

Greenfield City Council
August 16, 2023
244th Regular Meeting
6:30 p.m.
John Zon Community Center/Zoom Hybrid

To join in person:

35 Pleasant Street, Greenfield

To join via Zoom:

<https://greenfield-ma-gov.zoom.us/j/95605496226?pwd=bU1NRtFMa2I5YnptbWExZmRxUVd4dz09>

Meeting ID: 956 0549 6226

To join the meeting via phone:

Dial by your location

+1 301 715 8592 US (Washington DC)

+1 305 224 1968 US

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+1 312 626 6799 US (Chicago)

+1 646 558 8656 US (New York)

+1 646 931 3860 US

+1 346 248 7799 US (Houston)

+1 360 209 5623 US

+1 386 347 5053 US

+1 507 473 4847 US

+1 564 217 2000 US

+1 669 444 9171 US

+1 669 900 9128 US (San Jose)

+1 689 278 1000 US

+1 719 359 4580 US

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+1 253 215 8782 US (Tacoma)

Meeting ID: 956 0549 6226 Passcode: 775514

Find your local number: <https://greenfield-ma-gov.zoom.us/j/ab6uc4tAxS>

To view the full agenda

AGENDA

1. Call to Order

CHAIRS STATEMENT: This meeting is being recorded by the City Council and GCTV-17. If any other persons present are doing the same you must notify the chairperson at this time. In accordance with MGLc 30A SS 20(g) “No person shall address a meeting of a public body without permission of the Chair and all persons shall, at the request of the chair, be silent. No person shall disrupt the proceedings of a meeting of a public body. If, after clear warning from the chair, a person continues to disrupt the proceedings, the chair may order the person to withdraw from the meeting and if the person does not withdraw,

the chair may authorize a constable or other officer to remove the person from the meeting.”

2. Roll Call of Members
3. Pledge of Allegiance (voluntary)
4. Approval of minutes – None.
 - Executive Session Reason #3 - For the purpose of discussing strategy with respect to pending litigation. (In person only – minimum 30 minutes) **(Pg. 4)**
5. Communications from Superintendent of Schools and School Committee (10 minutes) – See attached written communication. **(Pg. 5)**
- 5a. Questions from the Council for Superintendent of Schools and School Committee
6. Communications from Mayor, City Officers and Employees (10 minutes)
 - New Department Heads introductions
 - Storm damage updates from DPW Director Marlo Warner
 - Digital Literacy for Seniors Grant
 - New Fire Station construction update
 - Licensed Site Professional (LSP) Bruce Nickelsen **(Added to agenda 08/14/2023 with permission from President Guin)**
- 6a. Questions from the Council for Mayor
7. Communications from other City Employees as needed, by invitation – None.
8. Public Comment
9. Public Hearing(s) and Second Reading(s): None
10. Motions, Orders, and Resolutions
 - I. Mayor’s Appointments & Reappointments – Community Preservation Commission, David Brock; Local Cultural Council, Marcel LaFlamme; Human Rights Commission, Kathleen Kenny & Quinn Mass; Planning Board, Charles Roberts; Public Safety Commission, Maria Burge; Board of Health, John Romano; Zoning Board of Appeals, Peter Wozniak; Commission on Disability Access, Virginia Desorgher; Historical Commission, David Brock. **(Pg. 6)**
 - II. Creation of Opioid Settlement Stabilization Fund pursuant to MGL Chapter 40, §53B. **(Pg. 19)**
11. Presentation of Petitions and Similar Papers - None
12. Report of Committees - None

13. Unfinished Business - None

14. Old Business - None

15. New Business

First Reading (Pg. 34)

- Interfund Transfer of \$7,650 from Executive Administration Salaries F/T to Accounting Salaries F/T.

16. Motions for Reconsideration

17. Adjournment

EXECUTIVE SESSION MAY BE CALLED

**Please note that the list of topics was comprehensive at the time of posting, however, the public body may consider and take action on unforeseen matters not specifically named in this notice. Posted in accordance with M.G.L.c 30A § 18-25.*

CITY COUNCIL ORDER
City of GREENFIELD
MASSACHUSETTS

Councilor _____:
Second by Councilor _____:

The City Council,
Moved that it be ordered,

THAT THE GREENFIELD CITY COUNCIL VOTES TO ENTER TO EXECUTIVE SESSION FOR REASON #3: TO DISCUSS STRATEGY WITH RESPECT TO COLLECTIVE BARGAINING OR LITIGATION IF AN OPEN MEETING MAY HAVE A DETRIMENTAL EFFECT ON THE BARGAINING OR LITIGATING POSITION OF THE PUBLIC BODY AND THE CHAIR SO DECLARES.

Roll Call Majority vote required



PUBLIC SCHOOLS

195 Federal Street, Suite 100, Greenfield, MA 01301

"Every Child's Success is Our Mission"

Ph: 413-772-1326 / Fax: 413-772-1379

Christine DeBarge Ed. D, Superintendent of Schools

School Committee Chair and Superintendent Update to City Council August 11, 2023

Thank you for the opportunity to update you on news and events from the Greenfield Public Schools.

As you likely have heard, Superintendent DeBarge has announced plans to retire from the Greenfield Public Schools and public education, at the conclusion of her current three-year contract, on June 30, 2024. The School Committee is incredibly grateful for her wholistic approach to leading the district, as well as a planful timeline for the transition to a new Superintendent. The Committee will work with the Massachusetts Association of School Committees (MASC) on next steps, with an initial public meeting on options and process at some point in September. We will keep the Council informed as we move forward.

We are gearing up for the start of the 23-24 academic year, with the following upcoming events:

- Convocation for District Staff - Aug 28
- Professional Development for District Staff - Aug 29 & afternoon of Aug 30
- First Day of School Grades 1-12 – Aug 30 (half-day)
- First Day of School for Kindergarten – Sept 1 (half-day)
- First Day of School for PreK – Sept 5
- Meet & Greet Events at all schools – Aug 28
 - Academy of Early Learning - 4-5pm
 - Newton, Federal Street, and Four Corners - 5-6pm
 - Greenfield Middle - 6-7pm
 - Greenfield High - 7-8pm

The Superintendent is planning a Tour of the school buildings for Councilors and School Committee on January 26, 2024, which is a district professional development day. This is after the election of new members of both bodies. Further information will be provided as we get closer to the date.

With the signing of Governor Healey's FY24 budget, Universal School Meals is fully funded for our students, entitling all PreK-12 students to free lunch, continuing an initiative begun with federal funds, during the COVID pandemic.

See you in September!

--Amy P.

Amy L. Proietti

Greenfield School Committee, Chair

*The Greenfield Public Schools is committed to maintaining a discrimination-free environment for all students, families, and employees.
Greenfield Public Schools is an Equal Opportunity Employer.*

CITY COUNCIL ORDER
City of GREENFIELD
MASSACHUSETTS

Councilor _____:
Second by Councilor _____:

The City Council,

Moved that it be ordered,

THAT THE GREENFIELD CITY COUNCIL, PURSUANT TO CHARTER SECTION 2-10,
AFFIRMS THE FOLLOWING APPOINTMENTS & RE-APPOINTMENTS BY THE MAYOR:

Appointments:

- Community Preservation Commission - David Brock, Term to Expire June 30, 2024; (short term to finish out John Passiglia's term)
- Greenfield Local Cultural Council - Marcel LaFlamme, Term to Expire December 31, 2025 (short term to maintain staggered terms)
- Human Rights Commission - Kathleen Kenny, Term to Expire December 31, 2024 (short term to finish out Irene Woods' term)
- Human Rights Commission - Quinn Mass, Term to Expire December 31, 2025 (short term to maintain staggered terms)
- Planning Board - Charles Roberts, Term to Expire June 30, 2026
- Public Safety Commission - Maria Burge, Term to Expire June 30, 2026

Reappointments:

- Board of Health - John Romano, Term to Expire June 30, 2026
- Zoning Board of Appeals - Peter Wozniak, Term to Expire June 30, 2026
- Commission on Disability Access - Virginia Desorgher, Term to Expire June 30, 2026
- Historical Commission – David Brock, Term to Expire June 30, 2026

Majority Vote Required.

