

Human Resources Study of Select Town Positions

prepared for the

Town of Bolton

By

**The John W. McCormack Graduate School of Policy Studies
at UMass Boston**

in collaboration with

The Ciccolo Group, LLC

with assistance from the

Metropolitan Area Planning Council

Project Leader and Report Author: Michelle Ciccolo, The Ciccolo Group, LLC
Administration and Oversight: David Sparks, The McCormack Graduate School
Reviewer: Stephen McGoldrick, Deputy Director, MAPC

TABLE OF CONTENTS

1. Introduction	3
2. Summary of RFP Requirements.....	3
3. Goals	3
4. Background and Context.....	4
5. Document Review	4
6. Underlying Assumptions.....	4
7. Process Undertaken.....	5
8. Summary of Data	6
9. Broad General Findings	7
10. Present Staffing:.....	9
11. Short Term Recommendations.....	10
12. Long Term Recommendations.....	14
13. Discussion of Individual Positions and Departments	16
Town Clerk	16
Assistant Town Clerk.....	20
Treasurer (Treasurer / Human Resource Manager)	22
Assistant Treasurer / Collector.....	25
Town Secretary	26
Tax Collector.....	28
Administrative Assistant (Land-Use Board Administrator)	29
Town Administrator	32
Personnel Committee	34
14. Practical Considerations.....	36
15. Employee Benefits	37
16. Appendix	38
Excerpt from Original RFP:.....	38
Comparable Communities:.....	45
Employee Questionnaire	46
Comparable Community Survey.....	53
Revised Job Descriptions:.....	57
Town Clerk	58
Assistant Town Clerk.....	62
Tax Collector.....	65
Administrative Assistant to the Town Administrator	68
Town Secretary	72
Assistant Town Treasurer / Assistant Tax Collector	75
Land Use Board Administrator	79
Town Treasurer	82

1. Introduction

On August 20th, 2007, the Town of Bolton issued its RFP to hire a consultant to conduct a Human Resources Study examining a number of Town Hall positions and the overall governance structure within specific municipal offices. The study aimed to evaluate eight (8) municipal positions and determine what, if any, reorganization of those positions is appropriate in order to enable Bolton to more effectively deliver services and more efficiently manage Town Hall functions. A copy of the relevant portions of the RFP which outline the project specifics is contained in the Appendix.

A team headed by the John W. McCormack Graduate School of Public Policy in conjunction with the Ciccolo Group, LLC and the Metropolitan Area Planning Council (MAPC) was awarded the contract for this project and given a verbal notice to proceed on September 17, 2007. Michelle Ciccolo served as the project manager for the consultant. David Sparks was the liaison at the McCormack School, and Steve McGoldrick provided assistance from the MAPC.

2. Summary of RFP Requirements

The following positions were to be reviewed as part of this process:

- Town Administrator
- Town Clerk
- Assistant Town Clerk
- Treasurer
- Town Secretary
- Assistant Treasurer / Collector
- Administrative Assistant (BOH)
- Tax Collector*

** This position review was not part of the original RFP but was added just prior to the start of the study.*

In addition to the examination of the responsibilities and duties of these positions, the consultant was asked to evaluate the functioning of the existing Personnel Committee and make recommendations as to what that committee's roles "ought" to be as it relates to and interacts with the day-to-day personnel operations of the Town.

3. Goals

As directly outlined in the RFP:

The goal of this study is to obtain recommendations on ways to better structure these jobs to improve the efficiency and effectiveness of the organization. Additionally, new job descriptions should be crafted, along with proper classification of these positions, and a recommendation of the work hours necessary to adequately complete the

functions of each job. The human resources duties being transferred from the Personnel Committee to Town Hall staff should be clearly defined in the recommended restructuring.

4. Background and Context

Motivation for this study was initiated in part by the fact that there has been some present and anticipated turn-over among key positions within Town Hall. A vacancy existed in the Administrative Secretary position which had primarily served the Board of Health. The Town Clerk was due to retire in November. The Treasurer is somewhat newly appointed having served the town for approximately nine (9) months at the start of the study. The Town Planner was new to the position having commenced her employment with the Town during the Summer. The Collector has also begun to express some thoughts of retirement. The Personnel Committee had a complete change of membership during 2007 with all three of its appointments filled with fresh recruits. These recent and upcoming changes provided an opportunity to re-examine the present way of doing business in Town Hall. It also precipitated the need to have more clearly defined roles and responsibilities to help avoid the communication gaps that frequently plague organizations when turnover occurs.

5. Document Review

A number of past studies and reports were reviewed by the consultant to provide insight into the unique characteristics of the Town of Bolton, especially as it relates to the management of personnel in Town. These studies and documents include:

- ❑ “Professional Management Capacity Study,” 1997, prepared by Patricia Vinchesi, DHCD Peer-to-Peer program
- ❑ “Report to the Town Government Study Committee,” June 1998, by MMA Consulting Group, Inc.
- ❑ “Management Study Committee, Final Report and Recommendations,” October 1998
- ❑ “Town Services Satisfaction Survey” responses and recommendations by Future Management Systems, Inc., 2003.
- ❑ “Proposed Updated Compensation and Classification Plan for Non-Union Positions,” November 2005, by Human Resources Services, Inc.
- ❑ “Bolton Annual Town Report,” 2006
- ❑ “Benchmark Titles Salary Survey,” FY07 Edition, January 2007, Mass. Municipal Personnel Association

6. Underlying Assumptions

The goals of this study were fundamentally different than a routine grade and classification personnel study. A standard classification study would primarily seek to identify the proper pay rates for individual employees based on internal and external comparisons. Job

descriptions in a standard study would be adjusted merely to reflect or reiterate the role the employee was currently playing within the system. By contrast, this study sought to identify opportunities for the improvement of efficiency and effectiveness within each department or function area. Consequently, the questions asked of individual employees focused less on identifying the normal duties the employee routinely undertakes and more on ways to streamline Town Hall functioning. In both written survey materials and interviews, employees were asked to help the consultant identify ways in which the flow of work could be adjusted to improve the delivery of services to the public and what changes might be contemplated to enable Town Hall to function more efficiently. Externally, data from comparable communities was gathered not only to help identify appropriate pay rates for each position but also so that comparisons relative to staffing size and hours dedicated to each service and/or department could be made.

At the onset of the process, certain assumptions were made to help guide and direct the efforts of the study. These assumptions include the following:

- ❑ Since only some Bolton positions were being evaluated, it was preferable to fit new job descriptions and recommended classifications within the existing grading system, wherever possible.
- ❑ Efficiency improvements can not be undertaken in a vacuum without regard to the individual incumbents holding those positions. *In a perfect world, one would start with no employees and design job descriptions and duties to maximize the desired service outcomes. However, in Bolton, as within any existing personnel structure, it was important to recognize the skill sets presently available to attempt to place individuals into positions which are appropriate for them. If possible, new positions should accommodate existing personnel.*
- ❑ The proposed changes to various positions' classification, duties, and hours does not necessarily need to be budget neutral. However, developing a new system that minimizes the budgetary impact is preferable.

7. Process Undertaken

At the beginning of the study, the consultant developed a recommended set of *Comparable Communities* based on a number of factors commonly used in the industry to compare towns. These factors included overall operating budget, population size, community area, equalized valuation per capita, median family income, miles of roads, and form of government. A set of approximately 17 communities were proposed to the Town Administrator who also recommended that the communities used for comparison in the 2005 classification study be included this time as well. Several contiguous communities were recommended to be included regardless of comparability because it is to those communities many employees might go if seeking career opportunities. After discussion with employees, and the Board of Selectmen, a final list of 14 "comparable communities," were chosen. Those 14 communities serve as the basis for which data comparisons were made in the study. A spreadsheet

containing the list of those 14 towns with the relevant factors used for selection is included in the Appendix.

Meetings and Interactions

At the onset of the study, several meetings, and communication exchanges occurred between the Town Administrator and the consultant. These served to provide project background, clarify goals, and set an implementation schedule for the project. A kick off meeting was then held with the effected employees on October 11th, 2007. All but two employees were in attendance at that meeting. The employee questionnaire (see Appendix) was distributed and explained at this meeting. The consultant then met in public session with both the Board of Selectmen and the Personnel Committees. The Town Planner was consulted to determine the specific administrative needs of that department. Private face-to-face interviews with each effected employee were later conducted after each employee had turned in her responses to the questionnaire. Follow-up information clarification also occurred. Finally, phone conversations with each member of the Board of Health were also performed.

Survey Materials

A detailed 4-page position analysis questionnaire was developed and distributed to the effected employees both electronically and in hard copy. This questionnaire served as the basis of information needed to inform the consultant of the employee's role and to help suggest follow-up questions that should be probed. A blank copy of the questionnaire is attached in the appendix to demonstrate the types of initial questions asked. There were also some standard follow-up questions that were asked of each employee. Participants were given ample time to complete the questionnaire and extra time was provided to those who indicated they needed a little more time for this effort. It was important to enable each employee to have adequate time to thoroughly answer the survey.

Concurrently with the distribution of the employee questionnaire, a survey was developed to assist the consultant in gathering the comparable data relative to the effected positions. That survey which was distributed to the 14 selected communities is also in the Appendix.

Follow-Up Research

A series of telephone calls to Town Halls were made to encourage communities to participate in the survey and in some cases to clarify data. Document review, electronic information searches, and web data collection were also conducted. By-laws from some communities were examined as a basis of structural comparison to assist in identifying the various roles of the personnel committees, make up of departments, appointing authorities, and other factors.

8. Summary of Data

The full set of data gathered from the comparable communities is attached separately due to its size and complexity. This file has been provided to the town in a spreadsheet format so that it can be utilized in the future as needed. The salary specific data is summarized in a chart below. Not surprisingly, the data yielded variable results. Personnel systems often

develop to take advantage of the strengths of existing employees while simultaneously minimizing weaker performers. Thus, it is inevitable that there will be individuals within certain organizations that appear either over or under paid. Nonetheless, when the statistical average is utilized, the comparison data serves as a benchmark appropriate for Bolton to use as a comparison. While some communities are paying considerably more than Bolton pays specific municipal employees, some are paying appreciably less.

To understand the data fully, an explanation of how it was derived should be noted herein. Of the 14 communities studied we obtained data on 13 communities. However, only 8 towns actually filled out and returned the survey. For the remaining five communities, the FY07 data provided in the Mass. Municipal Personnel Associations “Benchmark Titles Salary Survey,” was utilized along with follow-up calls and other research. This FY07 data was then adjusted by factoring in a presumed Cost of Living Allowance (COLA) equal to the rate granted by that municipality to employees in FY07. Where possible, gaps in the data were then filled in by follow-up phone calls or web research. Numbers reported as total annual salary were then adjusted to an hourly rate so that a meaningful analysis could be conducted. In most cases, the total weekly hours worked by the employee were cited by the town responding. However, in a few instances, the researcher had to posit the hours worked by looking at hours worked by other similar positions within that town and by examining the Town Hall operating hours.

9. Broad General Findings

It was interesting to note that certain key themes were frequently cited as problems within Town Hall. Many, if not all, interviewees commented on these concerns. Not surprisingly several of these items were also noted in some of the earlier studies cited above. These findings are summarized here because they potentially impact all of the departments and effected positions.

Town Hall space is a “problem”

Both the lack of space in general and the open nature of the offices were referenced. Some offices specifically do not have sufficient space to locate proper computers or adequate desk space. Comments were received about the constant disruptions occurring as traffic flows through the offices to copiers and other equipment which interrupts workplace efficiency. While some Town Halls consider office proximity and openness a benefit, in this particular Town Hall it would appear that the closeness is no longer serving the desired purpose. Private conversations can not be achieved and individual employees are often drawn in, unnecessarily, to business going on at nearby offices. This also leads directly to disruption and confusion. A by-product of the openness in Town Hall is a nagging security problem. Employees mentioned the difficulty securing their spaces and the valuable data, equipment, and other items within their offices. Valuable records are unprotected and the very nature of the open window environment makes it impossible to properly lock spaces. Although cash turn-over procedures have now been addressed by the new Treasurer, the open window environment still makes it difficult to secure funds during the day while Town Hall is open.

Record Keeping is a “concern”

Not only are some vital records not locked and protected from oxidation, it would appear that the systems for record keeping within Town Hall are inadequate. Basic space deficiencies prevent individual departments from organizing their records in an adequate fashion. Storage of records required to be maintained long-term, in accordance with the Secretary of State’s guidelines, is difficult to achieve.

Some positions are overburdened; Others apparently have excess capacity

Some individuals, by their own admission, have too much on their plate. Other participants within the study confirmed this and suggested that certain key positions should probably have fewer responsibilities or more assistance in carrying out their duties. Uniformly participants in the study cited the increasingly complex requirements and responsibilities of the Town Administrator’s office. This seemed to express itself in a desire by some to have more frequent direction from and interaction with the Town Administrator. There was also a general recognition of the communication improvements that could be made if the Town Administrator had more assistance. In various ways, individuals also commented on the involvement of the Town Secretary in each of their offices. Some noted that the Town Secretary’s duties had seemed to evolve to the point of having too many responsibilities and a role that is no longer clearly defined or understood.

More surprising than the identification of a few positions that are overburdened was the identification of several positions that would appear to not be fully assigned with adequate duties. Two to three of the individuals seem to have excess capacity to take on more duties. In each of the instances the employees themselves identified the “extra” time in some fashion and then others within the study corroborated these findings. In a few cases, individual incumbents appear inappropriately suited for the jobs with which they are matched. All of this adds up to the opportunity and need to restructure certain key functions. The particulars will be discussed in detail in the sections pertaining to each job position and an overview of the short term changes are identified in the chart in Section 11.

Productivity could be improved by streamlining duties and clarifying responsibilities

In several instances, individuals referenced tasks that are not clearly assigned to one department or another and things that are not getting done that in their opinion should be done on a regular basis. There are also situations that arise in Town Hall when more than one person gets involved in specific matters muddying the waters and confusing the staff who attempting to work on the issue. This observation points to a potential communications problem and possible conflicts that clearly occur when duties are not well understood or when the lines of authority are not clear. Reporting structures are in some cases in conflict when an appointed person reports to an elected position but then also often given direction by other managers or policy setting boards. It is further complicated when budgets are under the apparent direction of one department but the individual reports to someone from another department. Finally, in several instances, individuals are housed in locations other than Town Hall making the communications, supervision, cross-collaboration, and delegation of responsibilities difficult. Bolton is not unique in experiencing problems of this nature. In

some ways it is inevitable in a governmental system that has many players, boards, committees, task forces, commissions, and other entities that often have conflicting missions. Nonetheless, to optimize performance of municipal departments and those who serve within them, it is desirable to clarify the roles and reporting structures as much as possible. Specific recommendations regarding specific positions will be discussed in the corresponding section of the report.

Personnel Committee needs a clearly defined role

The personnel committee is comprised of members who have newly joined this committee. It would appear that because of this and other factors, this committee is having some difficulty identifying how it can best serve the community. Many of the functions that this committee historically got involved in seem to be tasks and duties that may have been delegated to it because of a lack of internal administrative capacity. Duties of a routine nature, especially those that require immediate attention, should be delegated to one or more employees within the Town to be carried out. Advisory matters and policy recommendations could then become the domain of this committee. Specific recommendations for the committee are contained within the personnel section.

10. Present Staffing:

In order to have a meaningful discussion about the positions within this study, it is helpful to summarize the basic information about each. Below is a chart that describes the present constitution of each position. Immediately following this chart is another chart that depicts the grading of other select positions within the Town that were not part of this study. These positions were shown as a means to help the reader consider internal comparisons that influence the proper placement and grading of the positions being studied. In some cases, internal fairness or consistency can effect the grading of personnel as much, if not more than, external competitive factors.

<u>Position</u>	<u>Hours per Week</u>	<u>Grade / Classification</u>	<u>Reports to</u>	<u>FY08 Budgeted Salary</u>	<u>Projected FY09 Salary w/ 3% COLA (no change)</u>
Administrative Assistant (to Boards)	30	3	Town Secretary	25693	26464
Assistant Town Clerk	35	4	Town Clerk	37510	39798
Assistant Treasurer/Tax Collector	20	5	Reports to Treasurer	19385	20567
Tax Collector	22	6	Citizens	26169	28267
Town Administrator	40+	16	BOS	98717	104721
Town Clerk	30	9	Citizens		51203
Town Secretary	40	7	TA	53955	57244
Town Treasurer	40	9	TA	52749	55959
TOTALS:	217			\$314,178	\$384,223

For Internal Comparison:

<u>Position</u>		<u>Grade / Classification</u>
Town Accountant		11
Administrative Assessor		5
Admin Assist. Police		5
Admin Assist. DPW		5
Conservation Admin		6
Town Planner		9

11. Short Term Recommendations

With any personnel system, there are strategic goals that can not easily be implemented in a given year and some may take multiple years to undertake, given the complexity of the desired outcomes. Space limitations, incumbency, existing talent, and other factors combine to make the long term goals a bit out of reach. Some actions, however, can be undertaken virtually immediately and often without significant negative ramifications. These short term action steps are listed below and depicted in the chart. Each position is also discussed in detail in Section 13 below and revised job descriptions for all of the jobs within this study are contained in the Appendix. A series of long term recommendations are presented in Section 12.

