



**TOWN OF WENHAM**  
**CLASSIFICATION AND COMPENSATION STUDY**

**DRAFT FINAL REPORT**

**JANUARY 2023**



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## I. INTRODUCTION

GovHR USA, LLC (GovHR) is pleased to have had the opportunity to work with the Town of Wenham on this Classification and Compensation Study. Human resource management is a significant concern as governmental services continue to increase in cost and complexity, and the resources to fund local governments are constrained. Day-to-day operations present challenging administrative problems in planning, organizing, and directing human resource functions in order to achieve maximum efficiency and effectiveness in the delivery of municipal services. A properly developed and administered Classification and Compensation Plan forms the foundation for meeting these challenges. It helps to ensure that the Town can not only recruit the best and brightest employees but can also retain those employees, even in a competitive marketplace. By retaining qualified, experienced employees the Town avoids the costs of re-recruitments and lost productivity, while maximizing the benefits of the investments it has made in employees and the institutional and community knowledge acquired by those employees over their tenures.

GovHR understands the high expectations that have been established in Wenham for service delivery and competitiveness in recruiting and retaining excellent employees. These factors have been taken into consideration in the analysis and reflected in the Study results.

### A. Scope of Work

The scope of work called for GovHR to carry out the following:

#### **Job Evaluation Analysis and Job Classification System**

Below is a list of tasks included in this component of the Study (listed in the order that the work was performed):

- **Study preparation and project meetings.** Met with Town Administration to discuss Study methods and expectations, and to review the current Classification and Compensation Plan and organizational structure. Determined problem areas, answered questions, and reviewed the scope and schedule of work.
- **Material distribution.** Prepared a memorandum of explanation, which was distributed to employees. Held meetings with employees to discuss the Job Analysis Questionnaire (JAQ) and to explain the scope and purpose of the Study. Employees were allowed about ten (10) days to complete the questionnaire. The completed questionnaires were then reviewed by each employee's Supervisor and/or Department Head and Town Administration. The JAQs were returned to GovHR within approximately three (3) weeks of distribution.

- **Determined comparable communities and collected compensation data.** GovHR, along with the Town, determined a logical survey sample of “like” communities that impact the compensation market of Wenham. Then, GovHR designed and sent out the survey for the benchmark positions covered in the Study.
- **Job Evaluation Analysis and Establishment of a Classification Plan.** Upon return of the JAQs by the Town, GovHR performed the following:
  - Read each JAQ and corresponding Job Description in its entirety.
  - Conducted virtual interviews with at least one (1) employee in each position covered by the Study to further understand the scope of duties and responsibilities of the position.
  - Applied a measurement system of Job Evaluation Factors to all positions, which formed the basis for internal rankings (equity) of positions.
  - Upon completion of the Job Evaluation measurements, a new Classification Plan was developed.

### **Salary Survey**

The following tasks were included in this component of the Study:

- Tabulated, summarized, and analyzed comparative compensation information obtained from the comparable communities. Prepared pay tabulations that compared the salary ranges of the Town of Wenham to the salary ranges of its comparable communities. Prepared comparison calculations at the 50<sup>th</sup>, 60<sup>th</sup>, 65<sup>th</sup>, 75<sup>th</sup> and 80<sup>th</sup> percentiles. Displayed data for each jurisdiction and for each position and summarized the data in table form. Based on discussions with the Town and the gathered data, developed salary ranges that would establish Wenham as a payer at the 50<sup>th</sup> or 75<sup>th</sup> percentile of the salary data from the comparable communities.
- Based on the above data, developed, and recommended new salary schedules and recommended new Job Titles for some positions.

### **Draft and Final Report Preparation**

- A preliminary analysis of the data and recommended Classification and Compensation Plan was shared with the Town. Feedback from Town Administration was reviewed and incorporated into the recommendations.
- This draft report has been prepared by GovHR and sent electronically to the Town.
- A presentation of these draft findings will be conducted for Town Leadership.
- Once the presentation is made and review comments are returned by the Town a final report will be prepared and transmitted electronically.

## **II. EXECUTIVE SUMMARY**

A Classification and Compensation Study encompasses a significant amount of information that can be time consuming to condense and organize into an abbreviated format. Therefore, GovHR has compiled this Executive Summary in order to provide a quick synopsis regarding the major components, findings and recommendations of this Study. The purpose of a well-designed Classification and Compensation Study is twofold. First, it establishes internal equity (ranking) among employees across Departments in the Town. Second, it assures external equity/competitiveness by comparing the compensation of Wenham employees against market data.

### **A. Internal Equity - Classification Plan Development**

The Study developed a new Classification Plan for thirty (30) positions in the Town. To complete this task, the Consultant completed a Job Evaluation. The Job Evaluation included the completion of a questionnaire by all employees covered in the Study and interviews with at least one (1) employee working in each position covered by the Study (see Appendix A). Upon the completion of those tasks, the Consultants assigned a numerical value to each position so that like positions within the organization would be grouped together in a classification to produce an internal equity hierarchy. Nine (9) factors were used for the evaluation of Wenham's positions:

- 1) Preparation and Training
- 2) Experience Required
- 3) Decision Making and Independent Judgment
- 4) Responsibility for Policy Development
- 5) Planning of Work
- 6) Contact with Others
- 7) Work of Others (Supervision Exercised)
- 8) Working Conditions
- 9) Use of Technology/Specialized Equipment

The product of this internal ranking is shown in Table 1, which lists the Town's positions with their numerical Job Evaluation score, also known as a Classification Plan. The higher the Job Evaluation Score, the higher the position is within the Classification Plan.

**B. Job Title Changes**

After conducting the Job Evaluation noted above, the Consultants observed some inconsistencies with the market and the actual duties assigned to some positions. Therefore, the following Job Title changes have been recommended based on clarification of duties and market trends.

<u>Current Title</u>	<u>Proposed New Title</u>
Executive Secretary to Board of Assessors	Assistant Assessor

**C. External Equity – Market Competitiveness**

The next component of the Classification and Compensation Study involved establishing external competitiveness. A group of communities comparable to the Town was established. The Consultants started with Massachusetts communities in Essex, Middlesex and Suffolk Counties with populations between 1,500 and 25,000. After that, a specific set of comparison criteria (e.g., total assessed value, total budget, income per capita, etc.) was applied to each community (see Appendix B). Based on the results of this analysis, sixteen (16) communities with a total compatibility score of sixty-five percent (65%) or greater were deemed to be most comparable to the Town. The full list of the sixteen (16) chosen comparables is listed below.

<i>Boxford</i>	<i>Lincoln</i>	<i>Rowley</i>
<i>Carlisle</i>	<i>Merrimac</i>	<i>Salisbury</i>
<i>Essex</i>	<i>Middleton</i>	<i>Topsfield</i>
<i>Georgetown</i>	<i>Nahant</i>	<i>West Newbury</i>
<i>Groveland</i>	<i>Newbury</i>	
<i>Hamilton</i>	<i>Rockport</i>	

**Salary Data**

GovHR then prepared and distributed a salary survey to the sixteen (16) comparable communities. Nine (9) of the communities responded to the survey or supplied GovHR with a copy of their Compensation Plan/Union Contracts; data for five (5) additional comparable communities was obtained from their Town websites or previous studies conducted by GovHR. The salary summary results can be found in Table 2 and the detailed salary data can be found in Appendix C. To provide external competitiveness for the

Town's salaries, the salary ranges derived from this data collection were used to help establish the proposed Compensation Plan. In some cases where there was not enough salary range data, actual salaries were used. The recommended pay ranges are contained within Table 3 of the report.

### **Proposed Classification and Compensation Plan**

The goal of this Study was to recommend a Classification and Compensation Plan that is internally equitable and externally competitive. To accomplish this, a Compensation Plan was developed using the 50<sup>th</sup> or 75<sup>th</sup> percentile comparison of the salary ranges that were acquired through the salary survey. The resulting Classification and Compensation Plan consists of ten (10) pay grades; one (1) being lowest and ten (1) being highest and is broken down into the following three (3) bands:

Grades 1 – 3: Administrative and Technical Staff

Grades 4 – 6: Supervisors and Advanced Technical Staff

Grades 7 – 10: Directors and Senior Manager

All proposed pay ranges are open ranges. There is a 5% gradation between Grades 1 – 3, a 5% gradation between Grades 4 – 6 and a 15% gradation between Grades 7 – 10. Grades 1 – 6 have a 30% range spread from minimum to maximum and Grades 7 – 10 have a 40% range spread from minimum to maximum.

### **Future Administration of the Classification and Compensation Plan**

Within the body of this report, GovHR has outlined how the Town can maintain the Classification and Compensation Plan. GovHR will supply the Town with a User's Manual and all associated documents to maintain the Classification and Compensation Plan and the steps to ensure the Town remains competitive with the market in the years to come.

## **III. JOB EVALUATION**

GovHR's approach to Job Evaluation involves a quantitative point and factor comparison method, which cross-compares all positions in the organization against numerous factors such as educational requirements, experience, work conditions, etc. Therefore, all jobs in each organizational unit (e.g., Police, Administration, Finance, etc.) may be compared against each other, based upon the same factors.

In conducting the Job Evaluation exercise, it must be emphasized that the position, and not the incumbent's qualifications, performance, or years of service in the position, is evaluated. An incumbent



employee may feel he/she should be placed in a higher level (i.e., receive more points) because the individual performs well, has a long tenure with the organization, and/or has additional education or skills not required to perform that job, or may feel he/she does more tasks than a similar employee in another Department, but these are not valid determinants for a position.

Before reviewing the results of the evaluation of the positions, it is important to note that the purpose of a Job Evaluation is to identify whether a job is more or less advanced than, or equal to, other jobs in the organization, based on nine (9) objective factors. While these factor definitions are guidelines, they are constructed to allow limited flexibility of interpretation while at the same time providing a strict framework and structure for comparison. The nine (9) factors used for the evaluation of Wenham's positions are as follows:

- 1) Preparation and Training
- 2) Experience Required
- 3) Decision Making and Independent Judgment
- 4) Responsibility for Policy Development
- 5) Planning of Work
- 6) Contact with Others
- 7) Work of Others (Supervision Exercised)
- 8) Working Conditions
- 9) Use of Technology/Specialized Equipment

As part of the Job Evaluation process, the duties, responsibilities, and qualification requirements for each position were reviewed via a thorough reading of the incumbent's current job description and a Job Analysis Questionnaire (JAQ) completed by each employee (Appendix A). In addition, GovHR conducted interviews with at least one (1) employee in each of the positions covered by the Study. Points were then assigned to each factor by selecting the description that best fit the appropriate level of compliance. In other words, a position that requires a master's degree would receive more points under the "Preparation and Training" factor than positions that did not require this advanced degree. Points for each factor were then totaled for each position. Using this method, the positions were found to fall into distinguishable Job Factor Analysis (JFA) scores. Table 1 contains the Classification Plan, including the Position Title, the Proposed New Title (if applicable), the JFA Score, Skill Level and proposed Grade for the evaluated positions.

As part of the service provided in the Compensation Study, GovHR makes Job Title change recommendations to either reflect a better description of the job being performed or to be consistent with trends in the organization or the marketplace. Based on this, GovHR recommends the following Job Title changes:

**Current Title**

**Proposed New Title**

Executive Secretary to Board of Assessors

Assistant Assessor

**IV. THE CLASSIFICATION PLAN**

A Classification Plan provides for a systematic arrangement of positions into classifications. A position, often referred to as a job (e.g., Office Assistant), contains a specific set of duties and responsibilities and that is the objective of the classification process – not the person currently holding that job. A classification is a grouping of positions which have similar levels of knowledge, skills and abilities needed to perform the job. The positions are also similar in nature of work, level of work difficulty and responsibilities. Positions allocated to the same classification are sufficiently similar with respect to the types of factors enumerated above to permit them to be compensated at the same general level of pay. The positions do not have to be identical, they can be in different departments, dealing with different subject matters and performing different duties.

It is this arrangement of positions and resulting classification structure that forms the basis for the Classification Plan. As noted in the previous section, a Job Evaluation and Classification Plan is not intended to assess individual performance. To that end, a position that belongs in a certain classification is not entitled to be placed in a higher classification simply because the individual performs with a high degree of success and efficiency, nor is it placed in a lower classification simply because the incumbent performs with low competence or productivity. Variations in individual performance are not recognized by differences in classifications, instead they are management issues. Similarly, there is a tendency in some work forces to use the Classification Plan to reward longevity, even though the duties and responsibilities of individual positions may not have changed over time. Longevity is not a classification factor and the Classification Plan should not be used in this manner.

As an assessment of duties performed and of responsibilities exercised, a Classification Plan is an exceedingly useful managerial tool. It provides the fundamental rationale for the Compensation Plan and helps management identify positions which have taken on (or in some cases reduced) duties and

responsibilities. Through proper maintenance of the Classification Plan, employees are assured of management’s continuing concern about the nature of work that they carry out and its reward in the form of appropriate pay levels and relationships. The Classification Plan also provides the basis for recruitment, screening, and selection of employees in direct relationship to job content. Promotional ladders as well as opportunities for lateral career development are also evidenced by the logical grouping of allied occupational classifications and hierarchies.

**V. SALARY DATA**

The Town initiated this Study with the objective of assuring that its Compensation Plan is both internally equitable and externally competitive. The Job Evaluation System (outlined in Section III) is performed to address the issue of internal equity. To achieve external competitiveness, a market survey of comparable jurisdictions was conducted. The following explains the labor market review and collection of salary data.

**A. Selection of Comparable Jurisdictions for Data Purposes**

Selecting jurisdictions for the comparison group is an important element in a Classification and Compensation Study. When selecting jurisdictions to serve as comparables, it is important to use particular criteria to evaluate the other jurisdictions to assure that those chosen as comparables will be the most similar to Wenham.

To determine which municipalities should be used for survey purposes, GovHR first considered all Massachusetts communities in Essex, Middlesex and Suffolk Counties with populations between 1,500 and 25,000. Then, the following set of comparison criteria was applied to each community:

<u>Criterion</u>	<u>Total Possible Points</u>	<u>Factor Weight</u>
1. Population	15	15%
2. Per Capita Income	15	15%
3. Equalized Value Per Capita	15	15%
4. General Fund Expenditures	15	15%
5. Total Assessed Value	15	15%
6. Tax Levy	15	15%
7. State Aid	5	5%

8. Proximity	5	5%
	100	100%

The eight (8) categories listed above were selected to mirror important criteria that reflected the following:

- 1) Similar Financial Conditions: 80% of the criteria involved financial benchmarks.
- 2) Population: 15% of the criteria involved a population comparison.
- 3) Proximity: 5% of the criteria involved the proximity of the communities to Wenham.

Within each of the eight (8) categories, ranges of compatibility were established. For example, the closer a community was to matching the Wenham’s estimated population, the closer the community would be to receiving the maximum of fifteen (15) points. A community whose population was significantly larger or smaller than the Town’s population would receive fewer or even zero (0) points. Thus, a municipality achieving a total of one hundred (100) points would be considered most comparable to the Town of Wenham. A community with zero (0) points was therefore determined to be the least comparable to Wenham. A more detailed explanation of the methodology used to determine the comparable communities is included in Appendix B.

A cutoff of sixty-five (65) points was established to select the communities most similar to Wenham across the eight (8) categories. After applying the eight (8) criteria, sixteen (16) communities achieved sixty-five (65) or more compatibility points on the comparison scale with Wenham. The full list of the sixteen (16) comparables is below:

<i>Boxford</i>	<i>Lincoln</i>	<i>Rowley</i>
<i>Carlisle</i>	<i>Merrimac</i>	<i>Salisbury</i>
<i>Essex</i>	<i>Middleton</i>	<i>Topsfield</i>
<i>Georgetown</i>	<i>Nahant</i>	<i>West Newbury</i>
<i>Groveland</i>	<i>Newbury</i>	
<i>Hamilton</i>	<i>Rockport</i>	

## **B. Salary Survey**

The Consultants then prepared and distributed a salary survey to the sixteen (16) comparable communities. Eight (8) of the comparable communities had recently provided salary data for some of the surveyed positions to GovHR as part of studies conducted on behalf of other Towns. Those eight (8) communities received abbreviated surveys and GovHR incorporated the previously gathered data into Wenham's data set.

Seven (7) of the communities responded to the survey or supplied GovHR with a copy of their Compensation Plan/Union Contracts; data for seven (7) additional comparable communities were obtained from their Town websites or previous studies conducted by GovHR. Table 2 is a summary of the benchmark salary survey data. The detailed salary survey data for each position is contained in Appendix C.

It is important to make a few of observations regarding Table 2 and Appendix C.

- 1) The salary data is information that was available as of October – November 2022. The new recommended salary ranges for the Town were developed using this salary data from the comparable communities.
- 2) Some of the comparable municipalities provided salary range minimums and maximums for comparison purposes, while others (those that don't utilize salary ranges as part of their pay plans) provided actual salaries for surveyed positions. The salary range minimums and maximums were analyzed to determine the 50<sup>th</sup>, 60<sup>th</sup>, 65<sup>th</sup>, 75<sup>th</sup> and 80<sup>th</sup> percentiles to identify wage ranges for "average" and "above average" payers. Any actual salaries provided by the comparable municipalities were only analyzed in a few instances when there was not enough salary range information. Salary ranges are a better gauge of market salaries than an actual salary and are thus preferred to conduct analysis.
- 3) Salary ranges associated with positions that have been reclassified may not be consistent with other salary ranges in a particular Grade.
- 4) Data contained within Appendix C has been thoroughly reviewed. If the Consultants determined the data was not relevant, it was removed. Thus, if a specific position within the salary survey has two worksheets associated with it in Appendix C, then data was removed. The second data sheet will have the word "Edited" after the title of the position surveyed. If a specific data point was

removed, it is highlighted on the first and second worksheets and then removed on the second worksheet associated with the position.

### **C. Appraisal and Use of Salary Data**

While comparing Wenham's current salaries to those paid by other employers in the comparable communities, it must be noted that variations in compensation may be due to several factors, including:

- 1) Organizational size and economic conditions can have an impact on positions. In smaller organizations, employees are often asked to "wear many hats" and therefore take on more duties and responsibilities than would normally be required of a certain position. In addition, the economic downturn forced organizations to "do more with less", compelling staff to take on more duties and responsibilities than they have in the past. Therefore, it becomes increasingly harder to compare "like" positions within organizations.
- 2) Some employers place a different relative worth on certain groups of employees. For example, some employers are forced to place a higher value on certain employees or groups of employees because of the market, and therefore, pay them more. Overall, the policies and value judgments of different employers in compensating the same kind of work can vary widely. There is rarely a single prevailing rate for any particular kind of work, even within the same labor market.
- 3) It can be difficult to make exact comparisons among the different employers of the duties and responsibilities of ostensibly similar jobs.

Nevertheless, comparative salary data is widely recognized as a good measure of the appropriate compensation rates with respect to the prevailing market. This data is also useful as an indication of prevailing opinions concerning the compensation relationships that should exist among different classifications of work. Of equal importance, however, are the internal relationships for the various positions that were accomplished in the Job Evaluation portion of this Study.

## **VI. COMPENSATION PLAN DEVELOPMENT AND RECOMMENDATIONS**

### **A. Development of the Compensation Plan**

A basic element in any human resources management program is adequate and equitable employee compensation. A Compensation Plan of this nature is essential if qualified employees are to be recruited and retained. To achieve this goal, there must be a reasonable and widely accepted model of Job Factors

upon which the Compensation Plan rests. Application of this model was the purpose of the Job Evaluation aspect of this Study. The Plan presented in this report is designed to accomplish the Study goals by:

- 1) Providing for equal compensation for work of equivalent job content and responsibility.
- 2) Facilitating adjustments to compensation levels based on changing economic and employment conditions that impact these interrelationships.
- 3) Establishing compensation ranges that compare favorably with those of other equivalent jurisdictions within the appropriate labor market.

In preparing this Plan, the Study only looked at base compensation. The compensation associated with longevity or other fringe benefits was not analyzed or factored into the Compensation Plan.

## **B. Compensation Plan Options for the Town's Consideration**

One of the purposes of this Study was to provide an updated Compensation Plan that relates to the external market and is internally equitable. Below is a detailed explanation of three (3) different Compensation Plans:

- 1) **Defined Increment Plan:** This is a Compensation Plan that has salary ranges with a minimum and a maximum with defined percentage increments (e.g., 3%) in between. If an employee has a satisfactory performance evaluation, he/she systematically advances through the compensation range. The performance evaluation and resulting salary increment increase occurs annually.
- 2) **Open Range Merit Plan:** This is a Compensation Plan that also has salary ranges with minimums and maximums, but without defined percentage increments in between. Employees are advanced through the compensation range based on an annual satisfactory performance evaluation, with the percentage of their increase determined annually by Town Administration.
- 3) **Blended Merit Plan:** This is a Compensation Plan that uses techniques from both a Defined Increment Plan and an Open Range Merit Plan.