VOTE:

Explanation of supporting rationale: Charter Section 2-10 does not call for a formal vote to affirm the appointees but does say that “at least nine (9) members shall be necessary to reject an appointment proposed by the Mayor”



City of
GREENFIELD, MASSACHUSETTS
OFFICE OF THE MAYOR

MEMO

TO: Dan Guin, City Council President
Chris Forgey, City Council Vice President
FROM: Mayor Roxann Wedegartner
DATE: August 1, 2023

RE: August Appointments to City Boards and Commissions -

I submit the following names for appointments and reappointments to these City Boards and Commissions:

Appointments:

- David Brock; Community Preservation Commission; June 30, 2024; (short term to finish out John Passiglia's term)
- Marcel LaFlamme; Greenfield Local Cultural Council; December 31, 2025 (short term to maintain staggered terms)
- Kathleen Kenny; Human Rights Commission; December 31, 2024 (short term to finish out Irene Woods' term)
- Quinn Mass; Human Rights Commission; December 31, 2025 (short term to maintain staggered terms)
- Charles Roberts; Planning Board; June 30, 2026
- Maria Burge; Public Safety Commission; June 30, 2026

Reappointments:

- John Romano; Board of Health; June 30, 2026
- Peter Wozniak; Zoning Board of Appeals; June 30, 2026
- Virginia Desorgher; Commission on Disability Access; June 30, 2026
- David Brock; Historical Commission; June 30, 2026

Mayor Roxann Wedegartner

A handwritten signature in blue ink that reads "roxann wedegartner".



Mayor of Greenfield <mayor@greenfield-ma.gov>

Community Preservation Committee

1 message

David Brock <dcb@dcbrock.net>

Wed, Jul 5, 2023 at 3:22 PM

To: mayor@greenfield-ma.gov

Cc: Caitlin von Schmidt <caitlin.vonschmidt@greenfield-ma.gov>, John Passiglia <ironjohnny@msn.com>

Dear Mayor Wedegartner,

Recently, John Passiglia asked if I could serve on Greenfield's Community Preservation Committee, replacing him as the Historical Commission appointee on the CPC. I'd welcome the opportunity to do that.

As an historian and museum curator, I can bring my 25-years of professional experience to help with the historical preservations aspects of the CPC and the Community Preservation Plan in particular. I also look forward to the change to act as a bridge between the Community Preservation Committee and the Historical Commission.

As a 20-year resident of Greenfield, the other dimensions of the Plan — housing, open space, and recreation — certainly resonate with me as well. I certainly agree with the Plan's "highest priority" of creating more diverse housing in our city.

All the best,

David

+++++

David C. Brock

dcb@dcbrock.net

40 Russell Street, Greenfield, MA 01301

Mobile: 413-522-3578

Skype: dcbrock

Twitter: @dcbrock

Pronouns: he, him, his

Marcel LaFlamme
99 Meridian St.
Greenfield, MA 01301

July 19, 2023

Mayor Roxann Wedegartner
City Hall, Room 201
14 Court Square
Greenfield, MA 01301

Dear Mayor Wedegartner:

I am writing to express my interest in being appointed to one of the vacant seats on the Greenfield Local Cultural Council. My husband and I recently moved to Greenfield from the Worcester area, and we are looking forward to getting involved in the civic life of our community.

My investment in the arts and humanities goes back to my undergraduate degree in folklore, which taught me to think broadly about the varied forms that cultural expression can take. Early in my career, I worked closely with rural theater makers at the William Inge Center in Independence, Kansas, surfacing a collection of unpublished plays so they could be performed for the first time. Later, while pursuing graduate studies in anthropology, I collaborated with a photographer on an installation about afterlives of the Cold War that was funded by the North Dakota Humanities Council and, in 2013, won a national award from the Federation of State Humanities Councils.

I believe that locally rooted artistic and cultural programming can enrich residents' quality of life and catalyze important conversations. As a Local Cultural Council member, I would seek to responsibly steward the funds to be granted, while emphasizing a diversity of perspectives, organizations, and media in evaluating proposals. I would also welcome the opportunity to learn more about the creative and cultural sector in the community I plan to call home.

Thank you for your consideration, and I look forward to hearing from you.

Yours sincerely,

Marcel LaFlamme

MARCEL LAFLAMME

CULTURAL PROGRAMMING ADVOCATE

PROFILE

Qualitative researcher and publishing professional
committed to supporting community vitality
through arts and humanities grantmaking.

CAREER HIGHLIGHTS

Invited speaker on scholarly publishing topics
in both Europe and North America

Defined an approach to assessing needs and assets
of research communities that is now in
general use at my organization

Led a major upgrade of a society publishing
platform, liaising with developers, designers,
consultants, and an elected board

CONTACT

99 Meridian St.
Greenfield, MA 01301
(617) 851-5854
mlaflamme@gmail.com



WORK EXPERIENCE

OPEN RESEARCH MANAGER

Public Library of Science (PLOS) | 2021 -
San Francisco, California (remote)

- Develop, implement, and evaluate solutions aiming to increase adoption of open research practices across 14 journals
- Support research and demonstration activities that seek to influence policy around research assessment

POSTDOCTORAL RESEARCHER

Open Innovation in Science Center | 2019 - 2021
Vienna, Austria

- Designed and carried out qualitative research on drivers of openness and collaboration in science, as part of an interdisciplinary and cross-cultural team

MANAGING EDITOR

Cultural Anthropology | 2015 - 2019
Houston, Texas

- Managed the publishing process for a society-published open-access journal, providing oversight of editorial and production services as performed by external vendors and contractors
- Provided guidance and support for 50+ early-career volunteers involved with the Contributing Editors Program
- Prepared reports to enable data-driven decision-making by editors and society leadership

DIRECTOR OF LIBRARY SERVICES

Independence Community College | 2008 - 2010
Independence, Kansas

- Supported teaching and learning at a rural-serving institution through focused collection and service development
- Managed a team of two full-time staff and developed policies to improve consistency of service outcomes

EDUCATION

PhD, Anthropology

Rice University | 2010 - 2018

- Dissertation: "Remaking the Pilot: Unmanned Aviation and the Transformation of Work in Postagrarian North Dakota"

MS, Library and Information Science

Simmons College | 2006 - 2008

- Completed coursework in evaluation of information services, organization of information, and publishing trends

BA, Folklore and Mythology

Harvard University | 2000 - 2005

MARCEL LAFLAMME

CULTURAL
PROGRAMMING
ADVOCATE

SKILLS

Budget oversight
Data analysis and interpretation
Communication across difference
Project management
Writing and editing
Public speaking

STRENGTHS

Strategic thinking
Creative problem-solving
Ethical decision-making
Empathy and emotional intelligence
Building consensus
Change management

CONTACT

99 Meridian St.
Greenfield, MA 01301
(617) 851-5854
mlaflamme@gmail.com



SELECTED PUBLICATIONS

[A Survey of Researchers' Methods Sharing Practices and Priorities](#) (2022), with James Harney and Iain Hrynaskiewicz, preprint posted to MetaArXiv.

[Seeing Oneself as a Data Reuser: How Subjectification Activates the Drivers of Data Reuse in Science](#) (2022), with Marion Poetz and Daniel Spichtinger, research article in *PLOS ONE*.

[The Open Innovation in Science Research Field: A Collaborative Conceptualisation Approach](#) (2022), with Susanne Beck et al., research article in *Industry and Innovation*.

[Affiliation in Transition: Rethinking Society Membership with Early-Career Researchers in the Social Sciences](#) (2020), white paper for the Association of Research Libraries.

SELECTED PRESENTATIONS

Practical Aspects of Making Research Data Available, STM US Annual Conference, April 2023

Breadth as a Publishing Core Value, AAA Editors Assembly meeting, December 2022

Who Are the Drivers of Systemic Change in Open Science? PLOS webinar, October 2022

Care, Control, and the Politics of Access: Ethnographic Research and Open Data, Iowa State University, March 2022

Open As or Open And? Articulating What's Next for Open Access, EASA webinar, November 2021

PROFESSIONAL SERVICE

Content and Partners Seat, AAA Publishing Futures Committee

Treasurer, Society for the Anthropology of Work

Executive Committee, Libraria

Publishing Board, Open Knowledge Press

Reviewer: *American Ethnologist*, *Cultural Anthropology*

GRANTS AND AWARDS

Eric R. Wolf Prize, Society for the Anthropology of Work

Schwartz Prize, Federation of State Humanities Councils

Dissertation Improvement Grant, National Science Foundation

Graduate Research Fellow, National Science Foundation

David B. Goodstein Scholar, Point Foundation



Mayor of Greenfield <mayor@greenfield-ma.gov>

Re: Human Rights

kathleen kenny <kkenny860@yahoo.com>
To: Mayor of Greenfield <mayor@greenfield-ma.gov>

Wed, Jul 19, 2023 at 5:53 PM

Thank you! I wasn't sure what information would be appropriate!!