- Town Clerk – There is no significant short term change to the actual duties, responsibilities, hours, or pay for this position. It is being recommended at a 35 hour per week job which is 5 hours per week fewer than were budgeted in prior years.
- Assistant Town Clerk – The duties of this position change very little. However, because of her need to occasionally step-in during the absence of the Town Clerk and for reasons of both internal and external consistency, this position is recommended to be upgraded by one grade. The total hours, however, are reduced nominally from 35 to 33 hours.
- Tax Collector – This is an elected position and the incumbent appears to be fulfilling her duties more than adequately. Therefore, there are no major short term changes to this role. However, during quiet times, the Collector expressed a willingness to assist in other routine Town Hall tasks. Also, given the fact that she may be eligible for retirement and expressing some thoughts in that direction, preparation for that eventuality is recommended. The Tax Collector is currently covered during temporary absences by the Assistant Treasurer/Collector. However since that position is physically not located in Town Hall, cross training of others within Town Hall to

cover for short term absences is highly recommended. Long term changes to this position will be discussed in Section 13.

- ❑ Town Secretary – The individual performing Town Secretary role has had tremendous longevity serving Bolton for nearly twenty years. She is a wealth of information and knowledge and is thus a considerable asset to the community. However, as the nature of the work in Town has become increasingly complex and boards and committees have evolved, it is no longer possible or even desirable for one person or position to attempt to oversee many of the various board activities in Town. Her role should become more specific and focused. Licenses and one-time transactions are regular and frequent requests at Town Hall. She should be in charge of administering those activities. Less involvement with the Boards and Committees is desirable as it is not possible for one individual to attend multiple board meetings and/or attempt to get agenda and minutes accurately filed for so many different groups. The hours slated for this role have been somewhat reduced to 35 hours per week. Further reductions in hours are not recommended given the large work load of the Town Administrator and Board of Selectmen’s Offices. However, since the duties are becoming more streamlined, less complex, and more clerical in nature, the classification for this position is also recommended to be reduced.
- ❑ Town Administrator – The Town Administrator has a large number of significant capital and non-routine projects she is presently overseeing and there is small likelihood that these assignments will decrease as the years continue, given the already identified projects in the pipeline. These undertakings have been added to the normal, but very high-level functions she is required to carry out ever day. She is presently attempting to handle these duties without the benefit of a non-clerical assistant. However, due to the nature and complexity of her role and responsibilities, many of her projects and duties are not easily delegated to clerical subordinates. Although the Town Secretary routinely assists the Town Administrator, her role has substantial daily on-going work related to tasks for the Board of Selectmen, Advisory Committee, and Town Administrator functions. The Town Secretary, therefore, can not be expected to perform these regular activities and provide assistance to the Town Administrator with special projects. An assistant to the Town Administrator is recommended and discussed under the Town Administrator section of the report.
- ❑ Administrative Assistant (BOH) – Prior to the resignation of the incumbent, this position reported to the Town Secretary and was a 30 hour per week role. Responsibilities for this job included handling administrative needs of the Board of Health and some work for the Town Planner. Miscellaneous board and committee responsibilities were also being performed. This position is being recommended to be reinstated at a higher grade but with somewhat fewer hours dedicated to it and with a job description that focuses solely on the Board of Health, Planning, and Zoning Boards. The reporting structure is also recommended to change.

- ❑ Treasurer – The Treasurer’s position, as it is being performed today, is tangibly different than the position a year ago when it was filled by a different individual. This treasurer is responsible for working with the Insurance Advisory Committee, making recommendations and decisions pertaining to the financial well-being of the community, and is increasingly taking on expanded duties. Consequently, specific new HR related duties are recommended to be added officially to the job description (some of which are currently being performed by the incumbent) and the position is being recommended for an upgrade once satisfactory training is obtained.

- ❑ Assistant Tax Collector / Assistant Town Treasurer – There is no change being recommended in the hours or pay for this position. However, with the addition of the Human Resources function within the Treasurer’s office, this position should be required to provide clerical and administrative support in this area.

Immediate recommendations, where they represent a change from the existing grading system, reporting structure, or hours of work, are highlighted in bold print in the chart below.

Short Term Recommendations:

<u>Position</u>	<u>Hours Per Week</u>	<u>Grade</u>	<u>Reports to</u>	<u>Projected FY09 Salary w/ 3% COLA but prior to any Change</u>	<u>PROPOSED FY09 Salary with recommendations incorporated</u>	<u>\$ Change</u>
Administrative Assistant (to Boards)	25.5	6	Town Planner	26,464	25,908	-556
Assistant Town Clerk	33	5	Town Clerk	39,798	38,195	-1,603
Assistant Treasurer/Tax Collector	20	5	Reports to Treasurer	20,567	20,567	0
Tax Collector	22	6	Citizens / Administratively to the TA	28,267	28,267	0
Town Administrator	40+	16	BOS	104,721	104,721	0
Town Clerk	35	9	Citizens / Administratively to the TA	51,203	47,538	-3,665
Town Secretary	35	5	TA	57,244	47,211	-10,033
Town Treasurer	40	11	TA	55,959	59,709	3,750
Assistant to TA	35	8	TA	0	42,697	42697

TOTAL CHANGE: 40,623

12. Long Term Recommendations

1. Amend the Administrative Code to allow for Personnel Rules and Regulations to be adopted by the Board of Selectmen. This will require Town Meeting action and the reasoning behind it was specifically addressed in Section 13 in the discussion pertaining to the Personnel Committee. Essentially this is being proposed to enable the Town to be more flexible in amending its rules in order to remain current with State and Federal Regulations as they are promulgated. The present system does not allow the Town to respond adequately to an ever changing Human Resources environment and this could expose the Town to potential law suits and other conflicts.
2. Convert the Town Clerk's role to an appointed position. This requires both Town Meeting action and a vote at a local ballot. A discussion of the pros and cons of having an elected Town Clerk is elaborated upon in Section 13 under the Town Clerk's area.
3. Combine the Treasurer and Collector functions. Within the present study, the Treasurer's role is anticipated to increase as that position takes on the Human Resources function. However, eventually, for efficiency reasons, the Treasurer and Collector's roles should probably be merged. Since one person can not do everything, additional staff resources would have to be dedicated to this area in order for such a structure to work adequately. See the discussion below for how this might be facilitated.
4. Convert the Tax Collector's position to an appointed one. Again, both a Town Meeting action and local ballot initiative would be required. The Town has expressed a desire to continue to professionalize the service it provides under the Treasurer's office and as noted above, we are suggesting that the Town eventually move towards a combined Treasurer/Collector's position. If the Town would like to make this change sooner rather than later, it could grandfather the existing incumbent at her rate of pay. Then, upon her retirement, it is recommended that the Town combine the regular day-to-day money collection activities with the Assistant Collector/Treasurer's job so that this newly constituted position becomes full time and is located in Town Hall.
5. Consider phasing out the Town Secretary position and assigning these duties to the Town Clerk's Office and the Collector's office upon the retirement of the present incumbent. As other offices' roles grow and their procedures and filing systems become both more departmentally-specific it will be harder for the Town Secretary to contribute to the clerical transactions in these offices. At the same time, with increased hours in the combined Treasurer/Collector's department, this office could handle payments for transfer station stickers, beach stickers, and other routine payments. The Clerk's office, once the new Town Clerk is fully up to speed with her duties and as she begins to further involve the Assistant Town Clerk in matters, could probably handle some of the other citizen inquiries and walk-in services. Whether or not to phase-out the Town Secretary role should be evaluated based on the amount of clerical duties within the Board of Selectmen and Town Administrator's offices at the

- time the incumbent retires. Depending on the work load at that time, it may still be necessary for the Town to carry a strictly clerical position within that office.
6. Invest in a quality phone system that provides voice mail for each individual. Countless hours are wasted transferring calls, playing phone-tag, and misinterpreting written messages. Voice mail is a major advance in efficiency and enables callers to get directed to the right office and to leave detailed messages for the correct individual. Such a service allows specific requests to be left on a machine and permits follow-up to be feasible sometimes without having to place multiple back and forth calls. Valuable human resource hours are wasted in not having such a system. If the Town invests in a better phone service, it can expect that its employees will have a greater amount of time to spend on actually responding to citizen's needs.
 7. Renovate Town Hall to allow for key positions such as the Treasurer/Collector and Town Accountant to be located in Town Hall. As will be discussed later in the report, it might be feasible to combine the Collector and Town Secretary into one of their spaces. Even if this is not immediately possible, the Town should look into bringing these functions back to the Town Hall. It is virtually impossible for someone off-site to efficiently oversee a department and it is even more difficult to supervise individuals who are at another location. Because all of the offices in Town Hall must interface with the Treasurer and Town Accountant, it is even more valuable from a work-flow perspective to have these individuals located at Town Hall. Finally, it should be noted that the present personnel system has the Assistant Treasurer/Collector backing up the Collector when she is not in attendance. However, this service is rarely called upon except in prolonged absences because they are not in the same building. If the Collector wants to take a lunch break or needs to get to an appointment on short notice, it is not easy to just step out or turn one's work over to someone located elsewhere. In order to minimize disruption or hours where there is no one available to service the public, these individuals, if at all possible should work side-by-side.
 8. Consider moving land-use permitting boards to an off-site location to allow for greater space and records management within Town Hall. Notwithstanding the case made for bringing people back to Town Hall to improve efficiency, it is clear that as the Town grows and the expectation of having professional services continues to expand, space may not be adequate at Town Hall for all functions. Filing and meeting room space is at a premium. The Land-use permitting boards and their administrators could move to a new location if space was available. It is recommended that going forward the functions of the Planning and Zoning Boards, with the Town Planner, the role of the Board of Health and the Conservation Commissions, and building department and all their staff be clustered together for effectiveness. If necessary, these individuals could be relocated but should be done so as a group to preserve adequate communications and efficiency.

13. Discussion of Individual Positions and Departments

Town Clerk

The Town Clerk's office is presently in a state of flux. The long-time elected incumbent, was preparing to retire during the initial phase of this study. Her impending exit created some anxiety and tension for existing employees both within and outside the Town Clerk's office. However, it has also created the opportunity to look at the functioning of this office with a fresh perspective. The Incumbent's longevity and historical knowledge of the Town provided a tremendous wealth of information and she was frequently called on by fellow employees as well as by the public to serve as a resource of insight into the way things operate in the Town. It will be difficult, if not impossible, to replace her with someone who has as much historical background pertaining the community. However, this town-specific knowledge base is probably less important to performing the role of Town Clerk than is the knowledge of the statutory obligations required of all Town Clerks; knowledge that the incumbent had accumulated over her many years of service to Bolton.

Much of the responsibilities born by any Town Clerk are established by the Secretary of States Office and by innumerable state laws and regulations. The statewide Town Clerk's Association cites 73 separate chapters and 451 different sections of the General Laws which help to define the role of the Town Clerk. These duties generally do not vary from one town to the other. However, all Town Clerks must be familiar with the specific administrative by-laws, general by-laws, charters and/or special acts under which his or her town operates.

In order to adequately perform the duties of this position, Town Clerks must previously possess or be able to rapidly acquire the technical knowledge pertaining to those statutes and by-laws mentioned above. Thus, individuals who have performed the role of Town Clerk or Assistant Town Clerk, served in other municipal offices, or those with a background in election practices are most likely to possess the skills necessary to succeed at the job. However, equally important will be the individual's problem solving skills, ability to relate professionally with the public, strategic thinking capacity, and interpersonal aptitude.

These four skill areas are essential to the successful discharge of the Town Clerk's duties because this office is required to relate to all of the other offices and function areas within the town and with the public simultaneously. Nonetheless the role is less of a policy setting position and more of a facilitator for information transfer, record keeper, enforcer of procedures, and conductor of fair elections.

Some people believe there is an apparent advantage in having someone familiar with the community perform this function. However, as explained above, the exact duties of a Town Clerk often vary very little from town to town. Therefore, someone outside the community should be able to perform the duties just as adequately as someone from within (provided that resident has sufficient knowledge and background). This issue relates to whether or not the

position should be an elected or appointed position. It may actually be a disadvantage to have an elected Town Clerk because the community is limited to selecting someone within the town who may or may not have the technical know-how to perform the statutory functions. Furthermore, as all elections can sometimes be a contest of popularity, this could yield a Town Clerk who does not possess the basic administrative skills to adequately carry out the necessary responsibilities. Although elected annually, not having a competent Town Clerk for a year or more could seriously infringe upon the town's ability to legally discharge its duties to the public. Expensive and time consuming law suits could result as could disruption of services, flawed record keeping, and deterioration of morale within Town Hall.

The Town Clerk's Association discussion of the Town Clerk's position relative to it being elected or appointed notes the following:

“job performance is often judged not in terms of how well the office is run, but whether or not the voters like the personality of the incumbent.” – from 30 page book on Town Clerk's.... “anybody can run and anybody can be elected whatever his qualifications or lack of same.”

There is also an inevitable difficulty in providing oversight to an employee who serves as an elected official. Such an official can often be perceived to be without a supervisor other than the citizens of the community. This sets up a situation where implementing policies and procedures that affect the Town Clerk's office can be met with resistance. Furthermore, because the Town Clerk has no authority over departments who receive policy direction from other Boards, establishing a clear chain of command is cumbersome. Who gets to set the direction for the organization? In a conflict over procedural matters, who is in charge?

The trend in municipal government over the past decade is moving away from elected positions and towards a more centralized form of government which affords greater accountability and better reporting standards. However, within this region, out of the 13 comparable communities for which we have data 9 Town Clerks are elected and 4 are appointed. Since this can still be an issue on which consensus is difficult to achieve, the consultant queried participants in the study to see how folks in Bolton perceived the matter. Out of approximately 14 employees and board members in Bolton who were directly asked about this issue, only two respondents believed the Town Clerk's position should remain elected.

Regardless of whether or not the Town takes steps in the upcoming year or so to recommend that Town Meeting and the electorate establish an appointed Town Clerk's position, clarifications should still be made in the Town Clerk's job description to assist the new appointee in carrying out his or her duties. Section 1.20.1 of the Town's Administrative Code pertaining to the duties of the Town Administrator, explicitly notes the following:

*The administrator shall be responsible for coordinating and implementing general office operating policies that shall apply to all **elected** and non-elected employees as may be agreed upon by the Board of Selectmen and other boards.*

This passage is crucial as it establishes that the Town Administrator, with the agreement of the Board of Selectmen, shall have the authority to set office hours, town hall procedures, and matters of general policy, even where they pertain to the Town Clerk's office. Accordingly, the job description for the Town Clerk has been revised to emphasize this reality.

In efficient personnel systems, checks and balances are always set up to ensure that duties get performed. Even a Town Administrator needs someone to whom he or she reports. The Town Clerk should be no different as it is impractical and improbable to expect that the citizens of Bolton can or should be able to dictate the performance of an employee. While one might argue that exercising the right to not reelect someone is the ultimate performance review, this methodology does not provide the opportunity for employees to be adequately reviewed and guided in their job growth. It is especially important for new employees to receive regular and thorough feedback and to be given an opportunity to improve as needed. The job description is further modified to recommend that the Town Clerk's reporting structure recognize that the position serves under the privilege of the electorate but that it reports in all administrative matters to the Town Administrator. The clause in the Administrative Code cited above helps to support this approach but further refinements and clarifications to the actual code would be preferable if the position remains an elected position.

An initial review of the position's functionality was performed as it relates to the Exempt and Non-Exempt provisions in the Fair Labor Standards Act (FLSA). It would appear that the Town Clerk meets the requirements for being *Administratively Exempt* but this should be verified with personnel counsel.

Comparable data from other communities yielded fairly consistent results in this job category.

Town Clerk's Comparable Data:

Comparable Community Average Low Pay Range Rate	Comparable Community Average High Pay Range Rate	Comparable Community Average Actual FY08 Pay	15% lower than actual average pay	15% higher than actual average pay	Bolton Grade 9 Low Range Limit	Bolton Grade 9 High Range Limit
\$22	\$28	\$27	\$23	\$31	\$23.90	\$31.19

From the perspective of external comparability, the data indicates that a Grade 9 is the correct pay range for this position. When examined from the perspective of what actual Town Clerk's in neighboring communities are being paid one sees that the average rate of pay falls at a Bolton Grade 9, Step 5 (or right in the middle of this grade range). Although the average comparable range is closer to Bolton's Grade's 8, actual employee pay is somewhat higher which is why the 15% data is offered. A range that is no less than 15% of comparable area pay and no more than 15% higher than area pay is a reasonable range if one wants to ensure a competitive salary structure. This corresponds almost identically with Bolton's

Grade 9. For informational background, it should be noted that the lowest rate of actual pay being disbursed within the comparable communities is \$21 and the highest rate of pay is \$40.

