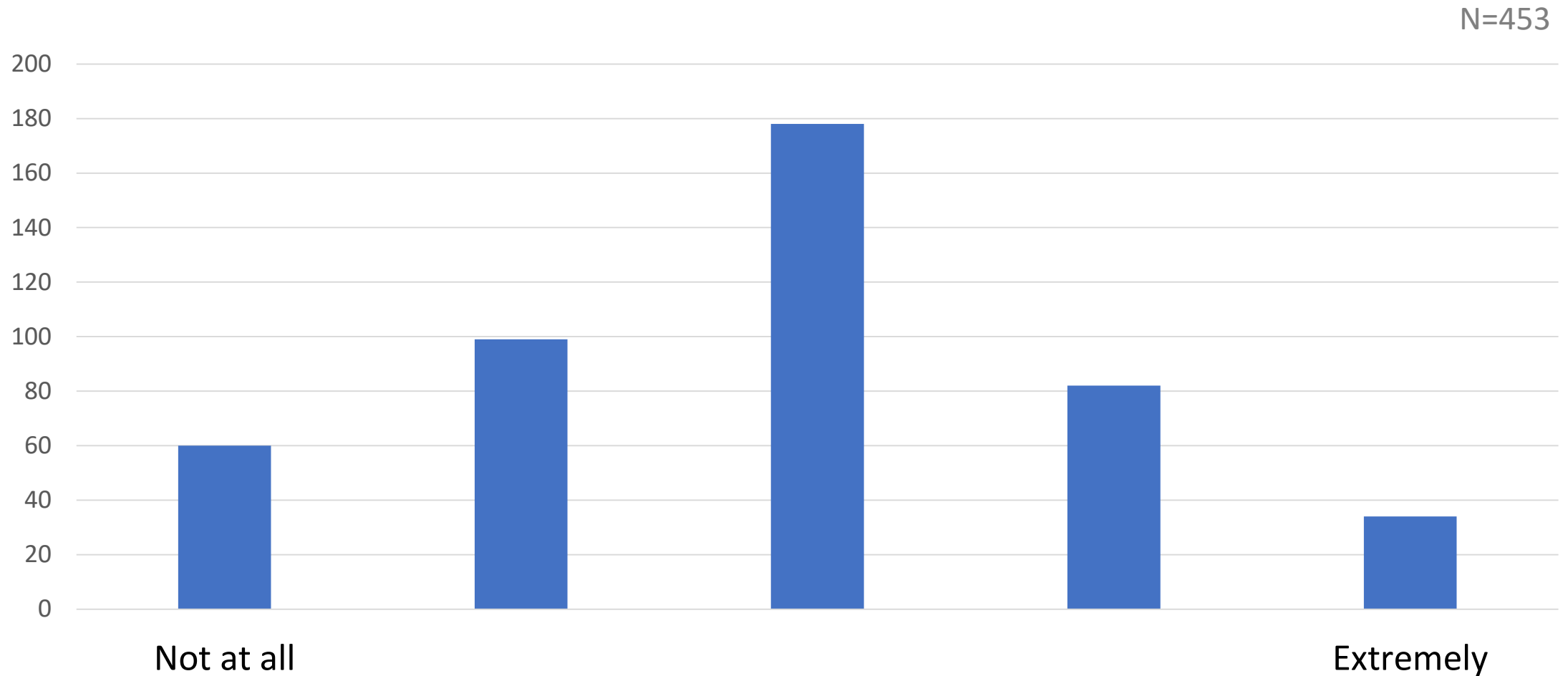
*More info: <https://www.bain.com/insights/introducing-the-net-promoter-system-loyalty-insights/>

5. How satisfied are you with the overall quality of services and government provided by the Town of Sherborn?

N=455

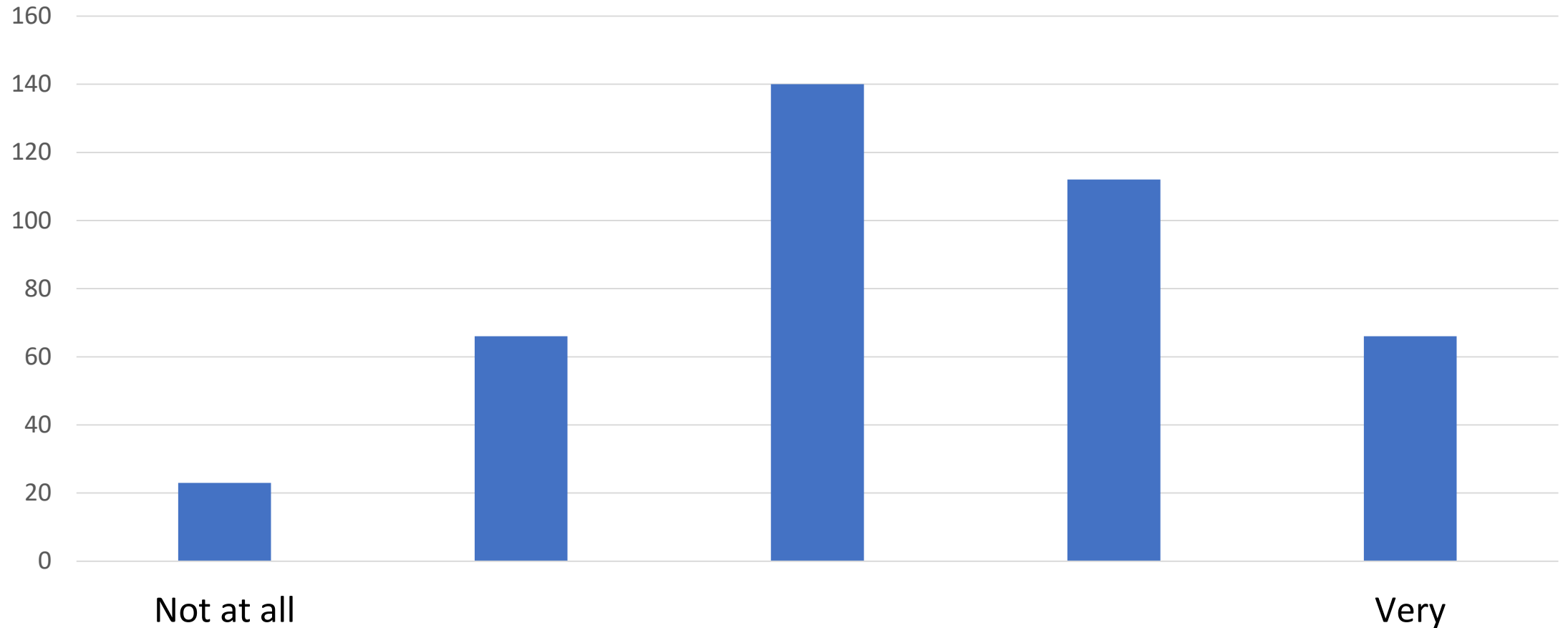


6. How well does Town government share information with you and other citizens?

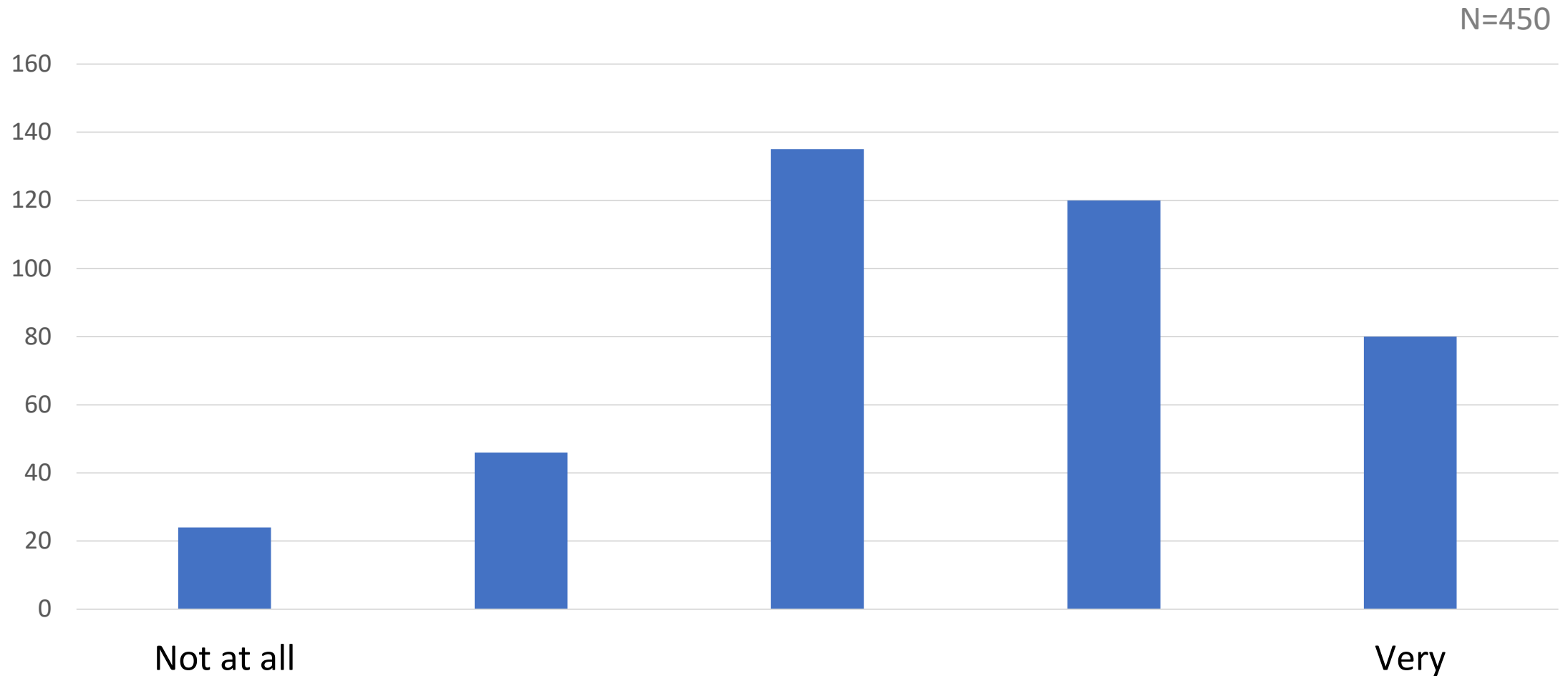


7. How satisfied you are with the quality of services provided by Administration? (Select Board, Town Administrator, Town Clerk)

