

**THE REPORT AND RECOMMENDATIONS
OF THE AD-HOC
RESTRUCTURING COMMITTEE**

JUNE 2015

MONTEREY, MASSACHUSETTS

THE FORMATION AND NEED FOR THE RESTRUCTURING COMMITTEE

THE ORIGINS: On November 24, 2014 at the behest of the Select Board, the town clerk swore in nine members of an ad-hoc Restructuring Committee. The purpose of this committee was to study the structure and dynamics of Town Hall, enhance the Select Board's understanding of problems, and make recommendations to the Select Board of ways to improve the overall administration of our municipal government as well as provide suggestions for improving the work environment of our employees in Town Hall.

BACKGROUND: It was apparent that the issues swirling around Town Hall had been present for many years. These have bred difficulties with interdepartmental interactions and caused them to become quite problematic. Over the years both the complexity and the amount of work for the Select Board has increased dramatically and that increase was ultimately passed on to the Administrative Assistant, making this position central in the operations and execution of Town Hall functions. The office became Command Central with an extraordinary amount of authority.

METHODS EMPLOYED

INFLUENCES: All of our Restructuring Committee members are currently participating in town affairs in some capacity or have done so in the past. Each committee member brought to the table their own, often first hand, experience with town employees and town governance and this was likely to influence their understanding of responses by those interviewed. Also in the natural state of verbal communication facial expressions, body language and reading between the lines come into play. It must be said that these did play a role in the committee member's interpretation of answers given by interviewees.

INTERVIEWS AND QUESTIONS: Over the period of several months, the committee requested employees located in Town Hall to come before us and be prepared to respond to questions posed by committee members. Most of these interviews were with the entire committee asking questions. In one instance a single committee member conducted several interviews with people who declined the opportunity to sit before us. These conversations were reported back to the

whole group. The inquiries were about the general atmosphere in Town Hall and how it affected each persons work situation. We were also interested in how the Select Board responded to employee concerns. We asked about their contact with other employees as well as their contact with the public. Suggestions were solicited from them on how to improve their work environment. The airing and resolving of interpersonal problems was of great importance to us as well. We asked about what resources each individual had to help them with their job. And we asked them about their relationships with the Select Board and the Administrative Assistant.

We held two additional interviews with Mr. Joseph Kellogg, a former Town Manager with the towns of Great Barrington and Lenox. He is retired and presently acts as a consultant with other small towns in the Berkshires. He described the role and responsibilities of a Town Manager and a Town Administrator and also described some of the complexities of present-day town governance in Massachusetts.

THE COMMITTEE'S FINDINGS

OVERVIEW: Before detailing any complaints that were expressed by our interviewees it must be said that there were some who were very happy with their interactions with the Select Board and Town departments and felt that their interactions occurred in a professional manner. Several themes resonated throughout most of the interviews. The role and responsibilities of the Select Board were of primary concern. The various areas of responsibility and interactions of the Administrative Assistant were also a recurring topic, among others. All employees who were interviewed by the committee expressed the opinion that the atmosphere in Town Hall was either strained at best or hostile at worst.

SELECT BOARD: The Select Board has been given the responsibility to supervise all town departments and employees and to enact and implement policy for the town. Yet many described them as not having exercised adequate supervision over the workforce of the town. Others felt that the Select Board themselves should perform some of the responsibilities given to other individuals. One overarching problem that affects everything is the absence of Select Board influence on the "operations" phase. Some of those we interviewed stated that they had very little contact with the Select Board and were concerned that interaction with them occurred only when there was a problem. Another problem area was conflict resolution. Monterey does not have a person in Town Hall whose job includes conflict resolution. Therefore, this responsibility has fallen to the Select Board. The members have no expertise in this area and were not

always successful in their attempts at diffusing tense situations. The fact that all discourse with the Select Board must occur in public in an open meeting hampered and stymied any efforts that might have been attempted.