In considering which Plan to use, it is important to understand that employees at various levels of responsibility may react differently toward, and be motivated differently by, the Compensation Plan they work under. Management personnel that are goal-oriented may have a higher acceptance of the Open Range Merit Plan, and thus tend to be more comfortable with this method of compensation. Mid to lower-level positions may want the assurance of a defined salary increase based on satisfactory performance. Possible advantages and disadvantages of each Plan are summarized below.

## **Defined Increment Plan**

### **Advantages**

Town: A Defined Increment Plan has the advantage of creating financial predictability because it is easier for management to predict and plan for salary increases on an annual basis.

Employees: Employees like a Defined Increment Plan because it offers security and predictability for advancement through the range. Another advantage of this Plan is that it offers a high degree of internal equity and fairness – the expectation that fellow workers in this Plan are all being treated the same.

### **Disadvantages**

Town: The Town may feel that a Defined Increment Plan simply rewards compensation increases on a routine basis. However, by tying the increase to a satisfactory performance evaluation, the Town can be assured that only employees with acceptable performance will receive a salary increase.

Employees: Employees may feel unmotivated to perform at an above average or at a superior level, knowing their salary increase amount is pre-determined. One way to remove this negative notion is to allow an employee with a superior performance evaluation to get a two (2) increment increase. This, however, would be the exception and not the rule. Most employees would be considered “average” performers and receive a one (1) increment increase.

## **Open Range Merit Plan**

### **Advantages**

Town: The Open Range Merit Plan tends to motivate employees to perform at a higher level, thereby achieving greater production/benefit for the Town. This Plan also enables the supervising authority to reward high-performing employees with a salary increase greater than a defined increment.

Employees: Employees who are high performers like working under this Plan as they can earn a higher percentage salary increase.

### **Disadvantages**

Town: Anticipating the cost of merit increases has less financial predictability, as it is not always possible to know how many employees will be high performers in any given year. However, the Town can fund a “merit increase pool” for all Open Range Merit Plan employees to receive an average



percentage (i.e., a 2-3% increase), knowing that some employees will receive less (or no) increase and some employees will earn more.

Employees: An Open Range Merit Plan can create a perceived inequity regarding how individuals are granted salary increases. It is incumbent upon management to use an equitable performance evaluation system when implementing this Plan. It is also incumbent on management to ensure that the performance evaluation system is applied fairly and that supervisors receive appropriate training on conducting the evaluation and using the evaluation tool properly.

### **Blended Merit Plan**

There are positives and negatives for both Defined Increment and Open Range Merit Plans. However, it is also possible to design a pragmatic salary system that uses elements of both Defined Increment and Open Range Merit Plans. It is becoming increasingly common for organizations to have a Blended Merit Plan for various levels of positions that reflects the particular circumstances and culture of the organization. A Plan of this type is customizable to the needs of the organization. It is also the preferred Plan for organizations that are transitioning from a Defined Increment Plan to an Open Range Merit Plan. The following is one example of a Blended Merit Plan:

**Exempt:** All exempt employees are in an Open Range Merit Plan.

**Non-exempt:** Non-exempt employees are in a Blended Merit Plan. In this Plan, salary ranges begin at the minimum with, for example, three (3) defined increments and then transition into an open range. The initial increment of the assigned range is intended as the normal hiring/promoting rate. Increments two (2) and three (3) would be awarded upon successful completion of the employee's initial evaluation period and/or after another period that is set by the Town (e.g., increment two (2) after the initial evaluation and increment three (3) after an additional year of employment.) After that, the employee may advance through the open range as a result of a successful performance evaluation.

### **C. Recommendation: Open Range Merit Plan**

GovHR is recommending that the Town adopt an Open Range Merit Plan. An Open Range Merit Plan has salary ranges with minimums and maximums, but without defined percentage increments in between.

Employees are advanced through the ranges based on an annual satisfactory performance evaluation, with the percentage of their increase determined by their supervisor and Town Administration.

The Open Range Merit Plan also allows maximum flexibility for the Town relative to recruitment and funding as employees can be hired within the range and the increases provided annually for meritorious performance can fluctuate based on available funding. Given Wenham's goal to recruit, reward and retain motivated, high-performing employees, the Open Range Merit Plan has been selected for recommendation.

#### **D. Pay Philosophy**

An important component in the process of developing a Compensation Plan is understanding and applying the pay philosophy of the Town. In Wenham, the Town subscribes to a pay philosophy of compensation employees at a rate at the 50<sup>th</sup> or 75<sup>th</sup> percentile.

#### **Proposed Compensation Plan and Structure**

The next step in this process is to combine the JFA scores included in Tables 1 and 2 with the proposed salary ranges in Table 3. The Classification and Compensation Plan consists of ten (10) pay grades; one (1) being lowest and ten (1) being highest and is broken down into the following three (3) bands:

Grades 1 – 3: Administrative and Technical Staff

Grades 4 – 6: Supervisors and Advanced Technical Staff

Grades 7 – 10: Directors and Senior Manager

All proposed pay ranges are open ranges. There is a 5% gradation between Grades 1 – 3, a 5% gradation between Grades 4 – 6 and a 15% gradation between Grades 7 – 10. Grades 1 – 6 have a 30% range spread from minimum to maximum and Grades 7 – 10 have a 40% range spread from minimum to maximum.

**Note 1:** Different compensation grades may have different ranges from minimum to maximum compensation. It is appropriate for the lower grades in a Compensation Plan to have a smaller spread from minimum to maximum as it is likely that new employees would start at the minimum compensation of the range. Conversely, it is more likely that more experienced employees or Department Head level employees may be hired at a rate above the minimum compensation of a range, thus it is necessary to have a greater spread from minimum to maximum compensation.

**Note 2:** Gradation refers to the relationship between the minimum compensation of one grade to the minimum compensation of the next grade. In this case, the starting compensation for employees in Grade 2 is 5% higher than Grade 1 and so on. The gradation will vary depending upon the relationship between the salary data for the grade, the number of grades in the compensation band and the established compensation range.

Table 2 combines all of the classification and compensation data at the 50<sup>th</sup> and 75<sup>th</sup> percentile.

### **Implementation and Administration of the Compensation Plan**

Implementation of the Compensation Plan, as it affects individual employees, should be under the following pattern of adjustments:

- 1) Employees whose present compensation is below the minimum compensation of the range for their classification should be raised to the minimum of the range.
- 2) The compensation of employees whose present compensation is within the range for their classification should be slotted into the new Compensation Plan at their current pay rate.
- 3) The compensation of employees whose present compensation is above the maximum compensation of the range should be held at their present rate, without a reduction in compensation, until such time that further market analysis indicates commensurate alignment with the marketplace. However, the Town can consider lump sum increases for these employees, which does not impact base compensation levels, until the ranges adjust to include the individual employee compensation rates.

In other studies, GovHR has been asked for ideas on how to address the situation of long-term employees whose current compensation falls near the bottom (within 5 - 10%) of the proposed range. If this occurs, it illustrates that the position has been compensated at less than the market rate for someone with similar tenure. Thus, some communities elect to make additional adjustments for those employees at implementation. This program is discretionary for the Town to adopt and only occurs one time, at the implementation of the new Classification and Compensation Plan. If the Town wishes to consider such a program, an example is illustrated below:

<b>Service</b>	<b>Adjustment</b>
1 - 3 Years	0%
Over 3 and up to 8 Years	1%
Over 8 and up to 15 Years	2%
Over 15 Years	3%

### **Employee Advancement through the Ranges**

To implement the new Compensation Plan, GovHR recommends that the starting salary of the range (minimum) is the normal hiring/promoting rate. Exceptions to this starting point should be limited to hiring situations involving:

- 1) Applicants with exceptional background and qualifications.
- 2) A promotion in which the employee's current compensation is higher than the minimum of the new range.
- 3) In the case of a labor market situation where it is impossible to recruit qualified candidates at the minimum.

In these cases, employees may be appointed to their positions anywhere within the defined range (generally up to the midpoint), depending on their experience and qualifications, and based on the provisions of the Town's policies (if applicable). Employees should not be hired below the minimum of their compensation range.

Salary advancement between the hiring rate and the top of the range (maximum) is done throughout the employee's tenure with the organization. Advancement through the range would be done on an annual basis and be dependent on a satisfactory performance evaluation. Incumbents progressing through the range should understand that standards of performance would become more exacting or controlling as compensation levels advance. Typical movement through the range could be in increments of 1% to 3%, depending on the employee's performance evaluation and goal attainment, as well as the financial resources of the Town.

The Town may also wish to provide a merit bonus for exemplary performance after an employee reaches the maximum compensation for the range. If this option is exercised, then an employee would be eligible to receive a payment after a successful performance evaluation each year. This payment should not be

worked into the base salary. It can be in the form of a lump sum payment that is a set amount calculated each year and the same for all employees, such as \$500 for meeting expectations and \$1,000 for exceeding expectations. Another option is to calculate a percentage of the employee's base compensation and provide a lump sum payment equivalent to that amount, such as 1% for meeting expectations and 2% for exceeding expectations.

It is recommended that the Town set aside a "merit pool" every year, to fund increases for employees in this Plan. This money would then serve as the pool for merit payments, knowing that some employees will be high performers, getting a higher percentage, and some employees will be lower performers, getting a lower percentage.

Again, it should also be noted that the implementation and use of a formal performance evaluation process for all staff members is a key component to the success of this Plan. Equally, if not more important, is that supervisors are adequately trained to perform the formal performance evaluation process.

#### **E. Future Administration of the Compensation Plan**

To maintain competitive salary levels there should be an annual review of the Town's salary ranges. The sixteen (16) communities used in the survey group for this Study have been determined to be comparable jurisdictions to the Town. Therefore, Wenham can continue to use these jurisdictions as a comparable salary survey group for annual salary comparison purposes, until it is determined that they are no longer valid comparables. As mentioned earlier, the salary levels for these comparables are current as of October – November 2022. It is GovHR's recommendation that an annual survey of these communities be conducted to determine the percentage increase each organization in the comparable group is granting, either as an annual across-the-board increase to their employees or as a general adjustment to their compensation ranges. The Town may wish to provide an across-the-board increase to all employees based on the information received from the comparable communities. If this is the case, then the increases would be granted separately from any merit increase that would be awarded as a result of a successful performance evaluation.

It is the further recommendation of GovHR that the compensation ranges for each grade be increased by the average percentage increase of the comparable group, even if an across-the-board increase is not

given to all employees. Employees would continue to advance through the compensation ranges (provided that the employee is not at the maximum of the compensation range) by virtue of a merit increase granted for satisfactory or above satisfactory performance of their job duties. Finally, it is recommended that the Town review the compatibility of the municipalities after five (5) years.

#### **F. Future Administration of the Classification Plan**

The administration of a Classification Plan is an ongoing process. It must be recognized that it is not static and is not intended to affix positions permanently into classifications. Instead, the Plan must be administered continually to adapt it to changing conditions.

Three (3) specific types of changes in the Plan itself are possible: abolition of a position, creation of a position, or a revision of a position.

- 1) When a position in a classification is eliminated or when a position has significantly changed work duties and responsibilities to the extent that the position becomes inappropriate or inaccurate, the position should be abolished.
- 2) New positions should be created when new work situations arise that are not covered by the established positions. However, caution should be exercised in this respect, particularly to assure that new positions are justified, are not merely duplicating established positions, cannot be accommodated through changes in existing positions, and reflect substantially permanent rather than temporary situations.
- 3) The adjustment or revision of a position should be done when there are substantial changes to the requirements of the position or to the nature and complexities of the duties being performed. In this instance, a position may need to be re-scored and move up or down into a new classification.

All changes should be thoroughly evaluated for their effect on employee morale and the integrity of the classification relationships established in the Classification and Compensation Plan. Town Administration has been provided with the Job Analysis Questionnaire as well as the Job Factor Scoring Sheet, enabling the Town to grade a newly created or revised position. GovHR provides scoring assistance in such cases free of charge for one (1) year after the delivery of this report.

**Appreciation**

GovHR has appreciated the opportunity to work with the Town of Wenham on this Classification and Compensation Study. A special thank you to the employees for all of the information provided to allow for the analysis and to the Town Administration for the significant amount of work and support dedicated to the project.

Table 1 - Classification Plan

Current Job Title	Recommended Job Title Change	Grade	Total Score	Skill Level
<b>Directors and Senior Managers</b>				
Police Chief		10	760	755+
Fire Chief			760	
Finance Director/Town Accountant		9	725	705 to 750
DPW Director			720	(45 points)
Library Director			715	
Water Superintendent			710	
Deputy Fire Chief		8	695	655 to 700
Deputy Police Chief			695	
Planning Coordinator			665	
Treasurer Collector			665	
Inspector of Buildings			660	
Assistant Director Library		7	625	605 to 650
Town Clerk			625	
Council on Aging Director			620	
Facilities Manager			620	
Assistant Town Administrator			615	
<b>Supervisors and Advanced Technical</b>				
Children's Librarian (Head of Dept.)		6	565	555 to 600
Exec. Asst. to Town Administrator			560	
Exec. Sec. to Assessors	Assistant Assesor		560	
Conservation & Open Space Coordinator			555	
Head of Circulation			550	
Head of Reference		5	525	505 to 550
Head of Technical Services			525	
Young Adult Librarian		4	485	455 to 500
Adult Services Librarian			485	
Reference and Technology Librarian			485	
Firefighter			480	
Assistant Treasurer/Collector			470	
<b>Administrative and Technical</b>				
No Positions in Grade		3		355 to 400
Library Assistant II		2	350	305 to 350
Library Assistant I		1	290	To 300



Table 2 - Comprehensive Table

Job Title	JFA Score	Skill Level	New Grade	50th Percentile Salary Survey Data		75th Percentile Salary Survey Data		Current Salary	Proposed Salary Range 50th Percentile		Proposed Salary Range 75th Percentile	
<b>Directors and Senior Managers</b>												
Police Chief	760	755+	10	108,583	136,323	112,934	145,770	147,576	93,534	130,947	99,617	139,464
Fire Chief	760			101,144	123,552	104,457	130,515	120,890				
Finance Director/Town Accountant	725	705 to 750	9	89,320	121,576	108,873	129,769	115,003	81,334	113,867	86,624	121,273
DPW Director	720	(45 points)		93,600	123,552	106,756	128,922	124,800				
Library Director	715			78,077	96,546	80,782	108,835	88,543				
Water Superintendent	710			88,982	100,398	90,292	105,498	105,310				
Deputy Fire Chief	695	655 to 700	8					115,565	70,725	99,015	75,325	105,455
Deputy Police Chief	695			93,600	119,600	99,590	120,297	120,786				
Planning Coordinator	665			73,517	97,879	82,465	107,008	52,286				
Treasurer Collector	665			85,917	102,981	87,963	117,659	89,648				
Inspector of Buildings	660			75,962	104,775	85,328	107,130					
Assistant Director Library	625	605 to 650	7	57,000	67,000	65,260	85,179	65,320	61,500	86,100	65,500	91,700
Town Clerk	625			70,158	85,097	54,960	71,329	70,000				
Council on Aging Director	620			61,568	80,766	79,976	95,485	52,965				
Facilities Manager	620											
Assistant Town Administrator	615			85,917	120,284	89,759	120,982	75,000				
<b>Supervisors and Advanced Technical</b>												
Children's Librarian (Head of Dept.)	565	555 to 600	6	48,558	57,000	50,603	58,235	63,591	52,369	68,079	56,779	73,812
Exec. Asst. to Town Administrator	560			49,565	65,909	54,960	71,329	72,634				
Exec. Sec. to Assessors	560			46,017	61,357	46,052	61,403	69,733				
Conservation & Open Space Coordinator	555			49,497	68,820	64,586	81,722	30,628				
Head of Circulation	550			48,326	57,932	50,115	59,122	53,199				
Head of Reference	525	505 to 550	5	50,603	58,235	50,680	59,496	63,281	49,875	64,838	54,075	70,298
Head of Technical Services	525			53,546	71,395	65,023	86,697	52,179				
Young Adult Librarian	485	455 to 500	4	48,443	55,349	48,500	55,493	62,026	47,500	61,750	51,500	66,950
Adult Services Librarian	485							47,830				
Reference and Technology Librarian	485											
Firefighter	480			57,483	64,889	57,565	68,467	59,134				

Table 2 - Comprehensive Table

Job Title	JFA Score	Skill Level	New Grade	50th Percentile Salary Survey Data		75th Percentile Salary Survey Data		Current Salary	Proposed Salary Range 50th Percentile		Proposed Salary Range 75th Percentile	
Assistant Treasurer/Collector	470			55,155	64,358	59,023	76,455	63,374				
<b>Administrative and Technical</b>												
No Positions in Grade		355 to 400	3						36,934	48,014	40,241	52,314
Library Assistant II	350	305 to 350	2	38,979	44,637	43,160	53,362	18,653	35,175	45,728	38,325	49,823
Library Assistant I	290	To 300	1	36,026	44,637	38,979	54,454	17,863	33,500	43,550	36,500	47,450

Table 3 - Proposed Pay Ranges

50th Percentile - Proposed Pay Ranges		
Administrative and Technical <i>5% Between Each Grade and a 30% Range Spread</i>		
	Minimum	Maximum
<b>1</b>	33,500	43,550
<b>2</b>	35,175	45,728
<b>3</b>	36,934	48,014

75th Percentile - Proposed Pay Ranges		
Administrative and Technical <i>5% Between Each Grade and a 30% Range Spread</i>		
	Minimum	Maximum
<b>1</b>	36,500	47,450
<b>2</b>	38,325	49,823
<b>3</b>	40,241	52,314

Supervisors and Advanced Technical <i>5% Between Each Grade and a 30% Range Spread</i>		
	Minimum	Maximum
<b>4</b>	47,500	61,750
<b>5</b>	49,875	64,838
<b>6</b>	52,369	68,079

Supervisors and Advanced Technical <i>5% Between Each Grade and a 30% Range Spread</i>		
	Minimum	Maximum
<b>4</b>	51,500	66,950
<b>5</b>	54,075	70,298
<b>6</b>	56,779	73,812

Directors and Senior Managers <i>15% Between Each Grade and a 40% Range Spread</i>		
	Minimum	Maximum
<b>7</b>	61,500	86,100
<b>8</b>	70,725	99,015
<b>9</b>	81,334	113,867
<b>10</b>	93,534	130,947

Directors and Senior Managers <i>15% Between Each Grade and a 40% Range Spread</i>		
	Minimum	Maximum
<b>7</b>	65,500	91,700
<b>8</b>	75,325	105,455
<b>9</b>	86,624	121,273
<b>10</b>	99,617	139,464

# APPENDIX A

## EMPLOYEE JOB ANALYSIS QUESTIONNAIRE (JAQ)

Town of Wenham, MA

NAME:	DATE:
YEARS OF EXPERIENCE WITH EMPLOYER:	JOB TITLE:
YEARS OF EXPERIENCE ON THIS JOB:	YOUR JOB IS: FULL TIME <input type="checkbox"/> PART TIME <input type="checkbox"/>
YOUR YEARS OF EXPERIENCE IN THIS FIELD:	YOUR EDUCATION: <input type="checkbox"/> High Sch. <input type="checkbox"/> Assoc. Deg. <input type="checkbox"/> Bach. Deg. <input type="checkbox"/> Mas. Deg.
NAME OF IMMEDIATE SUPERVISOR:	HIS/HER TITLE:

### INSTRUCTIONS

The purpose of this questionnaire is to obtain additional information about your job that may not be included in your current job description. Please answer each question thoughtfully and frankly. After you have finished your portion of the questionnaire, give it to your immediate supervisor, who will complete his/her section.

**General Summary:** In three or four sentences, please summarize the major purpose or primary function of your job.

Please indicate if you have reviewed your current job description.

If you have any changes to your current job description, please mark them on the JD and attach it to this JAQ, or indicate changes here:

If you do not have a job description available to review, please list your job duties. Try to place your duties in order of importance and group "like" tasks together (e.g., "clerical duties including word processing, opening mail, filing, etc." or "front desk responsibilities including greeting visitors, answering telephones and routing calls, etc."). Job duties:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.

- 9.
- 10.
- 11.
- 12.
- 13.
- 14.
- 15.

Feel free to add more numbers/duties if necessary.

**FACTOR 1. Education & Training:** In your opinion, what kind of education and training is necessary to perform your job?

- LEVEL 1: Level of knowledge that is below what is normally attained through high school graduation.
- LEVEL 2: High school diploma (GED) or equivalent.
- LEVEL 3: High school, plus elementary technical training, acquired on the job or through one year or less of technical or business school.
- LEVEL 4: Extensive technical or specialized training such as would be acquired by an Associate’s Degree or two years of technical or business school.
- LEVEL 5: Completion of four-year college degree program.
- LEVEL 6: Additional professional level of education beyond a four-year college program, such as a CPA or Professional Engineer (P.E.) training.
- LEVEL 7: Completion of graduate coursework equal to a Master’s Degree or higher.

