June 16, 2016

Daniel J. Morgado  
Town Manager’s Office  
100 Maple Avenue  
Shrewsbury, Ma 01545

Dear Mr. Morgado,

I am pleased to present the enclosed financial management structure review for the Town of Shrewsbury as part of the Baker-Polito Administration’s Community Compact Cabinet initiative. This collaborative program strives to create clear mutual standards, expectations, and accountability for both the state and municipalities. It is my hope that our guidance provides direction and serves as a resource for local officials as we build better government for our citizens.

Sincerely,

Sean R. Cronin  
Senior Deputy Commissioner
INTRODUCTION

At the request of the board of selectmen, a team from the Division of Local Services Technical Assistance Bureau reviewed the Town of Shrewsbury’s financial management structure. This project was sponsored through the Community Compact Cabinet, whose goal is to encourage the implementation of municipal best practices that promote good governance by fostering efficiency, accountability, and transparency in local government. As a best practice, a well-organized financial management operation reinforces policymaking efforts, strengthens internal controls, enhances service delivery, and streamlines reporting relationships through a cohesive team with defined roles and responsibilities.

Our report begins with a brief profile of Shrewsbury and its current financial management operations. We then propose reorganizing its existing accounting, treasury, collections, and assessing functions into a single, consolidated, municipal finance department headed by a newly created assistant town manager for finance. This structure modifies Shrewsbury’s 1953 model into one that is more conducive to managing today’s expanded service needs. Our intent is not only to streamline reporting relationships by relieving the town manager from supervising such an overly burdensome array of daily activities but also to enhance strategic and policymaking efforts through a new, dedicated professional charged with overseeing the town’s financial activities. We then offer several other observations to restructure town operations based on our interviews and analysis.

COMMUNITY PROFILE

The Town of Shrewsbury is a suburban community of 36,000 residents conveniently located six miles east of Worcester and 40 miles west of Boston, between Interstate 290 and Routes 9 and 20. Town services include police, fire, utility, highway, health, planning, library, and various other general government activities. Shrewsbury also provides a top tier pre-k through 12th grade education to over 6,000 students through its local school district. Altogether, the town has a total operating budget of about $123.7 million and around 830 full-time equivalent employees, the majority of whom work for the schools.

Attracted by its ideal location and excellent school system, Shrewsbury’s residential population has exploded over the last two decades. During this period, only three other communities in Worcester County and 12 in the state experienced greater population growth (FIGURE 1.1: POPULATION AND STUDENT ENROLLMENT TRENDS). Similarly, Shrewsbury’s student enrollment has grown by almost 79 percent over the last 20 years, now ranking 29th in the state. Mirroring these population and student enrollment trends, the total number of single-family homes has more than doubled since
the mid-1980’s, while the number of condominium units increased by over 350 percent (Figure 1.2: Single Family Home Trend). The town’s racial diversity and level of affluence has also expanded as new populations moved to town.

Figure 1.1: Population and Student Enrollment Trends
Source: Division of Local Services

Growing alongside Shrewsbury’s demographics is the range, complexity, and cost of municipal services. In last 12 years, the general fund budget has increased by nearly $44 million. Much of this growth is fueled by spending to support the town’s excellent school system. Since 2003, educational spending is up by almost 80 percent, while spending on all other services, such as public safety, health and human services, culture and recreation, and administrative overhead, has increased by only about 20 percent. It is important to note, however, that while Shrewsbury’s average single-family tax bill nearly doubled over the last decade, its overall tax burden remained relatively unchanged when compared to communities statewide. Similarly, Shrewsbury’s average single-family tax bill as a percent of resident income also remains relatively unchanged over the last ten years.

Table 1.1: General Fund Spending
Source: Division of Local Services
It is within this framework that Shrewsbury operates under a board of selectmen-representative town meeting form of government (Chapter 553 of the Acts of 1953). The elected, five-member select board serves as the town’s chief policymaking body, while legislative responsibilities are carried out by a representative town meeting consisting of 240 elected members from across 10 precincts. There is also a nine-member finance committee, which primarily reviews the annual budget, files a report, and makes recommendations to town meeting.