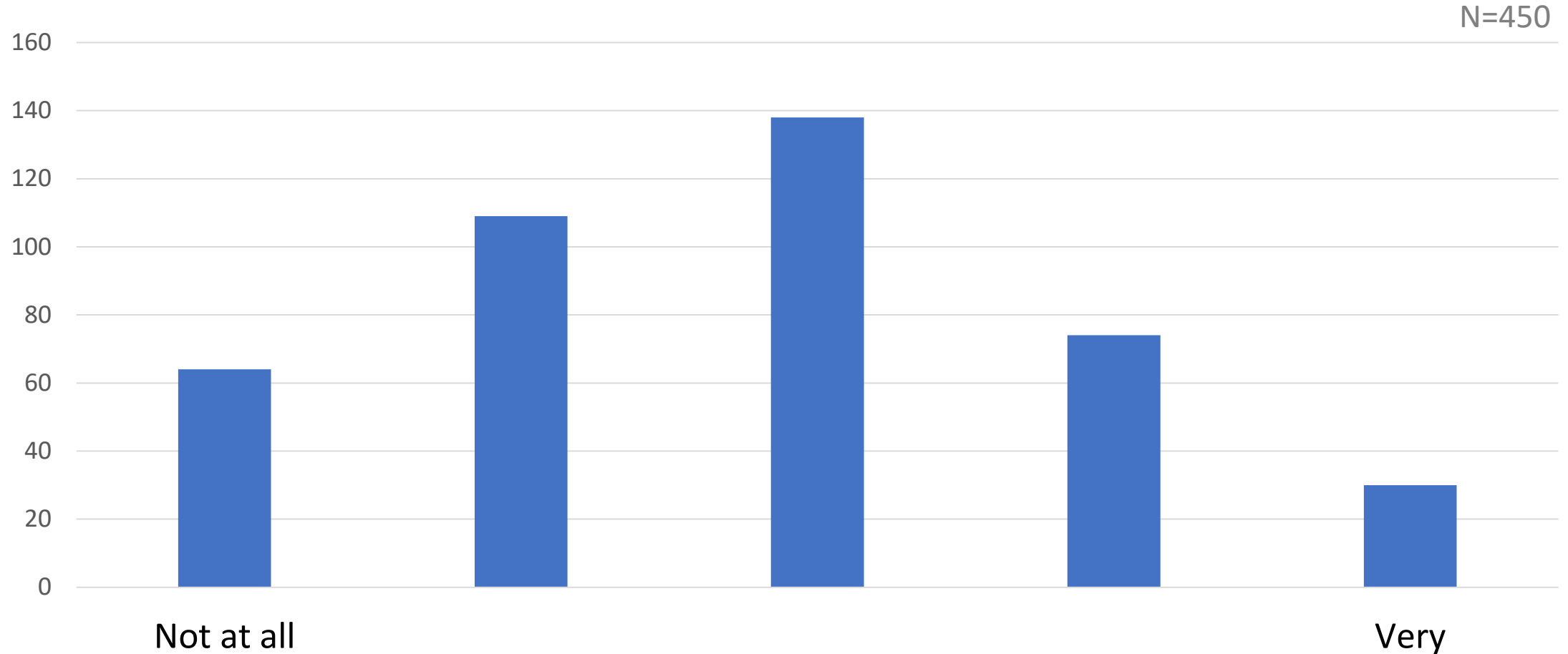
N=448



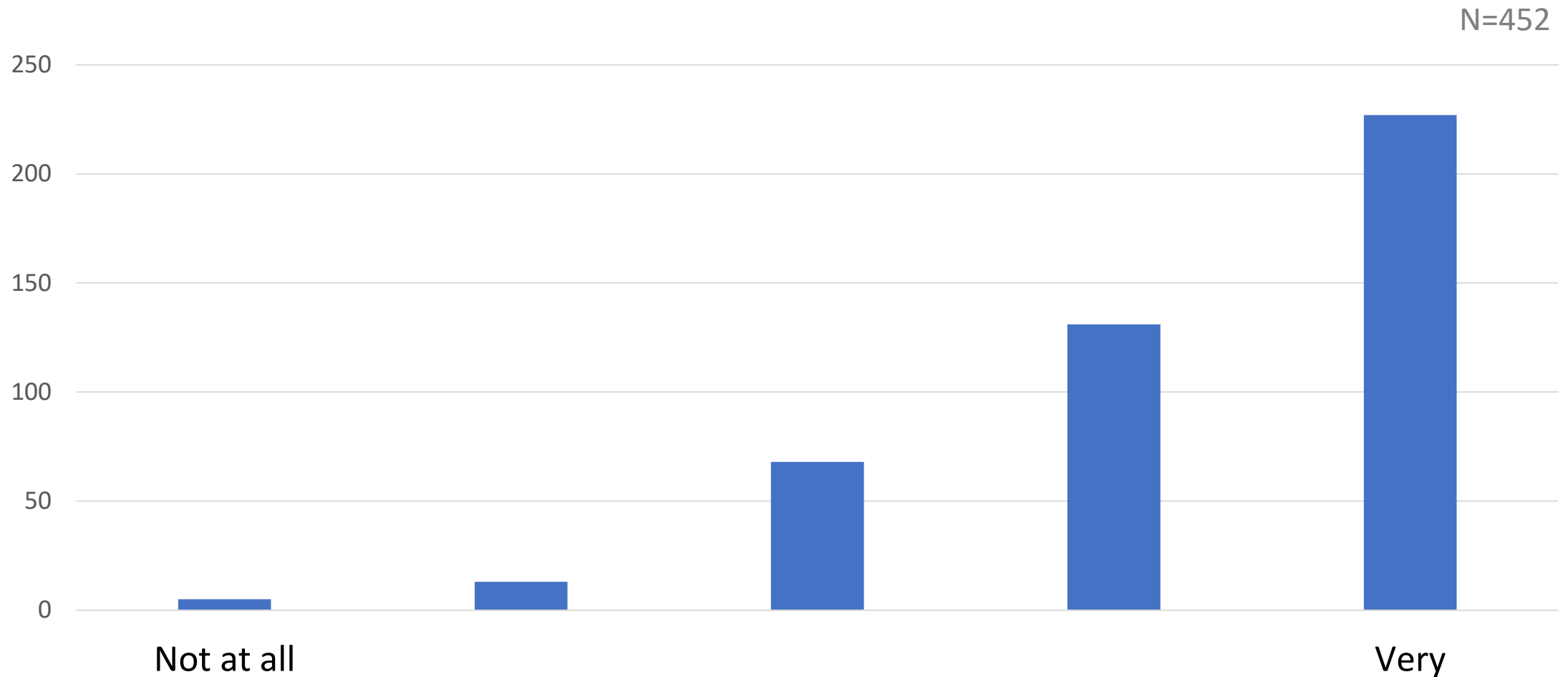
8. How satisfied you are with the quality of services provided by Finance and Taxes? (Tax Collector, Treasurer, Accountant, Assessor)



9. How satisfied you are with the quality of services provided by Planning and Development? (Planning, Building, Board of Health, Conservation, CM&D)

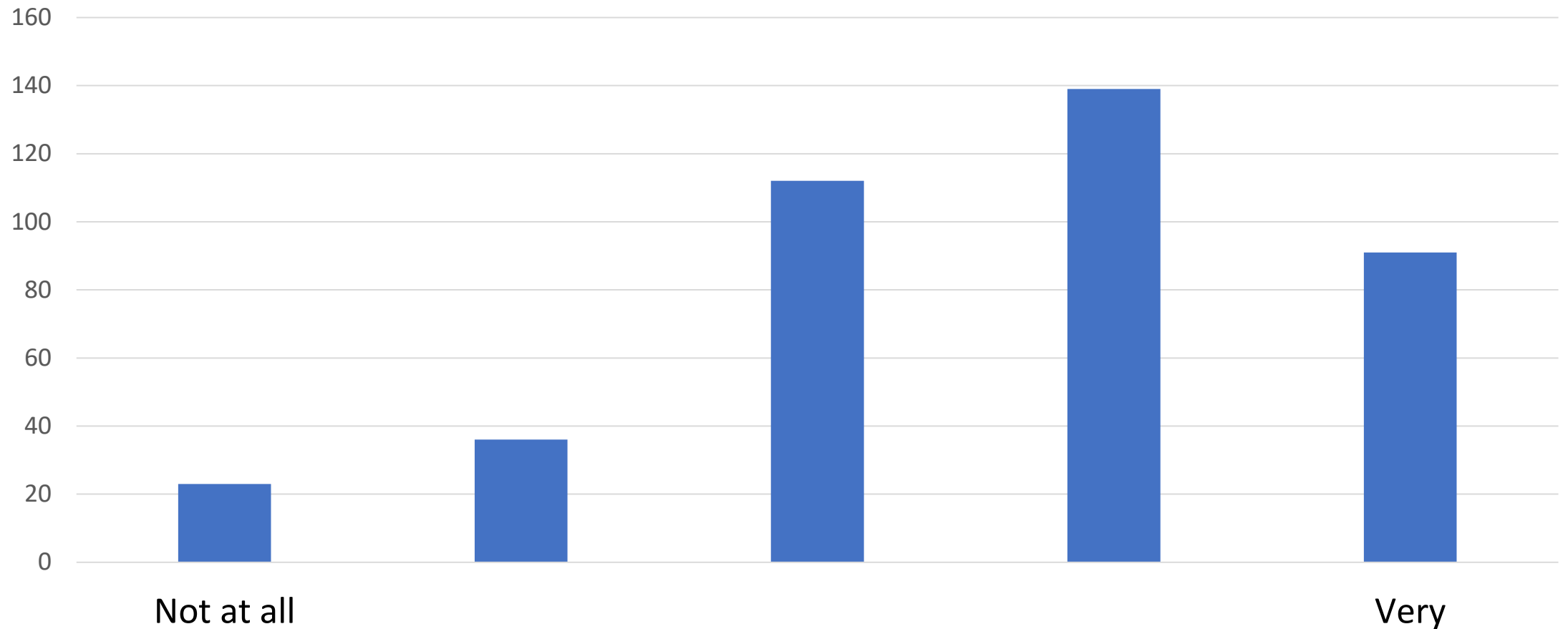


10. How satisfied you are with the quality of services provided by Public Safety? (Police and Fire Departments)



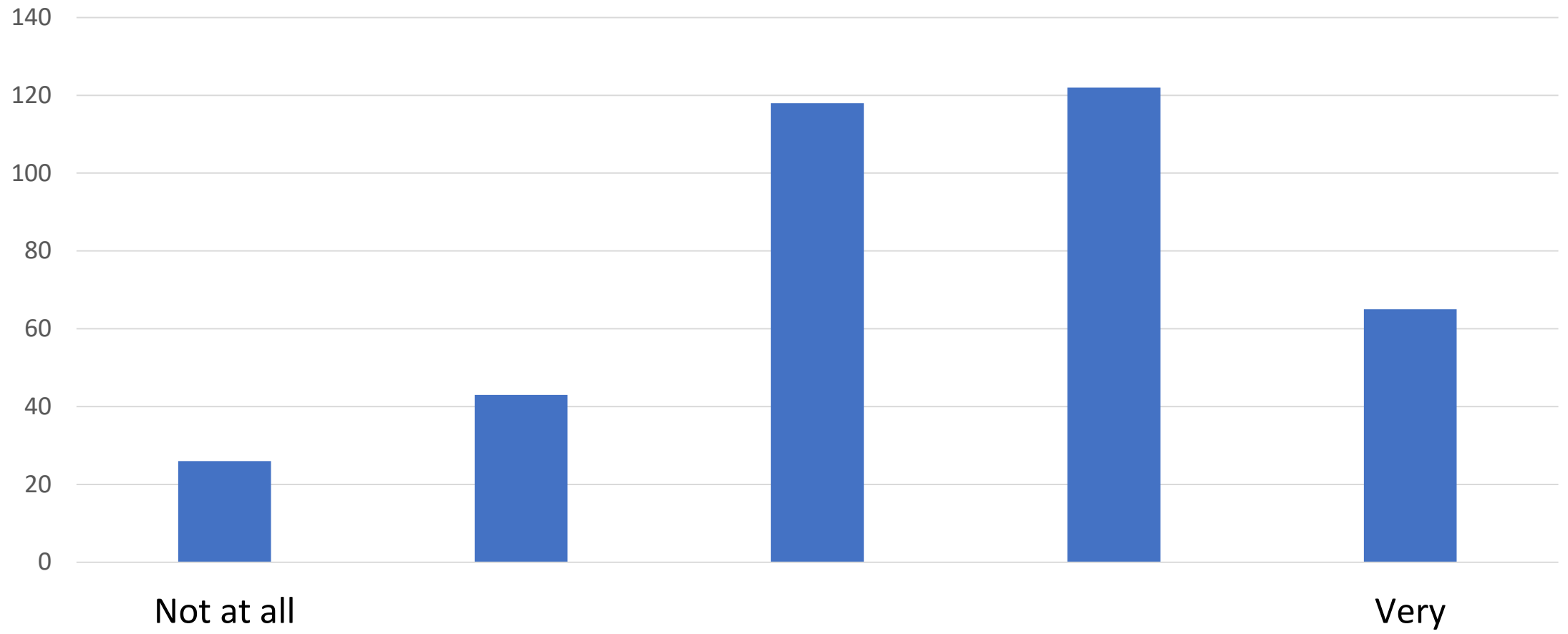
11. How satisfied you are with the quality of services provided by Other Departments? (Council on Aging, Library, Recreation)

N=449



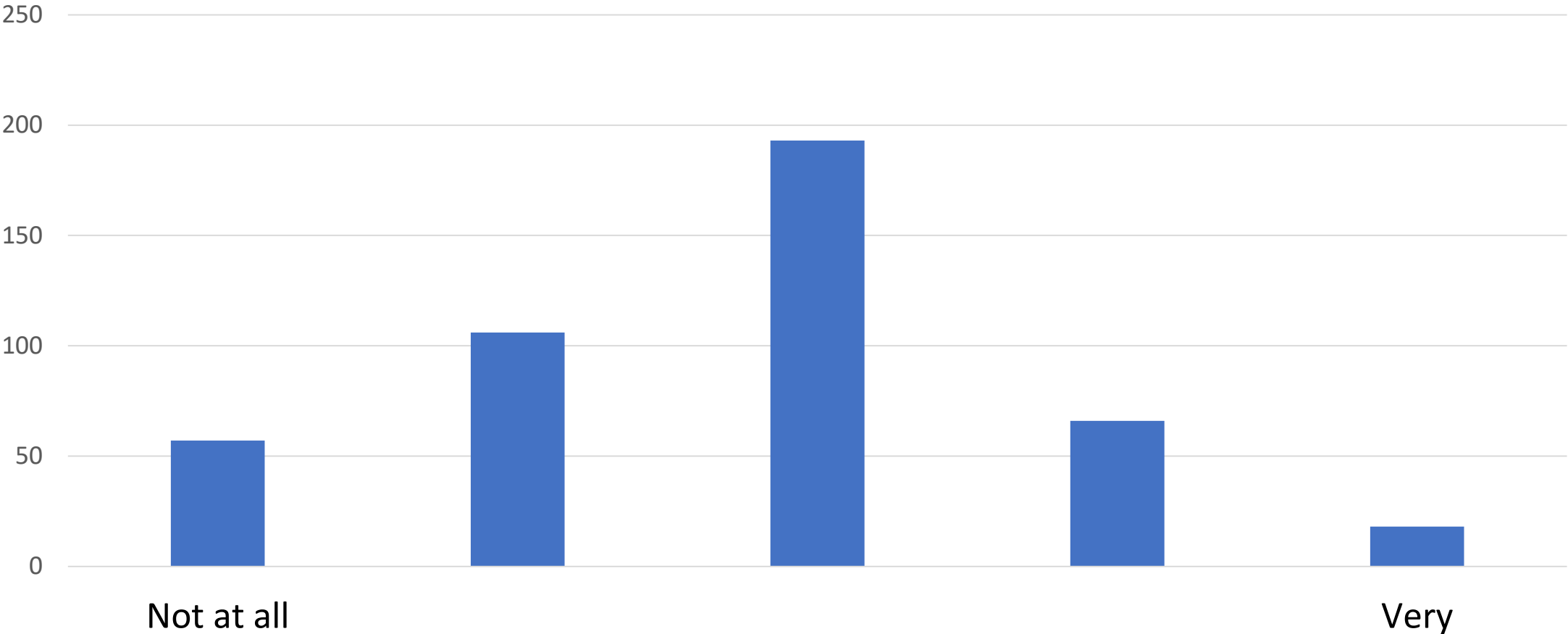
12. How satisfied you are with the quality of services provided by Committees? (Advisory, Capital Budget, Schools)