I was born and raised in Nj. I attended Newbury College in Boston, where I received an associates degree 1981. I went on to Boston State. I worked for Ingalls advertising, as well as Big Sister Association of Greater Boston. I migrated here to Greenfield with my three young children as I was divorcing a domestic violence survivor! Greenfield became my home as I brought up my children. They attended Greenfield Public School, Sports , our library etc! I know have 8 grandchildren, and work for Verizon!!

I feel I have a lot to bring to the table! I can supply character and professional references upon request. Thank you for your consideration. Also I would be happy to meet for coffee, tea etc!!

Thank you,

Kathleen Kenny

Sent from my iPhone



Mayor of Greenfield <mayor@greenfield-ma.gov>

Interest in a position on the Human Rights Commission

1 message

Quinn Mass <quinn.mass2@gmail.com>

Sat, Jul 15, 2023 at 2:58 PM

To: mayor@greenfield-ma.gov

Cc: caitlin.vonschmidt@greenfield-ma.gov, philippe@gctv.org, matthew.conway@greenfield-ma.gov, diana.schindler@greenfield-ma.gov

Dear Mayor Wedegartner,

Please let this email serve as my letter of interest in serving on the Greenfield Human Rights Commission. I am a lifelong resident of Greenfield and a rising senior at Greenfield High School. I come from a family that believes in community service and my mother has taught social justice at Greenfield High School.

I am active in many groups that work on human rights issues including the GHS Spectrem Club and serving on the Massachusetts Association of Student Councils State Board. I have been active in direct impacts on human rights issues from working as an elementary student on unified bocce tournaments for special olympics to marching in this year's Franklin County Pride Parade. I believe as a student I would bring a unique perspective to the Board's work.

If you believe I would be a good candidate, I would ask that I be appointed to an unexpired term that ends before August 2024, as I plan to go to higher education once I graduate. I love Greenfield and want to make this a community that continues its commitment to supporting human rights. Attached is a copy of my resume.

[Quinn Mass High School Resume - Google Docs](#)

Quinn Mass
248 Green River Rd.
413-772-9049

Name: Quinn Mass

Address: 248 Green River Road, Greenfield, MA, 01301

Email and phone number: quinn.mass2@gmail.com and 413-772-9049

GPA: 4.1227

Class Rank: 10 out of 76

Courses in Progress (AP and Advanced)

- AP Physics
- AP Literature and Composition
- AP Spanish
- AP Calculus
- Advanced European History

Courses Completed (AP and Advanced)

- AP Statistics (11)
- AP Language (11)
- AP United States History (11)
- Spanish 4 (11)
- Advanced Pre-Calculus (11)
- Advanced Chemistry (11)
- Advanced Biology (10)
- Advanced Algebra 2 (10)
- Advanced United States History 2 (10)
- Advanced English 10 (10)
- Spanish 3 (10)
- Advanced Geometry (9)
- Advanced United States History 1 (9)
- Advanced Physics (9)
- Advanced English 9 (9)
- Spanish 2 (9)

Awards and Achievements

- Commonwealth Award MASC (11)
- High Honors (8,9,10,11)
- Core Value of Excellence Award (11)
- Frederick Douglass and Susan B Anthony Scholarship (11)

Organizations/Activities

- Student Council (8-12)
- Library Club (10-12)
- Spectrum (10-12)
- National Honor Society (11, 12)
- Spanish Club (10-12)
- French Club (11)

- Green Room (Rock-Climbing Club) (10-12)
- Band (8-12)
- Valley Playwright Musical Drama Program (11)
- Varsity Soccer (8,9)
- Art Club (9, 10)
- Outdoor GOAL Summer Program (10-12)

Leadership Experience

- 2024 Class Representative (8,9,10,11,12)
- Student Council Historian (11)
- Student Council State Representative/Western-Massachusetts State Delegate (12)
- Library Club President (11)
- Spectrum Treasurer (11)
- Band Leadership Team/ Section leader (11)
- Class Cup Subcommittee (9)
- Presenter at Diversity and Equity Conference (11)

Community Service

- Green River Clean Up (8-12)
- Winter Carnival Face Painting (8, 10, 11)
- Greenfield Public Library Summer Intern (11,12)
- Federal Street School Library Summer Volunteer (11)
- Search Committee for Associate Principals (11)
- Big Brothers/Big Sisters .5k (10,11)
- Greenfield Triathlon Volunteer (10,11)
- Dress Drive (9,10,11)
- Comic Con Volunteer and Presenter (10,11)
- Homecoming Set Up (8,10,11)
- Staff Appreciation Breakfast (8,10,11)
- Read to Preschoolers (11)
- Polar Plunge for Special Olympics
- Unified Bocce for Special Olympics

Work Experience

- Greenfield Garden Cinemas (2020-Present)
- Dog Sitting (2019-2022)
- Summer Internship at the Imaginary Book Shop (2023)



Mayor of Greenfield <mayor@greenfield-ma.gov>

Board & Commission Volunteer Application

1 message

Charles Roberts <cwr4@comcast.net>

Fri, Jan 2, 2015 at 12:46 PM

To: Mayor of Greenfield <Mayor.of.Greenfield@greenfield-ma.gov>

Request From: Charles Roberts
Email: cwr4@comcast.net
Source IP: 70.90.49.201

Address: 15 Spring Terrace
City: Greenfield
State: MA
Zip: 01301
Phone: 413-695-7439
Alt Phone:
Fax:

Checkbox Choices

Planning Board, Zoning Board of Appeals,

What qualifications and/or experience do you have that you believe would make you an asset to the board or commission you selected?

I have been practicing architecture for 28 years and am currently a partner in a local design firm. I have been before many town boards and am very familiar with the process and the technical issues involved in permitting a project, both from the perspective of the applicant and the reviewing board.

Have you previously or do you currently serve in another municipal office? If yes, please list those positions and the term of expiration.

I sat on the Greenfield Planning Board for several years during the late 90's, I also sat on the long range planning committee during that time. I am currently involved Greenfield's Public Art Committee.

What amount of time would you be able to put towards a board or commission?

I am available for the usual two meetings a month as well as some additional time for committee work.

Are there any final remarks you would like the Mayor to be aware of when considering your application?

I believe strongly in balancing the needs of growth and forward thinking design. Communities become stronger and attract more positive growth when a town is clear about its goals and ambitions. I feel I have much to offer in this regard with my years of experience in the design world and working with developers as clients, not mention my previous tenure on the Greenfield Planning Board. I have learned much in the intervening time and welcome the opportunity to give some back to the community.

Appointments public safety commission

July 26, 2023

Maria Burge <maria.burge23@gmail.com>

to Roxann.wedegartner, Caitlin.vonschmidt, Councilor.bullock, Councilor.golub, Councilor.helie, Councilor

To Mayor Wedegartner,

I understand that a vacancy on the Public Safety Commission is forthcoming. This email is to express my interest in the next appointment. I am a 35 year retired law enforcement officer and feel that my experience will be an asset to this Commission. I have served in the Greenfield Police Department for 14 years. Please feel free to call me at 978-894-6515 if you have any questions.

Thank you for your consideration,

Respectfully,
Maria G Burge

CITY COUNCIL ORDER
City of Greenfield
MASSACHUSETTS

Councilor _____ :
Second by Councilor _____ :

The City Council

Upon recommendation of Mayor Wedegartner

An Order to Create Opioid Settlement Stabilization Fund

Move that it be Ordered,

That the City create a special purpose Opioid Settlement Stabilization Fund, pursuant to M.G.L. Chapter 40, §53B local option paragraph, with receipts from the Massachusetts State-Subdivision for Statewide opioid settlement funds to be deposited, and then appropriated annually to be used to supplement and strengthen resources available to communities and families for substance use disorder prevention, harm reduction, treatment, and recovery. Disbursement of said funds would be made at the request of the Mayor, and by vote of the City Council.