What specific degree/coursework is NECESSARY?

What specific degree/coursework is PREFERRED?

If a specific certificate or license is mandated by an outside agency to perform your duties, name the certificate or license:

What special skills, knowledge, and abilities are required to perform your job? Please list:

**FACTOR 2. Years of Experience:** How much previous work experience do you feel is necessary to perform your job?

- |   |                                       |                                       |  |   |
|---|---------------------------------------|---------------------------------------|--|---|
| LEVEL 1:                                  | LEVEL 2:                              | LEVEL 3:                              | LEVEL 4:                               | LEVEL 5:                                    |
| <input type="checkbox"/> Less Than 1 Year | <input type="checkbox"/> 1 to 3 Years | <input type="checkbox"/> 4 to 6 Years | <input type="checkbox"/> 7 to 10 Years | <input type="checkbox"/> More than 10 Years |

What is the minimum number of years required?

What specific experience is necessary?

**FACTOR 3. Independent Judgment and Decision Making**

**Part 1:** How much discretion do you have in making decisions with or without the input or direction of your supervisor?

- LITTLE: Little discretion or independent judgment exercised.
- SOME: Some discretion or judgment exercised, but supervisor is normally available.
- OFTEN: Job often requires making decisions in absence of specific policies and/or guidance from supervisors, but some direct guidance is received from supervisors.
- HIGH: High level of discretion with decisions restricted only by Departmental policies and little direct guidance from supervisors.
- VERY HIGH: Very high level of discretion with decisions only restricted by the broadest policies of the Organization.

**Part 2:** If you make an erroneous decision, what impact would this decision have on your work unit, department, and/or the Organization?

- MINOR: Some inconvenience and delays but minor costs in terms of time, money, or public/employee good will.
- MODERATE: Moderate costs in time, money, or public/employee good will would be incurred. Delays in important projects/schedules likely.
- SERIOUS: Important goals would not be achieved and the financial, employee, or public relations posture of the Organization would be seriously affected.
- CRITICAL: Critical goals and objectives of the Organization would be adversely and very seriously affected. Error could likely result in critical financial loss, property damage, or bodily harm/loss of life.

---

**FACTOR 4. Responsibility for Policy Development:** Does your job require you to participate in the development of policies for your unit/division/department/the Organization?

- LEVEL 1: Position involves only the execution of policies or use of existing procedures.
- LEVEL 2: May provide some input to supervisor when policies and procedures are updated.
- LEVEL 3: Position involves some development of policies/procedures for the Department and/or the interpretation or explanation of departmental policies for others in the organization or residents.
- LEVEL 4: Position involves significant or primary responsibility for the development of policies and procedures for a division or organizational component of a department, as well as the interpretation, execution and recommendation of changes to department policies.
- LEVEL 5: Position involves significant or primary responsibility for the development of policies and procedures for an entire department, plus occasional participation in the development of policies which affect other departments in the organization.
- LEVEL 6: Position involves the primary responsibility for the development of departmental policies and procedures and regular participation in the development of policies that affect other departments and occasionally involves participation in the development of organization-wide policies.

Give some examples of the types of policies you've written or been a part of creating:

---

**FACTOR 5. Planning:** How much latitude do you have to set your own daily work schedule and priorities for a given workday?

- LEVEL 1: Position requires that my daily work load and activities are assigned to me by my supervisor.
  - LEVEL 2: Position requires that I plan my own daily work load and work independently according to established procedures or standards.
  - LEVEL 3: Position requires that I plan my own daily work load and those of others in the department (first-level supervision).
  - LEVEL 4: Position requires an above average ability to analyze data and develop departmental plans, including plans where a number of difficult, technical and/or administrative problems must be addressed (Manager/Division level planning).
  - LEVEL 5: Position requires a high level of analytical ability to develop plans for a department or complex situation, including plans that involve integrating/involving/impacting other departments (Department Head level planning).
- 

**FACTOR 6. Contacts with Others:** In the course of performing your job, what contacts with people in your department, other departments within the organization, and/or people from outside the organization are you required to make?

- LEVEL 1: Position involves interaction with fellow workers on routine matters with relatively little public contact.
- LEVEL 2: Position involves frequent internal and external contact, but generally on routine matters such as furnishing or obtaining information.
- LEVEL 3: Position involves frequent internal contact and regular contact with outsiders generally on routine matters, including contacts with irate outsiders which require some public relations skill for taking complaints for others to follow up upon.
- LEVEL 4: Position involves frequent internal and external contacts which require public relations skills in handling complaints. Contacts involve non-routine problems and require in-depth discussion and/or persuasion in order to resolve the problem. Handles more difficult contacts that are referred by front line employees.
- LEVEL 5: Position involves frequent internal and external contacts which require skill in dealing with, and influencing others, and initiating changes in policy/procedures to address the issue so as to avoid having to deal with the issue again in the future.
- LEVEL 6: Position involves frequent internal and external contacts in which I act as the spokesperson for the department and am authorized to make commitments of significant resources on behalf of the department.
- LEVEL 7: Position involves frequent internal and external contacts where I represent the entire organization and am authorized to make commitments in matters of broad or critical interest to the entire organization.

With which internal individuals or groups do you have the most contact?

With which external individuals or groups do you have the most contact?

---



**FACTOR 7. Supervision Given:**

Do you supervise or assign work to other employees?  Yes  No

If yes:

- LEVEL 1: Position is regularly responsible for assigning work to an employee or employees, without acting in a supervisory role. To whom does this position assign work?
- LEVEL 2: Position is responsible for the supervision of one full time or several part time employees.
- LEVEL 3: Position is responsible for the supervision of two to five full time (or full time equivalent) employees.
- LEVEL 4: Position is responsible for the supervision of six to 15 full time (or full time equivalent) employees.
- LEVEL 5: Position is responsible for direct and/or indirect supervision of 16 to 29 full time (or full time equivalent) employees.
- LEVEL 6: Position is responsible for direct and/or indirect supervision of 30 to 50 full time (or full time equivalent) employees.
- LEVEL 7: Position is responsible for direct and/or indirect supervision of more than 51 full time (or full time equivalent) employees.

Actual number of full-time (or full-time equivalent) employees supervised:

---

**FACTOR 8. Physical Demands:** Please describe any physical demands required to perform your job.

Demand	No	Yes	How often? (Rarely, Occasionally or Daily)
Lifting to 20 pounds	<input type="checkbox"/>	<input type="checkbox"/>	
Lifting 20-50 pounds	<input type="checkbox"/>	<input type="checkbox"/>	
Lifting 50+ pounds	<input type="checkbox"/>	<input type="checkbox"/>	
Climbing	<input type="checkbox"/>	<input type="checkbox"/>	
Walking	<input type="checkbox"/>	<input type="checkbox"/>	
Kneeling	<input type="checkbox"/>	<input type="checkbox"/>	
Crouching	<input type="checkbox"/>	<input type="checkbox"/>	
Crawling	<input type="checkbox"/>	<input type="checkbox"/>	
Bending	<input type="checkbox"/>	<input type="checkbox"/>	
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	
Prolonged Standing	<input type="checkbox"/>	<input type="checkbox"/>	
Prolonged Visual Concentration	<input type="checkbox"/>	<input type="checkbox"/>	

**Unpleasant or Hazardous Conditions:** Please describe any unpleasant or hazardous conditions you are exposed to in performing your job and how often you are exposed to those conditions. Include only those conditions which are directly related to your work rather than specific work area conditions.

Condition	No	Yes	How Often? (Rarely, Occasionally or Daily)
Lighting-dimness or brightness	<input type="checkbox"/>	<input type="checkbox"/>	
Dust	<input type="checkbox"/>	<input type="checkbox"/>	
Heat	<input type="checkbox"/>	<input type="checkbox"/>	
Cold	<input type="checkbox"/>	<input type="checkbox"/>	
Odors	<input type="checkbox"/>	<input type="checkbox"/>	
Noise	<input type="checkbox"/>	<input type="checkbox"/>	
Vibration	<input type="checkbox"/>	<input type="checkbox"/>	
Wetness/Humidity	<input type="checkbox"/>	<input type="checkbox"/>	
Toxic Agents	<input type="checkbox"/>	<input type="checkbox"/>	

Electrical Currents	<input type="checkbox"/>	<input type="checkbox"/>
Heavy Machinery	<input type="checkbox"/>	<input type="checkbox"/>
Violence	<input type="checkbox"/>	<input type="checkbox"/>
Disease	<input type="checkbox"/>	<input type="checkbox"/>
Smoke	<input type="checkbox"/>	<input type="checkbox"/>
Other	<input type="checkbox"/>	<input type="checkbox"/>

**FACTOR 9. Use of Technology/Specialized Equipment:** Please check the level of technology or specialized equipment use needed for you to perform your job.

- LEVEL 1: Position has no responsibility for, or use of, technology.
- LEVEL 2: Position has some basic use of computers for data entry and some use of the telephone, copier, etc.
- LEVEL 3: Position has daily use of computers for data entry and use of the telephone, fax machine, copier, etc. Position has daily use of light equipment such as push mowers, weed whackers, pole saws, custodial equipment, etc.
- LEVEL 4: Position has daily use of computers, the Internet, Smartphones, etc. to create databases, spreadsheets, or reports. Position designs and creates customized reports, presentations, and/or documents using advanced software skills.
- LEVEL 5A: Position provides routine consultation and technology support for everyday computer programming and/or software requests/questions to others in the organization; is an applications super user; or uses specialized software such as GIS, SCADA or telecommunications software.
- LEVEL 5B: Position uses, troubleshoots, and/or repairs various pieces of specialized equipment such as HVAC, lighting, gas flares, blowers, engines, heavy equipment, diagnostic equipment, large vehicles (vacuum trucks, street sweepers, fire apparatus) and/or medical or public safety equipment.
- LEVEL 6: Position is responsible for advanced computer programming, system security, maintenance, training, and purchasing of items such as computers, printers, scanners, etc., for the computer system for the organization (IT personnel).
- LEVEL 7: Position is responsible for the overall direction and supervision of the staff that are responsible for the computer and technology needs of the organization, including responsibility for developing technology policies for the organization (IT personnel).

**Comments/Additional Information:** Feel free to add additional information below. If using a printed copy of this form, use the back of the form to add your comments.

Type your name and the date below, then save this form as a Word document with the file name of "JobTitle.LastName.FirstName" and email it to your supervisor. If using a printed copy of this form, sign and date it and then deliver to your supervisor.

\_\_\_\_\_  
**EMPLOYEE'S SIGNATURE OR TYPED NAME**

\_\_\_\_\_  
**DATE**

**THIS SECTION TO BE COMPLETED BY IMMEDIATE SUPERVISOR AND/OR DEPARTMENT HEAD**

Please provide your comments below. If using a printed copy of the form and additional space is needed, please use the back of this form or attach an additional sheet. **Please do not mark in employee’s portion of the questionnaire.**

- 1. Do you agree with the employee’s answers to all of the above questions? If not, please explain.
- 2. List any job duties or assignments which the employee performs which are in addition to those listed on the job description or this form.
- 4. Additional comments from the employee’s immediate supervisor:

Type your name and the date below, then email this form to your Department Head (if applicable) or to Town Administration. If using a printed copy of this form, sign and date it before forwarding.

---

***SUPERVISOR’S SIGNATURE OR TYPED NAME*** ***DATE***

---

**If Supervisor isn’t Department Head, Department Head should review this form as well.**

- I have read the above and substantially concur.
- I have read the above and have the following comments:

Type your name and the date below, and then email this form to the Town Manager. If using a printed copy of this form, sign and date it before forwarding.

---

***DEPARTMENT HEAD SIGNATURE OR TYPED NAME*** ***DATE***

**IMPORTANT DATES:**

September 26<sup>th</sup>:  
Employees complete and submit the JAQs to their Supervisors. Please save file as follows:  
JobTitle.LastName.FirstName.

October 5<sup>th</sup>:  
Supervisors and Department Heads review and then submit the JAQs to Town Administration.

October 12<sup>th</sup>:  
Town Administration reviews and then submits the JAQs to GovHR USA.

Week of October 24<sup>th</sup>:  
GovHR conducts interviews.

# APPENDIX B

<b>1. Population: Maximum 15 Points</b>						
<b>4,979</b>						
Factor	Minimum Range		Maximum Range		Points	
1.50	3,319	4,979	4,979	7,469	15	
2.00	2,490	3,318	7,470	9,958	11	
2.50	1,992	2,489	9,959	12,448	7	
3.00	1,660	1,991	12,449	14,937	3	
All Others					0	
<b>2. DOR Income Per Capita: Maximum 15 Points</b>						
<b>78,745</b>						
Factor	Minimum Range		Maximum Range		Points	
1.50	52,497	78,745	78,745	118,118	15	
2.00	39,373	52,496	118,119	157,490	11	
2.50	31,498	39,372	157,491	196,863	7	
3.00	26,248	31,497	196,864	236,235	3	
All Others					0	
<b>3. EQV Per Capita: Maximum 15 Points</b>						
<b>190,064</b>						
Factor	Minimum Range		Maximum Range		Points	
1.50	126,709	190,064	190,064	285,096	15	
2.00	95,032	126,708	285,097	380,128	11	
2.50	76,026	95,031	380,129	475,160	7	
3.00	63,355	76,025	475,161	570,192	3	
All Others					0	
<b>4. Total Assessed Value: Maximum 15 Points</b>						
<b>970.23 Million</b>						
Factor	Minimum Range		Maximum Range		Points	
1.50	646.82	970.23	970.23	1,455.35	15	
2.00	485.12	646.81	1,455.36	1,940.46	11	
2.50	388.09	485.11	1,940.47	2,425.58	7	
3.00	323.41	388.08	2,425.59	2,910.69	3	
All Others					0	
<b>5. Tax Levy: Maximum 15 Points</b>						
<b>19.00 Million</b>						
Factor	Minimum Range		Maximum Range		Points	
1.50	12.67	19.00	19.00	28.50	15	
2.00	9.50	12.66	28.51	38.00	11	
2.50	7.60	9.49	38.01	47.50	7	
3.00	6.33	7.59	47.51	57.00	3	
All Others					0	

6. Total Budget (without Enterprise and CPA Funds): Maximum 15 Points						
22.72 Million						
Factor	Minimum Range			Maximum Range		Points
1.5	15.15	22.72		22.72	34.08	15
2.0	11.36	15.14		34.09	45.44	11
2.5	9.09	11.35		45.45	56.80	7
3.0	7.57	9.08		56.81	68.16	3
All Others						0
7. State Aid: Maximum 5 Points						
0.49 Million						
Factor	Minimum Range			Maximum Range		Points
1.50	0.33	0.49		0.49	0.74	5
2.00	0.25	0.32		0.75	0.98	4
2.50	0.20	0.24		0.99	1.23	3
3.00	0.16	0.19		1.24	1.47	1
All Others						0
8. Proximity in Miles: Maximum 5 Points						
				Factor:		Points
				1 to 25 Miles		5
				26 to 50 Miles		3
				51 to 75 Miles		1
				All Others		0
Initial screen:						
All Massachusetts municipalities in Essex, Middlesex, and Suffolk Counties with populations between approximately 1,500 and 25,000.						
Sources:						
Massachusetts Department of Revenue Division of Local Services, Municipal Databank/Local Aid Section for: Population; DOR Income Per Capita; EQV Per Capita; Total Assessed Value; Tax Levy; State Aid; and Total Budget. <a href="https://www.mass.gov/service-details/at-a-glance-and-community-comparison-reports">https://www.mass.gov/service-details/at-a-glance-and-community-comparison-reports</a>						
Google Maps for proximity (lowest mileage listed)						
Note:						
Each of the eight criterion contain ranges to assess comparability with the Town's data. For example, each of the four ranges for the Town population is developed using a factor of .5 percent (+/-). To determine the population range that will receive a score of 15 (most similar to the Town), the Town's population is multiplied by 1.5 (maximum range) and divided by 1.5 (minimum range). The Town's population is then multiplied and divided by 2.0, 2.5 and 3.0 to determine ranges of decreasing similarity (and subsequently decreasing "comparability points").						

Town of Wenham, MA  
Criteria Comparisons - Sorted by Rank

Municipality	Population	Max. Points	Income Per Capita	Max. Points	EQV Per Capita	Max. Points	Assessed Value(millions)	Max. Points	Tax Levy (millions)	Max. Points	Total Budget (millions)	Max. Points	State Aid (millions)	Max. Points	Proximity (miles)	Max. Points	Total Points
Wenham	4,979	15	78,745	15	190,064	15	970.23	15	19.00	15	22.72	15	0.49	5	0.0	5	100
West Newbury	4,500	15	78,619	15	228,235	15	1,149.42	15	14.95	15	19.31	15	0.41	5	18.1	5	100
Essex	3,675	15	70,358	15	257,046	15	1,008.72	15	15.84	15	19.42	15	0.30	4	6.5	5	99
Merrimac	6,723	15	54,260	15	143,767	15	1,005.80	15	16.43	15	20.48	15	1.11	3	21.8	5	98
Rowley	6,161	15	50,745	11	195,090	15	1,272.78	15	18.61	15	22.84	15	0.76	4	10.6	5	95
Groveland	6,752	15	43,642	11	165,341	15	1,228.50	15	17.78	15	21.24	15	1.06	3	15.0	5	94
Newbury	6,716	15	69,852	15	258,518	15	1,913.16	11	18.62	15	22.99	15	1.02	3	15.6	5	94
Topsfield	6,569	15	76,334	15	230,286	15	1,622.80	11	27.02	15	32.80	15	2.11	0	4.8	5	91
Georgetown	8,470	11	52,909	15	168,314	15	1,632.09	11	22.98	15	33.82	15	6.77	0	11.6	5	87
Nahant	3,334	15	69,505	15	310,267	11	1,142.09	15	11.18	11	14.58	11	1.01	3	16.3	5	86
Hamilton	7,561	11	79,695	15	232,271	15	1,780.21	11	31.83	11	35.45	11	0.96	4	3.6	5	83
Carlisle	5,237	15	132,901	11	316,434	11	1,750.32	11	28.88	11	32.53	15	1.48	0	30.9	3	77
Salisbury	9,236	11	35,525	7	216,998	15	2,181.31	7	24.30	15	33.51	15	1.34	1	19.4	5	76
Boxford	8,203	11	110,612	15	247,130	15	2,100.64	7	31.97	11	37.96	11	2.54	0	7.9	5	75
Rockport	6,992	15	52,922	15	353,996	11	2,607.14	3	25.60	15	37.40	11	3.69	0	18.2	5	75
Middleton	9,779	11	59,433	15	241,994	15	2,453.16	3	32.50	11	41.41	11	2.42	0	8.5	5	71
Lincoln	7,014	15	156,203	11	331,302	11	2,342.33	7	35.48	11	44.78	11	2.42	0	30.7	3	69
Manchester By The Sea	5,395	15	179,745	7	493,440	3	2,835.46	0	30.06	11	34.67	11	0.28	4	8.8	5	56
Ipswich	13,785	3	68,857	15	235,517	15	3,442.82	0	44.27	7	58.60	3	6.06	0	6.5	5	48
Lynnfield	13,000	3	88,287	15	269,895	15	3,933.96	0	50.70	3	63.19	3	5.75	0	12.3	5	44
Swampscott	15,111	0	72,187	15	226,888	15	3,773.43	0	51.40	3	64.91	3	6.25	0	10.5	5	41
Winthrop	19,316	0	36,944	7	148,615	15	3,033.83	0	35.68	11	56.95	3	12.19	0	24.4	5	41
Amesbury	17,366	0	41,139	11	152,761	15	2,814.68	3	49.79	3	69.65	0	12.44	0	22.4	5	37
North Reading	15,554	0	68,613	15	231,945	15	3,814.00	0	57.21	0	80.77	0	9.68	0	13.6	5	35
Newburyport	18,289	0	65,979	15	271,419	15	5,292.43	0	63.56	0	82.93	0	8.05	0	17.3	5	35
Stoneham	23,244	0	47,784	11	201,179	15	4,924.39	0	55.74	3	73.83	0	10.63	0	18.2	5	34
Bedford	14,383	3	76,027	15	305,877	11	4,296.64	0	73.49	0	109.27	0	8.90	0	26.1	3	32
Marblehead	20,441	0	94,092	15	340,458	11	7,251.16	0	76.28	0	97.60	0	8.27	0	9.9	5	31
Wilmington	23,349	0	49,992	11	228,711	15	5,512.45	0	94.68	0	120.20	0	14.66	0	22.4	5	31
Winchester	22,970	0	121,868	11	377,913	11	8,983.33	0	112.13	0	142.44	0	11.54	0	21.4	5	27