It is also important to note, however, that this mid-point average pay rate mentioned above is not the pay rate at which a new individual should be brought into the system. Most of the Town Clerks in surrounding communities are incumbents who have occupied their positions for five or more years. Thus, they have earned steps higher than the starting rate of pay.

In general, it is preferable to start an individual off at the low-end of the scale to provide future pay growth opportunities, as a strong performer would typically earn an annual step increase allowing him or her to move up in pay steps. Furthermore, placement on the scale should take into consideration, the level of Town Clerk-specific knowledge and/or experience the new employee has. Those with prior Town Clerk (or Assistant Town Clerk) backgrounds could be started higher up in the step range because this knowledge presumably enables them to begin work without a learning curve and thus warrants compensation at a higher level.

Internal consistency was also examined relative to the Town Clerk's position and a Grade 9 would also seem to be the appropriate grade if one considers placement of other Bolton employees within the system. Other Grade 9 employees include the Town Planner and the Building Inspector – both jobs that have a similar level of complexity. Positions graded higher in the Bolton system tend to be Department Heads with significantly more employees under their supervision or those whose function areas are more complicated and involve a greater level of organization-wide responsibility.

Regarding matters pertaining to the general operations of the Town Clerk's Office in Bolton, the following should be noted:

- ❑ There appears to be a need to better track appointments that are made by the BOS to various committees. Tracking of appointment terms, reappointment qualifications, and resignations could benefit from some attention. Some Town Clerks' offices take a more active role in this function as they are the entity that also swears-in the volunteer. The Town Clerk's office should develop a database or spreadsheet, and keep a log book which notes the board or committee, the date the individual volunteer is sworn-in, the expiration of the term, etc. The Town Clerk's office could then be responsible for sending this information to the Board in Spring for reappointments.
- ❑ The PC situation needs to be addressed. Presently the Assistant Town Clerk does not have a town-issued computer work station. She only has access to the unit provided by the Secretary of State's office which has extremely restrictive use protocols and does not allow her to access town email on this system. A second town PC should be provided to this office or some other solution developed to enable her to have regular access.
- ❑ As the final repository of public records, the Town Clerk's office needs to have greater record keeping storage facilities. Additionally, reporting to this office from other departments should be streamlined to improve the timeliness of records and the accuracy of the information within

the Clerk's care. Some of the boards and committees in town as well as the departments themselves might need refresher training on public records retention.

- ❑ Relative to the Clerk's role in being a voting member of the entity that names the Advisory Board, if the Town moves to make the Town Clerk's position appointed, it should also consider at that time if it wishes to modify the Advisory Board appointment process.

Assistant Town Clerk

The analysis of this position is straight forward in terms of duties and responsibilities but is more complex when external comparability is considered.

The Assistant Town Clerk was found to be closely performing the duties assigned to this position as outlined in the existing job description. Very few, if any, deviations from this outline were observed. However, the office of the Town Clerk does experience considerable fluctuations in work load over the course of the year as periods during the preparation for and conducting of elections can be busy while other times can often be slow. There is occasional down-time in this office which sometimes creates excess staff capacity. Thus, we are recommending the position be budgeted for only 33 hours per week as opposed to the previous 35. While there may still be times when more than 35 hours per week are required, there inevitably will be times when less than 25 hours of actual work are needed to be performed. This office could benefit from some creative scheduling that will allow fewer hours to be worked during slow times and greater hours required in busy periods. Since the slow times tend to coincide with summer months, the incumbent would probably appreciate such a schedule. Nonetheless, it will still be important, in the provision of services to the community, for the Town Clerk's office to remain open at all times when Town Hall is open to the public. The schedule should also be established by the Town Clerk.

The Assistant Town Clerk should be given more training and clear direction to enable her to back-up the Town Clerk more effectively. Once the new Town Clerk is fully comfortable with her role, she should endeavor to include her assistant more proactively in routine Town Clerk functions. However, some confusion existed recently on the part of the existing incumbent as to whether or not she *acts* as Town Clerk in her absence. When a ranking official with legal authority leaves his or her post, when replacing that individual the new employee is sometimes appointed in an *Acting* role. There are also some municipal positions that allow for an alternate individual to be legally appointed as the "Acting" official in his or her temporary absence. However, in the case of Town Clerk, the statutory authority does not recognize any such position as "Acting Town Clerk." Although the Assistant Town Clerk is sometimes able to *act* on behalf of the Town Clerk, the highest authority recognized by the state is "Temporary Town Clerk," which does not carry the full legal authority to act in all matters in the Town Clerk's absence. We recommend that the Assistant Town Clerk's authorization be clarified to the incumbent so that it is clear what levels of authority and permissions are appropriate for her to have when she *acts* on the Clerk's behalf and that she understands those areas in which she does not have full authorization to act in the Town Clerk's absence.

Out of the 13 communities who participated in the survey, 5 did not have a full time Assistant Town Clerk. This makes the comparable data itself somewhat less relevant as there are only 8 communities in the subject comparison. We also see that of the 8 communities who do have Assistant Town Clerks, only Ayer and Hudson have full time individuals serving in this roll. The other six communities had roughly half-time or an average of 22 hours assigned to this position. Nonetheless, we have ascertained through interviews, past study conclusions, and discussion with Town Hall employees that a full time position is appropriate if Bolton wants to continue to provide the level of service that it is presently offering the community. The next questions to answer then would be what is the correct pay grade or range of pay for this position? If one looks at the average low range comparable communities are paying, you might conclude that the positions should be graded a 3 or a 4. However if you look at the average high range you would conclude a 6 or a 7 is the appropriate grade that coincides most closely to Bolton's system. In this case, looking at internal consistency and actual job functionality more appropriately sets the determination. Despite the discussion above relative to whether or not the Assistant Town Clerk could act on the Town Clerk's behalf and recommending further inclusion and training, the Assistant Town Clerk does need to learn many of the same rules, laws, and procedures as the Town Clerk needs to know. This is an added level of complexity performed by the Assistant Town Clerk that exceeds the role commonly performed by Administrative Assistants, and other office clerks. The complexity and need to perform higher level functions is roughly akin to the Assistant Treasurer Collector position and thus it is recommended that the Assistant Town Clerk be placed at a Grade 5 on the scale which is comparable to Administrative Assistants' level for the larger departments (DPW & Police) and on par with the Assistant Treasurer Collector's position.

Data from the surveyed communities is presented below along with the minimum and maximum for a Grade 5 within Bolton's system. It should be noted that because the incumbent has been with the Town for many years and has received routine Step increases, her actual rate of pay exceeds the average FY08 comparable pay and is near the top rate of the Bolton Grade 5 scale.

Assistant Town Clerk Data:

Comparable Com. Average Low Pay Range Rate	Comparable Community Average High Pay Range Rate	Comparable Community Average Actual FY08 Pay	15% lower than actual average pay	15% higher than actual average pay	Bolton Grade 5 Low Range Limit	Bolton Grade 5 High Range Limit
14	19	17	14.45	19.55	17.57	22.93

Treasurer (Treasurer / Human Resource Manager)

The Treasurer, as was noted above, has increased the scope of the position beyond the confines of the narrowly defined existing job description. She takes a greater role in overall town-wide financial management and assumes many responsibilities on par with the Town Accountant who works on a part-time basis.

Not long ago, when the present incumbent joined the staff, some responsibilities were not being carried out adequately by the previous Treasurer's office and many activities were being performed in an inefficient manner. Life Insurance payments, in particular, were not being attended to properly. Over the past year, the Treasurer has made considerable headway at improving the way her office functions. She has put systems into place and streamlined the way in which financial reporting and record keeping is maintained. In some areas, it has been a time consuming and painstaking effort to put in to place the systems needed to ensure the department functions appropriately. Now that many of these new procedures are up and running, the Treasurer will likely have greater flexibility to pursue other areas of management. She has expressed an interest in and a desire to continue to expand her role in the area of Human Resource management.

There are many personnel duties that the Treasurer's office has begun to assume over the past months. However, there are other HR functions that have been overlooked in recent years or performed sporadically by the Personnel Committee. Further there are other proactive HR activities that the Town Administrator and Board of Selectmen would like to see undertaken. As will be discussed later in the report, it is important for Bolton to have a central person handling routine HR processes and the Town Administrator overseeing those HR aspects of a more sensitive nature. Attending to employee medical issues (pre-employment physicals, disability retirements, unexcused sick leave, etc.), Worker's Compensation filings, and the like should not be assigned to a volunteer committee that lacks the necessary access to confidential information and assistance from legal counsel. It is recommended that these duties be born by the Treasurer who should be assigned a new title that more accurately reflects this expanded role. Grievances, disputes, and harassment claims, that are of a sensitive nature should be carried out by the Town Administrator with assistance from the Human Resources Manager.

In some instances, (such as complaints of a minor or unclear nature) it may be preferable not to have the Town Administrator deal directly with the employees on some HR issues as she should be held in reserve to act as a final arbitrator. Employees not satisfied with the outcome or resolution of their issue at the level of Human Resource Manager, should be allowed to seek a final disposition of the matter with the Town Administrator. Furthermore, if employees are permitted direct access to the Town Administrator, in many personnel areas, she must then respond immediately with swift and decisive action. However, if there is a process that first directs employees to the Human Resource Manager, smaller incremental steps can be taken to address a situation which is often preferable to a more draconian

response. Such a system would still be responsive to the needs of employees and could help avert personnel related law suits and disputes.

The Treasurer's Office in general is well placed to be able to step up HR activities and improve tracking of benefits, sick-leave and vacation time, employee pay status (Grade and Step), and general personnel record keeping. Developing and maintaining a better system for employee reviews could well be undertaken by the Treasurer's office within its newly defined role. As will be discussed in the next section, the Assistant Treasurer has the capacity to take on additional duties. Thus, assigning the more routine HR matters is a natural fit for this office. Health insurance and retirement system sign-ups are already performed by this office. Moreover, the Treasurer has taken a leadership role with the Insurance Advisory Committee which resulted in the employees' approval of Section 18 Coalition Bargaining. Since she commenced employment with the Town, the Treasurer has also routinely attended Personnel Committee meetings.

Because of these expanded duties over that which is in the current job description, and because the Treasurer's position has assumed many financial management functions, this position is being recommended for an upgrade to a Grade 11 which is more internally consistent given the complexity and nature of the Treasurer's new role. However, prior to the upgrade is authorized, it is recommended that the Town review with the incumbent what training might be necessary in order for her to be adequately prepared to assume Human Resource Management functions. The employee might need to attend additional training before she can fully function as the HR Manager.

A Bolton Grade 11 would seem, at initial review to be higher than the average salaries paid to Town Treasurers throughout the comparable study area. However, it must be pointed out that in Bolton, the Town Accountant is part time and thus some significant financial management duties, borne in other communities by the Town Accountant's role, must fall on the Treasurer. Furthermore, this Town Treasurer may also be serving as the Human Resources Manager once she has completed additional training which is a whole additional area of responsibility with its own complex rules and procedures that must be followed.

Although the Treasurer presently supervises only one part time staff, long term changes in future organization structures contemplate the possibility of this position supervising more than one individual. Regardless of the number of direct reports, with the increased emphasis on financial and human resource management, the Treasurer's position should now likely be classified as *Administratively Exempt* under the Fair Labor Standard's Act. Justification for this classification should be verified with labor counsel.

All of the thirteen communities for which we have data have either a full time Treasurer (3 towns) or a full time combined Treasurer/Collector (10 towns). With the exception of 3 towns, all were assigned a 40 hour work week for the purposes of budgeting and pay. The remaining three communities ranged from 35-37.5 hour work weeks. In the section on Long Term recommendations, there is a discussion about combining Bolton's Collector and

Treasurer positions down the road. Because the Collector is an elected position combining the Treasurer/Collector is not currently feasible.

As discussed above most of the sample communities have a combined Treasurer/Collector position. Thus, presented below is data regarding what other communities pay their Treasurer/Collectors. Examining actual average pay and then applying a 15% reduction and 15% increase to arrive at an appropriate Grade would appear to locate the Treasurer at a Bolton Grade 9 where the position is presently placed. Thus, without the addition of HR responsibilities, one would conclude that there should be no change to the classification of this position. However, with the addition of the HR function, the scope of responsibilities, job complexity, required training, decision making, and other factors all combine to increase the score the Treasurer/HR Manager would receive within the Classification System (as developed for the Town by Human Resource Services, Inc. in 2002 and later modified in 2005). A scoring sheet for the newly modified position as it fits within the old scoring system is available with the study materials and the job description is contained in the Appendix. The ranking shows the position could merit a Grade 11. This would seem to also be more internally consistent with similar functions within Town.

None of the other comparable communities appear to assign the Town’s HR duties to their Treasurer. This does not mean that Bolton’s approach is not valid. It merely reflects a more conventional approach in the surveyed communities. In many of the best and more innovative personnel systems, duties are often assigned to individuals who have the talent, capacity, and initiative to take on more. However, as a cautionary note, if the present incumbent moves on to another community, Bolton may want to examine whether or not to continue this combination of duties when it hires a replacement. If such an eventuality occurs, separation of the HR function from the Treasurer could be analyzed at that time.

Presented below is a snap shot of the Treasurer/Collector data along with the proposed Bolton Grade 11 hourly pay rates.

Treasurer/Collector’s Comparable Data:

Comparable Com. Average Low Pay Range Rate	Comparable Community Average High Pay Range Rate	Comparable Community Average Actual FY08 Pay	15% lower than actual average pay	15% higher than actual average pay	Bolton Grade 11 Low Limit	Bolton Grade 11 High Range Limit
21	29	28	23.8	32.2	27.87	36.37

Assistant Treasurer / Collector

The position of Assistant Treasurer/Collector was among the more difficult positions to analyze. Comparisons to the comparable communities yielded mixed results. Boylston and Lincoln were the only other two communities that had combined Assistant Treasurer/Collector duties. Out of the remaining 11 communities there were 5 with Assistant Collectors working 28 or more hours and 10 with “full time” Assistant Treasurers working 28+ hours. Absent any clear standard, a community must decide on its own if it has sufficient responsibilities for this position.

Bolton established this combined position only a couple of years ago when it identified the real need to have someone cross-trained in the Collector function and to do Payroll in the Treasurer’s absence. That need still exists today and thus the position can not be eliminated or reduced in hours without risking future service disruption. In developing the job description when the position was created, there was also an intentional effort to address deficiencies in the prior Town Treasurer’s Office and to provide a backup in the absence of the Tax Collector. Although it has proven infrequent that the Tax Collector has needed to call on that backup service, it is nonetheless essential to have someone trained in both collections and payroll backup in the event of a prolonged absence by the Collector or Treasurer. Furthermore, with the possible retirement of the Collector, there will need to be a system in-place to continue those mission-critical tax collection responsibilities. It is also worth noting that when examining the comparable communities’ staffing structures, most towns had either a full time Assistant Treasurer or a full time Assistant Collector (or both) averaging 35 hours per week.

Nonetheless, there is as described earlier some room for increased duties within this position as it would appear the incumbent has occasional slow periods. The incumbent has also expressed a willingness to be assigned additional duties if they are clearly laid out and well communicated to her.

With the increase of the Treasurer’s responsibilities to incorporate the Human Resource functions, it is recommended that this position assume some administrative duties in the personnel area. Diligent and deliberate record keeping systems are in the process of being developed within the Treasurer’s Office and the Assistant Treasurer/Collector should be assigned the role of administering many of these records.

Attendance at Personnel Committee meetings to take minutes and assist with that committee’s follow-up activities is being recommended to be assigned to this position. Because there are occasional slow or down times for this position, we are not recommending an increase in hours to accommodate the occasional evening hours. Rather we suggest that the weekly schedule be adjusted to reflect reduced daytime office hours on weeks that there are evening meetings. Further assistance to the Treasurer in performing Human Resource functions should also be assumed by this role.

The comparable data for this position is presented below and represents an amalgamation of the Assistant Collector, Assistant Treasurer, and Assistant Treasurer/Collector's salary numbers.

Assistant Collector/Treasurer Data:

Comparable Com. Average Low Pay Range Rate	Comparable Community Average High Pay Range Rate	Comparable Community Average Actual FY08 Pay	15% lower than actual average pay	15% higher than actual average pay	Bolton Grade 5 Low Limit	Bolton Grade 5 High Range Limit
16	21	19	16	22	17.57	22.93

Since averages do not usually tell the whole story, it is merit worthy that the two towns that had combined Assistant Treasurer/Collectors paid on a range of \$18-\$23 dollars per hour but there were only two towns with such an arrangement and that does not represent a sufficient statistical survey. The Assistant Collectors stand-alone positions paid the least with an average range of \$14-19 per hour. Assistant Treasurers were paid \$16-21. Again, though, nearly all of those other positions were full time and full time positions generally pay more than part time even for like or similar duties. Depending on which set of averages one chooses to use as a comparison, the Bolton position could justifiably have been rated at a Grade 4 or left at its existing Grade 5. Because Bolton has a combined position and because its responsibilities include some HR duties, we feel it more appropriate to leave the position where it is today graded at a level 5.