ADMINISTRATIVE ASSISTANT: The scope of responsibilities that have been entrusted to this position by the Select Board is very large and has been assumed by default with no clear line of authority. This position has been given power by the Select Board as well as additional power from other boards that have utilized secretarial services.

FISCAL TEAM: A third area of great concern that arose during our interviews is that there is a very serious lack of proper and timely interaction by the Treasurer and the Accountant with the Principal Assessor and the Tax Collector. The state is very strict on matters financial and the lack of availability of these two individuals prohibits the others from performing their duties in a manner that they would like and that the State requires. A serious factor is that the Treasurer is unavailable during normal business hours. The committee finds that the essential job functions have not been met in these positions.

RECOMMENDATIONS FOR IMMEDIATE ACTION

1. LIAISON/ADVOCATE: Oversight of all employees, departments, boards, commissions and committees, whether elected or appointed, should be a job shared by all three Select Board members. Each entity needs to have a named Select Board member as their liaison and advocate. This will be the first line of communication for that entity or individual. This is the person that they would know to contact if they had any needs or concerns and that would make certain that help was found if needed. This will also keep the Select Board aware of problems that need attention before they get out of hand. Our thank you to the Select Board for already starting on this road and we hope that they continue until every employee and entity has a "go to person".

2. PROFESSIONAL CONSULTANT: Bringing in an experienced and professional Town Manager, such as Mr. Joseph Kellogg, to tutor the Select Board on the functions of municipal governance is a "no-brainer". This should help them all to get a very broad view of the dynamics of town interactions. They could also zero in on those areas where they felt they needed more depth of understanding. He could help them with job descriptions. He could give them a better understanding of how the treasurer and the accountant's offices work and their relationships to other offices. This could be one of the most important aspects of restructuring of our town governance, whether or not the Select Board determines that a Town Administrator is needed.

3. SELECT BOARD DUTIES: The Select Board needs to assume their responsibilities in administering the town and they should consider assuming some of the tasks now performed by the Administrative Assistant. For example, the Chair, or a designated member should be the person who contacts Town Counsel. The interpretation of his opinions and comments must come from a Select Board member. A Select Board member should research Massachusetts General Laws when needed. This is to make certain that the selection of laws chosen for interpretation are truly representative of the inquiry and are then interpreted by a Select Board member, or Town Counsel, if needed. Website management should come under the direct supervision of the Select Board. Closer attention needs to be paid to the training of all new employees so that they can reach a professional level of performance in the shortest possible time. Each Select Board member should spend some time each week visiting with various offices.

4. TOP-DOWN MANAGEMENT: There is a difference between management and micro-management. The Select Board must restore a policy of top-down management. It is the responsibility of the Select Board to manage the heads of all departments. The heads of all departments are similarly responsible to manage all employees within their department. This directive should include a requirement that all department heads meet with their employees on a regular basis in order to build lines of communication and resolve conflicts.

5. FISCAL TEAM: The creation of a "Fiscal Team" that would consist of the Accountant, the Treasurer, the Tax Collector, the Principal Assistant Assessor, one Select Board member and the Town Administrator, when and if we have one, would be an important development. They should meet on a monthly basis to review progress or problems and be bringing everyone into the loop. The meetings should take place in the Town Hall so that the raw financial data is always available to the team. This communication between individuals whose jobs are interdependent upon each other for the smooth and proper functioning of Town Hall finances must be a requirement that is expected from each employee. This would also allow team members to help in the training of novice employees

6. SATURDAY HOURS: We feel that having Town Hall open Saturdays till noon would be beneficial. Someone should be able to give out general information, dump stickers, etc. A well informed "people person" would be able to answer questions and take down information and would be a good asset for the citizens. The Town Clerk holding hours on Saturday would also be helpful. Perhaps a Select Board member could man the fort on a rotating Saturday from 10am to noon. This would allow citizen's access to a Select Board member and give the member a chance to talk with the public, review warrants, catch up on mail, look at plans and be available for any employee that needed time.

