

MEMO

To: Selectboard
From: Town Administrator Lisa Wong
Re: DLS Request
Date: 2/13//26

Background

As part of the Budget Task Force report, there was a recommendation to have ongoing operational audits. There was also a recommendation to hire a Finance Director.

Parallel, the various departments that comprise Finance and Administration are and will be going through changes in the next year to five years, including retirements. This provides an opportunity to evaluate the structure of Town Administration, including Human Resources, and the three financial departments - Accounting, Assessing and Treasurer/Collector. The town needs to assess efficiency and also recommended services levels, as well as how we would structure the department if the town will need to reduce staff. For example, it is unlikely the full time clerk in the Treasurer/Collector department will be fully replaced, and the clerk in the Assessor office had been reduced many years ago. The town would also like to review the role of the Appropriations Committee and whether a Finance Committee is needed instead.

The Financial Management Resource Bureau (FMRB) has been working closely with municipalities across the Commonwealth for more than 30 years to enhance financial management practices. In every engagement, our team assesses the community's goals, challenges, and constraints to deliver practical advice to improve operations. Please note that FMRB project requests may only be made on behalf of the community's executive body/officer (i.e., selectboard, mayor).

More information including past reports:

www.mass.gov/financial-management-resource-bureau

Recommendation

The Selectboard vote to allow the town to submit a request for a review.

4/7/26 UPDATE

The Prudential and Water Commissions for both District 1 and 2 have voted unanimously to join the audit to review all financial personnel across entities. The Department of Revenue is fine with this and is on track to start the project mid-Summer. The next step would be to set up a meeting with DOR once a project manager is assigned to review the scope, timeline and expectations. No further action is required but Selectboard could endorse this development.