Shrewsbury’s town manager serves as the chief administrative and fiscal officer charged with overseeing government operations under the provisions set forth by Chapter 559 of the Acts of 1953. He is appointed by the selectmen and directly oversees 23 town departments, including police, fire, highway, water and sewer, engineering, conservation, health, assessors, and inspections. He is also responsible for developing the annual operating and capital budgets, negotiating contracts, collective bargaining, procurement, and administering town policies and procedures. Comparably speaking, Shrewsbury has a very stable management presence. In it 63 years with a town manager structure, only three individuals have held the office, with the current town manager in his 19th year.

Supporting the town manager is a full-time assistant town manager/economic development coordinator and two full-time administrative assistants. While the administrative assistants provide general office-related support to the town manager and select board, the assistant town manager/economic development coordinator has a more specialized role. Traditionally, the role of Shrewsbury’s assistant town manager was not dissimilar to other communities. The individual was responsible for organizing, directing, and coordinating a variety of interdepartmental activities and other special projects on behalf of the town manager. Today, however, the assistant town manager/economic development coordinator oversees planning-related projects and activities. Although this is a relatively unique role in comparison to other communities across the state, it speaks to the tremendous growth and development-related pressures impacting the town.

Overall, Shrewsbury’s organizational structure is relatively flat compared to other communities of similar size and budget. There are only a few management layers, and departments with similar responsibilities are not consolidated into divisions, such as finance, public works, or community development and planning. Appointing authority over several major departments, including accounting, treasurer/collections, and assessing, is also allocated between the board of selectmen and town manager (Figure 1.3: Current Organizational Structure).
Although the presence of a town manager is fairly typical for a community of Shrewsbury’s budget and population, its flat organizational structure is generally associated with smaller communities with limited resources and smaller workforces whose staff take on more responsibilities and have fewer specialized functions and expertise. The fact that authority over core financial management appointments is divvied up between the select board and town manager also makes it unique. While this approach may have served some past purpose, in our opinion it only dilutes the town manager’s ability to direct strategic and financial planning efforts as chief administrative and fiscal officer.

![Organizational Structure Diagram]

**Figure 1.3: Current Organizational Structure**  
*Source: Division of Local Services*

In comparison with other communities having similar populations, operating budgets, and service demands, Shrewsbury’s current organizational structure is all the more an outlier. In the Appendix, we include a table of several key demographic and financial indicators comparing Shrewsbury against 11 peer communities (*Table 1.2: Community Demographic and Financial Comparison*). We then take this group and break down various organizational structure components to compare with Shrewsbury (*Figure 1.3: Community Structure Comparison*).

In almost all cases, Shrewsbury and its peers have a strong town manager or administrator, which we define as someone serving in a centralized executive role with the authority to direct administrative activities and appoint and remove most department heads. Similarly, Shrewsbury, like most other communities in the group, has combined its treasurer and collector functions into a single department, as we routinely recommend. Outside of these two structural elements, however, Shrewsbury begins to diverge from its peers. Of the 11 communities surveyed,
Shrewsbury and four others have yet to combine their finance management operations or formulate a finance director-type position. Equally compelling, Shrewsbury is the only community in the group that has yet to combine its highway, parks, and cemetery functions into a department of public works, and is one of only two in the grouping without a combined planning and community development department. We also point out that Shrewsbury is the only community without a dedicated human resources director.

**Proposed Structure**

To better align Shrewsbury’s organizational structure with its current and future service demands, we recommend that the town consider replacing its 1953 model with one built around clustered expertise in finance, public works, and community development. Doing so will allow the town manager to delegate any number of the wide-ranging responsibilities he has assumed over the years, so he can focus his limited time and energy on building stronger relationships with managers and staff and put more effort into town-wide systems thinking. At the same time, department managers will be empowered to add greater value to policymaking efforts and process improvements.

As an initial step towards creating this new organizational model, Shrewsbury should bring together its accounting, treasury/collections, and assessing functions into a consolidated finance department (*Figure 1.5: Proposed Financial Management Department Structure*). While this only addresses the town’s financial operations, it is a significant first step in a multiphase approach to modernizing Shrewsbury’s current organizational structure. It also redefines appointment authority between the select board and town manager and offers, in our opinion, the best opportunity to attract and retain talented employees.