Town Secretary

There are virtually no comparables for this job description as most towns do not have such a position. In Bolton the role of the Town Secretary appears to have evolved from earlier days when there was no Town Administrator and when state and federal regulations, under which Towns must now operate, were less onerous. Back then, the Town Secretary likely carried out the requests of the Board of Selectmen, and assisted the various committees in Town to perform their duties. However, over the past decade or so, Board and Committee responsibilities have evolved to reflect the increasingly complex legal requirements and mandates set on them by State and Federal regulatory authorities. It is primarily for this reason that it is no longer desirable to have one person attempt to participate in the ongoing operations of multiple different boards with varying missions. It is not practical to expect that one person can learn all of the regulations, personalities, procedures, and other practical matters of numerous boards and still be both efficient and effective. Such a role would also likely require attendance at too many evening meetings, beyond that which is reasonable to expect any one person to do. The exception to this generality is staffing for the major land-use permitting boards which will be discussed below.

Feedback from a number of sources seemed to indicate the having the Town Secretary involved in the affairs of many different boards and committees did not appear to be administratively effective or efficient as it could at times confuse issues or delay delivery of

services. While the Town Secretary primarily attended meetings of the Advisory Board, and Selectmen, there were other Boards and Committee chairs asking the Town Secretary to assist in carrying out their activities too. She was required to balance these requests while simultaneously attempting to serve the needs of walk-in citizen requests. Her effort and time was therefore often fragmented which reduced effectiveness. This is not to say that the Town Secretary has not been giving her all and making every attempt to keep up with the various duties which have, over the years, fallen on her plate. However, it would appear that focusing her efforts in fewer areas would have the result of taking advantage of her considerable knowledge and skills so that duties can be carried out more efficiently.

In addition to working with many Town committees, the Town Secretary presently also serves as a valuable source of information, directs citizens, answers inquires, and issues many licenses and permits. These are duties that will need to continue to be performed whether the Town Secretary does them or whether the responsibilities are assigned to a different office.

Since there is a considerable amount of day-to-day work at Town Hall that needs to get carried out regularly and the Town Secretary is uniquely positioned to be able to interface with the different offices (having done this for so many years), the Town Secretary's role can and should assist in various administrative and clerical matters. However, as described above, it is not desirable to have her continue to attempt to do agendas, minutes, and postings for multiple boards and also get involved in follow-up for specific committees. The Town Secretary could benefit from taking regular and ongoing direction from the Town Administrator to focus the duties she performs. This will help to ensure that she is not getting over extended or involved in matters with which she would not have the time or expertise to productively assist.

For this particular position, we are recommending that the Town Secretary's role be scaled back. The primary set of responsibilities for this position should be focused around Board of Selectmen matters, licensing, routine permit issuance, and attendance to phones and walk-in customers. This would include preparation of Selectmen licenses, the issuance of transfer station stickers, beach stickers, and other clerical functions such as photo copying and filing. There is a great need to improve filing in all of the Town Hall offices and focusing the Town Secretary's duties in this area would be efficient and productive. The sole area of permitting not being assigned to the Town Secretary is the Building Permits as these should be given out by the Land-Use Administrator (described below).

We are recommending that 35 hours be budgeted for this role. However, since the Town Secretary will be the key point person for citizen inquiries, it is essential that the actual hours worked correspond directly to those hours that Town Hall is open. The Town Secretary should be required to work the 25.5 public office hours. The remaining 9.5 hours can be split between evening meetings taking Selectmen and Advisory Committee minutes and extra office time. Office hours worked when Town Hall is not open to the public would be well served doing filing, photo copying, and general office duties assisting in the Town Administrator's office which continues to be a very busy workplace.

External data is not presented for this position, because as described above, there are few valid comparisons which can be made. Identifying an appropriate pay rate, therefore, can not be derived from market analysis. However, the newly reconstituted position has been rated and scored according to the Town's present classification system. That scoring and ranking sheet is available with the study materials and the job description is contained in the Appendix. It would appear from the score that the appropriate placement of this position within the current system would be at a Grade 5. Because of the long-time incumbency of the individual who presently holds the position, it would not be desirable to lose her considerable knowledge and background. Thus, it is recommended that her rate of pay be grandfathered at its existing rate of \$25.94 per hour. For reasons of internal consistency and fairness, the Town may want to consider withholding future COLA increases until such time as the Town Secretary's present rate of pay begins to fall within the Town's Grade 5 actual pay range.

Tax Collector

This position is an elected position. Thus, it is difficult to recommend many substantial modifications to its role. However, it is worth noting that the position often experiences some substantial down-time during certain periods of the year. If the incumbent wishes to scale back her hours, a small reduction in the total number of hours per year budgeted for this position would not be unreasonable. Actual hours worked per week could then be adjusted to allow for more hours during busy collections phases and fewer hours when the office is slow. Because it is an elected position, we have not recommended reductions. However, the Board of Selectmen might wish to pursue this with the Tax Collector further.

The present incumbent has expressed a willingness to entertain assisting with other routine Town Hall tasks, especially those that are of a customer-service nature. Thus, it would appear to make sense to consider cross-training the Tax Collector to back up the consumer oriented tasks that are performed by the Town Secretary (issuance of beach stickers, transfer station stickers, and the like). In this fashion, during times when the Town Secretary may be absent, citizens could still expect to be able to have the service they need while Town Hall is open. This would also give the Tax Collector a few more responsibilities to help fill her time more effectively.

We also recommend, similar to the distinction drawn with the Town Clerk's position, that the job description be updated to reflect that the Tax Collector reports administratively to the Town Administrator (see discussion under the Town Clerk). Modifications towards that end are included in the draft job descriptions in the appendix.

The Town may want to evaluate the feasibility of combining the Town Secretary and Collector's offices. This would enable those two individuals to work together more efficiently and would free up some much needed office space.

Continued modernization of this office would be of value to the Bolton community. Providing variable means for citizens to pay their taxes and other fees would streamline the

collections process. On-line bill paying, payment by credit card, and other options should be explored and implemented wherever possible.

Appropriateness of pay was examined for this role. Again external comparisons were few as only three towns, Ayer, Boxborough, and Shirley, had stand alone Collectors. Ayer's Collector serves for 20 hours per week and is elected so this position would appear to be the most comparable situation to Bolton's. Ayer is paying its Collector at an FY08 rate of \$14.28 per hour. Boxborough reported \$26 per hour and Shirley \$31 but both of these are full-time positions and therefore less comparable. Turning instead then to internal comparisons, the Tax Collector at a Grade 6 is presently on par with the Conservation Administrator, the Council on Aging Director, the Town Nurse, and the Assistant Library Director. This seems comparatively a little high given the duties and responsibilities presently born by all of those other positions which require a higher level of education and to fill roles with far greater complexity.

Although the Tax Collector has real legal responsibilities, the duties of this role are more of an administrative and clerical function. Tasks are somewhat routine, although they require an individual who has a facility with numbers and a high level of attention to detail. Scoring for this position within the existing Bolton system would actually likely place it at a Grade 5. Because it is an elected position, it could remain grandfathered at a Grade 6 temporarily until the present incumbent retires or the position is changed to an appointed position. Alternatively, the Town might consider freezing the rate of pay and withholding COLAs until the incumbent's rate of pay starts to fall within the actual Grade 5 pay range.

Administrative Assistant (Land-Use Board Administrator)

Presently, the work load of the Board of Health (BOH) is being "managed" in 7 hours per week by the prior incumbent who has stayed on temporarily to fill the gap before a replacement is hired. It is clear from discussions with Board of Health members along with Town Hall staff and the previous employee, that 7 hours each week for the BOH is not sufficient. However, the appropriate number of hours for the role, in general, is difficult to assess for a variety of reasons. First, miscellaneous work for the Town Secretary's office did take up some portion of the 30 hours that used to be dedicated to this position. Secondly, Because of the increasing regulatory burden being placed on Boards of Health across the state, the job itself has become more complex over the years. Finally, with the housing downturn, new construction and housing expansions have slowed which has in turn decreased, somewhat, the demand for new septic systems. We can expect that the downturn will correspondingly equate to fewer septic system approvals being required of the Board of Health going forward.

As mentioned above, the Administrative Assistant used to report to the Town Secretary and did perform clerical work for other Town boards and committees. However as described in the section on the Town Secretary, this arrangement resulted in that office being over extended. It also reduced the required focus and attention that should be placed on the key

“Land Use” permitting boards. In the new arrangement being recommended herein, the Administrative Assistant will now report to the Town Planner and will also perform administrative functions for the Town Planner as she carries out her responsibilities with the Planning Board and Zoning Board. This situation should result in far greater coordination and communication among the boards that have primary responsibility for granting approvals for various land uses.

In the recently released Mass. Association of Regional Planning Agencies (MARPA) Best Practices Guide for Permitting, having a single point of contact is strongly recommended to streamline permitting, improve efficiency, and reduce legal exposure to law suits resulting from disgruntled abutters and developers. This reconstituted position, which should also be given a new title of something such as: Land-Use Board Administrator, will enable the Town to have that single point of contact for homeowners and developers seeking guidance on the permitting process. The Town will also be better able to enforce its requirements and advance its goals and vision on land-use matters if the boards are working together in concert instead of being played off of one another by those with an agenda. Building Permits should be given out by the Land Use Board Administrator which will further provide a check and balance system to ensure that only those projects that have gone correctly through the permitting process be allowed to commence construction.

The job description for this position is revised and included in the Appendix. One will note that the modified position explicitly calls for a higher level of education and training and requires an individual who is capable of learning the various regulations of the Board of Health, Planning Board, and Zoning Board. The future hire should be a person with considerable skills in writing, attention to detail, and verbal diplomacy and communications. For these reasons, the job is being recommended at a Grade 6 on par with the existing Conservation Administrator with whom the new person will be regularly interfacing.

25.5 hours per week are recommended for the staffing arrangement. This will enable the employee to be available to the public during the Town Hall’s open office hours. However, in weeks during which the individual is required to attend evening meetings, the individual could reduce his or her in-office hours to accommodate the evening work. It is recommended that the Town Planner coordinate closely with her new report to ensure that at least one of them is available during all “open” hours to meet the public and answer related calls. Possible cross-collaboration with the Town Secretary could also occur for the taking in of building permit applications and for their issuance, provided that the Land Use Administrator is closely monitoring that process. The Town Secretary is familiar with the building permit process but she should not be called upon to make any decisions in regards to issuance of such because she will have less knowledge going forward as to what has been approved by the various boards. Also in the future, as the housing market and economy might dictate, this Land Use Administrator position may need to be increased to 30 or 35 hours per week but at present it would appear that 25.5 hours will be sufficient.

External salary comparisons were made to the communities within the study area. Many of the towns reporting on this category of employee cited that various part time individuals were

employed to manage the activities of different boards. Some cited general clerical assistance in this category which is in actuality less reflective of the type of work the Bolton position will be required to undertake. The low average range reported by the comparable communities was \$19 per hour and the high rate was \$23. This falls within the Bolton Grade 5 and 6 ranges. Because the other communities included low-level general clerical positions in their responses, we believe the higher grade is more of an appropriate determination. Scoring of the position also places it solidly in a Grade 6. Finally, for reasons of internal consistency and fairness, this position appears to be best placed in Grade 6.

Town Administrator

Over the recent decade, Bolton's Town management has become increasingly more professional and responsive to the needs of its citizens. Much of this change has been spearheaded by forward-thinking leadership and the diligent group of employees presently employed by the Town. Great strides were also made, improving Town management functioning, when the Town Administrator's position was created and filled.

At the same time, the regulatory burdens under which Towns must operate have expanded requiring an even greater level of diligence and performance and this pressure is compounded by the fact that the Town is growing. When the Town Administrator's position was originally created Bolton's population was somewhat smaller than today. More importantly though, the citizenry expected less of its government when there was a more informal governance structure. Bolton residents made a choice to change the system precisely because they wanted more accountability, services, systems, and better management. Responding to that call, the Town Administrator has been asked to professionalize a number of areas of government and to take on projects that lead to greater services.

Furthermore, across the commonwealth constant changes in procurement procedures, construction reform, DEP regulations, federal stormwater management standards, federal and state personnel laws, have all conspired to add to the complexity of the Town Administrator's role in every community. Finally, this is a time period where managers must be extremely creative in financing budgets when fiscal resources are limited and local aid is not what it used to be.

As mentioned above, this Town Administrator is also heavily burdened with a large number of complex capital projects. For some, just one project comparable to the Waste Water Treatment Plant, would consume nearly 40 hours a week to oversee. The Town Administrator is overseeing multiple complex capital and personnel matters in addition to her regular routine duties. Bolton is fortunate to have a talented Town Administrator who can handle multiple projects with grace and efficiency. However, despite her considerable abilities, she can not do it all without high-level assistance. Under the present arrangement, the Town Administrator is required to write nearly all of her correspondence, follow-up on virtually all Board of Selectmen matters, oversee routine procurement requests, and manage even the minutia pertaining to her office. This is probably not a good use of her time nor is it cost-effective to have one's highest ranking employee performing such functions. However, in order for her to delegate some of these duties, there must be an individual who is capable of tackling complex projects. For instance, the writing of RFPs, a somewhat standardized process, would require an effective writer with high level reasoning abilities who could establish a project scope of work, appropriate proposal requirements, a ranking and scoring system, etc. Follow-up correspondence and inquiries requested by the Board may require considerable diplomacy, tact, and a keen set of problem-solving skills. This is the kind of

work that the Town Administrator should be able to delegate if she had an assistant who could function at the required level.

Again, in reviewing the day-to-day activities of the Town Administrator, it is clear that not only is she over-burdened with projects, she is also doing some aspects of work that would be more appropriately delegated in order to free her up to handle more urgent issues and matters of greater importance. For these reasons, we are proposing the addition of an Assistant to the Town Administrator position. It is being recommended at 35 hours per week to enable the individual to be there much of the time that the Town Administrator is in the office and also to provide sufficient hours for the person to attend some evening meetings. With the refocusing of the Town Secretary's role, that position will no longer be assisting in overseeing Advisory Committee, Capital Planning, and other miscellaneous ad-hoc committees. The Assistant to the Town Administrator should staff these committees and attend related meetings where appropriate. This will allow for greater coordination in the budget and town meeting preparation process and better communications on Selectmen spearheaded projects.

Since the Assistant to the Town Administrator will regularly be acting to directly carry out the requests of the Town Administrator, this position is faced with a unique situation where he or she will at times need to help in directing the activities of other major departments. Thus, the position should carry a high level of authority, responsibility, and respect. A person with considerable poise and judgment should be sought to fill this role. Consequently, it is important to require experience, education, and skills commensurate with the desired level of responsibility. Our initial analysis indicated that the position could be Graded as high as a 9 but since it is always desirable to provide some room for growth when creating a new position a lower starting grade is defensible. Thus, we are recommending a Grade 8 for this role with the thought that if necessary to accommodate a high-performer, Bolton could regrade it to a 9 in subsequent years.

Comparable data from other communities is mixed in its results. Pay for the position diverges from a low range rate of \$17 per hour to a high range rate of nearly \$44 per hour. This could place the position within Bolton's system anywhere from a Grade 5 to a Grade 14. Because Assistant to the Town Administrator duties vary from work of generally a clerical nature to high-level professional work, the proper grading of the position should be entirely dependent on the job description and corresponding minimum professional qualifications.

The proposed job description for this position is in the Appendix and the scoring that justifies it be placed at a Grade 8 is available with the study materials.

Personnel Committee

The Personnel Committee is charged with maintaining the Personnel By-Law. However, over the past decade or so, personnel matters have evolved to include a complex set of legal requirements. Human resource related laws on both the Federal and State level are frequently changing, being updated, and new ones are routinely added such as the Small Necessities Leave Act. It is becoming increasingly difficult to stay current with the requirements of the Fair Labor Standard Act, Family and Medical Leave Act, Minimum Wage Laws, Internal Revenue provisions, etc. Bolton is in a particularly precarious position relative to its ability to keep its regulations current because any change must first be approved by the Town Meeting upon the recommendation of what is essentially a volunteer board. Other towns have responded to this situation by not having a Personnel By-law that spells out in detail the specifics of all of the Town's personnel rules. Instead these Towns delegate authority to an official board and identify which employees the policy is intended to cover. In this fashion the approach is to have a Personnel By-law that essentially states that the Town has the authority to adopt regulations and said regulations will cover the established groups of employees. Some towns have also disbanded Personnel Committees seeing them as a relic of the past, no longer suited to meeting the needs of the Town in a constantly changing personnel arena.