Town of Wenham, MA  
 Top Comparables 65+ Points

Municipality	Population	Max. Points	Income Per Capita	Max. Points	EQV Per Capita	Max. Points	Assessed Value(millions)	Max. Points	Tax Levy (millions)	Max. Points	Total Budget (millions)	Max. Points	State Aid (millions)	Max. Points	Proximity (miles)	Max. Points	Total Points
<b>Wenham</b>	<b>4,979</b>	<b>15</b>	<b>78,745</b>	<b>15</b>	<b>190,064</b>	<b>15</b>	<b>970.23</b>	<b>15</b>	<b>19.00</b>	<b>15</b>	<b>22.72</b>	<b>15</b>	<b>0.49</b>	<b>5</b>	<b>0.0</b>	<b>5</b>	<b>100</b>
West Newbury	4,500	15	78,619	15	228,235	15	1,149.42	15	14.95	15	19.31	15	0.41	5	18.1	5	100
Essex	3,675	15	70,358	15	257,046	15	1,008.72	15	15.84	15	19.42	15	0.30	4	6.5	5	99
Merrimac	6,723	15	54,260	15	143,767	15	1,005.80	15	16.43	15	20.48	15	1.11	3	21.8	5	98
Rowley	6,161	15	50,745	11	195,090	15	1,272.78	15	18.61	15	22.84	15	0.76	4	10.6	5	95
Groveland	6,752	15	43,642	11	165,341	15	1,228.50	15	17.78	15	21.24	15	1.06	3	15.0	5	94
Newbury	6,716	15	69,852	15	258,518	15	1,913.16	11	18.62	15	22.99	15	1.02	3	15.6	5	94
Topsfield	6,569	15	76,334	15	230,286	15	1,622.80	11	27.02	15	32.80	15	2.11	0	4.8	5	91
Georgetown	8,470	11	52,909	15	168,314	15	1,632.09	11	22.98	15	33.82	15	6.77	0	11.6	5	87
Nahant	3,334	15	69,505	15	310,267	11	1,142.09	15	11.18	11	14.58	11	1.01	3	16.3	5	86
Hamilton	7,561	11	79,695	15	232,271	15	1,780.21	11	31.83	11	35.45	11	0.96	4	3.6	5	83
Carlisle	5,237	15	132,901	11	316,434	11	1,750.32	11	28.88	11	32.53	15	1.48	0	30.9	3	77
Salisbury	9,236	11	35,525	7	216,998	15	2,181.31	7	24.30	15	33.51	15	1.34	1	19.4	5	76
Boxford	8,203	11	110,612	15	247,130	15	2,100.64	7	31.97	11	37.96	11	2.54	0	7.9	5	75
Rockport	6,992	15	52,922	15	353,996	11	2,607.14	3	25.60	15	37.40	11	3.69	0	18.2	5	75
Middleton	9,779	11	59,433	15	241,994	15	2,453.16	3	32.50	11	41.41	11	2.42	0	8.5	5	71
Lincoln	7,014	15	156,203	11	331,302	11	2,342.33	7	35.48	11	44.78	11	2.42	0	30.7	3	69



# APPENDIX C

Assistant Town Administrator				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	85,917	120,284	
Carlisle				
Essex				
Georgetown				
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	ATA/HR Director. Boxford Survey: FY22 rate	93,600	121,680	
Nahant				
Newbury				
Rockport				
Rowley	Boxford Survey: FY23 rate	67,953	77,875	
Salisbury	Boxford Survey: FY22 rate w. COLA			82,730
Topsfield				
West Newbury				
Wenham	40 hrs/wk			75,000
Range Data				
Average		82,490.00	106,613.07	
50th Percentile		85,917.00	120,284.00	
60th Percentile		87,453.60	120,563.20	
65th Percentile		88,221.90	120,702.80	
70th Percentile		88,990.20	120,842.40	
75th Percentile		89,758.50	120,982.00	
80th Percentile		90,526.80	121,121.60	
Actual Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				

Town Clerk				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	72,983	102,176	
Carlisle				76,688
Essex		54,263	67,550	61,699
Georgetown	32 hrs/wk	58,913	67,671	
Groveland				63,736
Hamilton	FY22 pay plan w. COLA	74,065	85,097	
Lincoln				
Merrimac				68,640
Middleton	Boxford Survey: FY22 rate	83,200	108,160	
Nahant				
Newbury	Elected. Boxford Survey: FY22 rate w. COLA	47,990	76,652	
Rockport	Elected. Boxford Survey: FY22 rate			83,213
Rowley	Elected. Boxford Surv. FY22 rate w. COLA			58,575
Salisbury	Boxford Survey: FY22 rate w. COLA			84,236
Topsfield		70,158	92,040	78,208
West Newbury				
Wenham				70,000
Range Data				
Average		65,938.83	85,620.90	71,874.31
50th Percentile		70,158.40	85,097.38	72,663.75
60th Percentile		71,853.16	89,262.95	76,991.60
65th Percentile		72,700.54	91,345.74	77,523.78
70th Percentile		73,199.41	94,067.20	78,055.95
75th Percentile		73,524.03	97,108.00	79,459.25
80th Percentile		73,848.64	100,148.80	81,211.00
Actual Data				
Average		64,686.88	86,249.18	
50th Percentile		65,397.38	87,196.50	
60th Percentile		69,292.44	92,389.92	
65th Percentile		69,771.40	93,028.53	
70th Percentile		70,250.36	93,667.14	
75th Percentile		71,513.33	95,351.10	
80th Percentile		73,089.90	97,453.20	

Executive Assistant to the Town Administrator

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle	Topsfield Survey: FY23 rate	57,912	66,921	
Essex	Selectman's Assistant	49,210	72,967	72,967
Georgetown	32 hrs/wk	46,336	53,244	
Groveland				
Hamilton				
Lincoln				
Merrimac	Selectmen Executive Assistant			60,770
Middleton	AA to TA. Topsf. Surv: FY23 rate to 40/wk	49,920	64,896	
Nahant				
Newbury	Exec Administrator. Topsf. Surv: FY23 rate	41,733	64,646	
Rockport				
Rowley	AA. Topsfield Survey: FY23 rate	42,848	49,109	
Salisbury	Chief Aide (ATM). Topsfield Surv: FY23 rate	70,000	80,000	
Topsfield		53,976	70,782	70,782
West Newbury				
Wenham	40 hrs/wk			72,634
Range Data				
Average		51,491.84	65,320.71	68,173.07
50th Percentile		49,565.00	65,908.70	70,782.40
60th Percentile		50,731.20	67,693.60	71,219.32
65th Percentile		52,150.80	69,044.95	71,437.78
70th Percentile		53,570.40	70,396.30	71,656.24
75th Percentile		54,960.10	71,328.55	71,874.70
80th Percentile		56,337.84	72,093.16	72,093.16
Actual Data				
Average		61,355.76	81,807.68	
50th Percentile		63,704.16	84,938.88	
60th Percentile		64,097.39	85,463.18	
65th Percentile		64,294.00	85,725.34	
70th Percentile		64,490.62	85,987.49	
75th Percentile		64,687.23	86,249.64	
80th Percentile		64,883.84	86,511.79	

Finance Director/Town Accountant

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	109,741	153,638	
Carlisle	FD/T-C. Boxford Survey: FY22 rate w. COLA	125,426	144,955	
Essex	Town Accountant. Contract employee			89,760
Georgetown	Town Accountant	87,474	100,479	
Groveland	Town Accountant			90,729
Hamilton	Boxford Surv. & FY22 Plan: FY22 w. COLA	108,583	124,708	127,500
Lincoln				
Merrimac	Finance Director			129,210
Middleton				125,157
Nahant	Town Accountant	83,013	123,552	
Newbury	TA serves as FD. Boxford Surv: FY22 w. COLA	66,773	103,553	
Rockport	TA. Vacant. Boxford Survey: FY22 rate			88,272
Rowley	TA. Boxford Survey: FY23 rate	79,976	91,645	
Salisbury	FD/CFD. Boxford Survey: FY22 rate w. COLA			126,879
Topsfield	Town Accountant	91,166	119,600	110,240
West Newbury				
Wenham	40 hrs/wk			115,003
Range Data				
Average		94,019.09	120,266.13	110,968.37
50th Percentile		89,319.98	121,576.00	117,698.50
60th Percentile		94,649.82	123,783.13	125,501.47
65th Percentile		100,745.80	124,187.61	126,104.30
70th Percentile		106,841.78	124,592.08	126,707.12
75th Percentile		108,872.87	129,769.41	127,034.52
80th Percentile		109,278.00	136,855.89	127,251.74
Actual Data				
Average		99,871.53	133,162.04	
50th Percentile		105,928.65	141,238.20	
60th Percentile		112,951.32	150,601.77	
65th Percentile		113,493.87	151,325.15	
70th Percentile		114,036.41	152,048.54	
75th Percentile		114,331.06	152,441.42	
80th Percentile		114,526.57	152,702.09	

Treasurer/Collector

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	85,917	120,284	
Carlisle	Acct. Boxford Survey: FY22 rate w. COLA	101,806	117,659	
Essex	Contract employee			71,400
Georgetown		87,474	100,479	
Groveland				75,000
Hamilton	Boxford Survey: FY23 rate	75,738	86,989	
Lincoln				
Merrimac				
Middleton	Boxford Survey: FY22 rate	83,200	108,160	
Nahant		69,181	102,981	
Newbury	Boxford Survey: FY22 rate w. COLA	47,990	76,652	
Rockport	FD/T-C. Boxford Survey: FY22 rate			111,654
Rowley	Boxford Survey: FY23 rate	87,963	100,797	
Salisbury	Boxford Survey: FY22 rate w. COLA			88,977
Topsfield		91,166	119,600	110,240
West Newbury				
Wenham	40 hrs/wk			89,648
Range Data				
Average		81,159.46	103,733.47	91,454.11
50th Percentile		85,917.00	102,981.00	88,976.55
60th Percentile		87,162.25	107,124.20	97,481.93
65th Percentile		87,571.49	110,059.82	101,734.62
70th Percentile		87,767.35	113,859.45	105,987.31
75th Percentile		87,963.20	117,659.08	110,240.00
80th Percentile		89,244.48	118,435.45	110,522.80
Actual Data				
Average		82,308.70	109,744.93	
50th Percentile		80,078.90	106,771.86	
60th Percentile		87,733.74	116,978.32	
65th Percentile		91,561.16	122,081.54	
70th Percentile		95,388.58	127,184.77	
75th Percentile		99,216.00	132,288.00	
80th Percentile		99,470.52	132,627.36	

Assistant Treasurer/Collector

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	61,996	86,794	
Carlisle	Boxford Survey: FY22 rate w. COLA	80,803	93,384	
Essex	N/A			
Georgetown	36 hrs/wk	52,128	59,899	
Groveland				44,745
Hamilton	Boxford Survey: FY23 rate	58,032	66,671	
Lincoln				
Merrimac	30 hrs/wk			43,493
Middleton	AT-C/Pay. & Ben. Coord. Topsfield Surv. FY23	56,160	73,008	
Nahant				
Newbury	Boxford Survey: FY22 rate w. COLA	31,531	50,483	
Rockport	Boxford Survey: FY22 rate			57,630
Rowley	From Boxford Surv. Annualized to 36.5 hrs	54,150	62,046	
Salisbury	Boxford Survey: FY22 rate w. COLA			72,888
Topsfield	34 hrs/wk	45,880	60,165	52,510
West Newbury				
Wenham	36.5 hrs/wk			63,374
Range Data				
Average		55,084.88	69,056.16	54,253.17
50th Percentile		55,154.97	64,358.06	52,509.60
60th Percentile		56,534.40	67,938.00	54,557.76
65th Percentile		57,189.60	70,156.13	55,581.84
70th Percentile		57,844.80	72,374.25	56,605.92
75th Percentile		59,023.00	76,454.50	57,630.00
80th Percentile		60,410.40	81,279.60	60,681.69
Actual Data				
Average		48,827.86	65,103.81	
50th Percentile		47,258.64	63,011.52	
60th Percentile		49,101.98	65,469.31	
65th Percentile		50,023.66	66,698.21	
70th Percentile		50,945.33	67,927.10	
75th Percentile		51,867.00	69,156.00	
80th Percentile		54,613.52	72,818.03	

Executive Secretary to the Assessors

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle				
Essex	Assessor's Clerk. AFSCME	48,399	51,208	51,208
Georgetown				
Groveland				
Hamilton				
Lincoln				
Merrimac	Assessor Clerk			49,686
Middleton				
Nahant				
Newbury				
Rockport				
Rowley				
Salisbury				
Topsfield	Assistant Assessor. 34 hrs/wk	45,880	60,165	51,131
West Newbury				
Wenham	36.5 hrs/wk			69,733
Range Data				
Average				50,674.85
50th Percentile				51,130.50
60th Percentile				51,146.01
65th Percentile				51,153.76
70th Percentile				51,161.52
75th Percentile				51,169.27
80th Percentile				51,177.02
Actual Data				
Average		45,607.36	60,809.82	
50th Percentile		46,017.45	61,356.60	
60th Percentile		46,031.41	61,375.21	
65th Percentile		46,038.39	61,384.51	
70th Percentile		46,045.36	61,393.82	
75th Percentile		46,052.34	61,403.12	
80th Percentile		46,059.32	61,412.43	



Library Director				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	79,187	110,861	
Carlisle	Boxford Survey: FY22 rate w. COLA	101,806	117,659	
Essex	Librarian. 35 hrs/wk	55,401	60,460	60,460
Georgetown		70,228	80,679	
Groveland				68,696
Hamilton	Reg'l position pd thru Town of Wenham			
Lincoln				
Merrimac				66,412
Middleton	Boxford Survey: FY22 rate	83,200	108,160	
Nahant				
Newbury	Boxford Survey: FY22 rate w. COLA	47,990	76,652	
Rockport	Boxford Survey: FY22 rate			96,900
Rowley	Boxford Survey: FY23 rate to 35/wk	76,968	88,197	
Salisbury	Boxford Survey: FY22 rate w. COLA			81,605
Topsfield		79,976	104,894	91,582
West Newbury				
Wenham	35 hrs/wk			88,543
Range Data				
Average		74,344.40	93,445.45	77,609.33
50th Percentile		78,077.40	96,545.80	75,150.68
60th Percentile		79,344.80	105,547.52	81,605.36
65th Percentile		79,620.95	106,690.48	84,099.62
70th Percentile		79,897.10	107,833.44	86,593.88
75th Percentile		80,782.00	108,835.25	89,088.14
80th Percentile		81,910.40	109,780.60	91,582.40
Actual Data				
Average		69,848.39	93,131.19	
50th Percentile		67,635.61	90,180.81	
60th Percentile		73,444.82	97,926.43	
65th Percentile		75,689.65	100,919.54	
70th Percentile		77,934.49	103,912.65	
75th Percentile		80,179.32	106,905.77	
80th Percentile		82,424.16	109,898.88	

Assistant Library Director				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle	Topsfield Survey: FY23 rate	80,626	98,844	
Essex	Assistant Librarian. 19 hrs/wk or less	21,183	25,866	25,866
Georgetown	N/A			
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	Topsfield Survey: FY23 rate	72,800	94,640	
Nahant				
Newbury	Topsfield Survey: FY23 rate	41,733	64,646	
Rockport				
Rowley	Asst. Lib. Dtr./Adult Svcs. Ann. to 35 hrs	51,925	59,496	
Salisbury	Topsfield Survey: FY23 rate	57,000	67,000	
Topsfield		57,720	75,719	59,300
West Newbury				
Wenham	35 hrs/wk			65,320
Range Data				
Average		54,712.27	69,458.68	
50th Percentile		57,000.00	67,000.00	
60th Percentile		57,432.00	72,231.10	
65th Percentile		57,648.00	74,846.65	
70th Percentile		60,736.00	79,502.80	
75th Percentile		65,260.00	85,179.25	
80th Percentile		69,784.00	90,855.70	
Actual Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				

Head of Circulation				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Head of Circulation. Annualized to 35 hrs			52,835
Carlisle	Circulation Lead			45,500
Essex	N/A			
Georgetown	Senior Library Technician/Circulation	46,930	53,947	
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	Circulation/ILL Librarian	48,651	55,349	55,349
Nahant				
Newbury	Circ. Librarian. Topsfield Surv: FY23 rate	37,309	57,864	
Rockport				
Rowley	Asst. Lib. Dtr./Adult Svcs. Ann. to 35 hrs	51,925	59,496	59,496
Salisbury	Admin. Asst. Long-term empl. above max	48,000	58,000	61,000
Topsfield	Circulation Librarian	50,603	66,359	59,534
West Newbury				
Wenham	35 hrs/wk			53,199
Range Data				
Average		47,236.18	58,502.27	55,618.78
50th Percentile		48,325.60	57,931.76	57,422.30
60th Percentile		48,651.20	58,000.00	59,495.80
65th Percentile		49,139.03	58,373.95	59,505.23
70th Percentile		49,626.85	58,747.90	59,514.65
75th Percentile		50,114.68	59,121.85	59,524.08
80th Percentile		50,602.50	59,495.80	59,533.50
Actual Data				
Average		50,056.91	66,742.54	
50th Percentile		51,680.07	68,906.76	
60th Percentile		53,546.22	71,394.96	
65th Percentile		53,554.70	71,406.27	
70th Percentile		53,563.19	71,417.58	
75th Percentile		53,571.67	71,428.89	
80th Percentile		53,580.15	71,440.20	

Head of Reference				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Head of Reference. Annualized to 35 hrs			52,835
Carlisle	Ref. & Special Collections Librarian			47,800
Essex	N/A			
Georgetown	Cataloguing & Reference Librarian	50,680	58,235	
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	Adult Services	48,651	55,349	53,019
Nahant				
Newbury				
Rockport				
Rowley	Asst. Lib. Dtr./Adult Svcs. Ann. to 35 hrs	51,925	59,496	59,496
Salisbury		45,000	55,000	46,429
Topsfield	Head of Readers' Services	50,603	66,359	
West Newbury				
Wenham	35 hrs/wk			63,281
Range Data				
Average		49,371.60	58,887.67	51,915.72
50th Percentile		50,602.50	58,235.27	52,834.60
60th Percentile		50,633.39	58,739.48	52,908.44
65th Percentile		50,648.83	58,991.59	52,945.36
70th Percentile		50,664.28	59,243.69	52,982.28
75th Percentile		50,679.72	59,495.80	53,019.20
80th Percentile		50,928.70	60,868.34	54,314.52
Actual Data				
Average		46,724.15	62,298.86	
50th Percentile		47,551.14	63,401.52	
60th Percentile		47,617.60	63,490.13	
65th Percentile		47,650.82	63,534.43	
70th Percentile		47,684.05	63,578.74	
75th Percentile		47,717.28	63,623.04	
80th Percentile		48,883.07	65,177.42	

Head of Technical Services				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle	Asst. Dtr. & Head of Technology			85,000
Essex	N/A			
Georgetown	Cataloguing & Reference Librarian	50,680	58,235	
Groveland				
Hamilton				
Lincoln				
Merrimac	Technical Services Librarian. 24 hrs/wk			24,972
Middleton	N/A			
Nahant				
Newbury				
Rockport				
Rowley	Asst. Lib. Dtr./Adult Svcs. Ann. to 35 hrs	51,925	59,496	59,496
Salisbury	Director does this			
Topsfield				
West Newbury				
Wenham	35 hrs/wk			52,179
Range Data				
Average				56,489.43
50th Percentile				59,495.80
60th Percentile				64,596.64
65th Percentile				67,147.06
70th Percentile				69,697.48
75th Percentile				72,247.90
80th Percentile				74,798.32
Actual Data				
Average		50,840.48	67,787.31	
50th Percentile		53,546.22	71,394.96	
60th Percentile		58,136.98	77,515.97	
65th Percentile		60,432.35	80,576.47	
70th Percentile		62,727.73	83,636.98	
75th Percentile		65,023.11	86,697.48	
80th Percentile		67,318.49	89,757.98	

Adult Services Librarian				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle	N/A			
Essex	N/A			
Georgetown				
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	Adult Services	48,651	55,349	53,019
Nahant				
Newbury				
Rockport				
Rowley	Asst. Lib. Dtr./Adult Svcs. Ann. to 35 hrs	51,925	59,496	59,496
Salisbury	Asst. Dtr. & others help with this			
Topsfield				
West Newbury				
Wenham	35 hrs/wk			47,830
Range Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				
Actual Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				