2/3 Vote Required (9)

VOTE:

Explanation: Since the State Legislature took no action in FY23 to create a special revenue fund by statute, the City should proceed to create this dedicated Stabilization fund.

Attachments:

1. Memo from Finance Director
2. City & Town Issue, July 7, 2022



City of
GREENFIELD, MASSACHUSETTS



FINANCE DEPARTMENT

Diana M. Schindler

Finance Director

City Hall • 14 Court Square • Greenfield, MA 01301

Phone 413-772-1504 • Fax 413-772-1519

diana.schindler@greenfield-ma.gov • www.greenfield-ma.gov

July 25, 2023

To: City Councilors
Cc: Mayor Roxann Wedegartner
Fr: Diana M. Schindler, Finance Director
Re: Opioid Settlement Stabilization Fund

Dear City Councilors,

Attached is the City and Town issue from MA Division of Local Services (DLS) at DOR that addresses the Opioid settlement proceeds. DLS was anticipating the legislature to allow a General Fund Revenue Exception in Chapter 44, Sec 53, that would permit municipalities to deposit statewide opioid settlement funds in a separate fund, outside of the General Fund, upon the approval of the Director of Accounts, which would be required to be appropriated for their intended purpose.

Since the Legislature has yet to do this, I'm recommending that the City move forward with creating a special Stabilization Fund into which the settlement proceeds are designated by local option and then appropriated only for the intended purpose, at the request of the Mayor with City Council vote as prescribed.

Further, as soon as FY23 Free Cash is certified, projected by end of October, the City Council will need to move the \$199k into the Opioid Settlement Stabilization Fund. The mayor has begun to gather experts and providers to hear priorities and initiatives for funding and will provide updates to the Council as available.

Also, as a reminder, the City must follow procurement for any appropriations in accordance with Chapter 30B.

Here's a link with more details regarding funding and procurement. <https://www.mass.gov/info-details/frequently-asked-questions-about-the-ags-statewide-opioid-settlements>

Please feel free to contact me with any questions.

*The City of Greenfield is an Affirmative Action/Equal Opportunity Employer,
a designated Green Community and a recipient of the "Leading by Example" Award*

A Publication of the Massachusetts Department of Revenue's Division of Local Services

City&Town

Geoffrey E. Snyder, Commissioner • Sean R. Cronin, Senior Deputy Commissioner of Local Services

July 7th, 2022



In this edition:

- **Ask DLS: Treatment of Opioid Settlement Payments**
- **Area of Fiscal Stress: Statutory Property Tax Limits**

Important Dates & Information

DLS Posts Three New Webinars

Recorded versions of recently held DLS webinars are now available on our YouTube channel! These include:

Free Cash Upload & Certification Walkthrough: On April 26th, Bureau of Accounts staff highlighted how to complete the forms necessary for free cash certification. These forms, uploaded in Gateway, are used to request certification of and calculate a city or town's free cash certification from BOA each fiscal year. As mentioned during the webinar, you can also refer to our [Introduction to Free Cash video](#) for an overview of how free cash is calculated, and an [additional video](#) providing a brief overview of the upload process. Slides from the presentation are also available to [download](#).

How to Value a Massachusetts Town for Taxation: On May 25th, DLS' Chris Wilcock, Chief of the Bureau of Local Assessment (BLA), provided an overview of mass appraisal, the standardized procedures for collecting data and appraising property to ensure that all properties within a municipality are valued

Ask DLS: Treatment of Opioid Settlement Payments

This month's Ask DLS features answers to frequently asked questions concerning municipal treatment of anticipated settlement payments from opioid defendants in connection with opioid settlements, including recent [statewide opioid settlements](#). Please let us know if you have other areas of interest or send a question to cityandtown@dor.state.ma.us. We would like to hear from you.

Can a municipality that anticipates receiving settlement funds from the recent opioid settlements set up a special revenue account to record them?

No. All money received or collected from any source by a city, town or district belongs to its general fund and can only be spent after appropriation unless a general or special law provides an exception, i.e., expressly restricts use for a particular purpose or allows expenditure by a department or officer without appropriation. [G.L. c. 44, § 53](#). At present, there is no general or special law that provides an exception for these settlement proceeds. Accordingly, statewide opioid settlement funds received by a municipality belong to its general fund.

Is the Legislature considering an amendment to create an exception to G.L. c. 44, § 53 for statewide opioid settlement funds paid to municipalities?

Yes. The Legislature is currently considering an amendment to [G.L.](#)

uniformly and equitably. Slides from the presentation are also available to [download](#).

Excess and Deficiency Upload: On June 8th, BOA staff provided instruction about how to complete the forms necessary for excess and deficiency certification. These forms, uploaded in Gateway, are used to calculate and approve a regional school district's excess and deficiency amount each fiscal year. Slides from the presentation are also available to [download](#).

FY2023 Telephone Company Central Valuations

Local boards of assessors will find the fiscal year 2023 telephone company central valuations pursuant to M.G.L. Chapter 50, Section 39 on the our [website](#) effective Wednesday, June 15, 2022. Also included is a memorandum to assessors about the FY2023 valuation, the new growth figures, a list of company billing addresses, and the *Additional Landline Telephone Personality by FCC Code* for each of the centrally valued telephone companies by community.

FY2023 Pipeline Company Central Valuations

Local boards of assessors will find the fiscal year 2023 pipeline company central valuations pursuant to M.G.L. Chapter 50, Section 38A on our [website](#) effective June 15, 2022. Also included is a memorandum to assessors about the FY2023 valuation as well as the new growth figures and a list of company billing addresses.

FY2023 Budget Issues and Other Related Matters

The Division of Local Services (DLS) Bureau of Accounts (BOA) has issued and posted Bulletin (BUL) 2022-5. This Bulletin addresses several topics that cities, towns, regional school and other districts should consider for FY2023 budgeting and other related matters.

BUL-2022-5: FY2023 Budget Issues and Other Related Matters

To view the bulletin, [click here](#). To access additional IGRs and Bulletins, please visit this [webpage](#). For additional information and guidance regarding emergency procedures, please visit our webpage [here](#).

One-Time Assistance for

[c. 44, § 53](#) that would permit municipalities to deposit statewide opioid settlement funds in a separate fund, outside of the general fund, upon the approval of the Director of Accounts. Under the proposed amendment, municipalities would still be required to appropriate the funds for their [intended purposes](#). The Division of Local Services linked to and summarized the proposed amendment in its [May 19, 2022 issue of City & Town](#).

Can a municipality that received opioid settlement proceeds prior to June 30, 2022 make an appropriation directly from those proceeds for their intended purpose at a meeting of the legislative body?

No. Funds received prior to the end of FY22 (June 30, 2022) will close to the general fund. In the ordinary course, the funds will then become part of the free cash certified by the Director of Accounts and once certified, may be appropriated. Free cash is traditionally certified in late fall in most communities. If certified by the time a town has their fall town meeting, the funds could be appropriated at that time. If a town does not have a fall town meeting or free cash is not certified until after a fall town meeting, presumably the spring town meeting could then vote to make the appropriation. A city could likewise make an appropriation once free cash is certified. However, it is important to note that free cash can be appropriated for any lawful purpose and difficulties can therefore arise when mandating that the settlement portion of free cash must be used for specific purposes. An additional issue arises if the community chooses not to certify their free cash or has a negative free cash balance.

How can a municipality that receives opioid settlement proceeds after July 1, 2022 use those funds in FY2023?

A city or town may classify settlement funds received in FY23 as general fund estimated receipts (Page 3 Local Receipts) and make an appropriation for the settlement purposes by amending their existing FY23 budget to reflect that new source of revenue before their tax rate is set. The amount they estimate should be the equivalent of what they raised and appropriated from taxation for the purpose, otherwise the excess will simply be reducing the tax levy.

Districts with Pandemic-Related Enrollment Disruptions Impacting Chapter 70 Aid

The Division of Local Services (DLS) and the Department of Elementary and Secondary Education (DESE) have jointly issued guidance regarding FY2022 One-Time Assistance for Districts with Pandemic-Related Enrollment Disruptions Impacting Chapter 70 Aid. The information provided includes the spending timeframe and purpose as well as accounting matters.

[Click here to view the DLS/DESE guidance.](#)

DLS Links:

[COVID-19 Resources and Guidance for Municipal Officials](#)

[Events & Training Calendar](#)

[Municipal Finance Training and Resource Center](#)

[Local Officials Directory](#)

[Municipal Databank](#)

[Informational Guideline Releases \(IGRs\)](#)

[Bulletins](#)

[Tools and Financial Calculators](#)



If a municipality does not follow the above-described process, is there anything else they can do with these proceeds in FY2023?