Bolton should strongly consider bringing an amendment to its Town Meeting that gives the Board of Selectmen the authority to establish Personnel Regulations. If it still sees a role for its Personnel Committee, it may wish to state in this article that those regulations will be based upon a recommendation from the Personnel Committee. It might also wish to designate the procedures under which the new regulations may be promulgated. For instance, will an advertised public hearing be required or can the rules be made at a duly posted Board of Selectmen's meeting? It may wish to establish appeal procedures that remain in the by-law and are further spelled out in the regulations. However, the one thing we specifically recommend is that there be some sort of a clause which identifies that the regulations apply to ALL employees except in instances where specific union contract language differs. Advice on how to word such an article should be sought from Labor Counsel. However, with the constantly changing personnel rules and regulations, the Town must have a mechanism to respond and keep current with new requirements. Because new regulations, by definition of being new, will not be addressed in union contracts, the by-law should cover ***all*** employees to protect the Town from falling out of compliance.

The remaining role of the Personnel Committee is called into question if the Town decides to modify its by-law in this fashion. However, in this day and age, it is probably no longer appropriate or desirable to expect that the committee can handle by-laws and other regulatory matters without significant and expensive assistance from legal counsel or other consultants. Furthermore, because of the complex and delicate nature of dealing with individual employees, resolving grievances and other matters, it is highly preferable to have the Town

Administrator, a person who is in the office on a daily basis, interact directly with personnel counsel and oversee the discharge of these duties through the Human Resources Manager as described above in the section on the Treasurer.

If it is to remain operating, this committee needs a role that can reasonably be tackled by volunteers. The Town is fortunate that the present Chairperson has a Human Resources background. However, in the future, volunteers may or may not have technical skills or expertise that will enable it to address the more complex issues pertaining to the personnel by-law and other Human Resource matters.

The Committee, therefore, should not be responsible for day-to-day duties since it does not meet that frequently. Additionally, it should not be signing off on step increases or other matters of employee pay. It should not be reviewing employees or evaluating them in any fashion as those actions appropriately fall to the person's direct supervisor. It should not be signing payments for tuition reimbursement as again, those matters are more of an urgent nature and should not be left to a volunteer board. The committee should not become involved in union negotiations or settling grievances of any sort as that could expose the Town to expensive law suits. In short, the Committee should probably not become involved in any of the duties assigned to the Human Resource Manager and Town Administrator and should not meet directly with employees on matters pertaining to that individual's employment. Finally, overseeing the routine Compensation and Classification studies should probably fall to the Town Administrator's office because these studies have budgetary and sometimes union negation implications. If the Town Administrator feels that this is an appropriate role, the Personnel Committee could serve on an ad-hoc consultant selection committee when the Town is hiring a consultant to perform classification studies.

If it is still searching for an appropriate role, the committee could serve as a policy setting board. It might wish to make recommendations on changes to the new set of Personnel Regulations. It might wish to independently conduct market research to make a recommendation to the Board of Selectmen regarding regular COLA increases. It could be very effective at gathering information and data on what other towns are doing in the personnel arena. For instance, it could gather samples of employment review forms used by other towns and then make a recommendation to the Town Administrator as to the form used in Bolton. In summary, the newly reconstituted Personnel Committee, if the Town continues to use this function, should become exclusively an advisory committee making recommendations on policies and procedures to the Board of Selectmen and Town Administrator.

14. Practical Considerations

- ❑ Where to put people will become an issue. Some of these matters have been discussed elsewhere within the report. However, if the Town goes forward to create an “Assistant to the Town Administrator” position, it should do so in a way that enables the person selected to fill the role to operate at maximum efficiency. The new position will require space in close proximity to the Town Administrator. Ideally, the position will also require a certain level of privacy. Proximity is also important in achieving efficiency goals for several other function areas. The new Land-Use Administrator will report to the Town Planner. If there is any way to locate that individual downstairs close to the Town Planner that would be preferable. It would also help to have Conservation located close to Planning so that these boards and their staff can interact more effectively and to achieve maximum communication and information transfer. This arrangement is also preferable for the public seeking services from these boards as the homeowner pulling a building permit is often the same individual who also needs to file a “Notice of Intent” with the Planning Board and seek a septic permit all concurrently. Thus, it might make sense for the Conservation Administrator to move downstairs and be grouped with the Planner, and Land Use Administrator. If this is accomplished, it will also free up a much needed office for the Assistant to the Town Administrator.
- ❑ Which offices will lack full time coverage during open hours? The discussion above is also relevant to this issue. The Conservation Administrator, and Land Use Administrator, are “part-time” positions in that they do not work 40 hours per week. The Town Planner although she works 35+ hours, works a flexible schedule. These same employees are also required to attend evening meetings which can further reduce their in-office hours. Thus, from a practical standpoint, cross training, clustering of space, and the sharing of duties within these function areas is highly desirable. If a citizen needs to come in to pick up a permit or file an application there should be someone able to help him or her at all times that Town Hall is open. With improved communications and office coverage that is coordinated, Bolton will be able to accomplish greater public service.
- ❑ Budgetary and funding issues are always part of the equation when considering change. The reader is referred back to the Short Term Recommendations chart in Section 11. This is a plan that contemplates approximately \$38,000 in increased personnel costs. However, this is a modest and somewhat conservative plan based on what the Town is trying to accomplish as ascertained through interviews, surveys, questionnaires, and other industry standards. There were several instances where the consultant could have recommended more hours than have been allocated to certain positions. Additionally, one or two of the positions could have been argued to be graded higher based on the roles the individuals will be asked to perform. However, we feel what has been proposed is appropriate and fair and will place Bolton in a position that is defensible. With all personnel systems and over time as things change, the Town will need to evaluate the appropriateness of the hours allocated and the rates of pay.

15. Employee Benefits

The RFP requested that the consultants look at what comparable communities are offering in the way of benefits. Having this data will assist Bolton in remaining competitive. A separate spreadsheet was forwarded to the Town Administrator which summarized the findings of this analysis.

Some of the benefit comparisons that are interesting to note is that only 1 town paid any portion of employee dental and that was Boylston which reported covering 70% of dental. About half the towns provided disability insurance but entirely as an employee election as no Towns seemed to cover any of the costs. Life insurance ranged from 20-75% Town paid but no plans offered more than \$10,000 in insurance. Half the towns which reported in provided flexible spending accounts. The trend in this benefit area will likely lead to more communities offering flexible spending accounts in years to come. All towns that reported data indicated that they offered employees Deferred Compensation accounts.

Health insurance for non-union works ranged from a low of 50% town paid (in Hudson) to a high of 90% (several towns) for an average of 76% of costs born by the municipality.

Towns offered typically between 12-15 sick days per year. Vacation benefits were fairly uniform across the board with 10 days provided to new employees and increasing by 5 days typically for every 5 years of service. Towns if they provided personal leave, usually made 3 days per year available to the employee but some towns did not provide this benefit.

Finally mileage reimbursement ranges from .40-.50 cents or Towns explicitly stated that they paid the IRS rate.

16. Appendix

Excerpt from Original RFP:

Request for Proposals
Town of Bolton
Organizational Study of Selected Municipal Positions

The town of Bolton, acting through its Board of Selectmen, is seeking proposals from qualified human resources firms, with extensive municipal experience, to provide the town with an Organizational Study of Selected Municipal Positions. This study shall result in a recommendation for changes to the current organizational structure based on input, comparisons with other communities, consultant's knowledge and expertise, and identified goals. Request for proposal specifications will be available from the Bolton Town Administrator's Office after 10:00 a.m. on Monday, August 20th, 2007.

Sealed proposals must be submitted with the price proposal in a separate sealed envelope from the technical proposal, clearly marked "Bolton Organizational Study Technical Proposal" and "Bolton Organizational Study Price Proposal". These sealed proposals must be submitted to Jodi Ross, Town Administrator, 663 Main Street, Bolton, MA 01740 no later than 11:00 a.m. on Monday, September 10th, 2007. No emailed or faxed proposals will be accepted.

The town of Bolton is an Equal Employment Opportunity employer and encourages Minority Business Enterprises and Women Business Enterprises to apply. The Personnel Committee will assist the Town Administrator and Board of Selectmen in evaluating proposals, with the intent to ask finalists to interview with the Board of Selectmen at their September 13, 2007 meeting. The Board of Selectmen is the awarding authority, and the goal is to award a contract after conducting interviews. The town reserves the right to reject any or all proposals if deemed in the public's best interest to do so.

Questions or requests for clarification relating to this project may be directed to Jodi Ross, Town Administrator, and will be accepted until 12:00 noon on Thursday, September 6th, 2007 via telephone 978-779-3300 or email at townadministrator@townofbolton.com. Answers to all substantive questions will be put in writing and supplied to all parties who have received a copy of the RFP, either by fax, mail or email.

Request for Proposals
Town of Bolton
Organizational Study of Selected Municipal Positions

General Information, Project Background, Project Goal

The Town of Bolton is a small community of approximately 5,000 residents, with an operating budget of approximately \$17 million, including schools. The municipal government structure is reflective of its small town status, and many town offices are staffed by only one or two people. Currently, the Bolton Town Hall offices are experiencing some turn-over due to retirements and/or resignations among a couple of key Town Hall positions. This has created an opportunity for the town to be able to look comprehensively and creatively at the functioning of the various Town Hall offices and to consider how best to meet the current and future needs of the community before filling any vacancies. Additionally, there is a need to examine the human resources function in the town. Currently there is some overlap in duties, and with the recent hiring of a full time Treasurer and a part time Assistant Tax Collector/Treasurer, who already oversee many employee benefits, there is a desire to examine the human resource function, and determine if these duties are being handled in the most efficient, effective manner.

Towards that end, this study is being commissioned to examine the following existing positions and to make recommendations thereon:

- Town Clerk
- Assistant Town Clerk
- Town Secretary
- Administrative Assistant to the Board of Health/Planner/Town Administrator/Selectmen
- Treasurer
- Assistant Town Treasurer/Tax Collector
- Town Administrator

Currently the Town Clerk's position is elected, and the incumbent works approximately 30 hours per week. The Assistant Town Clerk is appointed and works 35 hours per week. The elected Town Clerk plans to retire some time during the next several months.

The Town Secretary works 40 hours per week and provides assistance to the Board of Selectmen, Town Administrator, Advisory Committee, and Personnel Committee. The Administrative Assistant position was originally 19 hours per week, but has increased to 30 hours per week. This position was originally slated to assist the Town Secretary in the selectmen's office, along with providing clerical support to the Board of Health and Planner, however this job has evolved to include duties beyond the original job description.

The Town Treasurer works 40 hours per week and shares a 20 hour Assistant Treasurer/Tax Collector with the elected Tax Collector.

The Town Administrator position was created in January 2004 and is a full time position. All department heads, other than those holding elected positions, are supervised by the Town Administrator.

Job descriptions for the seven positions are attached.

Access will be available to other Bolton town management studies, current salary classification plan, the history of the evolution of positions, and any other information deemed pertinent.

The goal of this study is to obtain recommendations on ways to better structure these jobs to improve the efficiency and effectiveness of the organization. Additionally, new job descriptions should be crafted, along with proper classification of these positions, and a recommendation of the work hours necessary to adequately complete the functions of each job. The human resources duties being transferred from the Personnel Committee to Town Hall staff should be clearly defined in the recommended restructuring.

The following chart indicates the current status of the above noted positions:

Title	Reports To:	Date of Job Description	Status of Position	Elected Or Appointed (By)
Town Clerk	Citizens of Bolton	2005	Incumbent preparing to retire	Elected
Assistant Town Clerk	Town Clerk	2005	Incumbent	Appointed by the Town Clerk
Town Secretary	Town Administrator/BoS	2005	Incumbent	Town Administrator
Administrative Assistant to BoH/Planner/TA/BoS	Town Administrator/BoH/Planner	2005	Resigned	Town Administrator/Board of Health
Treasurer	Town Administrator	2006	Incumbent	Board of Selectmen
Assistant Town Treasurer/Tax Collector	Treasurer/Tax Collector	2005	Incumbent	Town Administrator
Town Administrator	Board of Selectmen	2005	Incumbent	Board of Selectmen

Scope of Work

A. The Consultant is expected to complete a comprehensive personnel study that achieves the following goals:

- Examine the existing structure of the municipal government to identify how personnel efficiencies can be maximized
- Compare existing staff structure to other comparable towns of similar size and character to identify alternative suitable staffing structures for Bolton to consider
- Discuss organization and personnel goals with Town Administrator, Board of Selectmen, Board of Health, Town Clerk, Treasurer, Tax Collector and Personnel Committee
- Make recommendations on changes to the current structure based on input, comparisons with other communities, consultant's knowledge and expertise, and identified goals
- Interview all incumbents and any other personnel that have a close association with the positions above
- Report back to Town Administrator, Board of Selectmen and Personnel Committee with recommendations and upon approval to proceed, revise job descriptions and pay scales accordingly
- Develop an implementation plan that will assist the town of Bolton in following through with the recommended staffing plan

B. Deliverables to be included in this study:

Analyze current structure of Bolton positions, including job duties and requirements, responsibilities, and interrelationships. Suggested processes may include:

Hold an orientation session with the incumbent employees to explain the study and the process. The timeline shall be laid out in clear fashion so that employees can understand what to expect.

Prepare a questionnaire to be distributed to participating employees that will allow employees to list job duties, requirements and responsibilities. The employee's immediate supervisor and department head shall review the responses to each questionnaire.

Compare the questionnaires with any existing job descriptions.

Conduct interviews with employees where necessary to verify/clarify the information received through the questionnaires. Department heads and the town administrator shall be interviewed to verify information gained from the interviews of employees.

Determine whether the duties performed by each employee actually reflect the duties of the job title/description assigned to that employee and, if not, recommend the appropriate job title and description for the employee.

Identify a list of communities that are comparable to Bolton in size, population, budget, economic climate, and other relevant factors to be used to determine external wage and

position comparability. The market survey should also consider a comparison of employee benefits. Obtain approval from the town officials of said list before proceeding.

Examine relevant job descriptions in these towns to determine parameters of duties for each position, along with interrelationship with other positions included in the study. Summarize this information in a readily understandable report and submit to the Town Administrator, Board of Selectmen, and Personnel Committee.

Compare existing job descriptions to other communities; analyze opportunities for efficiencies; consider realignment of job functions and duties; discuss goals with Town Administrator, Board of Selectmen and Personnel Committee.

Based on input from the decision makers, create, modify and/or update job descriptions for each of the positions within the study, in compliance with the ADA and other applicable federal and state statutes. Essential functions should be identified in each job description, along with the reporting structure.

The consultant shall prepare draft job descriptions to be reviewed by the Town Administrator (and Department Head/Supervisor where applicable) for accuracy. Comments may be submitted to the consultant prior to the finalizing of the job descriptions.

The consultant will prepare and submit final job descriptions, including detailed organizational structure (including interrelationships and supervisory delineation) for the included positions. In considering final job descriptions, the consultant should recommend whether employees should have exempt or non-exempt status in accordance with the Fair Labor Standards Act and other pertinent laws and regulations.

The consultant shall review the proposed job descriptions and recommend assignment of each position within the town's existing FY2008 non-union salary schedule.

At the conclusion of the study, the consultant shall provide a report that shall include measures and steps to take to implement the recommended structure.

III. Requirements

A. Qualifications -

1. Proposers must provide a resume of their qualifications to perform the work listed in the above Scope of Services. Specifically, vendors must provide for each employee that will be assigned to this project a resume detailing:

Formal education and work experience

Special qualifications and/or training related to municipal human resources

Ability to complete the task by November 30, 2007

B. Contents of Proposals

To facilitate review, each proposal at a minimum, must be organized as follows:

Technical proposal's Plan of Services (project approach, steps involved, process and timeline)
Qualifications, including references
Exhibit A – Proposal form
Exhibit B – Price proposal
Exhibit C - Signed contract

Eight (8) hard copies and two (2) cd copies of proposals must be submitted by deadline in a sealed package.

Price proposal must be submitted in a sealed envelope separate from the technical proposal, and are due to Jodi Ross, Town Administrator, 663 Main Street, Bolton, MA 01740 no later than 11:00 a.m. on September 10th, 2007.

C. Delivery Deadline

All work shall be completed by November 30th, 2007.

D. Payment for Services

A first invoice may be submitted to the town upon proof of completion of 50% of the contract work. Final payment will be made within 30-days of the project's successful completion, as determined by the Board of Selectmen.