7. JOB DESCRIPTIONS: The need for everyone, including the Select Board, to understand the job descriptions of all our employees is critical. A "working session" Select Board meeting to review and edit all town employee job descriptions should be held. Particular attention should be paid to the responsibilities of the Select Board itself. If a professional Town Manager is consulted then that person could help with this task.

8. REGULAR EMPLOYEE MEETINGS: Communication was clearly the missing link in Town Hall according to almost all of the interviewed employees. No organization can continue to perform tasks productively without easy communication between employees and with a basic trust in each other that healthy communication engenders. Holding regular monthly or quarterly meetings with all employees invited to attend was suggested by many of the employees we interviewed and is whole-heartedly endorsed by this committee. This kind of socialization could be the beginning of developing a sense of "team". Often casual conversations can avoid problems that might otherwise occur. Without much effort each employee would begin to understand the job descriptions and roles that other employees play

9. RELOCATION OF OFFICE SPACE: If the Town of Monterey wants to use the talents and knowledge that our staff possesses it may necessitate a reallocation of office space.

RECOMMENDATIONS FOR CHANGES IN TOWN GOVERNANCE

1. TOWN ADMINISTRATOR FORM OF GOVERNMENT: We recommend that the Town of Monterey adopt a Town Administrator form of government. Our committee supports this concept with a large majority, 8 out of 9 members, as the best path forward. It is heartening to this committee that at our recent Annual Town Meeting the voters approved this concept with the adoption of MGL ch. 41, sec. 23A by a very large majority of 66 to 10. A professional Town Administrator would address our lack of a Human Resources person in Town Hall and could provide an environment where communication is open and welcome and all of our employees could flourish. It would also bring a welcoming presence at Town Hall to our citizenry. The requirements of administering a municipality are becoming more and more complex and it behooves us to get ahead of the curve and have a professional to keep us informed, to keep us running smoothly and to provide accurate information for decision-making. This person would provide supervision over all town activities and would be a resource for all of our

employees and citizens. A Town Administrator is hired by the Select Board, answers to them and yet serves all of the people of the town. The role of this person is entirely supportive. Mr. Joseph Kellogg has expressed an interest and willingness to work with Monterey in identifying appropriately qualified candidates as potential Administrators for us. The committee recommends that we engage Mr. Kellogg part-time to act as a consultant and assist the Select Board in the restructuring of Monterey's governance. An experienced professional Town Administrator could be the Select Board's representative.

2. ELECTED TO APPOINTED POSITIONS: This committee recommends that the Select Board support at Town Meeting a vote to change the elected office of Treasurer, Town Clerk and possibly the Tax Collector to appointed positions. This will allow the Select Board to have more control over the fiscal functioning of the town. For example the hours that each is in Town Hall and available to other employees and the public could be dictated by the Select Board. A requirement that all records be kept in Town Hall with no records being kept at an employee's home would be important to consider. Having these positions appointed will bring a much broader candidate pool into play if and when that is needed. It is important to note that with this scenario the Finance Committee and the Board of Assessors must continue to be elected. This will give balance to the budget process with proper weight being given to the citizenry through their voting power.

It has been an honor to serve Monterey in its effort to improve the atmosphere in Town Hall and the functioning of our town government.

We are hopeful that our recommendations will have a positive impact on the various problems that have been exposed through our investigation. The love of our town is deep in the hearts of all of our residents and we hope that this affection for Monterey can also show itself in the atmosphere permeating Town Hall and in the entire governance of our town.

Respectfully submitted,

Larry Klein, chair
Bethany Mielke
Norma Champigny
Scott Jenssen
Bob Lazzarini
Muriel Lazzarini
Ray Tryon
Steven Weisz

*Joe Gallant
Became ill 2/3 into this Committee.
She requested her name NOT to be
included in the final version
Due to her NOT being
Present*

6/8/2015