N=452

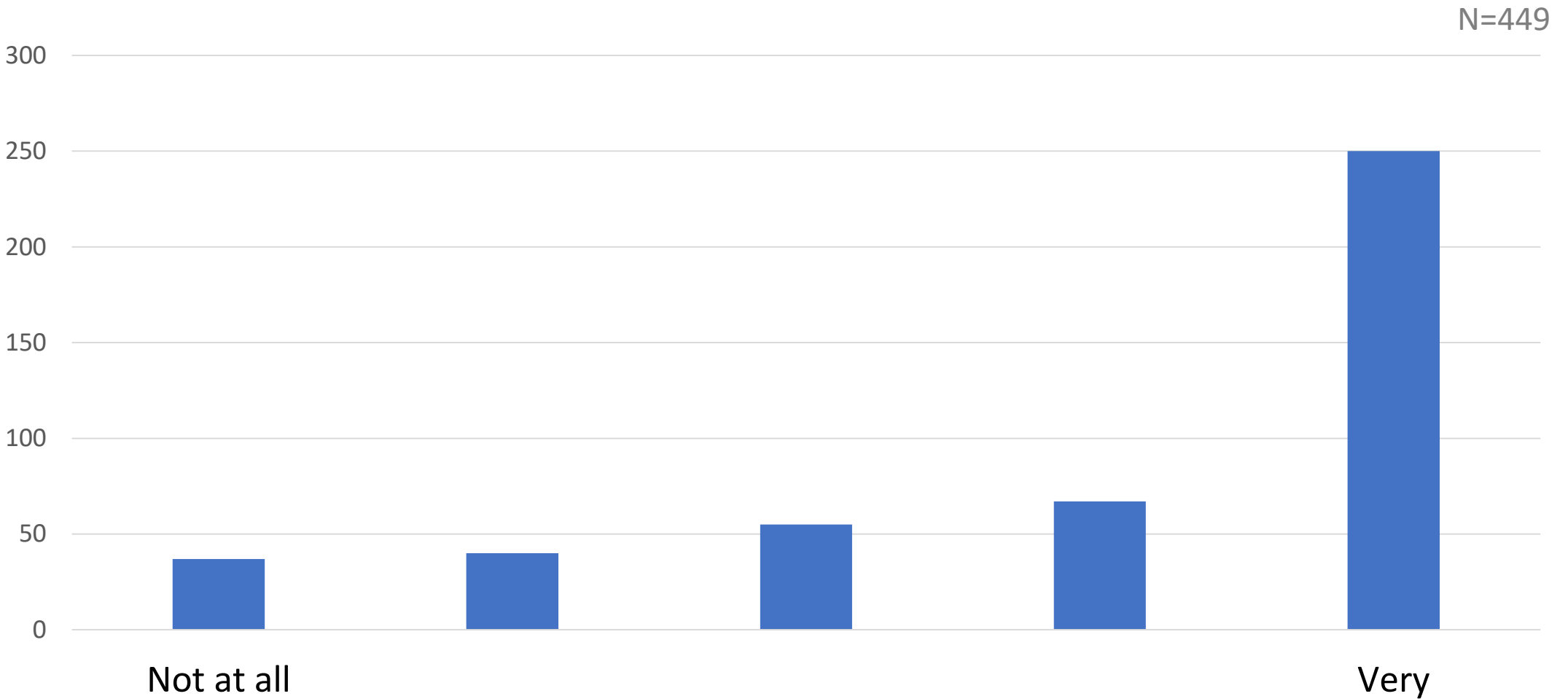


13. How well do Town departments continuously improve themselves to better meet your needs?

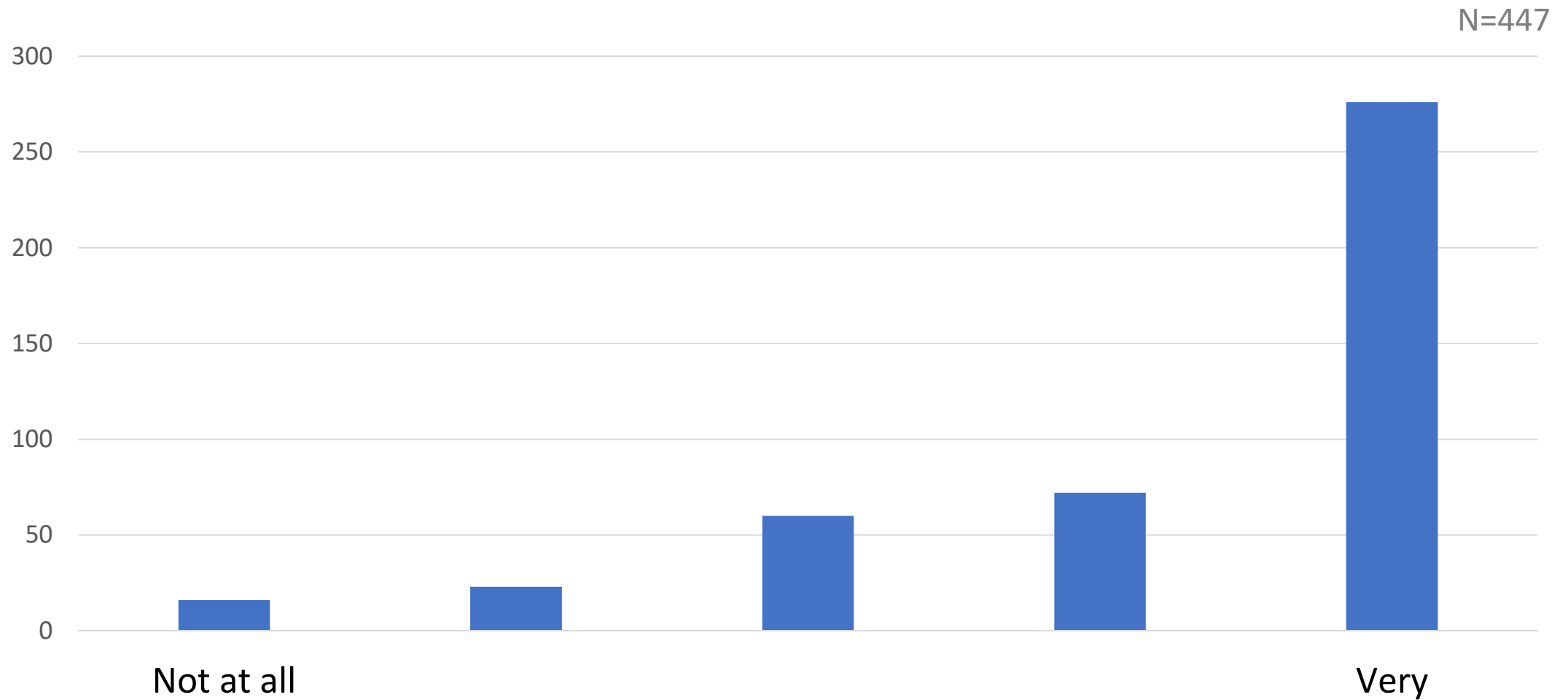
N=440



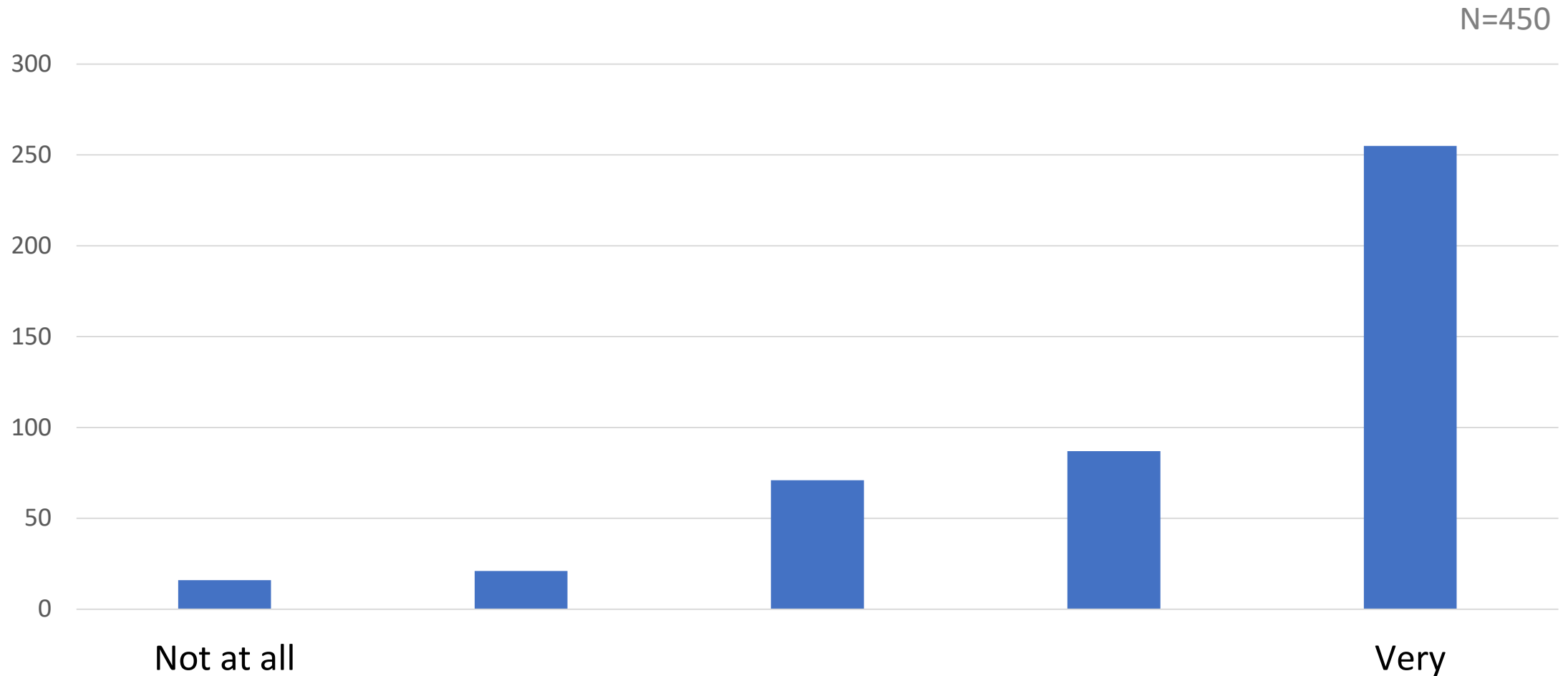
14. How valuable would payment by credit card be to you if it was offered in Sherborn?



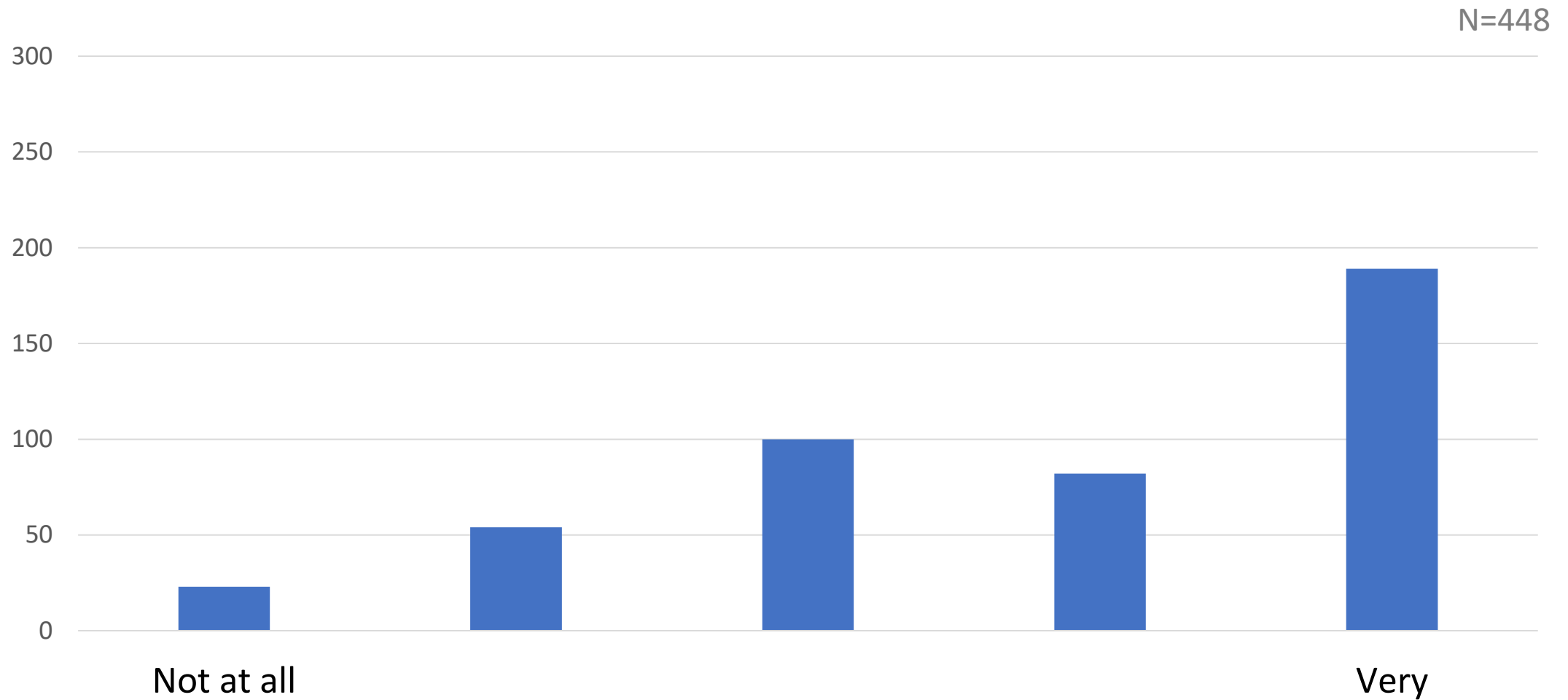
15. How valuable would a single registration and payment portal for all services be to you if it was offered in Sherborn?