If the settlement proceeds are received by March 31, 2023, a municipality can request that the Director of Accounts update their free cash certified as of the previous July 1 to include the unappropriated proceeds and make them available for appropriation on or before June 30, 2023. If the request is approved before the spring town meeting, the town could then make the appropriation at their spring town meeting or, in a city, at their subsequent regularly scheduled meeting.

Can a municipality vote to dedicate to a special purpose stabilization fund some or all of the opioid settlement funds it receives?

Yes. [IGR 17-20](#) outlines the procedures that a municipality can follow to create and dedicate funds to a special purpose stabilization fund. If a municipality receives opioid settlement funds before establishing a stabilization fund, it would need to utilize the processes noted above to appropriate into the stabilization fund after it is created. IGR 17-20 notes the required votes of the legislative body to effectuate these actions.

Must amounts appropriated from free cash for opioid remediation purposes be closed to the general fund if they are not expended prior to the next year end?

No. These funds may be reserved as a fund balance reserved for continuing appropriations until the purpose of the appropriation has been fulfilled.

Area of Fiscal Stress: Statutory Property Tax Limits

Tony Rassias - Bureau of Accounts Deputy Director

In the [December 6th, 2018](#) and [March 7th, 2019](#) editions of *City & Town*, we highlighted two areas that factor into a municipality's fiscal stress: reserve levels and pension funding. This article reviews another area of fiscal stress that may be seen graphically for your community in Category Three of the Division of Local Services' (DLS) [Municipal Finance Trend Dashboard](#) (Dashboard): property tax limits. This article provides information for local officials related to provisions allowed for under Prop 2½ that may provide relief from budget stress.

The Tax Levy

In November of 1980, the people of Massachusetts passed by ballot vote Proposition 2½, or Prop 2½ so called, that among other things, placed constraints on the dollar amount of a community's annual property tax levy beginning in FY1982. These constraints have continued to the present day.

The tax levy is an annual revenue source raised by the community's taxation of real and personal property. For FY2022, with 349 of 351 communities reporting as of this writing, the aggregate tax levy is \$19.8 billion, \$834 million or 4.4% over FY2021 for the same 349 communities.

For most communities, the tax levy is the largest source of revenue that, along with state aid and other local receipts and reserves, supports local spending for public services. As shown below, over the last several fiscal years, statewide tax levies have represented close to two-thirds of all general fund operating budget revenue sources.

General Fund Operating Budget Revenues - By Source %					
	FY2018	FY2019	FY2020	FY2021	FY2022
Property Tax	63.3	63.5	63.7	65.3	64.5
State Aid	20.9	20.7	20.8	20.6	20.4
Local Receipts	10.6	10.5	10.5	9.2	9.3
All Other	5.1	5.4	5.0	5.0	5.8
Total	100.0	100.0	100.0	100.0	100.0

For FY2022, individual community tax levies as a percent of total general fund operating budgeted revenues range from 91.1% in

Acton to 22.9% in Lawrence.

Because a community's budget must balance revenues with expenditures, placing a limit on such an important revenue source could add fiscal stress when developing the annual budget unless other revenue sources are available to replace it (see [City & Town, December 6th, 2018](#) for guidance on rebuilding and improving a diminishing level of reserves). If other revenue sources aren't available, further local action may be necessary.

Fiscal Budget Stress from a Property Tax Levy Limitation

Prop 2½ imposed an annual levy limit, or incremental limit of 2.5%, that may prove insufficient to completely support the community's annual spending needs. Prop 2½ also imposed a levy ceiling that caps the annual levy limit at 2.5% of the current fiscal year's total assessed property values. The lesser of the incremental limit or levy ceiling controls. For most communities, the incremental levy limit controls.

For example, in the table below, the levy ceiling controls in FY1 and FY2 since each levy ceiling is less than the incremental levy limit for those years which results in lost taxing capacity. The levy limit is said to have "hit the ceiling." In FY3, however, the incremental levy limit controls since it is less than the levy ceiling and there is no lost taxing capacity.

	FY1	FY2	FY3
PY Levy Limit	10,000,000	10,300,000	10,625,000
2.5% Increase	250,000	257,500	265,625
New Growth	150,000	150,000	150,000
Levy Limit	10,400,000	10,707,500	11,040,625
Assessed Value	412,000,000	425,000,000	450,000,000
Levy Ceiling (2.5% of AV)	10,300,000	10,625,000	11,250,000
Hit Ceiling?	Yes	Yes	No
Lost Taxing Capacity	(100,000)	(82,500)	0

Of these two imposed limits, the levy ceiling is less of a concern for most communities as the statewide median of local taxation is currently about 1.52%. But for some, the incremental limit has risen faster than the levy ceiling and has collided with the ceiling or the

ceiling has fallen and collided with a rising incremental limit. In either case, the levy ceiling controls and either a portion of or possibly the entire allowable increase to the incremental limit is lost.

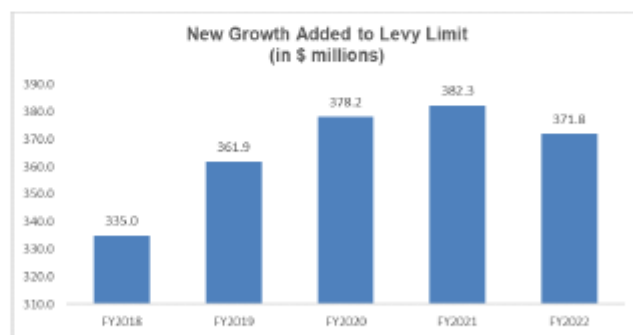
Relief of Fiscal Budget Stress from the Annual Levy Limit

Prop 2½ included means to help moderate the effects of the incremental levy limit by allowing that limit to increase. This limit increases automatically by 2.5% above the previous fiscal year's levy limit (not tax levy) and allows for further increases.

New Growth

New growth increases the annual levy limit, up to but not above the levy limit ceiling. It is based on the value of new construction and/or new articles of personal property in the community as determined by the assessors, converted into tax levy dollars, reported by the assessors to the DLS' Bureau of Local Assessment (BLA), certified by that Bureau and then added to the levy limit. Provided the incremental limit does not "hit the ceiling", new growth becomes a permanent part of the levy limit calculation.

As shown below, new growth added \$371.8 million to FY2022 levy limits, but below the amounts added in FY2020 and FY2021.



When developing revenue estimates for the next fiscal year's budget, local budget officials should request from, and then review with, the assessors any new growth estimate, any current trend, and whether a levy limit calculation demonstrates a possible ceiling collision. Assessors should then report new growth to the extent

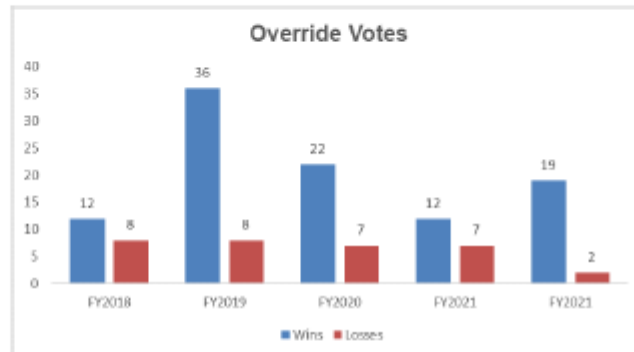
allowed by law, certify it through BLA, and then communicate the results to budget officials as final dollar amounts are determined.

Overrides

An override vote requires a majority vote of the electorate for approval to levy an additional amount above the annual levy limit for any lawful expenditure purpose. The vote must also include a certain dollar amount and a beginning fiscal year. Multiple overrides may also be presented for voter approval. If approved, the override becomes a permanent part of the levy limit calculation. For this example, assume that the levy limit has not “hit the ceiling.”

	FY1	FY2	FY3
PY Levy Limit	10,000,000	10,900,000	11,322,500
2.5% Increase	250,000	272,500	283,063
New Growth	150,000	150,000	150,000
Override	500,000	0	0
Levy Limit	10,900,000	11,322,500	11,755,563

The graph below shows override votes taken and reported to the DLS Databank in the most recent fiscal years. For FY2022, 19 winning override votes taken by 11 communities added \$19.2 million to levy limits for the following purposes: Schools (13), General Government Operations (4), and Public Safety (2).