Under our proposed structure, a newly created assistant town manager for finance would play a critical, point-person role in analyzing policy, developing strategies, and advising the town manager and policymakers. Process improvement efforts encompassing capital planning, long-range forecasting, and financial policies will also drive performance, improve outcomes, and strengthen internal controls. We routinely lecture on the benefits of a financial management team, which an assistant town manager for finance is best suited to manage on a day-to-day level.

In overseeing the accounting, treasury, collections, and assessing functions, the assistant town manager for finance would appoint, upon approval by the town manager the employees who work in the consolidated finance department. The assistant town manager for finance could also serve, if the town chooses, in a dual role such as town accountant, to avoid the added expense of an entirely
new position. However, we caution that the role of the assistant town manager for finance is very different from that of a town accountant or treasurer/collector. Although these positions all require strong attention to detail, the assistant town manager for finance must also possess leadership, teambuilding, and strategy setting abilities.

![Figure 1.5: Proposed Financial Management Department Structure](source: Division of Local Services)

Reporting to the assistant town manager for finance under our proposed structure is the town accountant, treasurer/collector, and principal assessor. Other employees within each department remain as they do today. The assistant town accountant, administrative assistant and executive director, for example, continue to report to the town accountant (who in turn reports to the assistant town manager for finance) rather than to the town manager as they do today. Overall, the assistant town manager for finance is the only new position under our proposed reshuffling, and we would expect the position to make between $90k to $120k, plus benefits.
Given Shrewsbury’s growing complexity and service demands, this approach offers the best opportunity to streamline operations and to provide necessary support and leadership. We also feel this structure will help curb the increasingly difficult task of finding and retaining talented employees. Today, Shrewsbury is fortunate to have a town manager with a long history, institutional knowledge, and skill sets necessary to direct a flat, far-flung organization, which may not always be the case.

In the Appendix, we provide sample special legislation to form a consolidated finance department, and a job description for our proposed assistant town manager for finance.

**OTHER OBSERVATIONS**

During our one-on-one interviews, we noted how various responsibilities and job functions are performed across town hall and the schools. From this analysis, we developed guidance on forming a consolidated municipal finance department. However, based on these observations, we believe there are other opportunities to codify certain roles, streamline operations, and improve overall performance.

As an initial starting point, we feel there is a real opportunity between the town and schools to share human resource responsibilities, which are currently spread among several different departments and the schools. Instead, the town should explore consolidating these tasks under a single director with staff support. Department responsibilities would include the administration of classification and salary plans for all employees, recruitment and hiring, maintenance of all employee records, administration of employee group insurance programs, administration of safety and workers’ compensation programs, administration of performance evaluation programs, management training and professional development, compliance, and consultation with boards, committees and department heads on employment issues, including collective bargaining.

Beginning this July, communities can select from among several new Community Compact Cabinet best practices, including human resources. Amid the available options, Shrewsbury can select to receive assistance to explore this possibility. For more information, visit: [www.mass.gov/ccc](http://www.mass.gov/ccc).
### Community Demographic and Financial Comparison

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<tr>
<th>Municipality</th>
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#### Averages

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**Table 1.2: Community Demographic and Financial Comparison**

*Source: Division of Local Services*
## Community Structure Comparison

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<th>Municipality</th>
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<th>Strong Town Manager/Administrator*</th>
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*Figure 1.3: Community Structure Comparison

Source: Charter, Bylaw, Community Website

*Serves as a centralized executive authority to direct administration and appoint and remove department heads*
AN ACT CREATING A DEPARTMENT OF MUNICIPAL FINANCE IN THE TOWN OF SHREWSBURY UNDER THE DIRECTION OF AN ASSISTANT TOWN MANAGER FOR FINANCE.

SECTION 1. Creation of Department of Municipal Finance. Notwithstanding the provisions of any general or special law to the contrary, there shall be in the Town of Shrewsbury a department of municipal finance responsible for the coordination of all financial functions and activities of the town, including but not limited to: maintenance of all accounting records and other financial statements; payment of all obligations on behalf of the town; investment of town funds and management of debt; receipt of all funds due; maintenance of a system of property valuation; rendering of advice, guidance, and recommendations to town departments, offices, and boards in matters related to their financial or fiscal affairs; and routine monitoring and reporting of revenues and expenditures by town departments, offices, and boards. The department shall include the offices and functions of the town accountant, treasurer/collector, board of assessors and principal assessor; provided, however, that although the board of assessors shall be part of the department of municipal finance, such board shall continue to exercise its duties and responsibilities under the General Laws, except as otherwise provided in this act. The department shall have such additional powers, duties, and responsibilities with respect to municipal finance-related functions and activities as the town may from time to time provide by bylaw.