16. How valuable would secure, intuitive, consolidated online access to your resident data be to you if it was offered in Sherborn?



17. How valuable would expanded office hours be to you if they were offered in Sherborn?



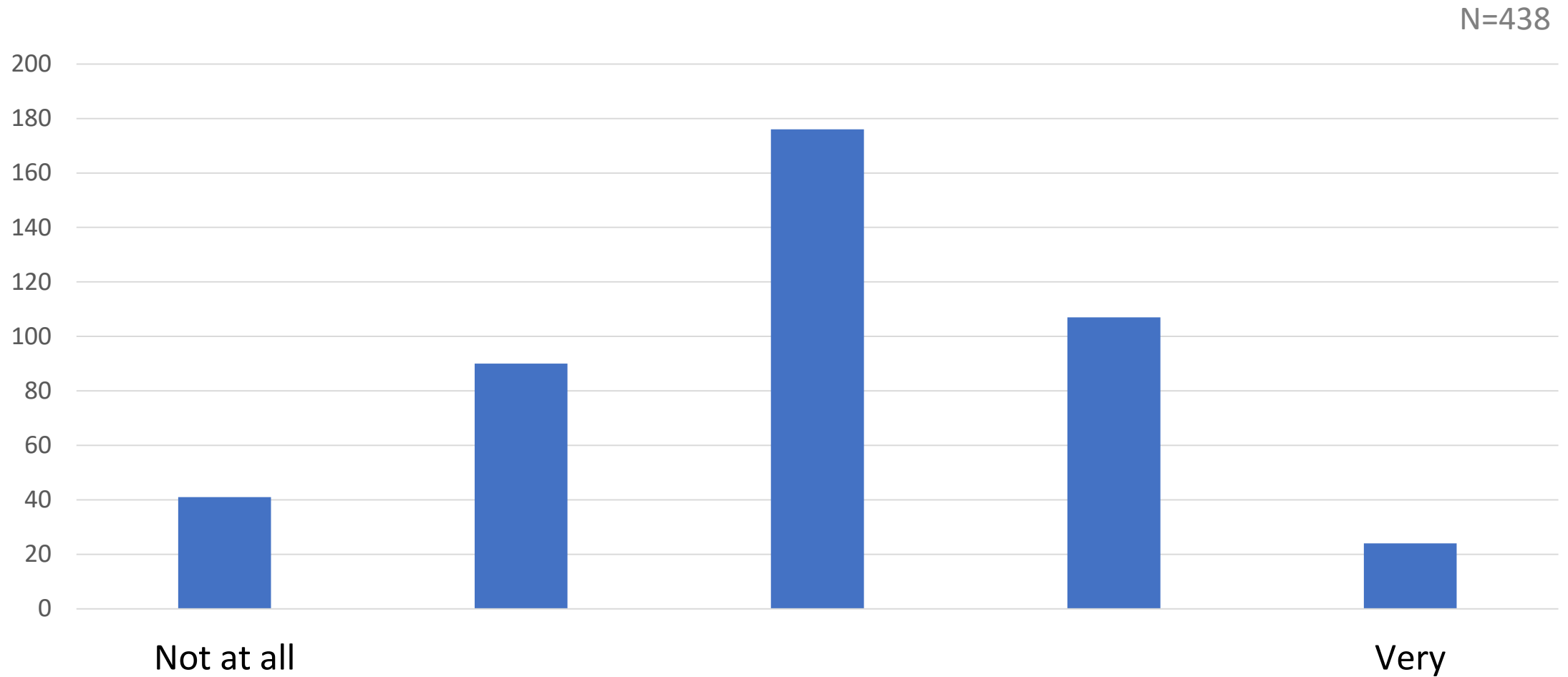
18. What other changes to town services do you believe Sherborn should invest in? Wordcloud* below built from the 198 comments. The larger the word, the more frequently it was used.

N=198

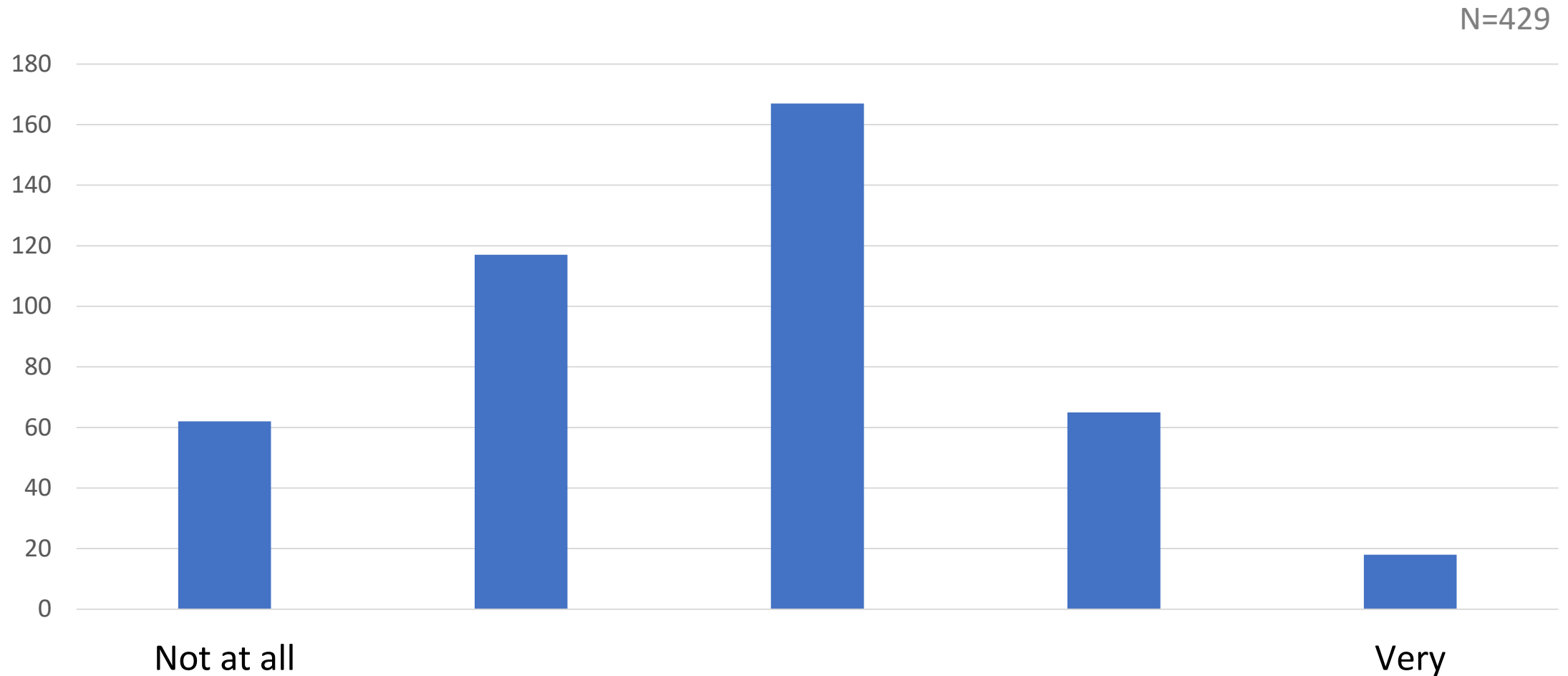


* Common words like pronouns and articles were excluded

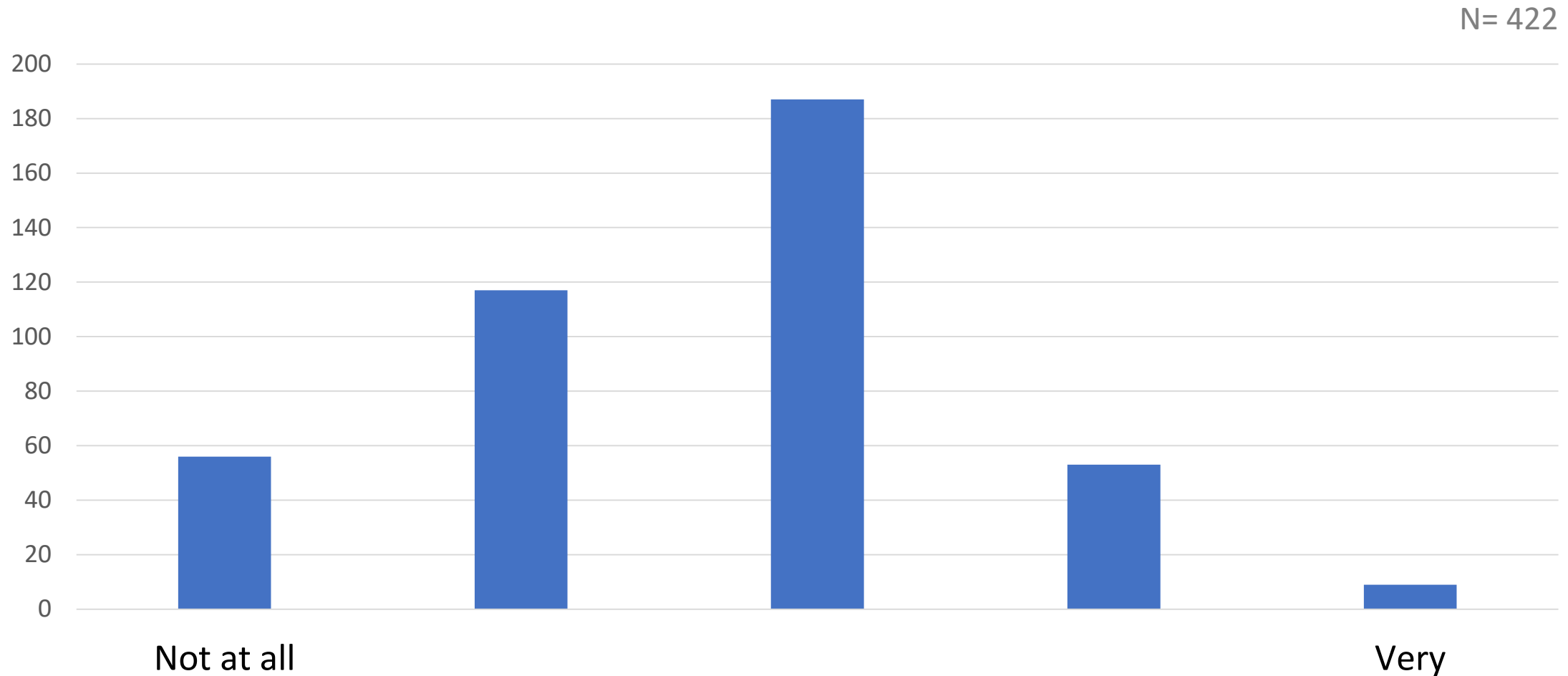
19. How satisfied are you with the Town's use of your tax dollars?



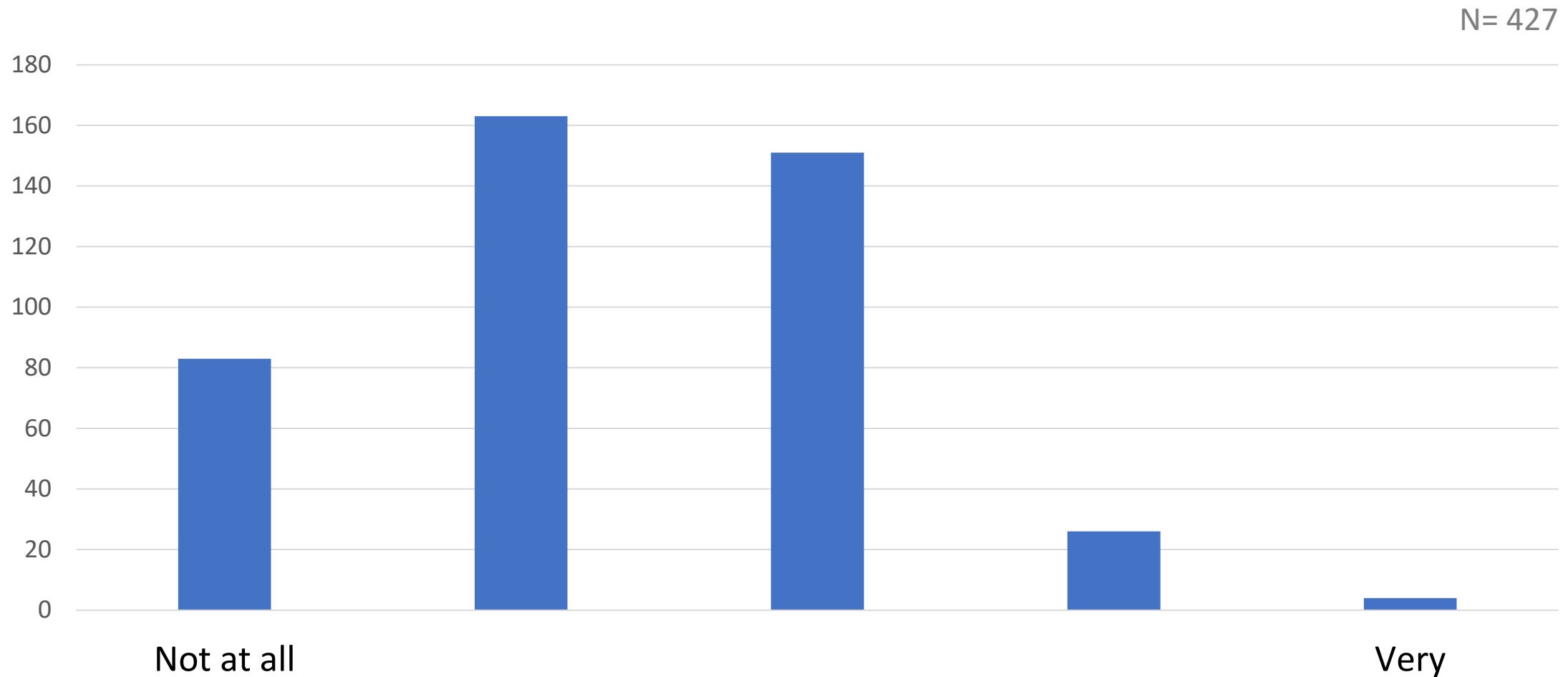
20. How satisfied are you with the Town's long term financial planning and oversight of the budget?