For FY2022, the town of Phillipston voted an underide which reduced the town’s FY2022 levy limit by \$97,763. An underide vote requires a dollar amount, a beginning fiscal year and a majority vote of the electorate for approval to permanently decrease the levy limit. Multiple underides may be presented for voter approval on a

regular or special municipal election ballot, but only three on a State biennial election ballot. Overrides may be placed on a ballot by a local referendum procedure authorized by charter or special act.

A special form of override earmarks additional tax levy dollars into a general or specific purpose stabilization fund (see [Informational Guideline Release 17-20](#) for more details). For FY2022, no new communities voted this form of override. However, 10 communities that voted this form of override in the past continued this funding.

Either override form allows an increase to the incremental levy limit, up to but not above the levy ceiling. For a community where the incremental limit is nearing the levy ceiling and where an override is intended, local budget officials must be certain that the levy limit calculation shows the intended override amount not exceeding the levy ceiling. For a refresher on how to estimate what dollar amount an override will cost in tax rate terms, see the [May 7th, 2015 edition of City & Town](#). DLS also provides [guidance](#) on Prop 2½ ballot questions.

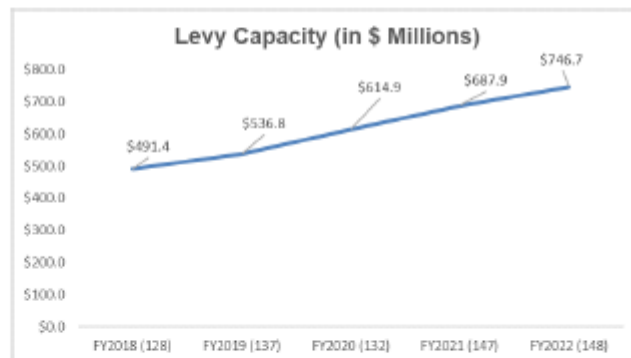
Levy Capacity

A community is not obligated to levy a property tax up to its incremental limit in any fiscal year if it does not need to. The additional amount the community could have levied in a fiscal year, but did not, is called excess levy capacity. In the example below, assume that the levy limit has not "hit the ceiling."

	<u>FY1</u>	<u>FY2</u>	<u>FY3</u>
PY Levy Limit	10,000,000	10,900,000	11,322,500
2.5% Increase	250,000	272,500	283,063
New Growth	150,000	150,000	150,000
Override	500,000	0	0
Levy Limit	10,900,000	11,322,500	11,755,563
Actual Levy	10,900,000	11,272,500	11,655,563
Excess Levy Capacity	0	50,000	100,000

As shown in the table, excess levy capacity that is not levied when the fiscal year's tax rate is set is lost for that fiscal year but can be captured in the next fiscal year. Not every community has capacity to capture either because they are levying up to their annual levy

limit already or because they have legally exceeded their annual levy limit by a certain form of vote (see "Relief of Fiscal Stress from the Levy Limit Ceiling" below). Depending upon the amount, levy capacity can help a community escape from budget stress in the next fiscal year. Seen below, statewide total levy capacity has steadily risen.



As indicated earlier in this article, when the incremental levy limit has maximized to the levy ceiling, the incremental limit has "hit the ceiling," the levy ceiling controls and either a portion of or possibly the entire allowable increase to the incremental limit is lost. As seen in the following table, the levy limit was between 95.5% to 98.9% of the levy ceiling in seven communities, and between 90.1% to 94.9% in seven communities.

FY2022 - Levy Limit as % of Levy Ceiling and Tax Levy					
	% Levy Ceiling	% Tax Levy		% Levy Ceiling	% Tax Levy
Holyoke	98.9	98.5	Westfield	94.9	91.1
Pittsfield	97.7	94.7	Agawam	94.0	82.4
Heath	96.3	89.3	North Adams	93.7	99.8
Springfield	96.0	99.0	Somerset	91.8	66.9
Shutesbury	95.7	91.3	Chicopee	91.7	93.2
Wendell	95.5	97.3	Greenfield	90.9	98.2
West Springfield	95.5	85.2	Monroe	90.1	85.9

The good news seen in the table above is that nine of the 14 communities have a tax levy below 95% of their levy ceiling, relieving some fiscal stress from potential lost capacity due to "hitting the ceiling."

Relief of Fiscal Stress from the Levy Limit Ceiling

Prop 2½ also included several means to legally exceed the annual levy ceiling and relieve budget stress by moderating the effects of that limit. These means, or “exclusions,” when added to the lesser of the incremental levy limit or levy ceiling, establish a maximum levy limit which the actual tax levy for the fiscal year cannot exceed. The following will highlight two of the most common exclusions that allow the incremental levy limit to exceed the levy ceiling: the debt exclusion and the capital outlay expenditure exclusion.

Debt Exclusion

The debt exclusion is by far the more frequently voted exclusion that requires a majority vote of the electorate for approval to levy an additional amount above the incremental or levy limit ceiling for permanent or temporary debt service on a certain capital project or capital asset purchase until the debt is retired. Multiple debt exclusions may also be presented for voter approval. Unlike overrides, the dollar amount of the debt exclusion does not become part of the base in calculating the next fiscal year’s levy limit. Note from the table below that FY2’s base is FY1’s levy limit, not FY1’s maximum allowable levy. Note also that FY3’s base is FY2’s levy ceiling, not FY2’s levy limit, as FY2 in this example “hit the ceiling.” The debt exclusion adds to the lesser of the levy limit or levy ceiling.

	<u>FY1</u>	<u>FY2</u>	<u>FY3</u>
PY Levy Limit	10,000,000	10,900,000	11,250,000
2.5% Increase	250,000	272,500	281,250
New Growth	150,000	150,000	150,000
Override	500,000	0	0
Levy Limit	10,900,000	11,322,500	11,681,250
Assessed Value	440,000,000	450,000,000	475,000,000
Levy Ceiling (2.5% of AV)	11,000,000	11,250,000	11,875,000
Debt Exclusion	750,000	700,000	650,000
Max. Allowable Levy	11,650,000	11,950,000	12,331,250

The graph and table below show newly added debt exclusion wins and losses as well as winning vote purposes for votes taken and reported to the DLS Databank in the most recent fiscal years.



Debt Exclusion Winning Vote Purposes						
	Culture and Recreation	General Government	Public Safety	Public Works and Facilities	Schools	Total
FY2018	13	17	27	35	30	122
FY2019	6	23	19	25	38	111
FY2020	9	41	22	40	36	148
FY2021	3	16	7	20	31	77
FY2022	6	13	19	42	35	115
Totals	37	110	94	162	170	573

For FY2022, a total of 1,654 debt exclusion votes added \$629.2 million to levy limits in 287 communities.

Capital Outlay Expenditure Exclusion

A second and less often voted form of exclusion is the capital outlay expenditure exclusion or capital exclusion. This exclusion requires a majority vote of the electorate for approval to levy an additional amount above the incremental levy limit or the levy ceiling for a specified capital project or capital purchase. Like the debt exclusion, this exclusion does not become part of the base in calculating the next fiscal year's levy limit. From the table below, note that FY2's base is FY1's levy limit, not FY1's maximum allowable levy. Note also that FY3's base is FY2's levy ceiling, not FY2's levy limit, as FY2 in this example "hit the ceiling." The capital exclusion adds to the lesser of the levy limit or levy ceiling. Unlike the debt exclusion, this exclusion is only applicable in the fiscal year indicated in the vote.

	FY1	FY2	FY3
PY Levy Limit	10,000,000	10,900,000	11,250,000
2.5% Increase	250,000	272,500	281,250
New Growth	150,000	150,000	150,000
Override	500,000	0	0
Levy Limit	10,900,000	11,322,500	11,681,250
Assessed Value	440,000,000	450,000,000	475,000,000
Levy Ceiling (2.5% of AV)	11,000,000	11,250,000	11,875,000
Capital Exclusion	750,000	0	0
Max. Allowable Levy	11,650,000	11,250,000	11,875,000

The following table indicates capital expenditure exclusion votes reported to the DLS Databank between FY2018 and FY2022. Over this time, there were 66 votes, 58 or 88% were wins and 8 or 12% were losses.