IV. Selection Criteria

Proposals will be reviewed and evaluated by a Selection Committee consisting of the Town Administrator, Board of Selectmen, and Personnel Committee based on the selection criteria listed below. Proposals will be ranked on the following scale reflecting the degree of benefit to the town: "Highly Advantageous, Somewhat Advantageous, Not Advantageous, or Unacceptable". In addition, references will be checked and finalist proposers will be interviewed at the September 13th Board of Selectmen's meeting. The proposal submitted should specifically address the following evaluation criteria:

- a) Experience: The project leader and team members must have specific experience in municipal human resources specifically as it relates to the evaluation of departmental functioning, job description development, and conducting and/or overseeing organizational studies. In ranking proposals, the Selection Committee will consider the proposer's experience both in managing personnel functions and in the development of appropriate job descriptions.
- b) Background, Ability and References: These criteria relate to the proposer's specific municipal knowledge, and ability to conduct and oversee projects of this genre. Samples of

work, resumes, a list of relevant projects, and references for past performance will be considered in reviewing these criteria. The Selection Committee will be looking for evidence of work and background that indicates that the proposer can execute comprehensive projects in a successful fashion.

c) Plan of Services: Proposers are expected to submit a “Plan of Services” with their proposals. This Plan should identify the consultant’s project approach and describe the steps and process the consultant will follow in completing the study.

V. Determination of Best Price

The Chief Procurement Officer (Town Administrator) shall open the Fee Proposal after receiving the final ranking of the Selection Committee and, with the Selection Committee, make a final recommendation of which proposal is in the best interest of the town. Price alone will not be the determining factor in the awarding of a contract. The Chief Procurement Officer and Selection Committee shall consider both the rating given to the Proposer by the Selection Committee and the Fee Proposal in making the recommendation to award to the Board of Selectmen.

VI. Awarding Authority

The Board of Selectmen are the awarding authority, and reserve the right to reject all proposals if deemed in the public’s best interest to do so.

Comparable Communities:

<u>Municipality</u>	<u>Population</u>	<u>Operating Budget (07)</u>	<u>Total Sq. Miles</u>	<u>EQV Per Capita</u>	<u>Median Family Income</u>	<u>Miles of Roads</u>	<u>Form of Gov</u>
<i>Bolton</i>	<i>4435</i>	<i>\$16,848,670</i>	<i>19.93</i>	<i>\$230,230</i>	<i>\$108,967</i>	<i>63.22</i>	<i>Open TM</i>
Ayer	7228	\$26,854,297	8.82	\$139,440	\$61,986	43.97	Open TM
Boxboro	5062	\$18,588,799	10.39	\$216,835	\$110,572	37.35	Open TM
Boxford	8177	\$29,300,629	23.8	\$237,338	\$119,491	95.52	Open TM
Boylston	4259	\$12,012,860	15.84	\$170,402	\$77,604	48.43	Open TM
Carlisle	4829	\$21,908,886	15.37	\$316,996	\$142,350	55.44	Open TM
Clinton	13995	\$36,061,709	5.36	\$90,315	\$53,308	49.05	Open TM
Harvard	6074	\$19,825,208	26.35	\$203,027	\$119,352	74.69	Open TM
Hudson	18943	\$54,209,394	11.66	\$134,811	\$70,145	11.66	Open TM
Lancaster	6845	\$15,392,143	27.65	\$130,077	\$66,490	67.85	Open TM
Lincoln	7931	\$28,634,820	14.56	\$256,991	\$87,842	57.23	Open TM
Littleton	8589	\$31,190,888	16.46	\$180,604	\$83,365	76.66	Open TM
Shirley	7612	\$16,586,623	15.81	\$86,511	\$66,250	48.30	Open TM
Sterling	7770	\$19,981,209	30.52	\$147,589	\$76,943	101.59	Open TM
Stow	6179	\$20,649,660	17.68	\$196,319	\$102,530	51.69	Open TM
West Boylston	7699	\$21,262,235	12.69	\$118,366	\$69,100	58.91	Open TM

Employee Questionnaire

Employees were asked to respond to questions and to provide detailed examples, etc. Further follow up questions were asked of participants during one-on-one meetings.



EMPLOYEE QUESTIONNAIRE

Signature of
Employee: _____

Basic Employee Information

Question:

- 1 Employee Name
- 2 Official Title
- 3 Descriptive Title (if different from above)
- 4 Number of Years in Position
- 5 Previous Role (if any) with the Town of Bolton preceding present position

Qualifications Required for Position

- How many years of formal education are minimally required
- 6 for this position?

What is the highest level of education you obtained prior to being appointed in this role for the town? Did you complete
7 any formal education while employed with the town?

How many years of formal education are optimally required to
8 succeed in this position?

Is any specialized training or certification required for this
9 position? If yes, please list all certifications and/or describe
special training.

Describe any ongoing training you participate in on a regular
10 basis.

Work Schedule

11 How many hours per week do you officially work?

12 How many hours per week do you actually work?

What are your scheduled hours? Are any of those work hours
13 performed outside of the Town Hall?

Are any of your hours scheduled for times that the Town Hall
14 is officially closed?

Do you work any evening hours? If so, how frequently
(weekly, monthly, yearly) and typically for how many hours at
15 a time?

Do you regularly (more than 3 times per week) check emails
16 at home?

Do you regularly (at least 2 x per week) receive work calls
17 while away from the office?

Public Interaction:

Do you interact primarily with the public or mainly with other
18 Town employees?

Describe the nature of your interaction with other employees?
19 Is it generally by phone, email, letter, or in person?

20 Describe the nature of your interaction with the public (by phone, email, letter, or in person). Be sure to provide at least one example

21 Do you routinely interact with any state officials or with individuals from other municipalities? Describe the nature of that interaction and provide an example.

Supervision:

22 To whom do you officially report? Are there others to whom you indirectly report? Identify by name any individuals to whom you report

23 Is the chain of command clear and precise or do you find yourself taking direction from a variety of sources?

24 Describe the frequency of supervision you receive.

25 Does your supervisor meet face to face with you regularly? If so, how often?

26 How are you given instructions (verbally, written, email, over the phone) - Describe the nature by which your supervisor provides you with direction.

27 Do you consider that direction to be detailed or more of a general nature? Provide an example of the type of direction you are routinely given.

28 Is your position provided with policy direction from a board or committee other than the Board of Selectmen? If so, please list the boards or committees who provide policy input into your role and responsibilities.

Supervisory:

29 List all employees who *officially* report to you (if any). Please provide their actual names and titles.

30 List any employees who you feel you supervise

31 Identify how many full time employees (if any) that you supervise directly:

- Identify how many full time employees (if any) that you supervise indirectly (through any subordinates who report to you):
- 32**
- 33** Identify how many part-time employees you supervise (if any):
Describe the type of oversight you give to those you supervise. Is this oversight primarily directional, or is it more of a policy nature?
- 34**
- Do you supervise any volunteers or seasonal staff? If yes, please tell how many, how often, and the types of projects or activities performed by these volunteers or seasonal employees.
- 35**
- Do you oversee a municipal department or function area? If yes, please identify the department or functional area/s for which you are responsible.
- 36**
- If you supervise staff, are you responsible for hiring or firing employees within your function area?
- 37**
- 38** Do you prepare annual reviews for any staff?

Duties and Responsibilities:

- List, in detail, the primary roles and duties which you perform on a regular basis (at least weekly)
- 39**
- 40** Describe in detail a typical work day
- 41** Describe your work-flow for a normal week
- 42** List any duties you routinely perform on a monthly basis
- List any duties that you are responsible for performing on a quarterly basis
- 43**
- List any duties or responsibilities which you are responsible for on an annual basis
- 44**
- How, if at all, have your duties changed over time? Provide an example
- 45**

Describe in detail any Special Projects which you have undertaken. Tell if these special projects have repeated or were generally one-time projects. Describe what your role in the special project was and be as precise as possible.

46

47 What are the roles you most frequently perform?

48 What do you consider your most important responsibilities to be, and why?

Work Environment and Conditions

49 Describe the office environment in which you work.

50 How many individuals work in the same immediate office group with you?

51 Do you feel that your office group functions as a number of individuals with separate and discrete roles or do you find your group works as a team and shares duties and responsibilities?

52 Do you consider your office environment to have a quiet background noise level, average noise level, moderate noise level, or to be loud?

53 Do you consider your office work flow to be slow paced, moderately paced, fast paced, or intensely paced?

54 Are you required to lift heavy objects? If so, what is the heaviest typical item you would be required to lift?

55 Are you required to do any physical or manual labor for your work? If so, please describe in detail.

56 Are you required to drive an automobile in the performance of your work duties? If yes, please describe the situations in which you would be required to drive.

57 List all office equipment you are required to use in the performance of your regular duties on a regular basis.

58 Do your duties or responsibilities require you to be outside for any period of time? If so, please describe.

Mistakes, Errors, and/or Omissions:

59 If you make a mistake in the regular performance of your duties is it likely to be (choose one) identified by a superior, identified publicly, or not identified at all?

60 How long would it typically take for an error or omission you made to be recognized?

61 From the following list, please check any that apply: Errors or omissions made by you in the performance of your duties could have the following consequences:

Injury to self

Injury to others

Monetary loss to the Town

Law suits or other legal ramifications

Damage to equipment, buildings, or supplies

Service delays or loss of service

Other (provide description under examples)

62 Please check (in the answer column) any responses that are valid for your position:

I have access to official employee personnel files

I have access to employee medical records

I have access to written legal correspondence

I have access to CORI materials

I participate in collective bargaining negotiations

I have knowledge of legal proceedings prior to settlement of cases

I participate in the resolution of legal matters

I attend Executive Sessions

I participate in discussion and contribute during Executive Session

Other Information:

63 When was the last time your job description was updated?

64 Is there anything else you would like to tell us about your position?

Comparable Community Survey

Town of Bolton Salary, Position, & Benefits Survey

***** *RESPONSE FROM TOWN OF* _____ *****

Name of Individual filling out form: _____,
Title: _____

Email: _____ *Phone:* _____

For each of the following positions, please provide the salary range (minimum, maximum, FY08 actual Pay) and total weekly hours per position:

<u>POSITION</u>	<u>MIMIMUM PAY RATE</u>	<u>MAXIMUM PAY RATE</u>	<u>FY08 SALARY</u>	<u>Total Hours per WEEK</u>
Treasurer				
Collector				
Treasurer/Collector Combined				
Assistant Treasurer				
Assistant Collector				
Assistant Treasurer/Collector Combined				
Town Clerk				
Assistant Town Clerk				
Town Secretary (not Chief Administrative Official)				
Secretary to the BOS				
Town Administrator (or Equivalent)				
Clerical Assistant General				
Assistant Town				

Administrator or Equivalent				
Assistant to Boards & Committees				

1. Do all of the offices in your Town Hall keep the same hours? YES: _____
NO: _____

2. What are the typical hours your Town Hall is open to the public?

3. Is your Town Clerk elected? YES: _____ NO: _____
How many full time employee in this office: _____ How many part time: _____

4. Is your Treasurer elected? YES: _____ NO: _____
How many full time employee in this office: _____ How many part time: _____

5. Is your Collector elected? YES: _____ NO: _____

6. Are your Treasurer and Collector positions combined? YES: _____ NO: _____
How many full time employee in this office: _____ How many part time: _____

7. Does your Town Administrator have a full time, **non**-clerical assistant? YES: _____ NO: _____

8. Do you have a full time assistant for your Board of Health? YES: _____ NO: _____

9. Do you have a full time Town Planner? YES: _____ NO: _____
Is there clerical support staff for your Planner? YES: _____ NO: _____
Does your Zoning Board and Planning Board share staff? YES: _____ NO: _____

10. Does your Board of Selectmen have a full time, non-clerical assistant? YES: _____ NO: _____

Does your Board of Selectmen have a full time, clerical assistant? YES: _____ NO: _____

11. How many total full time positions serve in the Board of Selectmen's Office: _____

12. How many full time positions serve in the Town Administrator's Office: _____

Does your BOS & Town Administrator share office staff: YES: _____ NO: _____

BENEFITS:

13. Do you provide employees with **dental insurance**? YES: _____
NO: _____

If yes, what percentage does the town pay? _____

14. Do you provide **disability insurance**? YES: _____
NO: _____

If yes, what percentage does the town pay? _____

15. Do you provide **life insurance**? YES: _____
NO: _____

If yes, what percentage does the town pay? _____

How much life insurance is provided? _____

16. Do you offer **Section 125 Flexible Spending Accounts**? YES: _____
NO: _____

17. Do you have a credit union? YES: _____
NO: _____

18. Do you offer employees with deferred compensation plans? YES: _____
NO: _____

19. What percentage of employee **health insurance** do you
pay? _____

20. How many **sick days** are your Town Hall employees allowed?

Do they carry over from year to year?

Is there a sick leave buy back provision in your benefits package?

21. How many **vacation days** are offered new Town Hall employees?

Does this increase after 5 years and if so to how much?

Does this increase after 10 years and if so to how much?

After 15 years (how much)?

After 20 years (how much)?

How much unused vacation days can be carried each year?

22. Do you offer **personal time or other paid leave** (please describe):

23. What is your **mileage reimbursement rate**?

24. How many **paid holidays** do you offer employees per year?

25. Do you have a clerical union representing any of the employees in the above chart? Yes / No?

Please list all of the employee positions in your Town Hall whose positions are similar to those being studied that are represented by a labor union:

Revised Job Descriptions:

Town Clerk

Position Purpose:

The purpose of this position is to perform administrative and supervisory work in connection with the maintenance of official municipal records, the issuing of various licenses and official documents, the management of the Town census, and the direction of election activities; all other related work as required. The Town Clerk is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control. Regularly performs other similar or related work as directed, required, or as situation dictates.

Supervision:

Supervision Scope: Performs a variety of highly responsible functions in accordance with state statutes and town bylaws requiring the exercise of considerable judgment and discretion in interpretation and application, and for which there is direct accountability to the Commonwealth.

Supervision Received: Elected by the citizens of the town; works under the policy direction of the Town Meeting, and in accordance with the provisions of the Massachusetts General Laws, Town Bylaws, and the rules and regulations of the Secretary of State's office and the Department of Revenue. Reports administratively to the Town Administrator and receives direction as to matters of general office policy from the Town Administrator

Supervision Given: Routinely supervises one full or part-time employee and seasonal election workers. Coordinates and oversees activities of occasional volunteers and may supervise part time Senior Tax Write-Off workers.

Job Environment:

Work is performed in typical office conditions, with frequent interruptions, to provide assistance and information to the general public on a walk-in basis and on the telephone. At times workplace can be moderately noisy. Scheduled hours are generally 30 hours per week but include an extended workday when elections and town meetings are conducted.

Operates computer and general office equipment such as copier, fax, postage meter and telephone.

Makes frequent contacts with town departments, boards and committees, state and county officials, banks, and the general public, as needed, to provide information and solve problems. Contact usually involves the provision of information of a technical or factual nature to the public or interested parties.

Has access to some confidential information such as vital statistics.

Errors could result in delay and confusion, result in the improper disclosure of confidential information, have legal and/or financial repercussions, and cause adverse public relations.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

Provides information to town departments and the general public regarding federal, state and local regulations and town bylaws, rules and regulations.

Serves as chief election officer for the town with full responsibility for all election activities; records votes taken at town meetings and notifies appropriate agencies; serves as clerk of the board of registrars supervising all aspects of voter registration; hires, trains and supervises part-time election personnel. Manages voter list and related functions using automated state voter registration information system.

Serves as registrar of vital statistics, recording births, marriages and deaths; serves as custodian of town records and issues certified copies of same; records and issues certified copies of births, deaths and marriages; submits reports to state and other authorities as required. Assists the public in conducting genealogical research, using such records.

Records Town Meeting votes and sends accepted bylaws to the Attorney General's office for approval. Certifies town budget in order for Assessor to set tax rate; certifies votes of all Town Meeting actions, as required. Receives and records special permit applications and decisions of the Planning Board, Conservation Commission and Board of Selectmen.

Records and maintains files on preliminary and definitive subdivision plans and plans not requiring approval under the Subdivision Control Law approved by the Planning Board; receives and records decisions of Zoning Board of Appeals and all appeals to such decisions.

Administers the annual town census; responsible for the updating, printing, and mailing of the census; prepares annual street list.

Receives, posts, and files meeting notices of all town boards and committees. Maintains copies of all approved minutes of boards and committees and provides same to the public upon request. Serves as the repository for most Town records of an official nature.

Issues a variety of state and town licenses and permits and certificates, including burial permits; provides for adequate maintenance of associated records and the collection of fees; submits monthly reports and fees to the Treasurer; maintains bank accounts.

Issues annual dog licenses, ensuring that vaccination against rabies is current. Responsible for the notifications, issuance of citations to dog owners, and the collection of all related fees related to late licensing.

Serves as keeper of the official seal of the town; administers oaths as necessary to all elected officials, appointed members of boards and committees, and police and fire department personnel.

Prepares and oversees the budget for the Town Clerk's office. Purchases all office supplies and equipment, as needed; processes all bills for payment.

Recommended Minimum Qualifications:

Education, Training and Experience:

Bachelor's Degree; five years experience in an office setting to acquire familiarity with standard office procedures.