SECTION 2. Assistant Town Manager for Finance. The department of municipal finance shall be under the direct control and supervision of a assistant town manager for finance who shall report to the town manager. The assistant town manager for finance shall be appointed by the town manager; provided, however, that said appointment shall be subject to the bylaws of said Town of Shrewsbury, as they may be amended from time-to-time, that provide for the appointment of officers of the town by the town manager. The assistant town manager for finance may be removed by the town manager at any time for cause upon fifteen (15) day notice. The assistant town manager for finance shall be a person especially fitted by education, experience, and training to perform the duties of the office. The salary, fringe benefits, and other considerations of employment of the assistant town manager for finance may be established by contract, subject to appropriation, for a period of up to five years, including but not limited to, severance pay, relocation expenses, reimbursement for expenses incurred in the performance of the duties of office, liability insurance, condition of discipline, termination, dismissal, and reappointment, performances standards, and leave.

SECTION 3. Assistant town manager for finance Duties and Responsibilities. The assistant town manager for finance may serve as the town accountant or treasurer/collector but not both and shall be responsible for coordinating the fiscal management procedures of the office of the town accountant, treasurer/collector, and principal assessor and shall be the administrator of budgeting, encompassing financial reporting, accountability and control, as well as an advisor to the board of selectmen, town administrator, finance committee, and all other town departments, concerning financial and programmatic implications of current and future financial policies, including stands for the preparation of the annual budget and capital plan. The assistant town manager for finance shall, in consultation with the town manager, be responsible for the supervision and coordination of all
personnel, tasks, and activities of the department. The assistant town manager for finance shall provide the town manager and board of selectmen with reports no less than quarterly and more often as requested concerning the matters under their supervision. The assistant town manager for finance shall have such additional duties and responsibilities as may be determined from time-to-time by the town manager, and as may be determined bylaw.

SECTION 4. Principal Assessor. Notwithstanding the provisions of any general or special law to the contrary, there shall be in the Town of Shrewsbury the position of principal assessor who shall report to the assistant town manager for finance. The principal assessor shall be appointed by the finance director in consultation with the town manager and board of assessors; provided, however, that said appointment shall be subject to the bylaws of said Town of Shrewsbury, as they may be amended from time-to-time, that provide for the appointment of officers of the town by the town manager. The principal assessor shall be a person especially fitted by education, experience, and training to perform the duties of the office.

SECTION 5. Town Accountant and Treasurer/Collector. Notwithstanding the provisions of any general or special law to the contrary, there shall be in the Town of Shrewsbury the position of town accountant and treasurer/collector who shall each have all the powers, duties, and responsibilities of and be subject to the liabilities and penalties conferred and imposed by law on the offices of town accountant and treasurer and collector under the General Laws, except as provided herein. The assistant town manager for finance in consultation with the town manager shall appoint the town accountant and treasurer/collector, if such positions are separate from the position of finance director; provided, however, that said appointments shall be subject to the bylaws of said Town of Shrewsbury, as they may be amended from time-to-time, that provide for the appointment of officers of the town by the town manager. The town accountant and treasurer/collector shall be persons especially fitted by education, experience, and training to perform the duties of those offices.
Sample Job Description for Proposed Assistant Town Manager for Finance

**Assistant Town Manager for Finance**  
Salary Range: $90,000 - $120,000

**Overview:**  
Under the general direction of the town manager, serves as the chief financial officer of the town; ensures the long-term financial and operational health and success of the municipal enterprise, with fiduciary and statutory responsibility over all financial assets; interprets and administers federal, state, and local laws, regulations, and policies relevant to municipal financial management. Accountable for and manages the services and staff of the treasurer/collector, accountant, principle assessor, and budget and procurement operations.

The assistant town manager for finance is responsible for maintaining and improving upon the efficiency and effectiveness of all areas under his/her direction and control. Performs varied and responsible duties requiring a thorough knowledge of departmental operations and the exercise of judgment and initiative in completing tasks, particularly in situations not clearly defined by precedent or established procedures. Incumbent is called upon to handle a significant amount of details, each varying from the other in substance and content, requiring incumbent to approach workload with flexibility.