Children's Librarian				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Head of Reference. Annualized to 35 hrs			52,835
Carlisle				54,000
Essex	N/A			
Georgetown	Head Children's Librarian	50,680	58,235	
Groveland				
Hamilton				
Lincoln				
Merrimac	Youth Services Librarian. 33 hrs/wk			40,704
Middleton	Child. Coll. & Outr. OR Child. Prog. Lib	48,443	55,349	50,731
Nahant				
Newbury				
Rockport				
Rowley	Youth Svcs Lib. Annualized to 35 hrs/wk	48,558	55,637	49,176
Salisbury		47,000	57,000	53,976
Topsfield		50,603	66,359	57,915
West Newbury				
Wenham	35 hrs/wk			63,591
Range Data				
Average		49,056.60	58,515.99	51,333.82
50th Percentile		48,557.60	57,000.00	52,834.60
60th Percentile		49,375.56	57,494.11	53,519.44
65th Percentile		49,784.54	57,741.16	53,861.86
70th Percentile		50,193.52	57,988.21	53,980.80
75th Percentile		50,602.50	58,235.27	53,988.00
80th Percentile		50,617.94	59,859.91	53,995.20
Actual Data				
Average		46,200.44	61,600.58	
50th Percentile		47,551.14	63,401.52	
60th Percentile		48,167.50	64,223.33	
65th Percentile		48,475.67	64,634.23	
70th Percentile		48,582.72	64,776.96	
75th Percentile		48,589.20	64,785.60	
80th Percentile		48,595.68	64,794.24	

Young Adult Librarian				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle	Teen, Children's & Reference Librarian			55,000
Essex	N/A			
Georgetown	Teen Librarian	46,930	53,947	
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton		48,443	55,349	53,019
Nahant				
Newbury				
Rockport				
Rowley	Youth Svcs Lib. Annualized to 35 hrs/wk	48,558	55,637	49,176
Salisbury	N/A			
Topsfield				
West Newbury				
Wenham	35 hrs/wk			62,026
Range Data				
Average		47,976.86	54,977.73	52,398.53
50th Percentile		48,443.20	55,348.80	53,019.20
60th Percentile		48,466.08	55,406.52	53,415.36
65th Percentile		48,477.52	55,435.38	53,613.44
70th Percentile		48,488.96	55,464.24	53,811.52
75th Percentile		48,500.40	55,493.10	54,009.60
80th Percentile		48,511.84	55,521.96	54,207.68
Actual Data				
Average		47,158.68	62,878.24	
50th Percentile		47,717.28	63,623.04	
60th Percentile		48,073.82	64,098.43	
65th Percentile		48,252.10	64,336.13	
70th Percentile		48,430.37	64,573.82	
75th Percentile		48,608.64	64,811.52	
80th Percentile		48,786.91	65,049.22	



Library Assistant II				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Library Assistant II. Annualized to 40 hrs			53,165
Carlisle				40,000
Essex	N/A			
Georgetown	Library Technician	37,258	42,790	
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	Circulation Assistants (PT). Annualized to 40 hrs			46,322
Nahant				
Newbury				
Rockport				
Rowley	Library Technician. Annualized to 40 hrs	38,979	44,637	
Salisbury	Part-time			37,440
Topsfield	Sr, Library Assistant. Annualized to 40 hrs	47,341	62,088	
West Newbury				
Wenham	19 hrs/wk			18,653
Range Data				
Average		41,192.65	49,838.27	44,231.60
50th Percentile		38,979.20	44,636.80	43,160.80
60th Percentile		40,651.52	48,127.04	45,057.28
65th Percentile		41,487.68	49,872.16	46,005.52
70th Percentile		42,323.84	51,617.28	47,005.92
75th Percentile		43,160.00	53,362.40	48,032.40
80th Percentile		43,996.16	55,107.52	49,058.88
Actual Data				
Average		39,808.44	53,077.92	
50th Percentile		38,844.72	51,792.96	
60th Percentile		40,551.55	54,068.74	
65th Percentile		41,404.97	55,206.62	
70th Percentile		42,305.33	56,407.10	
75th Percentile		43,229.16	57,638.88	
80th Percentile		44,152.99	58,870.66	

Library Assistant I				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Library Assistant I. Annualized to 40 hrs			46,966
Carlisle				
Essex	N/A			
Georgetown	Part-time Library Tech. Annualized to 40	33,946	38,995	
Groveland				
Hamilton				
Lincoln				
Merrimac	Circulation Assistant. 7 hrs/wk annualized to 40			34,320
Middleton	Circ. Assts. PT 15-18 hrs/wk. Topsfield Surv: FY23 rate ann. to 40 hrs			46,322
Nahant	Assistant Librarian. Annualized to 40	29,640	35,360	
Newbury	Info Asst. Topsfield Surv: FY23 rate 40 hrs	36,026	57,699	
Rockport				
Rowley	Lib. Tech. Topsfield Surv: FY23 rate. 40 h	38,979	44,637	
Salisbury				
Topsfield	Library Assistant. Annualized to 40 hrs	41,517	54,454	
West Newbury				
Wenham	18 or 19 hrs/wk. Actual average 3			17,863
Range Data				
Average		36,021.44	46,229.08	42,536.00
50th Percentile		36,025.60	44,636.80	46,321.60
60th Percentile		37,207.04	48,563.84	46,450.56
65th Percentile		37,797.76	50,527.36	46,515.04
70th Percentile		38,388.48	52,490.88	46,579.52
75th Percentile		38,979.20	54,454.40	46,644.00
80th Percentile		39,486.72	55,103.36	46,708.48
Actual Data				
Average		38,282.40	51,043.20	
50th Percentile		41,689.44	55,585.92	
60th Percentile		41,805.50	55,740.67	
65th Percentile		41,863.54	55,818.05	
70th Percentile		41,921.57	55,895.42	
75th Percentile		41,979.60	55,972.80	
80th Percentile		42,037.63	56,050.18	

Police Chief

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	109,741	153,638	
Carlisle	Boxford Survey: FY22 rate w. COLA			182,005
Essex	Contract employee			139,624
Georgetown		133,321	153,158	
Groveland				143,641
Hamilton	Boxford Surv. & FY22 Plan: FY22 w. COLA	108,583	124,708	164,605
Lincoln				
Merrimac				146,557
Middleton				135,300
Nahant		92,976	138,382	
Newbury	Boxford Survey: FY22 rate w. COLA	78,846	122,168	
Rockport	Is also EMD. Boxford Survey: FY22 rate			164,821
Rowley	Boxford Survey: FY23 rate	116,126	133,058	
Salisbury	From Boxford Survey; FY22 rate w. COLA			170,621
Topsfield	Employment Contract	103,938	136,323	129,811
West Newbury				
Wenham	40 hrs/wk			147,576
Range Data				
Average		106,218.79	137,347.78	152,998.22
50th Percentile		108,583.49	136,323.20	146,556.80
60th Percentile		109,278.00	137,558.48	160,995.36
65th Percentile		109,625.25	138,176.12	164,648.20
70th Percentile		111,018.08	141,337.26	164,734.60
75th Percentile		112,933.70	145,770.15	164,821.00
80th Percentile		114,849.32	150,203.04	167,140.89
Actual Data				
Average		137,698.40	183,597.87	
50th Percentile		131,901.12	175,868.16	
60th Percentile		144,895.82	193,194.43	
65th Percentile		148,183.38	197,577.84	
70th Percentile		148,261.14	197,681.52	
75th Percentile		148,338.90	197,785.20	
80th Percentile		150,426.80	200,569.07	

Deputy Police Chief

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle				
Essex	N/A			
Georgetown				
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	New position 1/1/22. Still needs to be graded into class & comp			112,000
Nahant				
Newbury				
Rockport				
Rowley	Captain. Ann. to 40 hrs/wk	105,581	120,994	111,779
Salisbury	Lieutenant	93,600	114,400	114,400
Topsfield	Police Captain	91,166	119,600	116,397
West Newbury				
Wenham	40 hrs/wk			120,786
Range Data				
Average		96,782.40	118,331.20	113,644.00
50th Percentile		93,600.00	119,600.00	113,200.00
60th Percentile		95,996.16	119,878.72	113,920.00
65th Percentile		97,194.24	120,018.08	114,280.00
70th Percentile		98,392.32	120,157.44	114,599.68
75th Percentile		99,590.40	120,296.80	114,899.20
80th Percentile		100,788.48	120,436.16	115,198.72
Actual Data				
Average		102,279.60	136,372.80	
50th Percentile		101,880.00	135,840.00	
60th Percentile		102,528.00	136,704.00	
65th Percentile		102,852.00	137,136.00	
70th Percentile		103,139.71	137,519.62	
75th Percentile		103,409.28	137,879.04	
80th Percentile		103,678.85	138,238.46	

Fire Chief				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	101,144	141,602	
Carlisle	Boxford Survey: FY22 rate w. COLA			132,925
Essex	\$8271 stipend/yr + \$23.74 per hour worked			
Georgetown		104,977	120,571	
Groveland				84,467
Hamilton	Boxford Surv. & FY22 Plan: FY22 w. COLA	108,583	124,708	129,997
Lincoln				
Merrimac				105,851
Middleton	Boxford Survey: FY22 rate			133,783
Nahant		83,013	123,552	
Newbury	Boxford Survey: FY22 rate w. COLA	78,846	122,168	
Rockport	Boxford Survey: FY22 rate			41,000
Rowley	Boxford Survey: FY23 rate	87,963	100,797	
Salisbury	Boxford Survey: FY22 rate w. COLA			127,451
Topsfield	Employment Contract	103,938	136,323	129,811
West Newbury				
Wenham	40 hrs/wk			120,890
Range Data				
Average		95,494.82	124,245.69	110,660.66
50th Percentile		101,144.00	123,552.00	128,631.05
60th Percentile		102,820.16	124,245.39	129,847.98
65th Percentile		103,658.24	124,592.08	129,913.17
70th Percentile		104,145.43	127,030.76	129,978.37
75th Percentile		104,457.18	130,515.42	130,729.00
80th Percentile		104,768.93	134,000.09	131,753.80
Actual Data				
Average		99,594.60	132,792.79	
50th Percentile		115,767.94	154,357.26	
60th Percentile		116,863.18	155,817.57	
65th Percentile		116,921.86	155,895.81	
70th Percentile		116,980.53	155,974.05	
75th Percentile		117,656.10	156,874.80	
80th Percentile		118,578.42	158,104.56	

Deputy Fire Chief

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle	Call dept -- Chief is only FT employee			
Essex	N/A			
Georgetown				
Groveland				
Hamilton	Call position. Boxford Surv: FY 22 rate to 40 hrs			64,542
Lincoln				
Merrimac	Assistant Chief			78,253
Middleton				
Nahant				
Newbury	N/A			
Rockport				
Rowley	N/A			
Salisbury				
Topsfield				
West Newbury				
Wenham	40 hrs/wk			115,565
Range Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				
Actual Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				

Firefighter				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	57,500	74,750	
Carlisle	Call dept -- Chief is only FT employee			
Essex	All call firefighters; \$23.74/hr worked			
Georgetown	Boxford Survey: FY22 rate w. COLA. 40 hrs			56,053
Groveland				
Hamilton	FY22 rate from pay plan ann. to 40 hrs/wk	57,762	66,373	
Lincoln				
Merrimac	Firefighter EMT-B			52,001
Middleton	Firefighter EMT-B	53,526	62,009	
Nahant	Firefighter EMT-B (No EMT max is \$59224.34	57,466	63,406	
Newbury	Boxford Survey: FY22 rate w. COLA			44,990
Rockport				
Rowley	Boxford Survey: FY22 rate			58,760
Salisbury	Boxford Survey: FY22 rate w. COLA			70,635
Topsfield				
West Newbury				
Wenham	40 hrs/wk			59,134
Range Data				
Average		56,563.37	66,634.50	56,487.81
50th Percentile		57,482.83	64,889.38	56,052.67
60th Percentile		57,493.13	65,779.43	57,135.60
65th Percentile		57,498.28	66,224.46	57,677.07
70th Percentile		57,526.16	67,210.52	58,218.53
75th Percentile		57,565.40	68,467.10	58,760.00
80th Percentile		57,604.64	69,723.68	61,134.99
Actual Data				
Average		50,839.03	67,785.37	
50th Percentile		50,447.40	67,263.21	
60th Percentile		51,422.04	68,562.72	
65th Percentile		51,909.36	69,212.48	
70th Percentile		52,396.68	69,862.24	
75th Percentile		52,884.00	70,512.00	
80th Percentile		55,021.49	73,361.98	

Public Works Director

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	DPW Supt./Town Engineer. FY22 rate	101,144	141,602	
Carlisle	DPW Supt. Boxford Surv: FY22 w. COLA	113,004	130,596	
Essex	Superintendent of Public Works	106,756	128,922	128,922
Georgetown	Highway Superintendent	87,474	100,479	
Groveland				95,509
Hamilton	Boxford Survey: FY22 rate w. COLA	110,748	127,211	
Lincoln				
Merrimac				104,887
Middleton	DPW Supt. Boxford Survey: FY22 rate	93,600	121,680	
Nahant	DPW Superintendent	83,013	123,552	
Newbury	Boxford Survey: FY22 rate w. COLA	66,773	103,553	
Rockport	Boxford Survey: FY22 rate			130,050
Rowley	Hwy Surv. Elected. Boxford Surv: FY22 rate w. COLA			84,286
Salisbury	Boxford Survey: FY22 rate w. COLA			128,094
Topsfield	Highway Superintendent	91,166	119,600	
West Newbury				
Wenham	40 hrs/wk			124,800
Range Data				
Average		94,853.04	121,910.53	111,957.89
50th Percentile		93,600.00	123,552.00	116,490.35
60th Percentile		99,635.20	126,479.31	128,094.10
65th Percentile		102,266.40	127,553.31	128,301.07
70th Percentile		104,511.20	128,237.65	128,508.05
75th Percentile		106,756.00	128,922.00	128,715.02
80th Percentile		108,352.61	129,591.50	128,922.00
Actual Data				
Average		100,762.10	134,349.47	
50th Percentile		104,841.31	139,788.42	
60th Percentile		115,284.69	153,712.92	
65th Percentile		115,470.96	153,961.29	
70th Percentile		115,657.24	154,209.66	
75th Percentile		115,843.52	154,458.03	
80th Percentile		116,029.80	154,706.40	



Water Superintendent				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle				
Essex	Chief Operator	86,489	97,101	89,000
Georgetown				
Groveland				
Hamilton				
Lincoln				
Merrimac				94,910
Middleton	N/A			
Nahant				
Newbury	N/A			
Rockport				
Rowley	Topsfield Survey: FY23 rate	87,963	100,797	
Salisbury	Chief Water Op. Topsfield Surv: FY23 rat	90,000	100,000	
Topsfield		91,166	119,600	110,240
West Newbury				
Wenham	40 hrs/wk			105,310
Range Data				
Average		88,904.65	104,374.45	98,050.13
50th Percentile		88,981.60	100,398.40	94,910.40
60th Percentile		89,592.64	100,637.44	97,976.32
65th Percentile		89,898.16	100,756.96	99,509.28
70th Percentile		90,116.64	102,677.12	101,042.24
75th Percentile		90,291.60	105,497.60	102,575.20
80th Percentile		90,466.56	108,318.08	104,108.16
Actual Data				
Average		88,245.12	117,660.16	
50th Percentile		85,419.36	113,892.48	
60th Percentile		88,178.69	117,571.58	
65th Percentile		89,558.35	119,411.14	
70th Percentile		90,938.02	121,250.69	
75th Percentile		92,317.68	123,090.24	
80th Percentile		93,697.34	124,929.79	

Council on Aging Director

Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Director of Senior Services. FY22 rate	72,983	102,176	
Carlisle	Boxford Survey: FY22 rate w. COLA	82,621	95,485	
Essex	19 hrs/wk	26,301	34,491	34,491
Georgetown	32 hrs/wk	54,041	62,087	
Groveland				
Hamilton	Boxford Survey: FY23 rate	79,976	91,874	
Lincoln				
Merrimac				65,120
Middleton	Boxford Survey: FY22 rate	83,200	108,160	
Nahant				
Newbury	Boxford Survey: FY22 rate w. COLA	47,990	76,652	
Rockport	Boxford Survey: FY22 rate			49,139
Rowley	Boxford Surv: FY23 rate. Hrly to 32.5/wk	59,099	67,718	
Salisbury	Boxford Survey: FY22 rate w. COLA			77,568
Topsfield		61,568	80,766	70,491
West Newbury				
Wenham	32.5 hrs/wk			52,965
Range Data				
Average		63,086.56	79,934.38	59,361.83
50th Percentile		61,568.00	80,766.40	65,119.60
60th Percentile		70,700.00	89,652.16	67,268.24
65th Percentile		74,381.60	92,595.91	68,342.56
70th Percentile		77,178.80	94,040.52	69,416.88
75th Percentile		79,976.00	95,485.14	70,491.20
80th Percentile		81,034.03	98,161.48	71,906.61
Actual Data				
Average		53,425.65	71,234.20	
50th Percentile		58,607.64	78,143.52	
60th Percentile		60,541.42	80,721.89	
65th Percentile		61,508.30	82,011.07	
70th Percentile		62,475.19	83,300.26	
75th Percentile		63,442.08	84,589.44	
80th Percentile		64,715.95	86,287.94	

Planning Coordinator				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	Director of Land Use. FY22 rate	85,917	120,284	
Carlisle	Town Planner			85,000
Essex	Town Planner. 15 hrs/wk			31,379
Georgetown	Town Planner	80,260	92,205	
Groveland				
Hamilton				
Lincoln				
Merrimac				
Middleton	Town Planner	83,200	108,160	96,153
Nahant				
Newbury	Pln. Dtr. Boxford Surv: FY22 rate w. COLA	66,773	103,553	
Rockport				
Rowley	Town Planner. No ZBA	51,925	59,496	57,203
Salisbury	Planner	55,000	68,000	68,000
Topsfield				
West Newbury				
Wenham	25 hrs/wk			52,286
Range Data				
Average		70,512.50	91,949.57	67,547.04
50th Percentile		73,516.69	97,878.82	68,000.00
60th Percentile		80,260.13	103,552.90	74,800.00
65th Percentile		80,995.10	104,704.68	78,200.00
70th Percentile		81,730.06	105,856.45	81,600.00
75th Percentile		82,465.03	107,008.23	85,000.00
80th Percentile		83,200.00	108,160.00	87,230.64
Actual Data				
Average		60,792.34	81,056.45	
50th Percentile		61,200.00	81,600.00	
60th Percentile		67,320.00	89,760.00	
65th Percentile		70,380.00	93,840.00	
70th Percentile		73,440.00	97,920.00	
75th Percentile		76,500.00	102,000.00	
80th Percentile		78,507.58	104,676.77	

Conservation & Open Space Coordinator				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford				
Carlisle				
Essex	Conservation Agent. Approx. 10 hrs/wk	12,932	18,465	16,640
Georgetown	Conservation Agent	73,641	84,588	
Groveland				
Hamilton	Cons. Coord. 19 hrs. FY22 plan w. COLA	31,472	36,148	
Lincoln				
Merrimac				
Middleton	Cons. Agent. Boxford Survey: FY22 rate	83,200	108,160	
Nahant				
Newbury	Cons. Agent. Topsfield Surv.: FY23 rate	47,993	76,640	
Rockport				
Rowley	Cons Agent. Topsfield Surv: FY23. 19/wk	28,188	32,298	
Salisbury	Cons. Agent. Topsfield Survey: FY23 rate	51,000	61,000	
Topsfield	Conservation Administrator	61,568	80,766	72,446
West Newbury				
Wenham	19 hrs/wk			30,628
Range Data				
Average		48,749.32	62,258.26	
50th Percentile		49,496.70	68,820.10	
60th Percentile		53,113.60	77,465.44	
65th Percentile		56,812.40	78,909.61	
70th Percentile		60,511.20	80,353.78	
75th Percentile		64,586.18	81,721.85	
80th Percentile		68,811.64	83,059.48	
Actual Data				
Average				
50th Percentile				
60th Percentile				
65th Percentile				
70th Percentile				
75th Percentile				
80th Percentile				

Inspector of Buildings				
Comparable Community	Title & Position Comments	Minimum Rate:	Maximum Rate:	Actual Salary:
Boxford	FY22 rate	79,187	110,861	
Carlisle	BC. Boxford Survey: FY22 rate w. COLA	91,711	105,996	
Essex	Annual stipend; works about 10 hrs/wk			15,286
Georgetown	Building Commissioner	70,228	80,679	
Groveland	Building Inspector			61,934
Hamilton	Reg'l BC. Boxford Survey: FY23 rate	92,955	106,787	
Lincoln				
Merrimac	Building Inspector. 15 hrs/wk			30,342
Middleton	BC. Boxford Survey: FY22 rate	83,200	108,160	
Nahant				
Newbury	Dtr-Insp. Svcs. Box. Surv: FY22 w. COLA	66,773	103,553	
Rockport	Boxford Survey: FY22 rate			79,922
Rowley	Boxford Survey: FY23 rate	72,738	83,346	
Salisbury	From Boxford Survey: FY22 rate w. COLA			105,527
Topsfield	Building Inspector. 28 hrs/wk	49,111	64,428	61,021
West Newbury				
Wenham				
Range Data				
Average		75,737.80	95,476.26	59,005.26
50th Percentile		75,962.30	104,774.67	61,477.48
60th Percentile		79,989.60	106,154.55	61,934.00
65th Percentile		81,394.15	106,431.25	66,431.00
70th Percentile		82,798.70	106,707.94	70,928.00
75th Percentile		85,327.77	107,130.25	75,425.00
80th Percentile		88,306.66	107,610.80	79,922.00
Actual Data				
Average		53,104.73	70,806.31	
50th Percentile		55,329.73	73,772.98	
60th Percentile		55,740.60	74,320.80	
65th Percentile		59,787.90	79,717.20	
70th Percentile		63,835.20	85,113.60	
75th Percentile		67,882.50	90,510.00	
80th Percentile		71,929.80	95,906.40	

11/1/2022 - Results of Survey distributed to all Municipalities in the State of Massachusetts. Only respondent to the survey are reflected below.