Minimum Requirements:

Must be electable within the Town of Bolton. Regular attendance and punctuality at the workplace is required.

Knowledge, Ability and Skill:

Knowledge. Working knowledge of state, local and federal statutes and regulations applicable to the duties and responsibilities of a Town Clerk's office. General knowledge of office procedures and the ability to supervise support staff in an effective and harmonious manner.

Ability. Excellent customer service skills and the ability to deal tactfully and appropriately with the general public in person and on the telephone. Ability to establish and maintain working relationships with town officials and departments, and state agencies. Ability to apply legal interpretations and precedents to current problems. Ability to establish and maintain complex record keeping systems. Ability to develop and manage a budget. Ability to perform multiple tasks independently.

Skill. Excellent communication skills, both oral and written. Skill in operating computers and related word processing and statistical applications. Strong organizational, managerial and planning skills. Must have independent initiative and also be willing to take direction from the Town Administrator.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable

accommodations may be made to enable individuals with disabilities to perform the essential functions.

Tasks require the ability to exert light physical effort in sedentary office work, which may involve some lifting, carrying, pushing and/or pulling of objects and materials of routine weights in the 5 - 10 pounds range but also occasionally lifting items weighing up to 30 pounds, such as ballots and supplies for elections. Tasks may involve extended periods of time at a keyboard or workstation. Some tasks require the ability to perceive and discriminate sounds and visual cues or signals. Some tasks require the ability to communicate orally. Requires the ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential office functions. Position requires sitting, standing, and bending routinely while working in the office, and may involve standing and walking for long periods of time at polling places, during elections, and at town meeting.

(This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.)

Assistant Town Clerk

Position Purpose:

The purpose of this position is to perform administrative and clerical work in assisting the Town Clerk in discharging the duties of the office; provides information to the general public and town departments; all other related work as required. The Assistant Town Clerk may perform Town Clerk duties in his/her absence. The Assistant Town Clerk is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control.

Supervision:

Supervision Scope: Performs a variety of responsible functions in accordance with state statutes and town bylaws, requiring the exercise of some judgment and discretion in the interpretation and application of laws, regulations, and procedures; refers questionable cases to supervisor.

Supervision Received: Works under the general supervision of the Town Clerk and according to applicable provisions of the Massachusetts General Laws. Generally sets own daily work plan and chooses between appropriate courses of action to achieve defined objectives. Refers all unusual cases to supervisor.

Supervision Given: Position has no direct reports but may supervise volunteers.

Job Environment:

Work is performed under typical office conditions with frequent interruptions from visitors and telephone calls. Work environment is moderately noisy.

Operates computer and standard office equipment, such as copier, fax, postage meter and telephone.

Makes regular contacts with the general public, town departments/boards/committees, political candidates, other municipal Town Clerks, contractors and state governmental officials. Contacts are by phone, correspondence, email and in person and requires excellent customer service skills.

Has access to confidential records relating to vital statistics.

Errors could result in delay and/or loss of services, and potential legal repercussions.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

Maintains and updates census data, voter files, dog files and a variety of information and business records in accordance with applicable procedures.

Processes voter registrations, updating records in state computer network; assists in conducting town census and in preparing voter lists and street list.

Assists in the issuance of a variety of licenses, permits and certificates, including dogs, sporting and fishing licenses.

Maintains vital statistics, receives, records and files birth, marriage, death and burial certificates.

Participates in compiling data and preparing reports for the Town Clerk, Secretary of State, Registrar of Vital Records and Statistics, and other federal, state, and local agencies as required.

Posts meeting notices; files various committee and board decisions; notifies appropriate parties. Types minutes taken of Annual and Special Town Meetings for official record.

Provides information to federal, state and local officials and the general citizenry as requested or required.

Performs secretarial functions for the Town Clerk and Board of Registrars.

Orders and purchases office supplies and equipment.

May act on behalf of the Town Clerk in his or her absence.

May be authorized to use the Town Seal for official Town business.

Regular attendance and punctuality at the workplace is required.

Performs similar or related work as required, or as situation dictates.

Maintains files of current committee and board members. Prepares lists of necessary annual appointments for action by the Board of Selectmen

Recommended Minimum Qualifications:

Education, Training and Experience:

High school diploma required; an Associate Degree or equivalent education preferred; one to two years of related experience, including experience working with the public and in a modern office environment; or an equivalent combination of education and experience.

Knowledge, Ability and Skill:

Knowledge. Working knowledge of office practices and procedures including records management. Knowledge of computer systems and software programs. Working knowledge of operations and functions of town departments. Familiarity with town government by-laws and Mass. General Laws.

Ability. Ability to operate various types of office equipment, including a computer. Ability to deal tactfully and appropriately with the general public and town departments in an effective manner. Ability to understand and follow instructions and to work independently when required. Ability to establish and maintain effective working relationships with other town employees, officials and the general public. Ability to maintain accurate records and complete tasks in compliance with assigned/mandated deadlines.

Skill. Skill in operating computers and related word processing and statistical applications. Excellent verbal and written communication skills. Strong organizational skills.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Tasks require the ability to exert light physical effort in sedentary to light work, which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5 - 10 pounds). Tasks may involve extended periods of time at a keyboard or workstation. Some tasks require the ability to perceive and discriminate sounds and visual cues or signals. Some tasks require the ability to communicate orally. Requires the ability to operate, maneuver and/or control the actions of equipment, tools, and/or materials used in performing essential functions. Files and types on a keyboard at a moderate speed.

(This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.)

Tax Collector

Position Purpose:

The purpose of this position is to perform administrative and technical work involving the collection of all taxes due to the town; all other related work as required. The Tax Collector is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control. Regularly performs other similar or related work as directed, required, or as situation dictates.

Supervision:

Supervision Scope: Performs varied and responsible functions requiring the exercise of independent judgment and occasional initiative in situations not clearly defined by precedent or established procedures. Work involves treating a variety of conventional problems and situations following prescribed criterion.

Supervision Received: Elected by the citizens of the town; works under the policy direction of the Town Meeting, and in accordance with the provisions of the Massachusetts General Laws and the rules and regulations of the Massachusetts Department of Revenue and under the day to day operational direction of the Town Administrator.

Supervision Given: Supervises one employee, develops job directions, assigns tasks, provides instructions and evaluates personnel performance.

Job Environment:

Work is performed under typical office conditions; work environment is moderately noisy.

Operates standard office equipment, including computers, facsimile machine, copier, and calculators.

Makes regular contact with the general public, other town departments, banks, mortgage companies and attorneys; contacts are in person, by telephone and in writing and require discussing routine and semi-complex information.

Work involves occasional confidentiality in discharging his or her duties.

Errors could result in serious monetary loss to the Town, confusion and delay of service, and legal repercussions.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

Responsible for all duties related to collection of Town receivables.

Plans, organizes and implements application of tax collection procedures. Work may include involvement in tax title and foreclosure procedures, as established by state law and internal regulations.

Maintains complex financial records; receives payments from taxpayers in person and by mail. Records payments in cashbook and commitment book. Processes, collects, posts, maintains records on all taxes paid to the Town.

Prepares bills for mailing.

Keeps accurate records of money collected, depositing funds in bank and turning the funds over to the Town Treasurer.

Responds to citizen requests for information concerning calculation of tax bills, payment schedules, and other matters relating to municipal collections.

Maintains a large number of detailed records on accounts receivable to the Town. Prepares and coordinates the preparation of miscellaneous reports on taxes received and outstanding.

Prepares demand notices and warrants. Prepares municipal lien certificates. Performs a variety of administrative and clerical functions related to taking tax title of a piece of property.

Trains and supervises one part-time assistant tax collector.

May act as the Parking Clerk. May assist in other routine customer service related functions such as issuing beach stickers and transfer station stickers and other such Town Hall transactions.

Regular attendance and punctuality at the workplace is required.

Performs similar or related work as directed, required, or as situation dictates.

Recommended Minimum Qualifications:

Education, Training and Experience:

High School Diploma required and knowledge of bookkeeping and accounting; an Associates Degree or equivalent education and/or relevant experience are strongly preferred.

Special Requirements:

Must be elected in the Town of Bolton.

Massachusetts Driver's License.

Certification by the Massachusetts Collectors and Treasurers Association is preferred.

Knowledge, Ability and Skill:

Knowledge. A high degree of relevant knowledge, skills and abilities of applicable Mass. General Laws and Town of Bolton Bylaws. Knowledge of the Massachusetts General Laws of Municipal Finance and Taxation.

Ability. Ability to keep accurate and detailed records. Ability to establish and maintain effective working relationships with employees, supervisors, other departments, officials, and the public and to provide a high level of customer service in resolving billing issues.

Skill. Strong interpersonal and effective communication skills. Problem solving and supervisory skills.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Tasks require the ability to exert light physical effort in sedentary to light work, which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5 - 10 pounds). Tasks may involve extended periods of time at a keyboard or workstation. Some tasks require the ability to communicate orally. Requires the ability to operate, maneuver and/or control the actions of equipment, machinery, tools, and/or materials used in performing essential functions.

(This job description does not constitute an employment agreement between the employer and employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.)

Administrative Assistant to the Town Administrator

Position Purpose:

Skilled executive level administrative support work in assisting the Town Administrator and the Board of Selectmen to discharge the duties of the office. On a day-to-day basis, performs administrative, technical, and supervisory work in assisting the Town Administrator in planning and coordinating town services and operations in addition to administering the day-to-day office work of the Advisory Committee, and Capital Planning Committee. The Administrative Assistant to the Town Administrator is responsible for maintaining and improving the timely flow of information and communication between town hall operations, town boards and committees, and various staff. Performs all other related work as require.

Supervision:

Supervision Scope: Performs varied and responsible duties requiring a thorough working knowledge of municipal operations and the considerable exercise of judgment and initiative to perform duties, complete assigned tasks, and analyze the facts or circumstances surrounding individual problems, particularly in situations not clearly defined by precedent or established procedures.

Utilizes staff appropriately to complete projects on time.

Supervision Received: Works under the general direction of the Town Administrator, following department rules, regulations and policies, requiring the ability to plan and perform operations, and to independently complete projects and assignments within a generally prescribed time; after initial training period employee works independently and generally only unusual cases are referred to supervisor.

Supervision Given: Hiring, training, and supervisory responsibilities for administrative assistants to various town boards and temporary help as needed. Helps to discharge the supervisory duties of the Town Administrator in relation to Department Heads and other senior-level personnel. Prepares and delivers evaluations for direct reports. May assist in providing input to the Town Administrator in the evaluations of other employees. Has direct supervisory responsibility for up to two administrative assistants. May supervise seasonal and other part-time volunteers.

Job Environment:

Work is performed under typical office conditions in a fast paced and sometimes intense atmosphere; the noise level is moderate. Work may require the attendance at evening meetings with the Board of Selectmen, Advisory Committee, and Capital Planning Committees and other town boards and committees as needed.

Operates computers, printers, facsimile machine, copier, calculator, telephone, and other standard office equipment.

Makes frequent contact with the general public, all town departments, boards and committees, and members of the business community, the media, attorneys and local state and federal government organizations. Contacts with the public require a high level of courtesy, tact, diplomacy, and patience. Contacts are in person, in writing, by email and by telephone and involve an information exchange dialogue, conflict resolution, and other problem solving responses.

Has access to a wide variety of highly sensitive town-wide confidential information such as personnel records, bid proposals, negotiating positions, and personal information about citizens, requiring the application of a sophisticated level of judgment, discretion and professional protocols.

Errors could result in poor public relations, delayed response time, loss of service, and have significant financial and/or legal repercussions.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.)

Assists the Town Administrator in coordinating the functions of the Town under the general direction and policies established by the Board of Selectmen.

In the absence of the Town Administrator, effectively administers plans set and delegated by the Board of Selectmen. Sets meetings, prepares agendas, and follows up on action points with appropriate parties.

Directs and/or provides administrative staff support to the Town Administrator, Board of Selectmen, Advisory Committee, and various other boards and ad hoc committees as needed.

Prepares meeting agendas for Board of Selectmen, Advisory Committee, and any other meetings as needed; reviews and prepares materials necessary for meetings and processes relevant information in preparation of meetings; Attends meetings, may take minutes of meetings and/or edit and review minutes. Discharges action items as a result of the meetings.

Oversees replies to citizens' issues and complaints on own initiative or with input from the Town Administrator as needed. Drafts response letters for Town Administrator's review and signature. Delegates appropriate follow-up to other departments. Assists in the resolution of disputes, develops solutions to problems, and facilitates communications among a wide range of individuals with varied interests and perspectives.

Works closely with Board of Selectmen, Advisory Committee, and Town Administrator to collect information for and assist in preparation of town budget. Gathers, analyzes, performs calculations, and presents data as needed in spreadsheet, charts, graphs, and other formats as required.

Directs the preparation of the Annual Town Report, Annual Town Meeting, and all Special Town Meeting Warrants. May author original sections of report or edit related documents.

Manages the Board of Selectmen license renewal process and oversees the collection and maintenance of accurate records pertaining to licensing.

Interfaces with the Town Clerk's office to note and record resignations and retirements from various boards and committees and helps in recruiting new volunteers. Assists in developing recommendations to the Board of Selectmen in filling board vacancies and other ad-hoc appointments or reappointments as needed.

In the absence of the administrative assistants within the department, assumes responsibility for the processing of required work and arranges for specific support services to other boards and town departments and the general public.

Synthesizes varied information, develops appropriate reports as needed, and makes public presentations as necessary. Proofreads complex materials, collaborates on projects, and facilitates special events.

Researches implementation procedures and materials to assist in the reviewing, editing or writing of bid documents, requests for proposals, and other procurement forms. Assists in evaluating and/or selection of bidders and proposers, performs reference checks, and makes appropriate recommendations to Town Administrator and Board on contract awards. Helps to develop contract documents with bidders and proposers.

Assists the Town Administrator in the discharge of Human Resource related duties.

May author or edit grant proposals and/or assist in the gathering of information, developing written presentation materials, administration and implementation of special projects resulting from grants or other non-routine funding sources.

Takes initiative, thinks creatively, collaborates effectively, and oversees special projects as needed.

Performs all other similar or related work assisting the Town Administrator in the discharge of his or her duties as required.

Recommended Minimum Qualifications:

Education, Training and Experience:

Bachelors degree required, Graduate degree or course work in a relevant field is preferred; and five years of very responsible experience in administrative work; municipal experience highly desirable; or any equivalent combination of education and experience.

Knowledge, Ability and Skill:

Knowledge: Thorough knowledge of office procedures, machines, and record-keeping principles. Working knowledge of bookkeeping and financial record keeping. Familiarity with municipal government.

Ability: Ability to establish and maintain effective working relationships with employees, board and committees, officials, and general public. Ability to deal effectively and appropriately with the business community and local, state, and federal officials. Ability to maintain detailed and accurate records. Ability to carry out work assignments with a high degree of independence. Ability to utilize a wide variety of computer software applications including popular word processing, spreadsheet, database, presentation, and financial software programs. Ability to maintain highly confidential information. Ability to prioritize tasks, delegate, and follow up with direct reports.

Skill: Strong administrative and organizational skills with advanced oral, verbal, and written communication skills. Problem solving ability with strong reasoning and analytical thinking skills are essential. Excellent customer service orientation required.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to walk, stand, sit, talk, and hear; uses hands to operate equipment and pick up papers, files, and other common office objects. Lifts/moves objects weighing up to 10 pounds. Must be able to access all municipal buildings and office spaces. Communicates verbally and in writing. Vision and hearing at or correctable to normal ranges. Ability to operate a keyboard and calculator at an efficient speed.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)

Town Secretary

Position Purpose:

The purpose of this position is to perform administrative support work in assisting the Town Administrator, the Assistant to the Town Administrator, and the Board of Selectmen to discharge the duties of the office. The Town Secretary is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control. The incumbent performs all other related work as required.

Supervision:

Supervision Scope: Performs varied and responsible duties requiring a thorough working knowledge of departmental operations and the exercise of judgment to perform duties, complete assigned tasks, and analyze the facts or circumstances surrounding individual problems.

Supervision Received: Works under the regular direction of the Town Administrator, Assistant to the Town Administrator, and the Board of Selectmen, following established departmental rules, regulations and policies, requiring the ability to plan and perform operations, and to complete assigned tasks according to prescribed time schedules; refers non-routine cases to his or her supervisor.

Supervision Given: None. May supervise seasonal volunteers or Senior Tax Work-off participants.

Job Environment:

Work is performed under typical office conditions; the noise level is moderate.

Operates a computer, printer, facsimile machine, copier, calculator, telephone, and other standard office equipment.

Makes frequent contact with the general public, all town departments, boards and committees; may interface with members of the business community and the media. Occasionally interacts with attorneys, local state and federal government organizations. Contacts with the public require a high level of courtesy and patience. Contacts are in person, in writing, by email and by telephone and involve an information exchange dialogue.