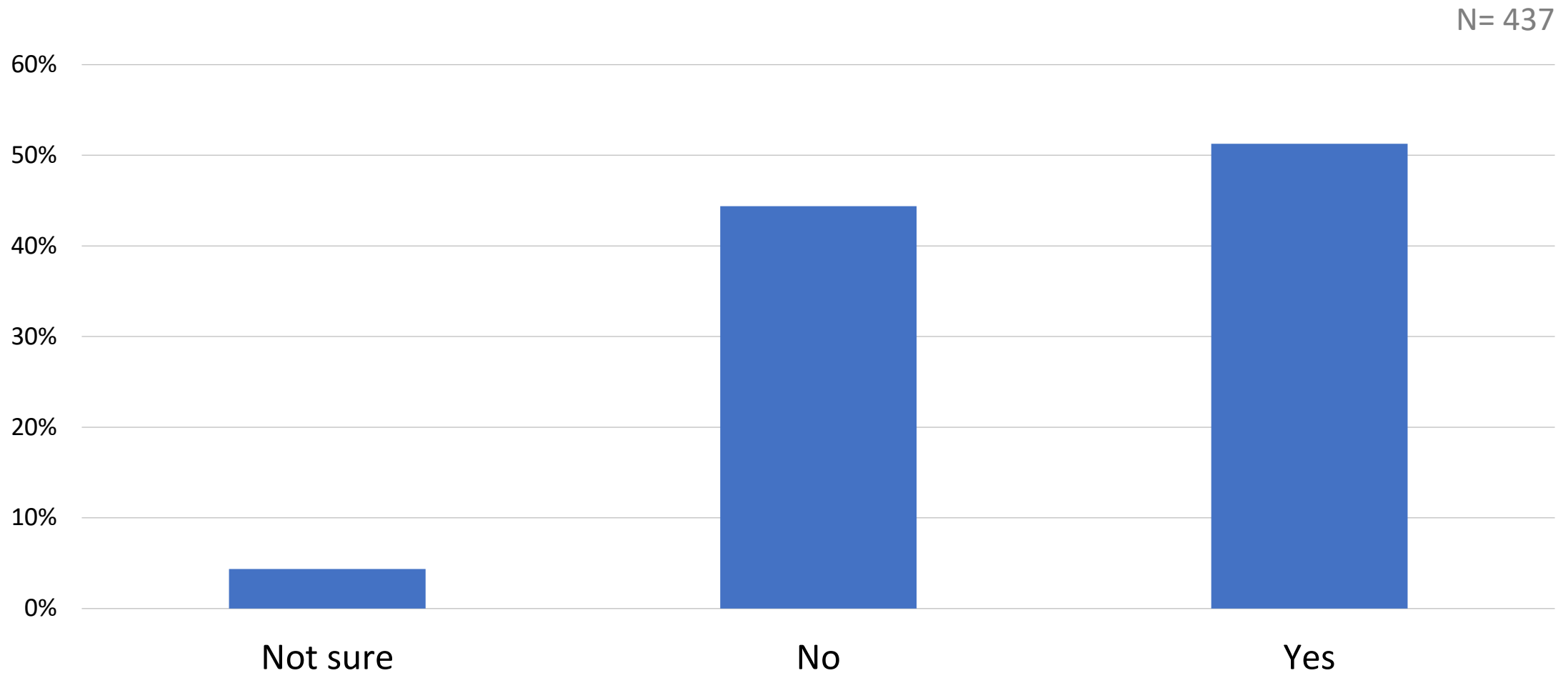
21. How well do departments and committees coordinate with each other to execute that plan and achieve the Town's goals?



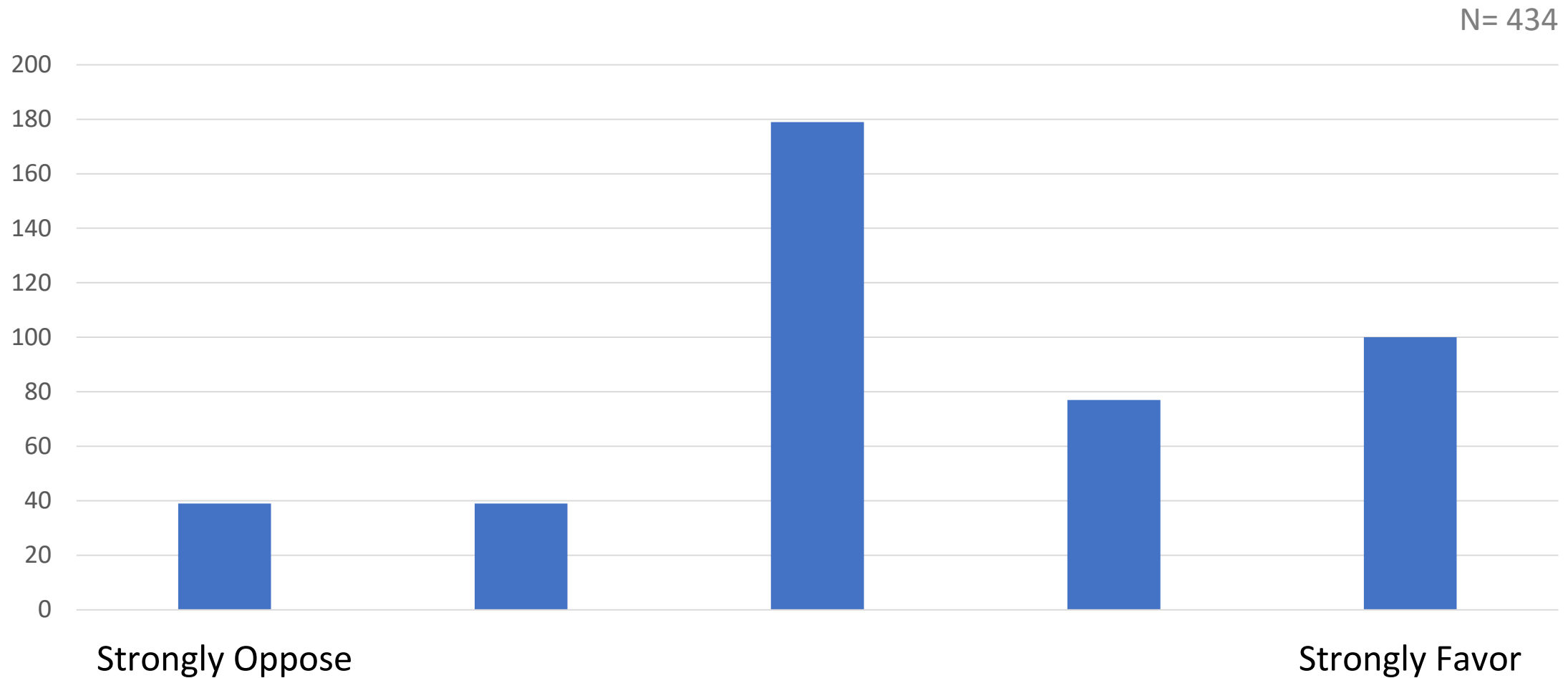
22. How effectively does the Town leverage technology and human resources?



23. Is your property tax payment managed by your mortgage company?

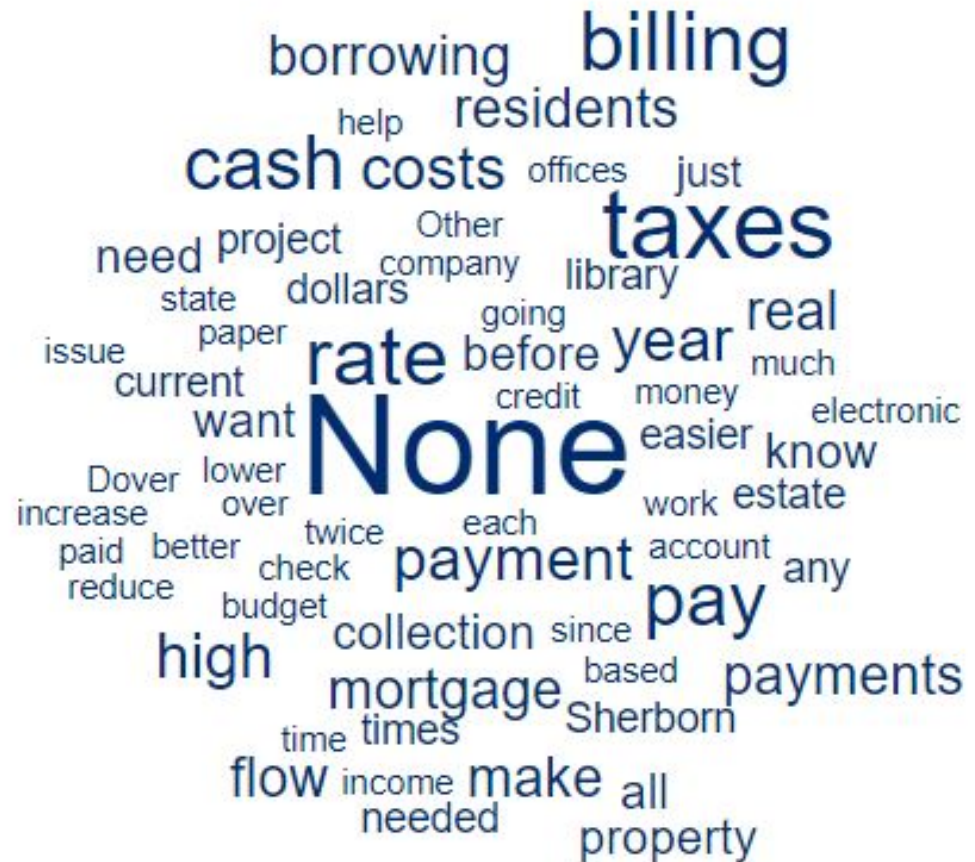


24. Based on your current understanding, how supportive would you be of shifting to quarterly tax billing?



25. What additional information would you like to have on quarterly tax billing? Wordcloud* below built from the 93 comments. The larger the word, the more frequently it was used.