Municipality	Population	County	Monday Hrs.	Tuesday Hrs.	Wednesday Hrs.	Thursday Hrs.	Friday Hrs.	Total Hours	Community Comment
Ashburnham	6,315	Worcester	7:30a-7p	7:30a-5p	7:30a-5p	7:30a-5p	Closed	37.5	
Ashby	3,193	Middlesex	8:00 AM - 4:00 PM	8:00 AM - 4:00 PM	8:00 AM - 4:00 PM	8:00 AM - 4:00	closed	32	
Athol	11,945	Worcester	8a-5p	8a-8p	8a-5p	8a-5p	Closed	36.5	
Barre	5,530	Worcester	9a-4p	9a-4p	9a-4p	9a-4p	Closed	28	
Billerica							Closed		
Boxford	8,203	Essex	8-4:30pm	8-4:30pm	8-4:30pm	8-4:30pm	Closed	34	
Boylston	4,849	Worcester	8a-2p & 6p-8p	8a-2p	8a-2p	8a-2p	Closed	26	
Brewster									Employees enjoy it!
Brookline	63,191	Norfolk							Most depts are closed. Legal and building depts remain open
Buckland	1,816	Franklin	9a-4p	9a-4p	9a-4p	9a-4p	Closed	28	Salaried employees sometimes log in remotely on Fridays or use Town Hall on Fridays for quiet project work, but not required
Charlton	13,315	Worcester	9:00AM-3:00PM	9:00AM-3:00PM	9:00AM-3:00PM	9:00AM-3:00P	closed	40	
Clarksburg	1,647	Berkshire							
Dalton	6,300	Berkshire	8-5pm	8-5pm	8-5pm	8-6pm	Closed	35	DPW works a four day week in the summer. Town hall 4days per week year round
Dighton	8,101	Bristol	7:30 am to 4:30 pm	7:30 am to 4:30 pm	7:30 am to 5:30 pm	7:30 am to 4:30	Closed	37	Implemented approx. 15 years ago to save cost on utilities. One (1) resident tried to reverse the policy a few years ago. Results from a Facebook poll showed that residents preferred the Town Hall to be open early and late one day a week and didn't care about Fridays being closed. Bills can be placed online. Drop off box for bills as well. Early and late hours during the week help parents drop and pick up kids. Employees love it!
Douglas	8,983	Worcester	8:30 am – 1:00 pm and 1:30 pm – 4:00 pm	8:30 am – 1:00 pm and 1:30 pm – 6:00 pm	8:30 am – 1:00 pm and 1:30 pm – 4:00 pm	8:30 am – 1:00 pm and 1:30 pm – 4:00 pm	8:30 am – 1:30 pm – 4:00 pm	30	Work is getting done with 4 day, 30 hr. work weeks, which is a big reason why most depts are closed. BOS and FINCOM meet on Tuesdays which helps justify fair, billable time. <b>Employees have told TA that their hours are their #1 source of happiness with the job.</b>
Dunstable	3,358	Middlesex					Closed		
Easthampton	16,211	Hampshire	7:30a-5p	7:30a-5p	7:30a-5p	7:30a-5p	Closed	38	
Everett	49,075	Middlesex	8a-7:30p	8a-5p	8a-5p	8a-7:30p	Closed		
Hardwick	2,667	Worcester	9 am - 6:30 pm	9 am - 4:30 pm	9 am - 4:30 pm	9 am - 4:30 pn	Closed	32	

							Also, did away with "long day" back in 2019 due to a lack from residents taking advantage of it. Allowed working from home during the summer to ease the costs of a/c. Now working toward working from home again with the hope of saving heating costs. Suggests having Town employees check their miles per gallon and ask them to calculate r/t mileage from home. Also suggests the Town check electric bills, Can login to National Grab to check kWh usage by month against degree heating/cooling days	
<b>Harvard</b>	6,851	Worcester	8:00 - 4:30 pm	8:00 - 4:30 pm	8:00 - 4:30 pm	8:00 - 4:30 pm	Some open	38
<b>Hubbardston</b>	4,328	Worcester	9-4pm	9-4pm	9-4pm	9-4pm	Closed	28
<b>Lancaster</b>	8,441	Worcester	9a-5p	9a-4p	9a-4p	9a-4p	Closed	29
<b>Leicester</b>	11,087	Worcester	8-5pm	8-7pm	8-5pm	8-5pm	Closed	38
<b>Lincoln</b>	7,014	Middlesex	8a-5p	8a-7p	8a-5p	8a-5p	Closed	38
<b>Lunenburg</b>	11,946	Worcester	8-4pm	8-6pm	8-4pm	8-4pm	Closed	36
<b>Malden</b>	66,263	Middlesex	8AM-5PM	8AM-7PM	8AM-5PM	8AM-5PM	Closed	38
<b>Manchester by the Sea</b>	5,395	Essex	8:30-5:00 PM	8:30-5:00 PM	8:30-5:00 PM	8:30-6:30pm	closed (see notes)	35.5
<b>Mendon</b>	6,228	Worcester	9:00 AM - 6:30 PM	9 AM - 4 PM	9 AM - 4 PM	9 AM - 4 PM	closed	33.5
							Full-time dept. heads are expected to work a half day on Fridays	
							Employees love it and it increases retention/morale and offices being open later and earlier has improved services to the public. Water supervisor feels it is more efficient to reduce mobilization. DPW work mon-Thurs from 6-4. libraries, parks and rec, senior center water treatment, police) are open	
<b>Montague</b>	8,580	Franklin	8:30-5:30pm	8:30-5:30pm	8:30-6:30pm	8:30-5:30pm	Closed	37
<b>Norfolk</b>	11,662	Norfolk	8a-6p	8a-6p	8a-6p	8a-6p	Closed	40
<b>Palmer</b>	12,448	Hampden	8:30a-7:30p	8:30a-4:30p	8:30a-4:30p	8:30a-4:30p	Closed	35
<b>Paxton</b>	5,004	Worcester	9 AM - 4 PM	9 AM - 4 PM	9 AM - 4 PM	9 AM - 4 PM	Closed	28
							Saved 20% on heat, a/c and lighting. Helps employee retention. DPW also works four days but has 5 day coverage. TA recommends to increase online capabilities as much as possible.	
<b>Plainville</b>	9,945	Norfolk	8a-7:30p	8a-4:30p	8a-4:30p	8a-4:30p	Closed	37
<b>Princeton</b>	3,495	Worcester	8-4pm	8-4pm	8-4pm	8-4pm	Closed	32
<b>Reading</b>	25,518	Middlesex	7:30a-5:30p	7:30a-7p	7:30a-5:30p	7:30a-5:30p	Closed	35
<b>Rutland</b>	9,049	Worcester	8-430pm	8-7pm	8-430pm	8-430pm	Closed	36.5
<b>South Hadley</b>	6,851	Hampshire						
<b>Swampscott</b>	15,111	Essex	8:00AM - 5:00PM	8:00AM - 5:00PM	8:00 AM - 7 PM	8:00AM - 5:00f	Closed	34
<b>Templeton</b>	8,149	Worcester	7:30a-6:30p	7:30a-4:30p	7:30a-4:30p	7:30a-4:30p	Closed	38
<b>Tyngsborough</b>	12,380	Middlesex	8:30-4p	8:30-4p	8:30-7p	8:30-4p	Closed	33
<b>Uxbridge</b>	14,095	Worcester	7:30a-5p	7:30a-5p	8a-7p	7:30a-5p	Closed	39.5
<b>Wareham</b>	23,303	Plymouth	8:15a-6p	8:15a-6:30p	8:15a-6p	8:15a-6p	Closed	39.5
							Works great! Mentioned that his former employer, the Town of Hampden, ME closed on Fridays also and worked well.	
<b>West Newbury</b>	4,500	Essex	8am-4pm	8am-4pm	8am-4pm	8am-4pm	Closed	36

<b>Whitman</b>	15,121	Plymouth	8:00 AM - 4:00 PM	8:00 AM - 7:30 PM	8:00 AM - 4 PM	8:00 AM - 4:00 CLOSED	31
<b>Winchendon</b>	10,364	Worcester	8-6pm	8-5pm	8-5pm	Closed	37
<b>Winthrop</b>	19,316	Suffolk	8a-4:30p	8a-7p	8a-4:30p	8a-7p Closed	39





**LAND USE DEPARTMENT  
TOWN OF WENHAM  
MASSACHUSETTS**

**MEMORANDUM**

TEL 978-468-5520 x8

FAX 978-468-8014

**TO: Steve Poulos, Town Administrator**

**FROM: Margaret Hoffman, Planning Coordinator**

**RE: Land Use Department Hours**

**DATE: November 22, 2022**

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We have been working to determine the amount of hours that are needed to successfully accommodate business in the Land Use office. Kate Mallory and I have discussed the need to increase the number of hours she will work so that Kate and I can share the additional workload.

The Land Use office is responsible for managing the day to day needs of several Boards and Committees. In my role as Planning Coordinator, I am responsible for the Planning Board, Zoning Board of Appeals, Affordable Housing Trust and the Master Plan Advisory Committee. Kate, as the Conservation Coordinator manages the Conservation Commission, and the Open Space Committee. The workload in the office has multiplied recently for the following reasons:

- Over the past year the Planning Board started work on the Master Plan. Through the Select Board they created the Master Plan Advisory Committee (MPAC) . As the Planning Board's Coordinator, I took on the role of managing and facilitating the work of the MPAC. They meet each month with bi weekly check ins with the consultant. The Chair of the committee requires frequent meetings with me as we review deliverables from the consultants and we will be responsible for much of the public outreach over the next year.
- The Planning Board meets regularly each month and they have several applications per year for Special Permits and subdivisions. They are also responsible for the new MBTA Communities compliance. This has taken a large amount of my time in order to attend certain training and keep

up with the new requirements. This will be a years long project to reach compliance with the State guidelines by December 2024. We anticipate that developers will be interested in developing multi family housing once this new zoning district is adopted by the Town.

- In my role as Planning Coordinator I am also working with the ZBA to manage all applications and oversee projects. The Maplewoods Senior Housing project is beginning construction and I will be responsible for certain aspects of the project to ensure compliance with the ZBA decision and with the Affordable Housing Trusts loan agreement.
- The AHT is working on creating programs and completing the action items in their Affordable Housing Trust Action Plan. Over the next year we anticipate the need for further oversight of these programs.
- As you know, Gordon College is hoping to sell some of their land to a developer. While we do not know the extent of this application, we do imagine that Gordon College is serious about finding a development proposal that works and will get permitted by the Planning Board. If the scope of the project is close to what they have shown us preliminarily, this project will require a large amount of oversight to get through the application process.
- Several large areas of Town owned land will be topics for the Planning Board to address in the next year. There is land in Beverly that is accessed by Boulder Lane. Town owned land off of Boulder could become more developable if road improvements occur. The Iron Rail property will be the subject of a new feasibility study that the Land Use office will be overseeing in the coming year.

The point of my memo is to request that we increase Kate's hours to allow her to assist me with the Master Plan Advisory Committee and Master Plan projects and to assist with any projects that are able to be shared. Kate has explained to me that her current hours of 19/week are satisfactory for her to complete her duties with the OSRC and Con Com, but she is available for additional hours and would be happy to assist with the Master Plan and any other projects that need additional assistance.

Just over 4 years ago I took my retirement from the Essex County Retirement and decreased my full time hours down to 19 which was what was allowed by State Statute. The Town hired a Conservation Coordinator and they worked 19 hours also. This arrangement worked out well for about 2.5 years. When Covid hit the State lifted the limit on the number of hours a retiree could work. The then Conservation Coordinator left the Town for another position and I was able to come back almost full time working as the Conservation and Planning Coordinator until we found a replacement. Since Kate started in October

2021 the workload in our office has been increasing. Last year the Governor signed a law that would allow retirees to increase their work hours to approximately 23/week. I have been trying to keep to that number, but it is increasingly difficult. I attend on average 6 night meetings per month and frequently get called in to meetings early in the day. I have found it difficult to limit my hours. Often on my days off I get calls from board or committee members for matters that need immediate attention.

We are aware that the Select Board is considering utilizing ARPA funds for additional hours in the Land Use office. Originally we felt that I could increase my hours to 30/week but there is no indication that the Governor will extend the exemption for retiree hours past December 31, 2022. After this time I will not be able to work more than 23 hours per week on average, but if agreeable to you, Kate could increase her hours by 4-5/week to allow her to assist me with the additional workload.

I am also aware that there may be certain obstacles in the Finance Dept regarding the difference between being a part time employee vs. benefitted employee. We are willing to discuss any agreements that we may have to make in order to accommodate the change.

Thank you and please let me know if you need more information.



The City of  
**WORCESTER**

**EMPLOYEE TELEWORK POLICY**

## Purpose:

The term telework refers to a “work flexibility arrangement under which an employee performs the duties and responsibilities of such employee's position, and other authorized activities, from an approved worksite other than the location from which the employee would otherwise work.” (Telework Enhancement Act of 2010). The City of Worcester (“City”) is committed to fostering a flexible workplace environment that recognizes employees’ ongoing navigation of career and life responsibilities.

The City through its Telework Policy (the “Policy”) is providing eligible City employees with a more flexible workplace and the opportunity to work remotely. This option is available to employees within certain departments that can maintain official City business operations while the employee is working from an alternate work location. Telework can be a viable option if work can be performed remotely with the same level of services as performed onsite.

The purpose of this Policy is to implement guidelines to enable a consistent application of telework practices across City departments, to ensure the security of City information and systems, support continuity of operations planning, and sustain the hiring and retention of a highly qualified workforce by enhancing work/life balance.

## Principle:

Flexibility is the key principle of Telework. Flexibility in the workplace, a business principle widely used to manage people, time, space, and workload supports the City’s goals related to employee recruitment, retention, and sustainability, employee excellence and well-being, and overall financial savings for the City.

1. **Types of flexibility:** The City offers numerous types of workplace flexibility (see Section A of this Policy, entitled “Work Schedule,” under Telework Guidelines), recognizing that not all forms of flexibility are applicable to *all* positions, or are a good fit for the specific skills of *all* employees.

Flexibility ultimately depends on the Department’s goals and specific employee functions, skills, and responsibilities.

2. **How to manage flexible work:** Departments are encouraged to have open dialogues regarding flexible work and integrate the concept as part of the workplace environment, as appropriate. The determination of whether an employee is eligible to participate in a flexible work arrangement shall be made at the discretion of the Department Head, on a case by-case basis, considering the needs of the department. Telework Agreements should be reviewed on a consistent basis and modified accordingly.

All mutually agreed upon flexible work arrangements must be in writing on a Flexible Work Arrangement Agreement Form (the “Agreement”) (see Related Resources) signed by the employee, the Department Head, and the Director of Human Resources (“HR”). The Agreement guides Department Heads and employees in specifying the particular details of a flexible work arrangement.

3. **What to do when issues or concerns occur:** If an employee has an issue or concern regarding a decision made under this Policy, it should first be brought to the attention of the Department Head for resolution. If the matter cannot be resolved, the employee may consult with the Human Resources Department.

## Definitions:

Term	Definition
Alternative Arrival/Departure	An arrangement that permits variations in starting and departure times, but does not alter the total number of hours worked in a workweek.
Cloud Storage/Files	Documents and data stored in the cloud, enabling remote teams to work together anywhere in real-time.
Flexible Job	A flexible job can be variable in hours or location, allowing employees to have complete or partial autonomy when it comes to schedule.
Telework Schedule	A schedule that is tailored to the individual employee and doesn't fall into a typical 9 am to 5 pm schedule.
Telework Agreement	An agreement established between an employee and the City wherein the time or location of work performed is different than the customary schedule or work location.
Hybrid Department	A City Department with some remote employees and some in-office employees.
Telework Technology	Includes any technology related to working remotely. Ex. Messaging software, video conferencing, VPN. Etc.
Telework Policy	A policy that outlines when, how and with what support employees may work remotely.
Designee	The individual in a department or division appointed by the Department Head, with primary responsibility for the regular and customary supervision of individual positions and telework arrangements. The designee may also be referred to as a manager or supervisor.
Working From Home	Working from home encompasses both employees who work remotely from a home office or shared workspace full time or those who work remotely some of the time.
Video Conferencing	Using video to conduct meetings, interviews, or any other business; requires video conferencing software and a web camera.
VPN	Virtual private network, used for security and enables remote employees to access company files from home.
Primary Work Location	The City work site where the employee would be required to work if they did not telework.
Telework Location	An approved work site other than the employee's primary work location where official City business is performed. Such locations may include an employee's home.
Teleworker	A City employee who has been authorized to work remotely and has an approved Telework Agreement.
Human Resources Department	The department that administers the human resources activities of the City, including personnel administration, collective bargaining, affirmative action, group insurance, employee training and education, workers compensation and injured-onduty.

## **Eligibility:**

This Policy is for all nonunion and union personnel, unless otherwise stated in a Collective Bargaining Agreement. Telework Schedules and Agreements must be approved and authorized, in writing, by the Department Head and HR.

To be eligible to participate in Telework, employees must be employed with the City for a minimum of three months (90 days). Exceptions to this requirement may be granted by the Department Head, with the approval of the Director of Human Resources.

Employees must be meeting work expectations, fulfilling the duties of their job description, have no recent history of performance or conduct issues, including verbal or written warnings, and no sick time abuse to be eligible.

### **A. Suitable Position and Assignments**

Full-time, part-time, seasonal or temporary positions may be eligible to participate in telework. The nature of the work performed and service provided must be considered in determining whether telework is an option for a particular position. Whether a position is suitable for telework shall be made at the discretion of the Department Head and will be evaluated on an individual basis considering the following criteria:

1. Some, or all, of the job functions are portable, or can be accessed electronically, and therefore can be performed effectively while working away from the primary work location. The work does not require access to equipment or materials that cannot be removed from the primary work location.
2. The employee's participation in the telework program will not adversely affect the department's ability to meet and/or exceed customers' needs.
3. The position does not require daily unscheduled face-to-face contact with other employees or the public at the primary work location. The employee has the ability to set up meetings with other employees, supervisors or customers at the primary work location.
4. Positions with established metrics that can be met in a telework environment.

### **B. Employee Performance**

Employees suited for telework need to possess several attributes which indicate they can work well and meet job expectations with this type of work arrangement:

1. Solid performer who knows the duties of the job and the department's standards and expectations.
2. Be able to work independently without close supervision and fulfill job duties and expectations.
3. Have the ability to prioritize work effectively and utilize good time management skills.
4. Be reliable, disciplined, and self-motivated with a high sense of responsibility in accomplishing work assignments.
5. No recent history of performance or conduct issues, including but not limited to sick time abuse.
  - a. Sick time abuse will be determined by the Director of HR. Anything over eight (8) sick days a year, excluding FMLA could be considered an abuse of sick time.

## **Responsibilities:**

### **A. Department Head**

- Serves as the sponsor of the department's telework program.
- Implements telework policies and goals.
- Approves or denies employee requests for telework based on several factors, including but not limited to suitability of the work and employee and work responsibilities, as outlined in the job description.
- Implements metrics, or a means of measuring work outcomes, for all positions eligible for telework.
- Reviews and authorizes the required forms for approved telework agreements and technology requests.
- May appoint a designee who shall be responsible for the regular and customary supervision of individual positions, teleworkers, telework arrangements and any other duties and responsibilities the Department Head deems appropriate. . This person may be called a supervisor or manager.

### **B. Designee**

- The Department Head Designee shall be responsible for implementing approved Telework Agreements in the Department and any ancillary issues that may arise out of the telework arrangement and the Agreement.
- Provide an environment that is conducive to telework, including scheduling and logistical support to employees.
- Obtain feedback regarding the impact of the telework arrangement on the teleworker, other employees of the Department, and the Department as a whole.
- The Designee may be called a manager or supervisor.

### **C. Technical Services Department**

- Provides technical support and problem escalation for City employees, including those with an authorized Telework Agreement.
- Sets the appropriate technology standards to facilitate telework.
- Provides options for remote access to the City's data and telecommunications network.
- Provides expertise and consultation for the telework program such as preparing technical user documentation and reviewing technology-related program material.
- Provides information security and cybersecurity awareness training to all employees.