Has access to a wide variety of highly sensitive town-wide confidential information such as personnel records, bid proposals, negotiating positions, and personal information about citizens, requiring the application of a sophisticated level of judgment, discretion and professional protocols.

Errors could result in poor public relations, delay, reduced levels of service, and have significant financial and/or legal repercussions.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.)

Assists the Town Administrator in coordinating the functions of the Town under the direction and guidance of the Board of Selectmen.

Sets meetings, prepares agendas, and follows up on action points with appropriate parties.

Provides administrative staff support to the Town Administrator, Assistant to the Town Administrator, Board of Selectmen, and Advisory Committee.

Prepares meeting agendas for Board of Selectmen, and Advisory Committee and occasional other meetings as needed; assembles materials necessary for meetings; sorts and processes mail; schedules appointments; maintains files. Attends meetings, takes, transcribes, and distributes minutes of meetings. May handle action items as a result of the meetings.

Works closely with Town Administrator, Board of Selectmen, Advisory Committee and Assistant to the Town Administrator to collect information for and assist in preparation of the Town budget.

Prepares payroll and bills for payment on a variety of accounts. Maintains records of each account and prepares annual financial statement for each.

Assists in the preparation of Annual Town Report, Annual Town Meeting, and all Special Town Meeting Warrants. Arranges for printing and distributes.

May assist as a back-up to the Land Use Board Administrator in certain administrative tasks related to building permit application process with Inspector of Buildings;

Prepares paperwork/license for annual approval of license renewals by the Board of Selectmen. Collects fees and maintains associated records.

Schedules use of Town Hall by town boards, town committees and outside groups.

Collects for the Town monies for permits, licenses, and various other fees the like. Maintains associated records.

Processes insurance claims from all departments relating to Workers Compensation, Injured on Duty, and Liability claims.

Serves as a resource person to other Town employees, Boards, and Committees regarding information on town matters and procedures to follow.

Responsible for overseeing the maintenance of office equipment located within the town hall (i.e. postage meter, copier, facsimile machine).

Assists the public and boards and committee members in person, via email or telephone, responding to requests for information, providing answers or direction to the appropriate town department, committee or board.

Performs similar or related work as required, directed or as situation dictates. Works on special projects as needed. Regular attendance and punctuality at the workplace is required.

Recommended Minimum Qualifications:

Education, Training and Experience:

Associate's degree in business; and five years of experience in administrative work; municipal experience highly desirable; or any equivalent combination of education and experience.

Knowledge, Ability and Skill:

Knowledge: Thorough knowledge of office procedures, machines, and record-keeping principles. Working knowledge of bookkeeping and financial record keeping. Familiarity with municipal government.

Ability: Ability to establish and maintain effective working relationships with employees, board and committees, officials, and general public. Ability to maintain detailed and accurate records. Ability to independently carry out work assignments. Ability to utilize a wide variety of computer software applications including word processing, spreadsheets, and databases. Ability to maintain highly confidential information. Ability to prioritize tasks.

Skill: *Strong administrative and secretarial skills.* Excellent customer service skills. Skill in maintaining the confidentiality of department records. Skill in above-mentioned equipment.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to walk, stand, sit, talk, and hear; uses hands to operate equipment and pick up papers, files, and other common office objects. Lifts/moves objects weighing up to 10 pounds. Communicates verbally and in writing. Manually operates all office equipment. Vision and hearing at or correctable to normal ranges. Ability to operate a keyboard at an efficient speed.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)

Assistant Town Treasurer / Assistant Tax Collector

Position Purpose:

Performs a variety of skilled, semi-complex bookkeeping, record keeping, and clerical support work in assisting the Town Treasurer and Tax Collector in the day to day administration of the offices. The Assistant Treasurer/ Collector is responsible for the daily communication and customer service necessary between the public taxpayers, various agencies and the Tax Collector and Town Treasurer's offices. Performs all other related work as required.

Supervision:

Supervision Scope: Performs varied and responsible functions requiring the exercise of judgment and initiative in situations not clearly defined by precedent or established procedures. Refers the more difficult customer service requests to supervisor. Work must comply with guidelines established by statute and professional standards.

Supervision Received: Routinely works under the direct supervision of the Town Treasurer. Also works under the direction of the Tax Collector as needed. Work follows department rules, federal, state and local regulations and policies, and requires the ability to plan and perform operations, and independently complete assigned tasks according to a prescribed time schedule.

Supervision Given: None.

Job Environment:

Work is performed under typical municipal tax/treasurer office conditions; work environment is moderately noisy.

Operates standard office equipment, including computers, facsimile machine, copier, calculator and telephone.

Makes regular contact with the general public, town retirees, other town departments and committees, banks, health insurance and retirement plan representatives, mortgage companies and attorneys; contacts are in person, by telephone, writing and via email and require discussing routine and semi-complex information.

Has access to department-level confidential information, which requires the application of appropriate judgment, discretion and professional office protocols.

Errors could result in confusion and delay, loss of department services, and have financial and legal repercussions.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.)

Assists the Tax Collector and the Town Treasurer in the daily operation of their offices. May act on behalf of the Tax Collector and/or Town Treasurer during absences of incumbents.

Assists the Treasurer in performing personnel functions and other related Human Resource activities. Attends evening and daytime Personnel Committee meetings and takes and prepares minutes. May develop agenda and perform other follow-up activities for this committee.

Performs required professional and administrative work relating to the collection of the Town's receivables.

Plans, organizes and implements application of tax collection procedures, including tax title and foreclosure procedures, as established by state law and internal regulations.

Prepares municipal lien certifications and performs a variety of administrative and clerical functions related to taking tax title of property.

Maintains financial records; receives payments from taxpayers in person and by mail. Records payments in cashbook and commitment book. Processes, collects, posts, maintain records on all taxes paid to the Town. Performs all related data entry work.

Prepares bills for mailing.

Keeps accurate records of money collected, depositing funds in bank, and turning the funds over to the Town Treasurer. Prepares and delivers deposits to bank depository.

Responds to citizen requests for information concerning calculation of tax bills, payment schedules, and other matters relating to municipal collections.

Maintains a large number of detailed records on accounts receivables to the Town. Prepares and coordinates the preparation of miscellaneous report on taxes received and outstanding.

With the cooperation of the Deputy Tax Collector, prepares demand notices and warrants. Prepares municipal lien certificates. Performs a variety of administrative and clerical functions related to taking tax title of a piece of property.

Performs basic duties of payroll administration. Prepares related reports. Maintains accurate records.

Maintains records of receipts and payments on behalf of the Town.

Processes vendor checks for bills payable warrant.

Assists independent auditors in retrieving and preparing financial documents as requested.

Assists in generating and providing financial information necessary for external agencies such as banks and bond counsel.

Attends meetings and seminars as needed to learn about changes in regulations and legislation. Networks with other Assistant Tax Collectors/Assistant Town Treasurers.

Performs similar or related work as required.

Recommended Minimum Qualifications:

Education, Training and Experience:

Associate's degree in accounting, finance, business administration or related field; three years of experience in accounting, payroll preparation, or financial management; or any equivalent combination of education, training and experience.

Special Requirements:

Massachusetts Driver's License
Must be eligible to be bonded.

Knowledge, Ability and Skill:

Knowledge. Knowledge of office procedures and office equipment. Working knowledge of applicable Mass. General Laws, Mass. Municipal Finance Laws, and Town of Bolton Bylaws. Familiarity with municipal tax receivable and municipal accounting software applications, and popular word processing, spreadsheet, and database applications; knowledge of Microsoft applications is preferred. Working knowledge of GAAP.

Ability. Ability to keep accurate and detailed records utilizing manually-kept ledgers and computer software. Ability to establish and maintain effective working relationships with employees, supervisors, other departments, officials, and the public and to provide a high level of customer service in resolving billing issues. Ability to analyze and interpret financial data and to present findings clearly to supervisor. Ability to multi-task and report to two supervisors. Ability to communicate orally and in writing.

Skill. Skill in typing and word processing. Skill in working with numbers and details. Bookkeeping and record keeping skills. Strong interpersonal and effective communication skills. Good organizational skills.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Tasks require the ability to exert light physical effort which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (10 pounds). May spend a large portion of shift standing at the counter. Files and types on a keyboard at an efficient speed.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer, as the needs of the employer and requirements of the job change.)

Land Use Board Administrator

Position Purpose:

The purpose of this position is to perform responsible clerical, secretarial, and administrative work of moderate difficulty and responsibility in supporting and overseeing the operations of the Board of Health and in providing clerical support for several of the town's other land use permitting boards and committees (Planning and Zoning). The incumbent performs all other related work as required. The Land Use Board Administrator is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control.

Supervision:

Supervision Scope: Performs varied and responsible duties requiring a working knowledge of departmental operations and the exercise of moderate judgment and initiative to perform duties, complete assigned tasks, and analyze the facts or circumstances surrounding individual problems.

Supervision Received: Works under the policy direction of the Boards of Health, and under the day-to-day operational direction of the Town Planner, generally setting own daily work plan and choosing between appropriate courses of action to achieve defined objectives; all unusual cases are referred to supervisor.

Supervision Given: None. May occasionally supervise activities of volunteers or Senior Tax Work-off employees.

Job Environment:

Work is performed under typical office conditions; the noise level is moderate. Attends night meetings of Planning Board and Zoning Board. May make site visits to active construction sites or other field visits to proposed project sites.

Operates a computer, printer, facsimile machine, copier, calculator, telephone, and other standard office equipment.

Makes frequent contact with the general public, other town departments/boards/committees, members of the building community, attorneys, local businesses, and local and state government organizations. Contacts are in person, in writing, and by telephone and involve an information exchange dialogue.

Has access to limited department-related confidential information including executive session minutes.

Errors could result in considerable delay or loss of service and have possible financial and legal repercussions.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.)

Sets up agendas, appointments and prepares necessary paperwork for meetings. This may include the scheduling and posting of meetings and hearings, preparing and sending all legal notices to newspapers and mailing notices to all concerned parties and abutters in accordance with statutory requirements.

Attends board meetings. Takes, types and distributes meeting minutes. Contacts other town departments and staff to relay instructions or information. Prepares informational packets.

Types correspondence, memoranda, reports, forms, and other documents. Maintains all department files and records.

Accepts driveway permit applications for distribution to Inspector of Buildings and Highway Department for approval. Collects fees and maintains associated records.

Receives applications and may issue permits authorized by Wiring and Plumbing/Gas Inspectors and Building Inspector. Answers telephone calls regarding wiring inspections; logs calls; relays information. Collects fees and maintains associated records.

Responds to citizen requests for information; conducts research to obtain information needed. Provides information, forms, and assistance pertinent to various licenses required by the Town or Commonwealth of Massachusetts; checks applications for completeness.

Regular attendance and punctuality at the workplace is required.

Performs similar or related work as required, directed or as situation dictates.

Recommended Minimum Qualifications:

Education, Training and Experience:

Associates degree; and five years of responsible experience in secretarial, bookkeeping or administrative work; or Bachelor's degree with two years of experience in administrative work; experience working with the public highly desirable; or any equivalent combination of education and experience.

Knowledge, Ability and Skill:

Knowledge: Thorough knowledge of office procedures, machines, and record-keeping principles. Familiarity with municipal government and board operations helpful.

Ability: Ability to maintain detailed and accurate records. Ability to deal effectively and appropriately with the general public. Ability to utilize a variety of computer software applications including word processing and spreadsheets.

Skill: Good customer service skills. Skill in all of the above-mentioned equipment and machines.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to climb stairs, walk, stand, sit, talk, and hear; uses hands to operate equipment and pick up papers, files, and other common office objects. Lifts/moves objects weighing up to 10 pounds. Communicates verbally and in writing. Manually operates all office equipment. Vision and hearing at or correctable to normal ranges. Must be able to operate a keyboard at an efficient speed.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)

Town Treasurer

Position Purpose:

The purpose of this position is to perform professional administrative and technical work involving the receipt, custody, disbursement, investment, and borrowing of funds, and for the preparation of related records and reports. The incumbent performs all other related work as required. The Town Treasurer is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control.

Supervision:

Supervision Scope: Performs highly responsible functions of a complex and technical nature requiring professional judgment and initiative in the planning, administration and execution of the department's services, in the interpretation of applicable laws, regulations and procedures. Performs a variety of responsible functions within the guidelines established by statute and professional standards. Makes policy recommendations for the maintenance and improvement of the financial condition of the Town.

Supervision Received: Work is performed with policy oversight from the Board of Selectmen and under the direction of the Town Administrator with duties and responsibilities defined by the state laws, town policies and town bylaws. Assumes direct accountability for departmental results.

Supervision Given: Supervises one regular part time employee. May oversee additional temporary or part time workers in the Collector's office. May supervise seasonal volunteers or part time Senior Tax Work-off employees.

Job Environment:

Administrative work is performed under typical office conditions.

Operates an automobile, computer, calculator, copier, facsimile machine, telephone and other standard office equipment.

Makes frequent contact with other town departments/boards/committees, town retirees, bank representatives, health insurance representatives, payroll and retirement representatives and vendors. Has infrequent contact with the general public. Contacts require persuasiveness and resourcefulness to influence the behavior of others.

Has significant access to confidential information including department-related material and confidential employee records.

Errors could result in delay and confusion, major financial losses, deterioration of the Town's financial position and could have substantial legal ramifications.

Essential Functions:

(The essential functions or duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.)

Preparation and issuance of all checks for payment of payroll, loan obligations and expenses. Maintains custody of all town funds deposited to the town treasury.

Maintains records of all receipts and payments on behalf of the Town. Maintains cashbook, bank funding of transfers, payroll and payable warrants.

Responsible for maintaining payroll records on personnel administration functions and benefit administration; review and distribution of W-2 forms.

Forwards forms, such as W-4 tax withholding forms, insurance, and retirement paperwork to Town Departments for completion by individual employees. Processes enrollment forms. Keeps completed forms on file and forwards to appropriate agencies as required.

Oversees the coordination of health and other insurance programs; answers employees' questions and provides explanations on matters pertaining to their payroll, health and life insurance, OBRA, retirement benefits.

Prepares federal and state quarterly reports and other payroll-related deduction reports; generates bi-weekly, monthly, quarterly and annual reports.

Maintains financial records for Town Trust Funds. Deals with banks and reviews banking services with bank officials.

Evaluates various investment or borrowing alternatives. Works with financial advisor on long and short term borrowing and prepares required prospectuses.

Prepares monthly Treasurer's cash report; bank reconciliation's of all town accounts.

Prepares various financial statements to be included in the Town's annual report.

Meets periodically with Board of Selectmen and Advisory Committee to discuss budget and financial matters. Attends meetings and manages duties of Insurance Advisory Board. Works closely with, attends meetings, and oversees activities of Personnel Committee.

Oversees Human Resource functions not otherwise designated to other individuals. May serve as the Sexual and Protected Class Harassment Officer. May assist in the disposition

and resolution of employee disputes. Assists in updating personnel by-laws and related regulations.

Manages tax title accounts.

Prepares and delivers deposits to bank depository.

Prepares and submits annual department budget.

Pays department bills, health and life insurance, and county retirement bills.

Attends meetings and seminars on changes in regulations and legislation. Network with other Town Treasurers.

Regular attendance and punctuality at the workplace is required.

Performs similar or related work as required, directed or as situation dictates.

Recommended Minimum Qualifications:

Education, Training and Experience:

Bachelor's degree in business administration, accounting, finance or a related field; three years of progressively responsible municipal experience in accounting or financial management; Master's Degree in a related field preferred plus focused training in Human Resource Management; or any equivalent combination of education and experience.

Special Requirements:

Must be eligible to be bonded.

Possession of a valid Massachusetts Driver's License.

Possession of a Massachusetts Treasurers' Association Certification preferred.

Knowledge, Ability and Skill:

Knowledge. Thorough knowledge of the principles and practices of financial management and specific knowledge of the legal controls, methods and procedures of municipal finance. Working knowledge of computer applications for financial management. Thorough knowledge of the Massachusetts laws regarding municipal finance. Thorough knowledge of the principles and practices of municipal accounting and of applicable provisions of the Massachusetts General Laws. Comprehensive knowledge of GAAP and UMAS. Detailed knowledge of human resource management concepts, laws, and administration.

Ability. Ability to establish and maintain cooperative relationships with other town officials and governmental representatives. Ability to communicate effectively in written

and oral form. Ability to analyze and interpret financial data and to present findings clearly. Ability to perform multiple tasks.

Skill. Office management skills. Well developed skills in computer hardware and software. Aptitude for numbers and details. Excellent organizational skills.

Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Regularly required to sit, talk, and hear; uses hands to finger, handle, feel or operate objects, tools, or controls, and reach with hands and arms as in picking up paper, files, and other common office objects weighing up to 30 pounds. Must be able to operate a keyboard at an efficient speed. Vision and hearing at or correctable to normal ranges.

(This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.)