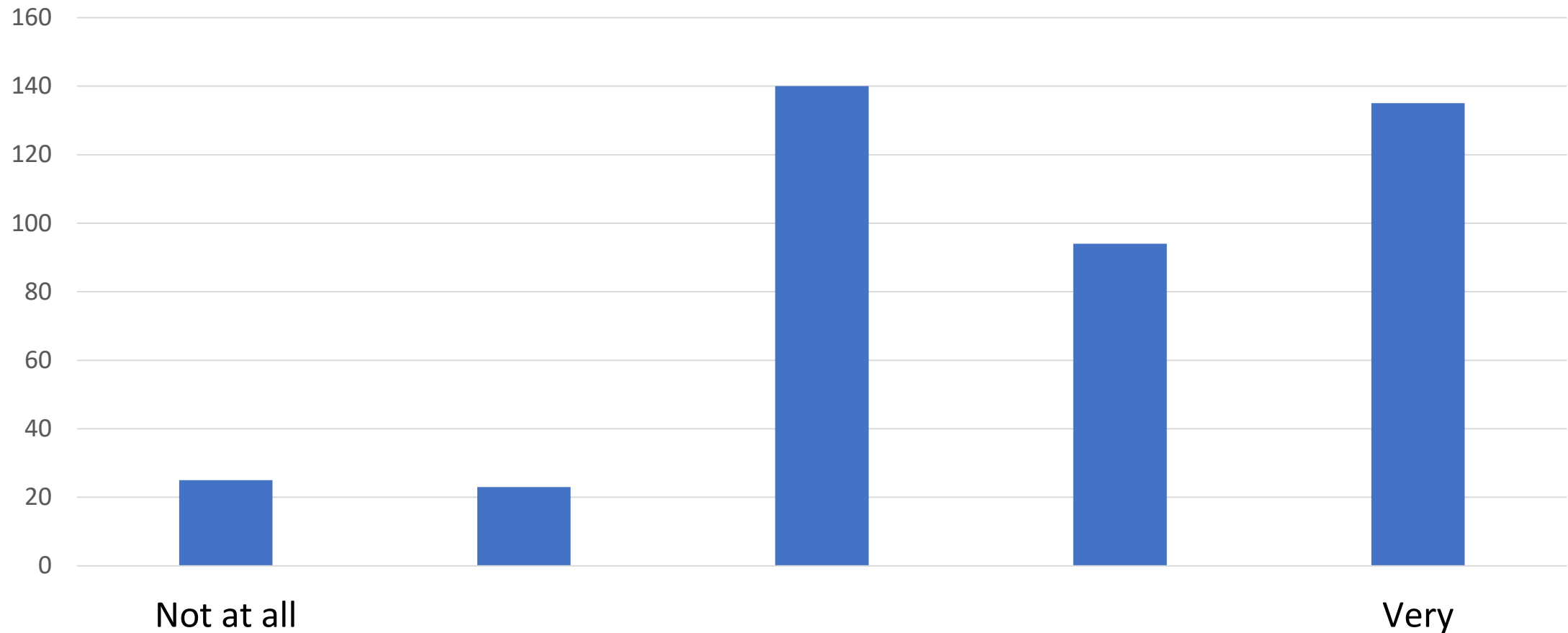
N=93



* Common words like pronouns and articles were excluded

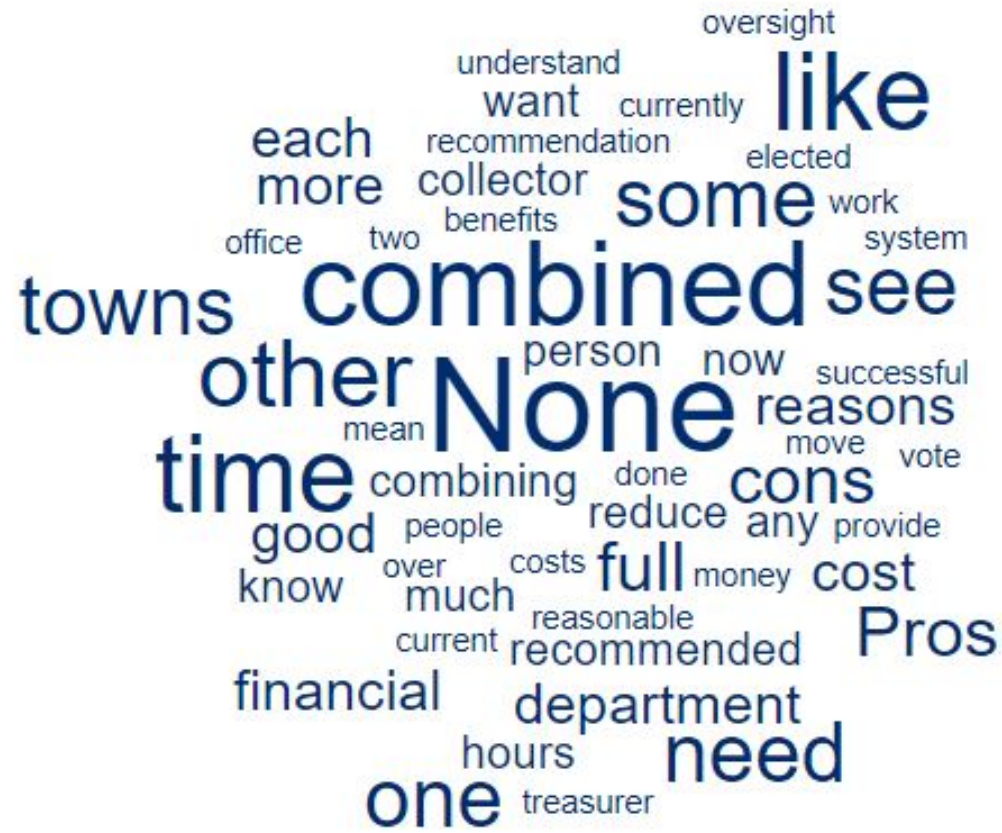
26. Do you support the DOR recommendation that Sherborn combine and appoint the positions of Collector and Treasurer, adopted by many towns similar to Sherborn?

N= 417



28. What additional information would you like on the appointed treasurer/collector issue? Wordcloud* below built from the 89 comments. The larger the word, the more frequently it was used.

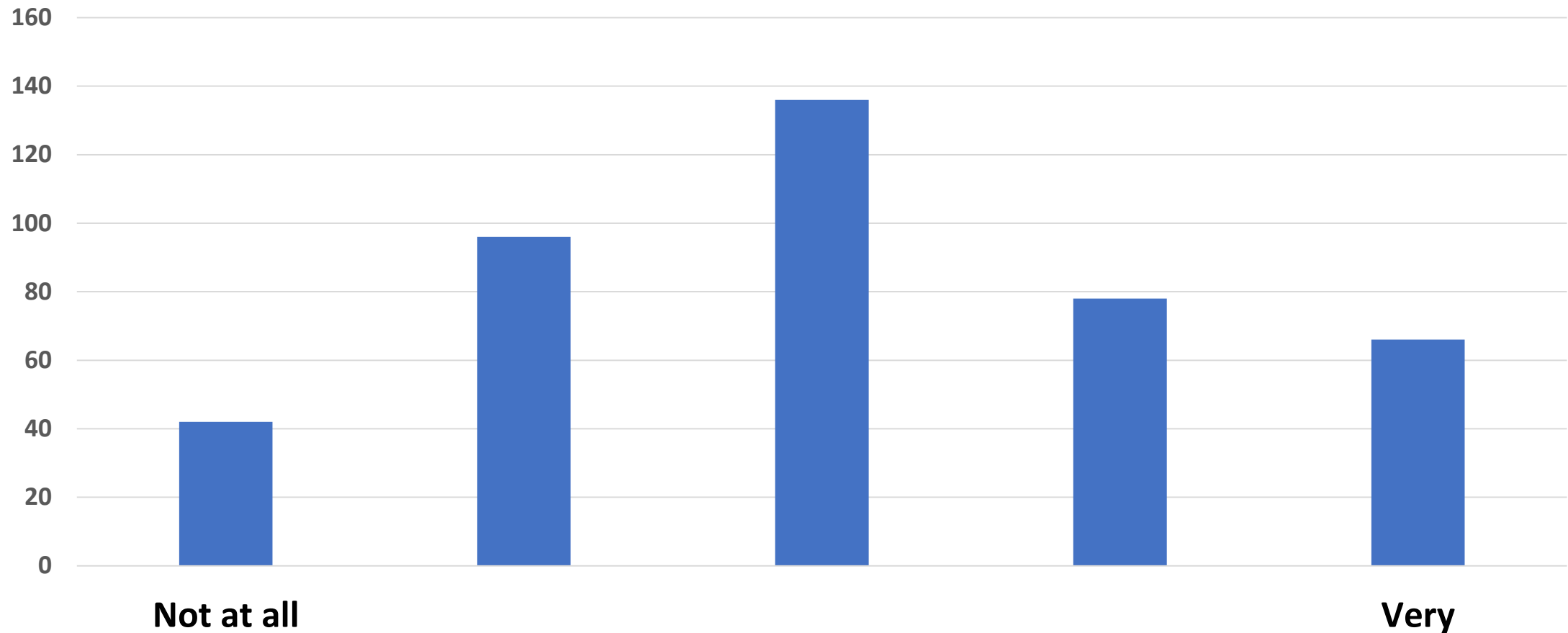
N=89



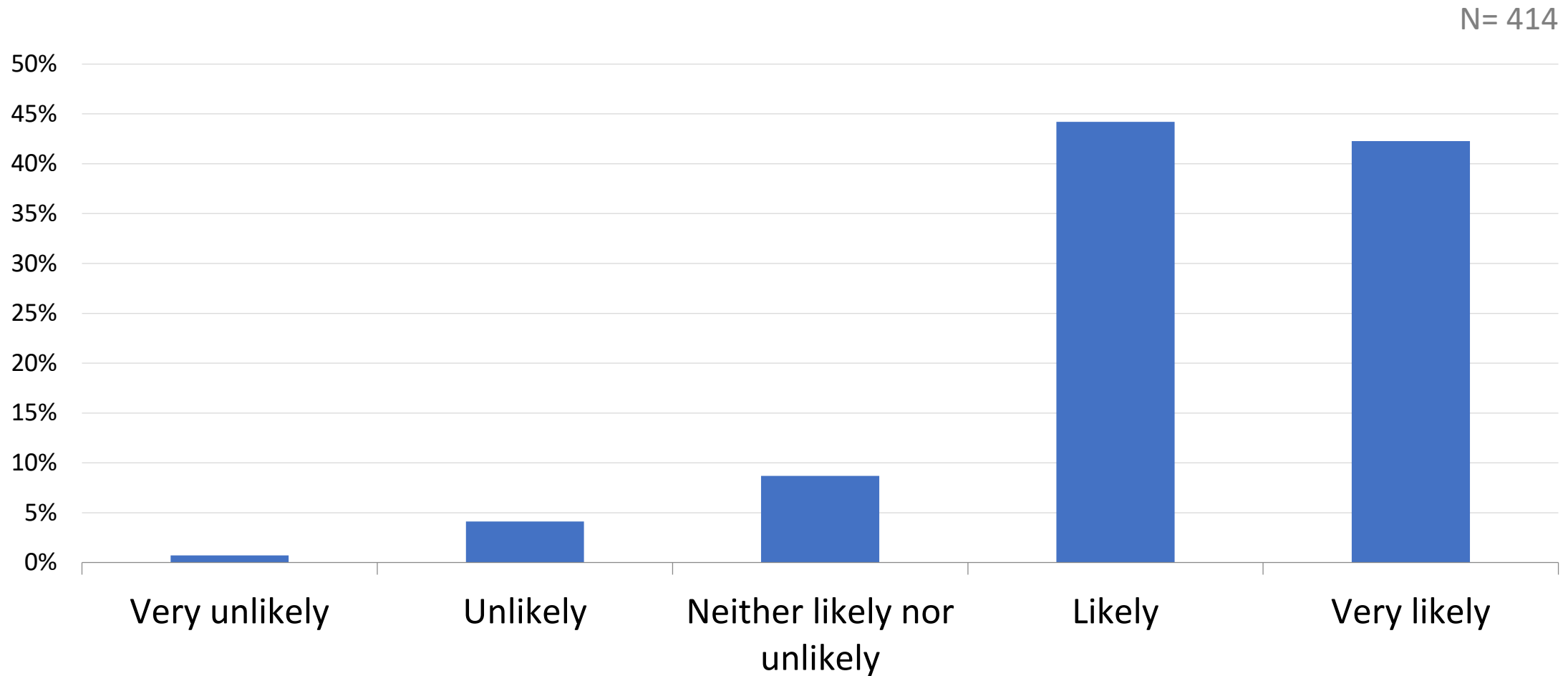
* Common words like pronouns and articles were excluded

29. How well do you feel that you understand Sherborn's town government - including how it is structured, who's responsible for what, and how decisions are made?

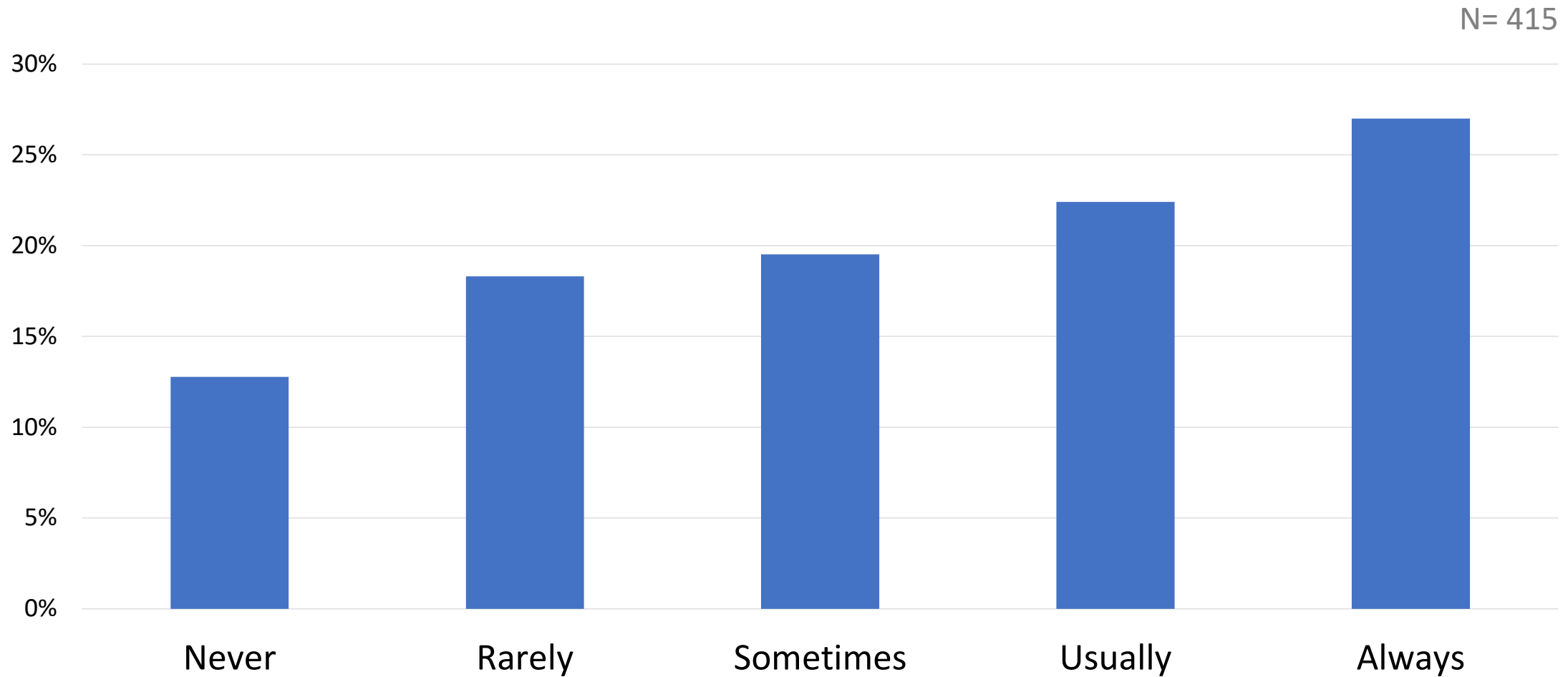
N= 418



30. Would you take the time to read, watch or listen to something that explained 'How Sherborn Works' if it were available?