### **D. Human Resources Department**

- Develops and implements telework guidelines.
- Prepares, maintains and disseminates Telework Program information.
- Provides trainings and briefings for City employees in matters related to telework.
- Provides or coordinates trainings to prepare employees who have been approved for telework and provide them with the necessary skills to be productive while working remotely. Examples of training for this include team skills training and time management training.
- Provides analysis of the effectiveness of the Telework Program to departments and recommends appropriate modifications or remedial actions for specific situations arising from a Telework



Agreement.

- Provides analysis of the effectiveness of the Telework Program across all City departments and reports to the city manager or city council, as appropriate.

#### **E. Teleworkers**

- Must keep informed of the City's Telework Policy requirements, as updated, and any related procedures, guidelines and regulations and ensure compliance.
- Remain accessible to customers, co-workers, supervisors and provide seamless customer service.
- Plan and organize job tasks for telework for efficiency and productivity.
- Request approval from Department Head prior to incurring any overtime.
- Develop proficiency in the use of the technology required for telework.
- Adhere to the provisions in the Telework Agreement.

### **Telework Guidelines:**

#### **A. Work Schedule**

##### **Forms of Flexibility**

##### Alternative Arrival/Departure Times

The core hours for a position are typically set by the department. An employee may seek to alter their arrival or departure time on a temporary or consistent basis. This form of flexibility does not typically alter the total number of hours per week the employee works.

One option under this type of flexibility is when the Department Head and employee work together to determine an agreed upon arrival and departure time which is outside the "core hours" of the job description. Alternatively, a Department Head may set a range of time during which an employee is expected to arrive. For instance, a Department Head may determine it is critical for the job functions of an employee to be working between the hours of 9:00 a.m. and 3:00 p.m. and may permit an employee to arrive anytime between 7:00-9:00 a.m., and work until the hours assigned for that day are complete.

##### Compressed Schedule

A compressed schedule is another form of alternative arrival/departure flexibility, wherein the total number of hours expected to work each week are conducted in less than five (5) full workdays. The most common compressed schedule is four (4) ten (10) hour workdays per week.

##### Reduction in Time Commitment

An employee may seek to reduce their time commitment to the City on a permanent or temporary basis to accommodate personal life transitions (e.g., returning from parental leave, preparing for retirement, pursuing a degree, etc.). An employee seeking this type of flexibility must work with the Department Head and HR to determine feasibility, duration of time, impact on pay and benefits, and whether there any other policies or local ordinances or regulations that may apply to the request.

#### **B. Procedures**

Outlined below are the basic procedures for proposing, authorizing and implementing a telework arrangement. Employees seeking approval for a Telework Agreement shall first submit a proposal (see Telework Agreement Request Form in Related Resources) to the Department Head for review. The Department Head shall review the proposal and, at their discretion, consult with other departments (Technical Services, Human Resources, etc.) or personnel prior to making a determination. If approved, the Department Head and employee shall complete a Flexible Work Arrangement Agreement Form, which shall be reviewed, signed, and filed with HR. Once a Telework Agreement is authorized, the Department Head, or Designee, shall routinely review the Agreement and make adjustments to address concerns/challenges. An initial review shall be scheduled within thirty (30) days of the effective date of the Agreement; thereafter, reviews must be scheduled routinely and at a minimum shall be conducted annually, although they may occur more frequently. If a Department Head determines to deny a request for a Telework Agreement they should work with HR to notify, in writing, the employee of the denial and reasons thereof.

#### Agreement

It is recommended that Telework Agreements are limited to no more than five (5) days per week; however, exceptions may be granted by the Department Head. A clearly defined schedule of work hours, including specific work hours and break times, must be set prior to the employee starting to telework. Based on the job description some employees may be expected to work outside of regularly scheduled hours. The expectations of an employee's availability and scheduled work hours shall be detailed in the Telework Agreement. Employees are not authorized to work during preapproved break times. The total number of hours that an employee works in a workweek shall not be affected or altered by teleworking.

For non-exempt employees, hours of work beyond the authorized workweek and any overtime require prior approval and will be compensated according to Fair Labor Standards Act (FLSA) regulations.

When teleworking, employees must be available and accessible during work hours to internal/external customers, employees in their department, and any managers or supervisors and the Department Head. During teleworking hours, an employee is required to participate in scheduled meetings via teleconference; however, there may be times when teleconference is not appropriate and the employee shall arrange to be at the primary work location during the employee's Telework Schedule. Notwithstanding the agreed upon Telework Schedule, at a Department Head's discretion, an employee may be required to report to the primary work location, or other designated locations, at any time for any task related to the employees job duties and functions.

#### **C. Work Expectations**

Teleworkers are subject to the same work expectations and job performance competencies as if the employee were at the primary work location. Employees are expected to provide the same level of customer service, work outcomes, and quality of work while teleworking. Time spent and work accomplished from a remote location should appear seamless to customers.

#### **D. Confidentiality**

Employees must maintain appropriate confidentiality of all work-related information, including written documents, electronic files, and verbal communication. Any work performed at the telework

location is considered official City business. If an employee requires hardcopy confidential information at the telework location, they shall first obtain approval from the Department Head or data owner, and once said information has been transferred to the telework location use best efforts to store said information temporarily. Electronic files and automated records must be safeguarded to protect unauthorized disclosure or damage.

Employees must store all protected health information, Personally Identifiable Information (PII), and confidential records in a secure location. Any verbal communication of confidential work-related information should be conducted in a private area.

Confidential information shall not be downloaded to a local laptop or workstation or placed in the cloud. Printing of confidential City materials in the remote telework location should be done in a secure manner.

#### **E. Work Space**

Employees are responsible for designating a work space for the purpose of performing work for the City.

The work space must be sufficient for the employee to perform the requirements of the job, including appropriate furniture, equipment, supplies and lighting. The remote work location must be safe and free from hazards, including ensuring the location is in compliance with all applicable building codes. The City is under no obligation to maintain or repair any structure at the telework location or the remote work space. Employees are not permitted to conduct face-to-face meetings in the employee's home.

Employees shall apply approved safeguards to protect all City records, including confidential documents as mentioned above, from unauthorized disclosure or damage and shall store all said documents in a secure location.

#### **F. Personal Vehicle**

Employees shall notify the Department Head, Designee, or direct supervisor in as much advance as possible when scheduling meetings that require traveling to another location on foot or via motor vehicle during scheduled work hours.

Without prior notification, an employee's travel in a motor vehicle during work hours may be considered a personal and non-work related activity. Such travel without permission may result in termination of telework privileges and/or other discipline.

#### **G. Equipment, Technology and Supplies**

The decision to purchase new equipment or supplies for a telework location is at the discretion of the Department Head and is contingent upon the availability of department funding to support the request. All such requests shall be discussed with the Department Head prior to initiating a Telework Agreement.

All equipment, supplies or other property provided by the City remain property of the City. Employees must take reasonable and prudent precautions to protect City equipment against damage, loss or abuse while in the employee's custody. Use of City equipment is governed by the City of Worcester Computer Usage Policy and any other applicable policies. City equipment is serviced and repaired by

Technical Services at City facilities; support technicians will not travel to a telework site. Only City approved software shall be downloaded on City equipment

Departments may provide the following resources as part of the City's support for telework:

- Telecommunications equipment including, voice over IP soft phone for computer and configuration for "extension to cellular phone." Line charges for use of home telephone equipment will not be reimbursed.
- City- issued laptop for use at the telework site.
- Standard office supplies such as paper, pens and pencils, folders, etc., as needed for the employee's work.
- Use of a City printer at a telework location must be approved by the Department Head and the Technical Services Department.
- The Teleworker must immediately notify Technical Service of any City allocated equipment that malfunctions

Employees who choose to telework must maintain internet service at their own expense and have a phone. Teleworkers are prohibited from using their home computer for City related work unless the City's secure remote access tools are used. For all City-issued laptops, employees must bring the laptop onsite, when requested by Technical Services, for updates and security patches. If equipment needs to be serviced or repaired, the employee must contact Technical Services to coordinate services. Employees shall bring the equipment to a City building location for service.

City equipment must be used for official City business only. Unauthorized persons are prohibited from using City equipment. Employees will be responsible for transporting and installing the equipment at the telework location.

Lost, stolen, or compromised devices must be reported, as soon as possible, to Technical Services, the Department Head, and to the Police, as appropriate, related to a telework location theft.

The Teleworker must safeguard access to City systems. A City-issued laptop computer, used to connect remotely, is subject to scanning by the City to check for performance issues and general compliance with City technology standards.

#### **H. City Policies and Procedures**

Compensation and benefits including hours of work, leave and overtime will remain the same for teleworkers as for all other employees.

All personnel regulations and other applicable City, state and federal regulations, policies and procedures apply to Teleworkers. This includes policies and procedures that address employee standards of conduct, the privacy and protection of information, electronic and e-mail use policies, responsibility for proper use and care of City-owned equipment, and City liability for on-the-job injuries.

#### **I. Liability**

The determination of compensability for remote work site injuries shall be determined like any other off site location for purposes of Workers' Compensation. Employees agree to notify their Department Head immediately of any accident or injury that occurs at the alternate work site and to comply with

City policies covering on-the-job injury. The City will not be liable for injuries occurring during scheduled telework hours if the employee is conducting personal, non-work related activities. Employees understand that the City will not be liable for any injuries to third parties or for damages to an employee's personal or real property while the employee is working at the alternate work site.

Information on the Teleworker's laptop or workstation may be subject to the Massachusetts Public Records Law and subpoena requests.

The City will not be liable for any damages to the employee's property that results from participation in the City's telework program. The City will not be responsible for operating costs, home maintenance, or any incidental cost (e.g. utilities) associated with the employee's use of their residence for telework for the City.

#### **J. Dependent Care**

Telework is not a substitute for child care or other dependent care responsibilities. If a child or dependent who would normally require child or other dependent care is present during scheduled telework hours, the employee shall make other arrangements for the care of the child or dependent. Employees may provide limited care for the child or dependent who requires occasional care in the telework location.

#### **K. Inclement Weather and Emergency Events**

When an employee is teleworking during inclement weather or emergency events, he/she is subject to department essential staffing requirements. An employee who is working a Telework Schedule may be required to come to the primary work location during adverse weather or emergency events.

In addition, telework employees may be required to work under the department's Continuity of Operations Plan (COOP).

#### **L. Telephone or Internet Service Outage**

In the event of an outage impacting telephone or internet service at the telework location, the employee should contact his/her supervisor to discuss whether to report to the City primary work location, work from an alternate telework location, work on assignments not impacted by loss of service, or take Personal Time Off ("PTO") for the time when work cannot be performed.

#### **M. Modifying, Renewing and Terminating a Telework Agreement**

Exceptions to an employee's regular Telework Schedule, such as adding or changing telework days, should be approved by the Department Head in advance, when possible. If an employee is not able to obtain prior approval of a schedule change they must at a minimum notify, in writing (via email), the Department Head, Designee, or direct supervisor of the change of schedule.

A Telework Agreement should be reviewed when an employee's job role, work assignments, or Department Head change. Telework Agreements are not automatically transferred from one position or Department Head to another. Telework Agreements must be reviewed and renewed annually to ensure there is a continued benefit to both the City and employee.

A Department Head, at their sole discretion, shall have the authority to modify any portion of a Telework Agreement.

Either party may terminate a Telework Agreement at any time, without cause, so long as at least 14 days' notice of said termination is given to the other party. Termination of a Telework Agreement by a Department Head is not eligible for appeal. Written notification of modification, suspension, or termination of a Telework Agreement shall be provided to the employee. Department Heads shall work with HR when seeking to modify, suspend, or terminate a Telework Agreement.

**Effective:** This Policy shall become

COMMONWEALTH OF MASSACHUSETTS  
HUMAN RESOURCES DIVISION  
ALTERNATIVE WORK OPTIONS PROGRAM

FLEXTIME PROGRAM INFORMATION PACKET

I. Introduction

Flextime is a work scheduling strategy that is part of the Massachusetts Alternative Work Options Program. Alternative Work Options provide Massachusetts state employees with greater flexibility in their work schedules. The options included in the program are: part-time, job-sharing, flextime and staggered work hours.

Flextime permits employees to set their own daily work patterns within guidelines set by agency management. Arrival and departure times may vary. Employees can make up time missed for a doctor's appointment or other personal business by working longer that day or another day that week. The hours worked each day may vary, but a total of 37.5 hours (40 hours for some positions) must be worked each week. Part-time employees may also vary their hours each day but must fulfill their weekly work hours commitment. Each work unit develops a flextime plan that specifies how flextime will be implemented in the unit. Flextime plans may also include the option of a compressed workweek, in which employees work 37.5 or 40 hours in four or four-and-a-half days.

II. History of Flextime In Massachusetts State Government

Legislation established flextime for Massachusetts state government in 1974. It was created as part of the "flexible hours employment" that was mandated by Chapter 7, section 6F of the Massachusetts General Laws. A copy of the legislation is included in this Information Packet.

Flextime has been expanding gradually among Massachusetts state agencies. There has been a recent trend toward increased flextime program implementation as a result of the changes in the composition of the state workforce. More working parents, employees who care for elderly or ill parents, working students, and employees with disabilities, all of whom benefit from increased work schedule flexibility, have joined Massachusetts state government.

A survey in June, 1999 conducted by the Human Resources Division shows that at least 49 state agencies in the Executive Branch had flextime programs, covering at least 7,000 employees; 63 state agencies had staggered work hours programs covering at least 8,000 employees; and 37 state agencies had compressed workweeks covering over 3,400 employees.

### III. Structure of Flextime

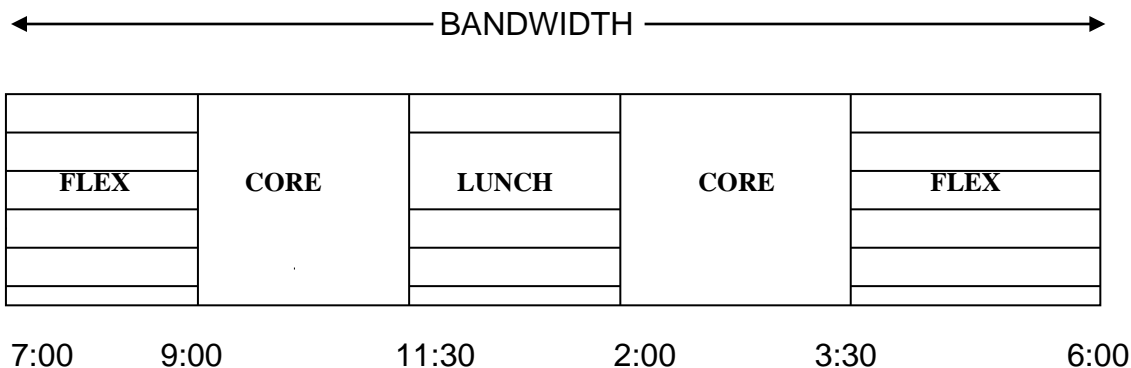
Flextime is comprised of three main components: core hours, flexible hours and bandwidth.

**Core hours:** Core hours are the times when all employees must be at work, regardless of their individual flextime arrangements. Generally, these are the hours when meetings are likely to be scheduled, because all employees are present. Examples of core hours are 9:00 to 11:30 a.m. and 2:00 to 3:30 p.m.

**Flexible hours:** Flexible hours are the times during the working day when employees may choose their arrival and departure times, within the limits established by the flextime plan for their work unit. Examples of flexible hours are 7:00 to 9:00 a.m. and 3:30 to 6:00 p.m.

**Bandwidth:** The bandwidth of a flextime plan is the span of time between the earliest an employee may arrive at the office and the latest an employee may leave. The office or worksite is not necessarily open to the public during the entire bandwidth. Typically, the standard business hours of 9:00 a.m. to 5:00 p.m. are maintained for public accessibility to state agency offices. A bandwidth may extend from 7:00 a.m. to 6:00 p.m., for example.

The following illustrates a typical flextime configuration. It is provided as an example and does not represent the only way to structure a flextime program.



Given this flextime model, the following features of the program apply:

- Employees must first define their “default” schedule, to be used as a planning tool for supervisors to ensure that minimum staffing requirements are met. Then, within the flexible bands, employees may vary starting and departure time without prior notification or approval of the supervisor, as long as the needs of the office are met.
- Employees may choose to work less or more than 7.5 (or 8) hours on any given day, up to a limit established by management; they must work their regular number of



hours (37.5 or 40) within the normal workweek. Part-time employees may vary the length of each workday but must fulfill their weekly work hours commitment.

- Employees may take an extended lunch period within the times established by program guidelines (in this model, from 11:30 a.m. to 2:00 p.m.), as long as the required number of hours are worked each week. Employees must take a minimum of a thirty-minute lunch period daily.
- Everyone must be in the office during core hours (for example, 9:00 to 11:30 a.m. and 2:00 to 3:30 p.m.) to be available for meetings, communication with supervisors, etc.
- Work can start as early as 7:00 a.m. and continue as late as 6:00 p.m.
- Management establishes minimum staffing levels for specified periods of the bandwidth (for example, at least 25% of the staff must be in the office by 8:45 a.m. and from 3:00 to 5:00 p.m. every day).

The compressed workweek is an option within flextime. The four-day model is implemented by eliminating core time on Mondays or Fridays, enabling employees to schedule their work over a period of four days (working Monday through Thursday or Tuesday through Friday, for example). A four-and-a-half day workweek is accomplished by allowing for arrival as late as 2:00 p.m. on Monday and departure as early as 11:30 a.m. on Friday.

#### IV. Eligibility for Flextime Program Participation

Flextime is a totally voluntary program. All employees, managers and non-managers, may participate in a flextime program. Work unit productivity must be maintained and appropriate coverage of work responsibilities must be provided at all times. As long as these conditions are met, the only employees who may not be offered the option of participating in a flextime program are those whose presence is critical during standard work hours, or those employees with an identified performance problem. Once the flextime program is implemented, employees should be excluded from the program if they violate the program requirements. In addition, the program can be withdrawn by management at any time, as long as employees are given 5 days notice.

Work unit managers retain the right to establish minimum levels of staffing and adequacy of coverage. Within these levels, individual employees set their own arrival and departure times without a pre-approved schedule. It is recommended that employees be organized into groups of five to ten people who generally work closely together. These work groups will determine among themselves the arrival and departure times of their members, considering the responsibilities and demands of their jobs.

Each agency or work unit establishes procedures to sanction abuse of the flextime program. "Abuse" is defined as taking advantage of the program, for example by:

- inaccurately filling out time sheets.
- failing to share duties or cover for other employees as required by the flextime arrangement.
- decreased productivity when staying late or coming in early, indicating that an employee is not working when others are not around.
- habitually working long hours Monday through Thursday and then calling in sick on Friday (this may also be an abuse of sick time).

Managers have the prerogative of reviewing the overall usage of the flextime program and removing an individual employee or a work unit because of abuse of the program.

The success of a flextime program is built on mutual trust. Employees must cooperate with each other, and employees and supervisors need to work together to ensure that the program works.

#### V. Time Monitoring Under Flextime

Generally, a written time sheet is maintained in a central location for each small work group or unit. Employees enter their arrival and departure times and keep a running tally of the hours worked each day to ensure that they work the full number of hours required. Some agencies use mechanical or electronic time monitoring systems (time clocks or computers).

It is important to distinguish flextime from staggered work hours schedules. A staggered work hours schedule requires employees to adhere to fixed times of arrival and departure, five days a week, although those times may vary from the traditional 8:45 a.m. and 5:00 p.m.. For example, an employee on a staggered work hours schedule may work from 8:00 a.m. to 4:15 p.m. or from 7:30 a.m. to 3:45 p.m.. There is no opportunity to make up missed work time, as is the case under flextime; an employee must use accrued leave for time away from the office.

In agencies which normally allow overtime pay, each work unit must specify the procedure for scheduling overtime for those employees participating in a flextime program.

#### VI. Advantages of Flextime

The advantages of flextime became apparent soon after the program was conceptualized in West Germany after World War II. A woman who worked at a factory developed the idea for staggered work hours to help relieve parking lot congestion. The idea caught on and was expanded to what is now known as flextime. It has been extremely popular in Europe since the 1950's.

There has been considerable research on the implementation of flextime programs in this country. Among the documented benefits of flextime to management are:

- virtual elimination of tardiness, since employees who come in later than usual simply make up the time during the week (with the exception of missed core time, which cannot be made up).
- reduction in paid absences and idle time on the job, resulting in more actual labor from the same number of hours.
- better organization of work, since meetings, visits and telephone calls are scheduled during core hours, resulting in the ability to tackle work that requires concentration during the quieter periods of the day.
- better managerial practices resulting from the need to delegate work and schedule subordinates' time more effectively, given that they will be working independently during parts of the day.
- the possibility of enhanced organizational effectiveness resulting from improved labor-management relations, greater employee participation in management, and new organizational development strategies.