Capital Expenditure Exclusion Votes - Wins and Losses						
	FY2018	FY2019	FY2020	FY2021	FY2022	Totals
# Wins	18	19	9	7	5	58
\$ Wins	\$5,350,113	\$9,330,220	\$3,895,800	\$2,249,352	\$1,767,860	\$22,593,345
# Losses	5	1	1	0	1	8
\$ Losses	\$1,578,000	\$1,200,000	\$582,090	\$0	\$2,250,000	\$5,610,090

A Cautionary Note – Burden on Taxpayers

Local officials should evaluate the public's financial capability to pay the additional tax. The DLS Dashboard provides information on the community's average single-family residential tax bill shown in whole dollars and measured against income and property value. A growth in this average measured against income may present a fiscal stress upon the average property taxpaying family's ability to pay the property tax, which could result in disapproval of an override or exclusion vote by the electorate. To view your community's average single-family tax bill history, follow this [click here](#).

Final Thoughts

The spotlight of this article was on an area of fiscal stress caused by statutory property tax limits. The roadmap to safety requires local officials to understand the levy limits on the community's ability to tax imposed by Prop 2½ and how to apply the provisions of that law for fiscal budget stress relief from those limits.

Remember the important points from this article:

- Maximize new growth
- Decide whether an override is needed
- Check the community's levy ceiling
- Consider a debt or capital expenditure exclusion vote
- Evaluate if an override or exclusion vote is affordable to your public
- Use the [DLS Dashboard](#) and other resources on the [DLS website](#) for further guidance on the provisions of Prop 2½ and on other matters related to municipal finance

Editor: Dan Bertrand

Editorial Board: Marcia Bohinc, Linda Bradley, Sean Cronin, Emily Izzo, Lisa Krzywicki and Tony Rassias

Contact *City & Town* with questions, comments and feedback by emailing us at cityandtown@dor.state.ma.us. To view previous editions, please [click here](#).

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Massachusetts Department of Revenue - Division of Local Services - PO Box 7095 - Boston, MA 02204-7095 - USA

City Council – First Reading- August 16, 2023

- Interfund Transfer of \$7,650 from Executive Administration Salaries F/T to Accounting Salaries F/T.

CITY COUNCIL ORDER

City of Greenfield

MASSACHUSETTS

Councilor _____ :

Second by Councilor _____ :

The City Council

Upon recommendation of Mayor Wedegartner

An Order for Interfund Transfer of \$7,650

Move that it be Ordered, that

The sum of \$7,650.00 be transferred from Executive Administration Salaries F/T to Accounting Salaries F/T to adjust compensation of Finance Director for FY24.

Current Balance in account is \$77,492.46

Majority Vote Required

VOTE:

Explanation:

Compensation Adjustment for the Finance Director, who in the absence of the Chief of Staff is taking on position's essential functions.

Attachments:

1. Memo to Mayor.
2. Position Description for Finance Director



City of
GREENFIELD, MASSACHUSETTS



FINANCE DEPARTMENT

Diana M. Schindler

Finance Director

City Hall • 14 Court Square • Greenfield, MA 01301

Phone 413-772-1504 • Fax 413-772-1519

diana.schindler@greenfield-ma.gov • www.greenfield-ma.gov

July 24, 2023

To: Mayor Roxann Wedegartner
cc: Council President Guin, Council Vice-President Forgey
Fr: Diana M. Schindler, Finance Director
Re: Interim Chief of Staff Essential Functions

Dear Mayor,

Thank you for your confidence in my abilities to perform the Chief of Staff functions while the position is vacant – I'm excited to assist and believe I can be an asset during this period. Accordingly, I contacted the State Ethics Division for advice relative to Chapter 268A, §20, which addresses appointed officials holding multiple municipal positions. I spoke with Attorney John McDonald and he advised that while there is no exemption under Section 20 for the Finance Director position, meaning I cannot have two separate contracts with the City, the Finance Director position description can be amended to include a line that states "In the absence of the Chief Administrative Officer or Chief of Staff, the Finance Director assumes that role until it is filled." I've attached the current Finance Director job description and would suggest the paragraph be added after "Performs other similar or related work as required, or as situations dictate". Along with that change, the Finance Director salary can be adjusted accordingly to account for the additional time spent working on Chief of Staff duties. An interfund line-item transfer is needed from the Executive Administration Salaries to the Accounting Salaries. I've calculated approximately 18 weeks starting July 31 through December 1, 2023, for a total transfer of \$7,650.

Sincerely,

Diana Schindler

Diana M. Schindler
Finance Director

*The City of Greenfield is an Affirmative Action/Equal Opportunity Employer,
a designated Green Community and a recipient of the "Leading by Example" Award*

DIRECTOR OF MUNICIPAL FINANCE

Department: Municipal Finance
Division: N/A
Appointing Authority: Mayor

Grade: 13
Revision Date: 12/21
Bargaining Unit: NR

Definition:

Responsible for administrative, supervisory, technical and professional work in planning, organizing, directing, coordinating, monitoring and supervising all the municipal financial management operations for the City including the Treasurer/Collector, Accounting, Procurement and Assessing Divisions; for development of financial policies and practices as set forth in Charter Section 6-3 and the General Laws; for maintenance of municipal accounting systems, for financial reporting, for central procurement system; and for compliance with all legal and contractual obligations; all other work as required that is logical to the position.

Supervision:

Reports directly to and works under the policy direction of the Mayor who sets policy guidelines and financial planning and program goals; Exercises authority over financial operations in conformance with directives and objectives set forth by the Mayor, the City Council, and any other city, state and federal governing bodies.

Performs highly responsible work, requiring the exercise of considerable independent judgment in the planning, direction and control of the Financial and Fiscal operations for the City.

Directly supervises three division heads, and has direct responsibility for all employees of the Municipal Finance Department.

Environment:

Varied work in a multi-task environment. Work is generally performed under typical office conditions. Noise levels are usually quiet to moderate. Frequently required to work outside of normal business hours. May be required to work on weekends and may be contacted at home at any time to respond to important situations and emergencies.

Maintains contact, which requires perceptiveness and discretion, with other city officials, particularly the Director of the DPW, School Superintendent, School Business Manager, State and Federal agencies, attorneys, auditors, local businesses, community leaders, city employees, department heads, city councilors and the general public.

Duties require considerable persuasiveness, resourcefulness, discretion, and negotiating skills to address the decisions and behaviors of others.

Has access to city wide confidential information regarding the formulation of city-side policy, financial management, collective bargaining negotiations, procurement, personnel information, bid documents and legal matters(exclusive of medical records).

Errors in judgment and administrative decisions could result in lower standards of service, may adversely impact operations, result in inadequate project and operational funding, have legal repercussions, cause confusion or delay and cause an adverse impact on public opinion.

Essential Functions: (The essential functions or duties listed below are intended only as illustration of the various types of work that may be performed and are representative of those that must be met by an employee to successfully perform the essential functions of the job. 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.)

Plans, controls and directs all aspects of the Finance Department including the activities of the Treasurer/Collector, Accounting, Assessing and Procurement Divisions ; develops and recommends departmental policies, projects, procedures and practices; confers with division heads concerning ongoing and future projects. Monitors and coordinates the authorizing and financing of major capital projects emanating from all departments. Coordinates financial activities between the City and the Schools; advises the Mayor, City Council Ways and Means Committee and City Council of all financial matters.

Advises Mayor on revenue projections and budget targets on departmental budgets and management; Establishes, controls and directs the City's annual Budgeting and Financial Planning process; Oversees the development and implementation of the city's Annual operating budget and capital improvement plan.

Plans, controls and directs the development of a financial plan and proposed operational and capital improvement budget for the ensuing fiscal year. Presents city budgets and plans to the Mayor and City Council. Structures the annual agenda, and provides information the City Council may request or would benefit from in order to make spending decisions and carry out evaluations of departments and department head performance for which they hold authority.

Provides professional financial management advice to the Mayor, to the City Council, and to all department heads as needed to ensure sound short-term and long-term fiscal health for the City. Advises both the Mayor and City Council on technical aspects of financial and fiscal operations.

Develops and implements schedule(s) that meet deadlines; prepares and oversees capital debt borrowing strategies, including preparation of official statements of analysis of activities and effective centralized purchasing practices and procedures and consultation with the City's outside financial advisor, as well as the City Treasurer.