31a. How often do you attend Annual Town Meeting?



31b. What is the main reason you don't attend Annual Town Meeting more frequently? Wordcloud* below built from the 105 comments. The larger the word, the more frequently it was used.

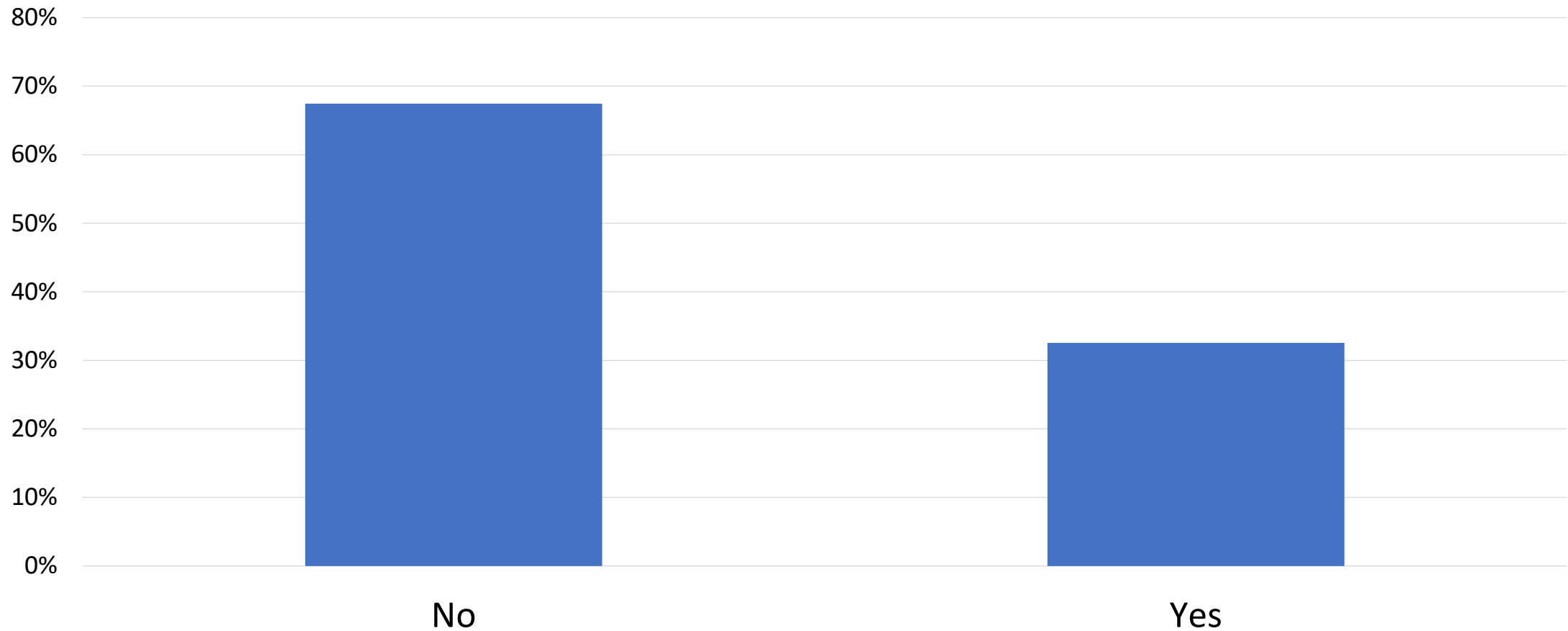
N=105



* Common words like pronouns and articles were excluded

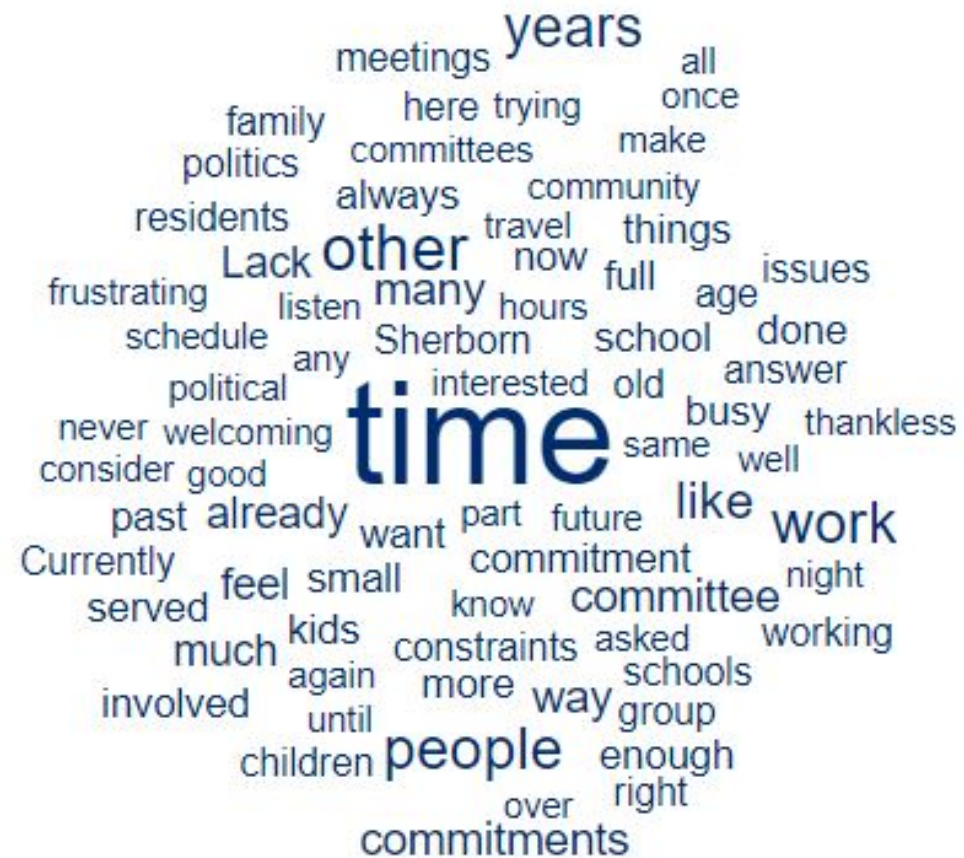
32a. Do you currently volunteer in town government or town committees?

N= 418



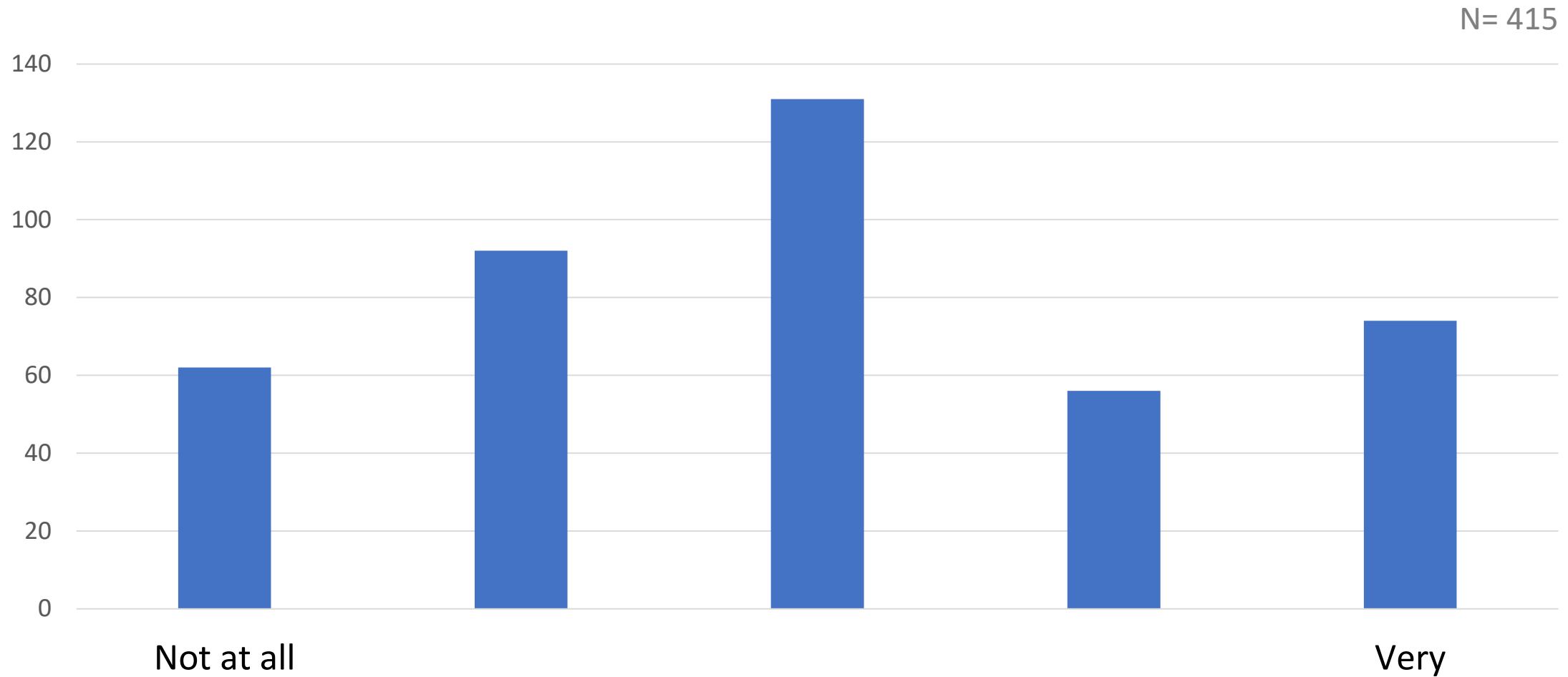
32b. If you are not likely to start or continue volunteering, why not? Wordcloud* below built from the 140 comments. The larger the word, the more frequently it was used.

N=140



* Common words like pronouns and articles were excluded

33. How likely are you to start volunteering or continue volunteering in town government/committees?



Appendix 4

**Recommendations to the Select Board
July 29, 2019**

Sherborn Structure of Town Government Task Force II

July 29, 2019

Town of Sherborn, Massachusetts
Select Board
George Morrill, *Chairperson*
Paul DeRensis
Eric Johnson
Jeff Waldron
Chuck Yon

Dear Select Board:

Our committee was gratified that the voters at 2019 Annual Town Meeting approved all four of our proposals – authorization of Town Administrator to hire outside Human Resource consultant, authorization of TA to act as Information Technology Manager, move to appointment of Town Treasurer, and move to quarterly property tax billing. We believe that these four provisions will help to improve the functionality of Sherborn's governing structure. Our primary concern now is that they be fully implemented, particularly quarterly tax billing which we anticipate will require considerable advance planning. As Sherborn's chief executives, we urge the Select Board to take the lead in their implementation and we offer you any assistance we can give.

We also want to share with you Part II of our work – findings and recommendations based on our study of comparable towns regarding specific issues which did not lend themselves to the drafting of a warrant article. They are: annual goal setting and status reports, mentoring committees, continuous improvement, Town Hall office hours and accepting credit cards. Our committee has written a summary of one of these issues and they are attached to this letter. Once again, as the town's chief executives, we urge you to consider and adopt these recommendations.

Thanks to all of you for your volunteer service to our community. The Task Force now has a taste of what it's like to meet frequently; research and talk, repeat, research and talk; attend hearings; survive some hits; and participate in town meeting. We're fortunate to have you.

Sincerely,

Structure of Town Government Task Force II
Coralinda Lincoln, *Chairperson*
Erin Carroll
Greg Kennan
Adam Page
Addie Mae Weiss

cc: David Williams, *Town Administrator*

SETTING GOALS

The Select Board is the chief policy-making body of the Town. The Task Force believes that it should be more proactive in setting, publishing, and updating strategic goals for the government of the Town. Further, doing so would set a tone for similar goal setting by all Town Departments, Boards, and Committees. Setting explicit goals will help better align Town Departments in the pursuit of those goals, offer benchmarks against which progress may be measured, and allow for more reasoned allocation of resources in implementation of those goals.

The Task Force's February 2019 survey indicated significant concern among Town residents regarding Town long-term planning and coordination among departments. Only [18.9% - CHECK EXACT NUMBERS] of survey participants responded positively to Question 20, "How satisfied are you with the Town's long-term financial planning and oversight of the budget?" Similarly, only [12.3% CHECK ACTUAL NUMBERS] of participants responded positively to question 21, "How well do departments and committees coordinate with each other to execute that plan and achieve the Town's goals?"

A consistent recommendation of the academic studies the Task Force has reviewed has been to engage in consistent forecasting and goal-setting. The May 2012 Town of Sherborn: Financial Management Review ("DOR Report") specifically recommended that the Select Board, in conjunction with the Town Administrator, develop and implement a set of goals; build a working timeline for executing individual recommendations; and engage department heads to develop a comprehensive list of clearly defined annual goals and objectives for each department. DOR Report, p. 6. The DOR Report specifically built on the earlier, 2011 recommendation of the Collins Center:

[T]he Board of Selectmen should be devoting more time to big-picture strategic issues, long-term planning, and goal-setting. We believe this as a general matter for the Town. Additionally, the current Board's core competencies and comparative advantages are not being used profitably by spending time debating the minutiae of the management of the Town's operations. Those competencies and advantages could be put to more valuable use thinking strategically about issues such as long-term plans for revenue, regionalization opportunities, the development of performance measures, and other such issues.