**Essential Job Functions:**  
Provides collaborative, forward-thinking and responsive leadership in the planning, analysis, development, implementation and maintenance of the town’s financial management programs and services in accordance with the directives of the town manager and the mission and strategic priorities of the town. Advises the town manager, finance committee, and town department heads regarding financial strategies, plans, and management.

Provides administrative direction and coordination for all operational areas of the department. Promotes the alignment of department and divisional goals and objectives with those of the town manager and select board; reviews, evaluates, and monitors service delivery methods and systems; keeps town manager informed of department activities and operations; regularly meets with management staff to coordinate and provide input into services; disseminates and ensures the execution of town-wide management plans, strategies, initiatives, values, policies, procedures, and standards of behavior.

Analyzes financial and economic data and trends; analyzes changes in federal, state, and local laws and regulations that have an economic impact on the town. Prepares recommendations and reports for the town manager, select board, finance committee, and for financial management strategies, plans, policies, and actions. Prepares and delivers public information regarding the town’s financial performance and long-range strategic planning.

Oversees the development and preparation of the town manager’s budget recommendations, including the general fund, enterprise funds, and capital improvement. Participates with the town manager and others in presenting, defending and resolving final budget plans before the finance
committees, other policymaking bodies, and public hearings. Monitors the implementation and compliance with adopted budgets.

As delegated by the town manager as chief procurement officer, oversees purchasing, procurement, and contracting functions performed by all departments reporting to the town manager, including authorization of purchase orders and contracts up to limits assigned.

Coordinates all town group insurance matters; works with brokers, insurers, consultants, legal counsel and town staff to ensure that the town’s group benefit plans are well managed.

Serves as liaison and provides administrative support to the finance committee. Regularly attends numerous evening meetings before a variety of public boards and committees. Attends annual and special town meetings.

Acts as liaison between the town manager and designated town boards, committees; regularly facilitates communications between and on behalf of parties. Represents the town manager in conducting business and may act as town manager in his/her absence.

Performs special projects and related responsibilities as initiated and requested.

Performs other related duties as required, directed or as the situation dictates.

Regular attendance at the workplace is required.

**Supervisory Responsibility:**
Directly supervises the activities and performance of and provides functional oversight to three division heads: treasurer/collector, accountant, principal assessor. Carries out supervisory responsibilities in accordance with policies and applicable laws. Responsibilities include interviewing and training employees; planning, assigning and directing work; appraising performance and recommending pay increases; implementing succession plans; addressing complaints and resolving problems; and making recommendations to the town manager concerning employee hiring, rewards or discipline.

**Education & Experience:**
Master’s degree in business administration, public administration or related field, plus at least ten years of progressively responsible experience in municipal government finances and municipal operations, including supervisory experience; or any equivalent combination of education and experience.

**Knowledge, Skills & Abilities:**
Expert knowledge of municipal finance management and all related laws, bylaw, rules, and regulations. Complete working knowledge of and skill in using computer applications for accounting and financial management. Ability to establish and maintain complex financial record keeping systems. Ability to analyze and interpret financial data and to present findings clearly in multiple forums.
Ability to recognize town-wide priorities and work cooperatively to support their accomplishment. Ability to analyze complex issues and to develop relevant and realistic plans, programs and recommendations. Excellent organizational, planning, decision-making, and supervisory skills; ability to conceptualize and put into operation goals and objectives for the department.

Ability to work with a high level of detail; ability to prioritize multiple tasks and deal effectively with interruptions, often under considerable time pressure; ability to identify and analyze complex issues and to develop appropriate recommendations.

**Working Conditions & Physical Demands:**
Normal office environment, not subject to extreme variations of temperature, noise, odors, etc. Majority of work is performed in a quiet work environment with constant interruptions. Frequently subjected to the demands of other individuals and to the volume and/or rapidity with which tasks must be accomplished. Limited off-site travel and required to attend meetings and seminars.

Operates computer, printer, video display terminal, typewriter, calculator, telephone, copier, facsimile machine and all other standard office equipment requiring eye-hand coordination and finger dexterity. Balancing, crouching, grasping, pulling, reaching and stooping may also be required.