Leads management team to ensure accountability and planning in the organizing, delivering and funding for city services and departments; including as delegated by the Mayor to formulate or coordinate policies, programs, or organizational capability in major functions such as public safety, regional services, energy policies, public utilities and departmental realignments.

Plans, controls and directs Finance department personnel including training, staffing, and evaluation of employees for which they hold authority; reviews and approves departmental expenditures including payroll, procurement, and contracts for outside services; administers all short and long-term planning; maintains department records and correspondence.

Oversees the preparation of the department's operating and capital budgets, which includes the budgets for the Treasurer/Collector, Accounting, Procurement and Assessing Divisions. Presents the department's annual budget to the Mayor and the City Council; implements various programs and projects according to authorized budget appropriations.

In compliance with MGL Chapter 41, serves as Chief Procurement Officer, establishes, plans and directs the City's purchasing function through coordination with and delegation to payroll and procurement staff.

Works with the City Auditor on all financial matters before the City Council.

Represents the department at a variety of different meetings both within and outside of the city; develops and maintains effective working relationships with municipal, county, state, and federal officials and agencies to ensure compliance with all laws and regulations affecting the City's Financial Operations.

Establishes systems to ensure that all invoices, expenditures and payments are made in accordance with approved budgets and applicable laws. Coordinates for all city offices the purchase, lease or disposal of all goods and supplies.

Has primary responsibility for municipal policies on revenues, and for projecting revenue trends and monitoring performance.

Develops and manages cost and pricing models for specific services as needed; maintains revenue/expenditure general fund forecasting model and rate setting enterprise models; reviews all revenues and make recommendations concerning fees, charges, and Enterprise Fund rates. Ensures that all revenues and expenses relevant to the development of the municipal budget are accurately and promptly tracked; develops annual projections and multiple-year forecasts of such revenues and expenses; advises the Mayor and City Council Finance Committee of all matters on a regular basis.

Establishes systems for receiving and recording all cash receipts. Ensure a proper and timely turnover, proper recording, and develop a standard receipt form for all cash receipts from many varied sources. Establish controls that provide the timely reconciliation of the Treasurer's receipts to the City Accountant and the sending departments.

Plans and coordinates the City's interaction with the Massachusetts Department of Revenue, Bureau of Accounts, and Division of Local Services. Including but not limited to the annual Schedule A, Balance Sheet, Free cash, Cash reconciliations, Receivable Reconciliation, Debt Statement, CPA report, Snow and Ice Report and the Annual Tax Rate Certification process.

Plans and coordinates the Annual audit and Federal Single Audit. Coordinate the issuance of the City of Greenfield's Comprehensive Annual Financial Report (CAFR), a nationally recognized award issued by the Government Finance Officers Association (GFOA).

Ensures financial officers develop reports and procedures and communicate accurate information to each other, department heads, the Mayor and City Council, as required for policy decisions or by local ordinance and regulations of the Commonwealth. Establishes the schedule for the departments' preparation of such reports monthly, quarterly and annually.

Oversight of the city's bonding activity involving the public markets, bond rating agencies in conjunction with the Mayor, Treasurer, Accountant, Assessor, Procurement, City Solicitor, Bond Council and Financial Advisor.

Reviews appointment forms for city personnel for compliance with the city's budget; monitors and adjusts staffing levels with the Human Resources Director; works with Mayor, Human Resources Director,

Director of General Administration and Chief of Staff in confidential preparations for negotiations with multiple collective bargaining units; acts as leader in modernizing all data processing and information services with various department heads, and tracking IS plan for the city.

Serves as media contact on budgetary and financial matters; researches and presents public reports on operations, costs and revenue patterns; seeks federal and state grants and other sources of revenue; assumes a strong role in reviewing purchasing practices by either acting as or supervising the Chief Procurement Officer for the City pursuant to charter.

Works with department heads to develop and promote a "customer focused" approach, including the development of user friendly systems for taxpayers and other city departments; actively works with school business office to seek ways of sharing tasks and cutting costs.

Represents the Mayor in examining and signing warrants related to the expenditure of City funds, namely vendor and payroll warrants.

Performs other similar or related work as required, or as situations dictate.

Regular and predictable attendance.

Minimum Qualifications:

Education and Experience: Bachelor's Degree from an accredited college or university in Public or Business Administration, Finance, Accounting or closely related field; five (5) years of progressively responsible experience in public or municipal finance, three (3) years in a management capacity (experience may be concurrent); strong public administration background highly desirable; Master's degree preferred; or, a any combination of education and experience that enables performance of all aspects of the position.

Must demonstrate track record of high level responsibility with supervisory experience. Must demonstrate leadership skills in the context of formal organizations.

Knowledge, Ability and Skill: Strong leadership abilities to communicate effectively and in a courteous manner; be able to work cooperatively with peers, subordinates, committees, and the general public. Ability to develop sound financial policies and practices; ability to effectively motivate and supervise staff and department managers. Knowledge and competency with Massachusetts Uniform Accounting System (MAS), GASB and Division of Local Services reporting requirements. Aptitude for numbers and details. Excellent organizational skills.

Comprehensive knowledge of general laws and administrative policies governing municipal financial practices and procedure, principles, methods and laws relating to municipal bond financing. Thorough knowledge of municipal finance, budget management, investment markets, business principles, personnel management, information technology, intergovernmental relations and the laws which affect local government; extensive knowledge of MGL Chapter 6A, 41, 44, 30B, 60, 61, 61A, 61B, 149 and associative general laws relating to municipal taxes and charges; the ability to perform various accounting functions such as balancing, recording, and reporting over a broad range of accounts and funds.

Thorough working knowledge of departmental functions and operations; of standard office practices and procedures; of use and operation of standard office equipment; ability to operate a personal computer in a windows environment with proficiency in MS Office and G-Suite required; familiarity with MUNIS, other

database programs and computer hardware and financial software applications.

Planning and delegation skills; ability to plan, manage others, analyze and interpret financial data and to clearly communicate key findings to decision-makers and concisely, carry out projects, consult and offer advice, supervise subordinates and facilitate groups; Ability to develop effective working relationships with subordinates and other city departments, both staff and boards; requires highly effective written and oral communication skills to facilitate change and promote strategic thinking and ability to represent the City before an array of organizations. Strong organizational skills and the ability to manage a large number of projects and tasks at any given time. Must perform all aspects of job responsibilities with honesty and integrity.

Knowledge of public records law regarding the public's right to inspect and copy records in the custody of the office, including knowledge of retention periods for all records and the process and requirements for disposition.

Ability to lead and direct Division Heads to ensure foresight and accountability in organizing, delivering and funding all City services.

Ability to establish and maintain cooperative relationships with city officials and governmental representatives. Ability to communicate effectively.

Knowledge of technological developments for the purpose of investigating the possibility of how they potentially may be utilized to increase operating efficiencies or service level to the public.

Ability to negotiate contracts, agreements and appropriate working arrangements with vendors and consultants, community organizations and the business community.

Ability to analyze and synthesize a wide range of material from inside and outside municipal operations to formulate policies on behalf of the city and to make needed recommendations to the Mayor and City Council for the short and long-term benefit of the people of the City.

Ability to develop city wide plans, policies, programs, procedures, and organizational capability in major areas like public safety, regional services, energy policies, departmental realignments, and the like relative to the City's fiscal and financial operations. Ability to maintain confidential information. Ability to evaluate complex financial systems and efficiently formulate and install accounting methods, procedures, forms and records. Prepare informative financial reports.

Physical Requirements: Minimal physical effort generally required in performing duties under typical office conditions include regular sitting, talking, walking, hearing and mental concentration for extended periods; intermittent moderate effort required for tasks such as moving files or related office equipment. Position requires the ability to operate a keyboard and view computer screens for an extended period of time. Specific vision requirements include close vision, distance vision, and the ability to adjust focus; hearing ability requirements include ability to interact with subordinates, the public, elected or appointed officials and outside organizations.

Special Conditions: Must be bondable. Must successfully pass CORI, SORI and reference checks.

(This job description does not constitute an employment agreement between the employer and employee. It is used as a guide for personnel actions and is subject to change by the employer as the needs of the employer and requirements of the job change.)

Approved:

EXECUTED 12/28/2021 AND ON FILE IN THE HR DEPARTMENT

Human Resources Director

Date

Revision History: Initial 4/04, 7/18, 2/19, 12/21

Mayor