Report Relative to the Organization and Operations of the Town of Sherborn, Massachusetts ("Collins Center Report"), pp. 12-13.

Recommendations by these experts to other towns echo the need for articulated goals and timelines. For example, the December 2016 Department of Revenue recommendations to the Town of Carlisle (pop. 5028) recommended that:

the Finance Director, each year, create and provide the Board of Selectmen and Finance Committee with a detailed budget forecast. The Finance Director shall also annually prepare a [five]-year financial projection of revenues and expenditures for all operating funds. These forecasts shall be used as planning tools in developing the following year's operating budget as well as the five-year capital improvement plan.

Town of Carlisle Financial Policies — A Community Compact Cabinet Initiative (December 2016), p. 2.

The Select Board already has established annual planning and goal-setting as one of its standard operating procedures. "The Board of Selectmen will adopt goals and objectives each year." Operating Procedures of the Sherborn Board of Selectmen, March 8, 2012, page 1. The Board should build upon and expand its own good example. Setting overall goals for the Town and requiring or at least encouraging similar goal-setting processes in all of the many Departments, Boards, Committees, and ad hoc groups on which the Town relies for its governance will help focus the activities of all such entities. The Select Board's establishing the expectation that all Town government entities will set goals, adhere to them, and measure progress against them will help coordinate town governmental activities, increase transparency of governmental operations, and enhance responsiveness to Town needs.

For the reasons above, the Task Force recommends that the Select Board should continue under, and consider enhancing, its current operating procedure and should require (or encourage where the Select Board lacks direct authority) other Town Departments, Boards, and Committees, after appropriate discussion, to:

- set written goals for each fiscal year;
- prioritize those goals;
- issue periodic status reports on the accomplishment of those goals; and
- make the goals and status reports part of the official record of the entity's activities.

If an entity's goals require coordination with other boards or entities, those discussions should occur at an early stage and coordinated or joint goals should be adopted.

While the Task Force understands that this recommendation may be seen as another activity burdening the workload of an already busy set of volunteers, we believe that the goal-setting process will lead to increased efficiency of Town operations, fewer instances of repetitive decision making regarding ongoing issues, increased transparency and better communications with citizens and Town employees, and better focus to and coordination of the efforts of Town staff.

MENTOR VOLUNTEER COMMITTEES

The level of citizen involvement in town government was a general issue mentioned by various Sherborn stakeholders – volunteer committees, town office holders, town staff and resident respondents to the survey – during our research. The difficulty of finding qualified volunteers willing to serve on committees was a specific concern.

First, we looked at the sheer number of committees and wondered if some of them could be merged or even disbanded. We found only two obvious candidates for merger – Traffic Safety and Town Safety -- but someone more familiar with committee appointments might see other possibilities.

Then we looked at how the various committees function and found large differences. Some committees understand their charge, meet regularly, fulfill their responsibilities and file annual reports. Others act only as needed. And some are so amorphous that they don't even know who the other members of their committee are. We believe that barely functioning or non-functioning committees contribute to the difficulty of finding volunteers. If committees are not informed, not active, and not communicative, current members are not motivated to seek reappointment and potential new recruits have never heard of them.

We urge the Select Board, as the largest appointing authority of committees, to mentor and establish by your example a system of common expectations for all volunteer committees:

- 1) Compile information packets for members including Open Meetings, Conflict of Interest, Social Media guidelines, how to post meetings, etc. Much of this already exists. Just needs to be collated.
- 2) Edit and distribute all committee charges to be parallel in construction and as specific as possible. Also publish on Town web site for public education.
- 3) Each committee should set annual goal(s). Forward them to Select Board. Report status at end of year.
- 4) Each committee should meet at least three times during the fiscal year.
- 5) Each committee should prepare a report for the Annual Town Report.

We also suggest that volunteer committees be grouped by general area of concern and divided by five with each Board member “adopting” a group or groups. Then make contact with committee chairpersons, advise where needed, reinforce common expectations, review annual report and even attend a meeting.

CONTINUOUSLY IMPROVING SHERBORN

Interviews with town officials, discussions with similar towns, and survey responses from residents and employees suggest that the Town of Sherborn has both an appetite and a potential to become better at continuously improving itself. The evidence ranges from strong support for new services, to employee statements about workplace improvements, to committee leaders recognizing a need to streamline the work done by time-crunched volunteers. These opportunities are not isolated to any one area, such as technology; rather they exist across the operation of the town.

Continuous improvement may sound like corporate speak for vague and ineffective ‘special projects’. However, the committee argues that - done well - it is a fundamental ability of any highly performing individual or organization. In its simplest form, all it means is being self-aware of opportunities for improvement, having a process to find and implement solutions, measuring the impact, and returning to step one to reassess opportunities.

The results improve employee morale (because it shifts work from mundane to fulfilling and meaningful), improves customer satisfaction (because the organization is more responsive to their needs, and more likely to develop innovations proactively), and improves strategies (because it reduces operational inefficiency and increases leadership’s ability to focus on the biggest problems). More importantly, continuous improvement done well could enhance Sherborn’s small-town character. Focusing town entities on self-awareness would empower them to achieve their goals, no matter if those goals are to increase revenue or to have more time to engage directly with townspeople.

The Advisory report for the 2019 Annual Town Meeting noted that it takes more to operate Sherborn every year. It is inarguable that Sherborn would benefit from doing more with less. A focused effort to build continuous improvement could significantly address this need. The Select Board can use its leadership to build the culture and framework required for this shift.

We recommend that the Select Board leverage its unique position to establish a culture of continuous improvement in a crawl, walk, run approach. Before taking any steps, the Town Administrator should work across departments to resend the survey held by the GTFII, to see how the citizen sentiment may have changed for the topics addressed. Where possible, keep questions unchanged so that a direct comparison can be made, and trends identified.

- First, start small – very small. Encourage town hall departments to share areas that they feel they could improve. That’s it. No fancy framework. Just a consistent effort to begin the conversation and self recognition. Make this topic a regular agenda item in Select Board and internal town hall staff meetings.
- The second step would formally list those areas of opportunity and prioritize them, so that Town Hall as an entity could collaboratively focus on problems with highest impact and highest ease of implementation.
- The town would then work on these opportunities in the third step - gathering small, temporary teams to brainstorm solutions, including stakeholders when possible, and planning out how to act on those solutions.

An effort to continuously improve isn’t expensive or complicated. It isn’t negative or critical. The hard part? It requires a cultural shift, and the evidence collected by the Governance Task Force II suggests that shift will be a significant one. One simple sign of success would be that eventually Governance Task Forces will become unnecessary, because the Town of Sherborn will have embedded that capability within the Committees, Departments, and Employees that make it up.

TOWN HALL OFFICE HOURS

Coming to Town Hall to conduct business is a primary point of contact between residents and their local government. Nothing is more frustrating than taking time off from work (because we don't have extended hours) to find that a simple transaction at the Selectman's office (getting a beach sticker) requires a stop at the Collection office (closed) before you can get your sticker, so you have to come back another day. The open office winds up dealing with the resident frustration and loses valuable staff time. No wonder a third of our survey respondents ranked extended town hall hours as "very valuable."

Unaligned hours also negatively affect interdepartmental communication and work flow. Asking questions, forwarding and receiving work that needs explanation, for example, must wait until both offices have overlapping hours.

The Governance Task Force considered the office hours question from the standpoint of the four departments located on Sherborn's first floor at Town Hall – Administration, Assessors, Clerk and Collector. We also looked at the practices of the ten smallest towns in Middlesex County. Three issues stood out – hours accessible to residents, alignment of hours among different departments, and total number of open hours. Please refer to the attached chart.

Six of the ten towns have regular extended hours to accommodate working residents. Sherborn does have some extended Clerk hours before elections and the Collector offers appointments outside regular hours. However, having a regular scheduled time would be a great step forward in providing quality service.

Most of the ten towns appear to attempt common office hours. Aligning hours among offices is a two-part issue in Sherborn. First, the unintended wrinkle created by designating the Collector as the only office handling money. Remember the problem with beach stickers? Multiply that by any other cash transaction when the Selectman's office is open, but the Collector is not. And second, the problems of inter-department work flow and communication.

Unfortunately, incomplete data makes it difficult to compare Sherborn's total number of office hours with all seven of the other towns. It does appear, however, that we are on the shorter end. We interviewed officials from the other towns and found that their greater number of office hours was achieved in large part, not by adding more paid hours or employees, but by sliding existing staff schedules to cover more hours. Instead of two people working 8-noon, have one work 8am-noon and the other noon-4pm or even 11am-3pm.

We urge you to put Town Hall office hours on your priority list. It will enable greater efficiency within Town Hall and also contribute mightily to resident service satisfaction.

Town Office Hours (Ten Smallest Towns in Middlesex County)

TOWN	ADMINISTRATION	# Staff	ASSESSOR	# Staff	CLERK	# Staff	COLLECTOR	# Staff
Ashby	M-W 10am-4pm (18 hrs)		MWTh 9am-1pm; W 4-8pm; F 9am-noon (19 hrs)		MTTh 8am-noon; W 8am-noon & 5-8pm (18 hrs)		M-F 9am-noon & W 6:30-8pm (16.5 hrs)	
Dunstable	M-F 9am-5pm (40 hrs)	2	M-Th 8am-4pm; M 5-7pm; F 8am-1pm (39 hrs)	2	M 3-7pm; T-Th 9am-2pm (19 hrs)	1	M 5-8pm; T 8am-1pm; W 8am-2pm; Th-F 8am-1pm (24 hrs)	T/C 2
Sherborn	M-Th 8am-5pm; F 8am-noon (40 hrs)	3	M-Th 8am-noon (12 hrs)	2	M-F 8am-noon (20 hrs)	3	M-Th 8am-noon (16 hrs)	3
Carlisle	M-F 9am-3pm (30 hrs)	2	M-F 9am-3pm (30 hrs)	2		2	M-F 9am-3pm (30 hrs)	T/C 3
Lincoln	M-F 8:30am-4:30pm (40 hrs)	3			M-F 8:30am-4:30pm (40 hrs)	3	M-F 8:30am-4:30pm (40 hrs)	T/C 3
Boxborough	M-Th 8am-4pm; F 8am-noon (36 hrs)		M-Th 8am-4pm & Th 4-7pm; F 8am-noon (39 hrs)		M-Th 9am-2pm & M 6-8pm; F 9am-noon (25 hrs)		M-Th 8am-4pm & Th 4-7pm; F 8am-noon (39 hrs)	
Stow	M-F 7am-3pm (40 hrs)	2	M-F 8am-4pm (40 hrs)	3	M-F 8:30am-4pm (closed 12:30-1pm) (35 hrs)	3	M-F 8:30-4:30pm (40 hrs)	3
Shirley	M 8am-6pm; T-Th 8am-5pm; F 8am-noon (41 hrs)		M 8am-6pm; T-Th 8am-4:30pm; F 8am-12:30pm (39 hrs)		M 8am-6pm; T-Th 8am-4:30pm; F 8am-12:30pm (39 hrs)		M 8am-6pm; T-Th 8am-4:30pm; F 8am-12:30pm (39 hrs)	T/C 3
Ayer	MWTh 8am-4pm; T 8am-7pm; F 8am-1pm (40 hrs)	2		2		2		T/C 3
Littleton			M 8am-6pm; T-Th 8am-4pm; F 8am-noon (38 hrs)	3	M-Th 8am-3pm; F 8am-2pm (34 hrs)		M 8am-6pm; T-Th 8am-4pm; F 8am-noon (38 hrs)	

IMPLEMENTING THE USE OF CREDIT CARDS

Throughout our research across other Towns within the Commonwealth, as well as interviews with Sherborn town officials and employees, and the survey of residents, there is overwhelming evidence that the Town of Sherborn could vastly improve their connectivity with both residents and non-residents through the acceptance of credit cards as a payment option for various permits, programs, taxes, and licenses. While this topic did not lend itself to the drafting of a warrant article, we feel it is important to address the feedback and facts we found throughout our work as we encourage the Town of Sherborn to be mindful of “continuous improvement.”

Through our research in comparing Sherborn to other similarly sized towns within the Commonwealth, we identified there are 170 towns with a population of less than 10,000. Based on information provided by the Massachusetts Department of Revenue and individual town websites, nearly 90%, 152 out of 170 towns, accept credit card payments via an online portal such as Unibank. In addition, based on the GTF survey results published in February 2019, residents of Sherborn overwhelmingly supported the implementation of credit cards as a method of payment, with fewer than 50 respondents out of 449 stating credit card optionality would “not at all” be valuable. Through our interviews across departments, various town employees expressed a desire to reduce cash and check payments processed in Town Hall and drive greater activity online, noting the acceptance of credit card payments would be additive as a service to residents and non-residents.

While the implementation of accepting credit cards as payment will create a need for adjustment in reporting and reconciliation, small steps can be made to advance change without meaningful disruption. As a first step, we recommend the Select Board implement credit card acceptance via the UniBank portal for all online payment options, while passing along any service fees or charges to the payee/user. Allowing additional payment options for residents and non-residents, without eliminating or impacting the current options, will demonstrate an understanding and positive response to the feedback both from within Town Hall as well as current residents. Once implemented, it will be valuable for the Town to inform residents of the change and continue to encourage online usage.

As noted above, and in our work to date, it is important for the Town of Sherborn to be thoughtful and progressive in advancing resident engagement and support. We encourage the Select Board to consider accepting credit cards as a payment option where the transition can occur with limited disruption to Town Hall but be seen as a welcomed change for residents and others. Finally, we hope that the Town will continue to be progressive in researching and assessing resources that will create a streamlined, efficient and user-friendly single use portal for all collections for residents and non-residents.