Employees typically report improved productivity and morale as a result of flextime programs. Among the benefits to employees are:

- Increased control over part of the work environment, resulting in improved satisfaction and productivity.
- The ability to adjust the work schedule to one's individual "biological clock", taking advantage of peak productivity periods.
- More efficient and flexible transportation usage, including reduction of rush hour travel and increased use of public transportation during non-peak hours.
- Better accommodation of work and personal needs, including caring for young children, sick relatives, or participating in educational programs.

The use of flextime also appears to be growing. According to the U. S. Bureau of Labor Statistics, 27.6% of the nation's 1999 work force has a flexible schedule, up from 15% in 1991. The 1996 Mercer Work/Life and Diversity Initiatives Benchmarking Survey, covering 800 organizations and 7 million employees, showed that 94% of the organizations surveyed offered flexible scheduling and 76% of those organizations rated flexible scheduling as the most important work/life program in recruiting. A 1998 Hewitt Associates survey demonstrated that 79% of 1,020 employers offered flextime and 29% offered compressed workweeks. At least 48 states surveyed by HRD in 1999 offered flextime programs, and a 1997 report on work/life programs in the federal government showed 34% of federal employees participating in flextime programs.

## VII. Establishing a Flextime Program

Any worksite, unit, or agency may develop and implement a flextime program. Employees, supervisors, and representatives of the collective bargaining units of affected employees may work together to develop a flextime plan for the work unit. This flextime plan is submitted to the Human Resources Division for review and approval. A discussion of the proposed flextime policy with the union(s) representing the employees involved is also required prior to implementation. The flextime program can then be implemented, evaluated and modified as necessary based on the work unit's experience.

A Flextime Program Planning Checklist has been included in this Information Packet to assist managers or employees who are interested in developing a flextime program.

More information and assistance are available from:

Policy Unit  
Human Resources Division  
One Ashburton Place, Room 301  
Boston, Massachusetts 02108 Telephone: 617-878-9710

## VIII. Definitions of Alternative Work Options

**Part-Time:** A part-time employee is scheduled to work at least half-time but less than full-time.

**Job-Sharing:** Job-sharing enables two (or more) employees to share the responsibilities assigned to one specified position.

**Flextime:** Flextime permits employees to establish variable arrival and departure times within guidelines established by agency management. Compressed workweeks are a form of flextime enabling employees to work four or four-and-one-half day workweeks.

**Staggered Work Hours:** This scheduling option enables employees to establish fixed arrival and departure times other than the standard 8:45 a.m. and 5:00 p.m.

IX. Additional Information and Supplemental Materials Available From HRD

The following materials are available to supplement this Information Packet:

- Massachusetts General Laws Chapter 7, section 6F
- Flextime Regulations
- Flextime Program Planning Checklist
- Common Questions About Flextime
- Sample Flextime Guidelines I, II and III
- Sample Letter to Union Presidents Regarding Flextime Plan
- Sample Letter to Managers Introducing Flextime
- Sample Letter to Employees Introducing Flextime
- Sample Form for Managers' Evaluation of Flextime Pilot Program
- Sample Form for Employees' Evaluation of Flextime Pilot Program
- Flextime Plan Approval Request Form

## GENERAL LAWS OF MASSACHUSETTS

Chapter 7, Section 6F: Coordinator of flexible hours employment within human resources division; plans or programs; report.

Section 6F There shall be a coordinator of flexible hours employment within the human resources division who shall work on the development, implementation and oversight of plans for the utilization, within all executive agencies, of persons who choose to be employed for a reduced number of hours per week and for the recruitment of such persons for civil service and non-civil service employment. All state agencies shall report to the coordinator the progress of implementation of any flexible hours plan in such agency. Such reports shall be filed on a semi-annual basis, beginning six months from the effective date of such program. Such reports shall include:

- (1) The number of regular part-time employees currently employed and the percentage of the full-time workforce represented by this number;
- (2) The agency policy for full-time employees who wish to convert to part-time status;
- (3) Agency plans to increase the number and scope and grade range of part-time employees during the next reporting period;
- (4) Extent of flextime programs in the agency.

The coordinator shall recommend to said department such action, including the submission of legislation and the making of rules, as shall be necessary from time to time in order to implement a plan or plans for flexible hours employment and in order to secure for flexible hours employees the normal advantages of their positions, including without limitation vacation time, sick leave, maternity leave, bonuses, advancement, seniority, length of service credit, benefits and participation in benefit plans or programs. The coordinator shall make an annual report to the personnel administrator containing information as to the activities of the program during the preceding year. Such report shall be a public record, and copies of it shall be furnished to the governor and to the state library.

(Chapter 500, Acts of 1974; amended by 1981, 767,S.6, approved, with emergency preamble, January 4, 1982.)

# REGULATIONS GOVERNING FLEXTIME HOURS PROGRAMS FOR STATE EMPLOYEES

## Part I - GENERAL PROVISIONS

### 1.1 Purpose

These regulations are adopted to allow state employees flexibility in determining their hours of work.

### 1.2 Applicability

These regulations are applicable to all offices, departments, divisions, boards, agencies, authorities, or commissions of the Commonwealth.

### 1.3 Authority

These regulations are adopted pursuant to Massachusetts General Laws Chapter 7, Section 6F (Chapter 500 of the Acts of 1974) and Massachusetts General Laws Chapter 149, Sections 30A, 30B and 100.

### 1.4 Delegation of Authority

The Personnel Administrator (Chief Human Resources Officer) may authorize an employee of the Human Resources Division to exercise any power or perform any duty of the Chief Human Resources Officer authorized by these regulations.

## 1.5 Severability

If any provision of these regulations or the application thereof is held to be invalid, such invalidity shall not affect other provisions of these regulations or the applications thereof not specifically held invalid. The provisions of these regulations and the various applications thereof are severable.

## Part 2 - DEFINITIONS

### 2.1 Meaning of Words

Words and phrases as used in these regulations shall have meanings ascribed in this part unless the text otherwise provides.

### 2.2 Approved Flexible Hours Program

"Approved Flexible Hours Program," means a flexible hours program which meets the standards required by these regulations and has been approved by the Chief Human Resources Officer.

### 2.3 Commonwealth

"Commonwealth", means the Commonwealth of Massachusetts.

### 2.4 Department

"Department", means any office, department, division, board, agency, authority or commission of the Commonwealth.



## 2.5 Core Time

“Core Time”, means the hours an employee is required to work each day pursuant to an approved flexible hours program.

## 2.6 Human Resources Division

"Human Resources Division" as established by Massachusetts General Laws Chapter 7, section 4A.

## 2.7 Flexible Hours Employee

“Flexible Hours Employee”, means an employee of the Commonwealth who is voluntarily participating in an approved flexible hours program.

## 2.8 Flexible Hours Program

“Flexible Hours Program,” means a department plan for the scheduling of work hours which allows individual employees to modify the standard work day and to determine their own hours of work, subject to departmental limitations.

## 2.9 Gray Book

“Gray Book,” means Rules and Regulations Governing Classification and Pay Plan of the Commonwealth.

## 2.10 Personnel Administrator

“Personnel Administrator”, means the Chief Human Resources Officer as established by Massachusetts General Law Chapter 7, section 4A.

## 2.11 Provisional Overtime

“Provisional Overtime,” means hours an employee works beyond scheduled hours at the request of the department.

## 2.12 Red Book

“Red Book”, means “Rules and Regulations Governing Leave and Other Benefits for Managers and Confidential Employees”.

## 2.13 Scheduled Hours

“Scheduled Hours,” means times chosen by a flexible hours employee, subject to any limitations of the flexible hours program, to work the regular number of hours required by the department.

# Part 3 - STANDARDS OF APPROVAL OF FLEXIBLE HOURS PROGRAMS

## 3.1 General

In order for flexible hours programs to be approved by the Chief Human Resources Officer, they must meet the minimum requirements set forth below.

### 3.2 Voluntary Participation

Participation in flexible hours programs by individual employees must be completely voluntary. Employees shall have the option of ending their participation in accordance with section 3.4 of these regulations provided that the department is furnished with a notice of not less than five (5) working days.

### 3.3 Employee Consultation

The flexible hours program should be developed in consultation with the employees of the department.

### 3.4 Notice

Any flexible hours program must include a provision for the department to give not less than five (5) working days notice of the program's discontinuance or of the exclusion of certain job titles from the program, and for a flexible hours employee to give not less than five (5) working days notice of his/her withdrawal from the program.

### 3.5 Statement of Limitations

Flexible hours programs must state with specificity any and all limitations which regulate an employee's work schedule such as the hours during which an employee must be present, the right of supervisors to require the attendance of employees at meetings and any rules concerning the number of hours worked each day.

### 3.6 Work Beyond Scheduled Hours

Flexible hours programs must provide the specific procedures by which flexible hours employees can be requested to work beyond their scheduled hours and must state specifically that flexible hours employees shall not work beyond their scheduled hours unless they have received a written request authorizing such work.

### 3.7 Office Hours

Departments which deal with the public must, at a minimum, be open to the public during the hours of 9:00 am. to 5:00 p.m. , pursuant to M.G.L. C. 30, s. 24.

### 3.8 Lunch Period

No employee shall be permitted to work for more than six hours during a calendar day without an interval of at least thirty minutes for a meal period, pursuant to M.G.L. C. 149, s. 100.

### 3.9 Time Requirement for Approval of Program

Departments must submit their written flexible hours program to the Chief Human Resources Officer for approval not less than three (3) weeks prior to the effective date of the program.

### 3.10 Posting

Approved flexible hours programs must be posted in conspicuous places throughout the department.

Part 4 - RELATIONSHIP OF FLEXIBLE HOURS REGULATIONS TO OTHER RULES  
AND REGULATIONS OF THE HUMAN RESOURCES DIVISION AND COLLECTIVE  
BARGAINING CONTRACTS

4.1 General Rule

Flexible hours employees shall continue to be subject to and enjoy the benefits of the rules and regulations of the Human Resources Division as set forth in the Red Book and Gray Book, or of the provisions of the applicable collective bargaining agreements; provided, however, that when the Flexible Hours Regulations specifically exempt such flexible hours employees from or amend or conflict with the provisions of the Red Book, the Gray Book or collective bargaining agreements, the provisions of the Flexible Hours Regulations shall control.

4.2 Exemption

Flexible hours employees are hereby exempted from those provisions of Massachusetts General Laws Chapter 149, section 30A, which require an eight (8) hour tour of duty in ten (10) consecutive hours in any work day and restrict work to five (5) tours of duty in any one (1) workweek and from those provisions of Red Book Rule 10.01 and Gray Book Rule 16, except if otherwise exempt by statute. Flexible hours employees are not exempt from the provisions of Massachusetts General Laws Chapter 149, section 30A, or the relevant provisions of collective bargaining agreements, which require, except in the case of part-time employment, not more than thirty-seven and one-half (37.5) hours

for those who work a thirty-seven and one-half hour workweek nor more than forty (40) hours for those who work a forty hour workweek, of work each week.

#### 4.3 Benefits and Charges

For the purpose of ascertaining the benefits to which flexible hours employees are entitled, including vacation, sick leave, and holidays, the word 'day' as used in the relevant sections of the Red Book, Gray Book and collective bargaining agreements shall mean seven and one-half (7.5) hours for flexible hours employees who work a thirty-seven and one-half (37.5) hour week and eight (8) hours for flexible hours employees who work a forty (40) hour week.

Except on the last workday of the workweek, flexible hours employees who utilize accrued leave or who are on leave of absence with pay or absent without pay shall be charged on the basis of a seven and one-half (7.5) or eight (8) hour day as indicated above. On the last workday of the workweek, charges shall be the difference between the total hours worked, excluding provisional overtime credit, and thirty-seven and one-half (37.5) hours or forty (40) hours, or the core time whichever is greater.

#### 4.4 Holidays

In any workweek in which a holiday occurs on a day that the department has determined a flexible hours employee may choose for his/her scheduled hours, any flexible hours employee who (1) fails to work the day immediately preceding that holiday or immediately following that holiday and (2) is on a leave of absence without pay or absent without pay during the workweek in which such a day falls, shall not be

paid for that holiday. Notwithstanding any other provision of these regulations to the contrary, an employee who is on leave without pay or absent without pay for any part of the core time immediately preceding a holiday or immediately following a holiday shall not be paid for the holiday.

## Part 5 - WORK SCHEDULES AND COMPENSATION FOR FLEXIBLE HOURS EMPLOYEES

### 5.1 Hours Per Day

The number of hours that a flexible hours employee works on any day and the time that such work begins and ends shall be decided by the flexible hours employee, subject to the limitations of the flexible hours program.

### 5.2 Hours Per Week

Unless given provisional overtime authorization, a flexible hours employee must limit the total of scheduled hours in any one work-week to thirty-seven and one-half (37.5) for those who work a thirty-seven and one-half (37.5) hour workweek, and to forty (40) hours for those who work a forty (40) hour workweek.

### 5.3 Procedure for Requesting Extension of Hours

A departmental request that any flexible hours employee work beyond scheduled hours shall be made by presenting the employee with a written request signed by a

department employee empowered to authorize overtime and stating the number of hours to be worked.

#### 5.4 Provisional Overtime Credit

Flexible hours employees who are requested by department representatives to work beyond their scheduled hours shall be given provisional overtime credit for each hour or fraction thereof so worked during a workweek.

#### 5.5 Provisional Overtime - Reduction of Scheduled Hours

Flexible hours employees who are requested and agree to work beyond their scheduled hours shall not be required to shorten their scheduled hours during a workweek in order to avoid the payment of overtime. Flexible hours employees may, however, incorporate provisional overtime hours into their scheduled hours during the same workweek if they elect to do so.

#### 5.6 Rate of Pay for Provisional Overtime

Flexible hours employees who have provisional overtime credit and who work a thirty-seven and one-half (37.5) hour workweek shall be paid at their regular hourly rate for every hour or fraction thereof of provisional overtime worked beyond thirty-seven and one-half (37.5) hours up to and including forty (40) hours and shall be paid at one and one-half (1.5) times their regular hourly rate for every hour or fraction thereof worked beyond forty (40) hours. Flexible hours employees who work a forty (40) hour workweek and who have provisional overtime credit shall be paid at one and one-half (1.5) times



their regular hourly rate for every hour or fraction thereof of provisional overtime worked beyond forty (40) hours.

#### 5.7 Exceptions

Sections 5.4, 5.5, and 5.6 shall not apply to employees specifically exempted from the provisions of Massachusetts General Laws, Chapter 149, section 30B.

### Part 6 - EMPLOYEE RESPONSIBILITY

Employees who choose to participate in a flexible hours program shall be responsible for meeting all of the requirements of the program. Failure to meet these requirements may result in the exclusion of an employee from the flexible hours program.

### Part 7 - EXCLUSION

These regulations shall not apply to employees who have otherwise been exempted from the provisions of Massachusetts General Laws Chapter 149, section 30A by either the Chief Human Resources Officer or by the provisions of a collective bargaining contract for the purpose of working a forty (40) hours week in less than five days.

COMMONWEALTH OF MASSACHUSETTS  
HUMAN RESOURCES DIVISION  
ALTERNATIVE WORK OPTIONS PROGRAM

Flextime Program Planning Checklist

This checklist is designed to assist you as you develop a flextime program. A pilot program is recommended and typically runs for three to six months, during which it is periodically monitored. As a result of the pilot program, the flextime plan can be modified to best meet the needs of employees, managers, and the agency.

Flextime Planning Step

Check When Completed

Pilot Program

1. Identify individual responsible for flextime program, for example, the Human Resources Director
2. Establish an advisory group to develop flextime program
3. Contact HRD for technical assistance with flextime program development
4. Identify the Divisions, Bureaus, units or work groups that will be included in the flextime program
5. Identify the number, job titles and collective bargaining units of employees who will be involved
6. Develop program procedures and guidelines including:
  - a. Program components:  
Bandwidth: From \_\_\_\_ to \_\_\_\_  
Core Hours: From \_\_\_\_ to \_\_\_\_  
Lunch Period span From \_\_\_\_ to \_\_\_\_
  - b. Minimum staffing levels (no. or % of employees):  
From official start time to start of core hours: \_\_\_\_\_  
During lunch period span: \_\_\_\_\_  
From end of core time to official closing time: \_\_\_\_\_
  - c. Record-keeping procedure (time sheet) for time worked by flextime employee
  - d. Schedule for periodic program reviews during the pilot period

Flexitime Program Planning Checklist (cont'd)

- 7. Solicit input from affected unions on proposed flexitime plan: 
  - a. Write to the president of each affected collective bargaining unit\*
  - b. Enclose copy of proposed flexitime plan
  - c. Reach agreement on an acceptable flexitime plan
- 8. Communicate flexitime program procedures to all affected employees and supervisors\*
- 9. Consider implementation of HRD Flexitime Training Module for affected employees
- 10. Implement pilot flexitime program

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Final Program

- 1. Develop final program procedures based on review of pilot program (sample evaluation form available\*)
- 2. Communicate final flexitime program procedures to all affected employees and supervisors
- 3. Provide flexitime training sessions for affected employees (HRD module available)
- 4. Complete and submit Flexible Hours Plan Approval Request Form\* to HRD (mandatory)
- 5. Implement final flexitime plan
- 6. Schedule review of final program at intervals of at least every six months (sample evaluation form available\*)

\*Sample materials available from HRD

Please note that this planning checklist is for internal use only. A Flexible Hours Plan Approval Request Form does need to be submitted to HRD for approval. Assistance is available from HRD in the completion of each step described above.

HUMAN RESOURCES DIVISION  
ALTERNATIVE WORK OPTIONS PROGRAM  
COMMON QUESTIONS ABOUT FLEXTIME

1. What is flextime?

Flextime is a work scheduling strategy that is part of the Massachusetts Alternative Work Options Program.

Flextime permits employees to establish their own daily work patterns within guidelines set by agency management. Arrival and departure times may vary. Employees can make up time missed for a doctor's appointment or other personal business by working longer that day or another day that week. The hours worked each day may vary, but a total of 37.5 hours (40 hours for some positions) must be worked each week. Part-time employees may vary their hours each day but must fulfill their total weekly scheduled work hours commitments. Each work unit develops a flextime plan that specifies how flextime will be implemented in the unit.

2. What are the components of flextime?

**Core hours:** core hours are the times when all employees must be at work, regardless of their individual flextime schedules. Generally, these are the hours when meetings are likely to be scheduled, because all employees are present. Examples of core hours are 9:00 to 11:30 a.m. and 2:00 to 3:30 p.m.

**Flexible hours:** flexible hours are the times during the working day during which employees may choose their arrival and departure times, within the limits established by the flextime plan for their work unit. Examples of flexible hours are arrival between 7:00 and 9:00 a.m. and departure between 3:30 and 6:00 p.m.

**Bandwidth:** the bandwidth of a flextime plan is the span of time between the earliest an employee may arrive at work and the latest an employee may leave. The office or worksite is not necessarily open to the public during the entire bandwidth. A bandwidth may extend from 7:00 a.m. to 6:00 p.m., for example.

3. Who may participate in flextime?

All employees, managers and non-managers may participate in a flextime program. Work unit productivity must be maintained and appropriate coverage of work responsibilities must be provided at all times. As long as these conditions are met, the only employees who should not be offered the option of participating in a flextime program are those with an identified performance problem for which there is an action pending. A manager may also exclude employees whose presence is critical during standard work hours.

4. What are the minimum requirements for a flextime program?

Work unit managers are responsible for establishing the flextime rules regarding minimum levels of staffing and adequacy of coverage. For example, if all twelve employees in a work unit came in at 7:00 a.m. and left at 3:30 p.m., the office would be uncovered in the late afternoon. Managers review the overall use of the flextime plan and modify it as necessary.

5. Does flextime require a pre-approved schedule?

No. Each employee arranges his or her daily work hours within the limits of the work unit's flextime plan. However, it is recommended that employees be organized into groups of five to ten people who generally work closely together. These work groups will determine among themselves the arrival and departure times of their members, considering the responsibilities and demands of their jobs. The office must be adequately covered at all times; the level of coverage necessary is determined by management.

6. How is time monitored?

Generally, a written time sheet is maintained in a central location for each work group or unit. Employees enter their arrival and departure times and keep a running tally of the hours worked each day, to ensure that they work the full 37.5 (or 40) hours a week required. Part-time employees keep track of their hours to ensure they meet their full weekly time commitments.

7. Is flextime the same as staggered hours?

No. A staggered hours work schedule requires employees to adhere to fixed times of arrival and departure, although those times may vary from the traditional 8:45 a.m. and 5:00 p.m. For example, an employee on a staggered work hours schedule may work from 8:00 a.m. to 4:15 p.m. or from 7:30 a.m. to 3:45 p.m. There is no opportunity to make up missed work time; an employee must use accrued leave for time away from the office.

8. What are the advantages of flextime?

Improved employee morale and work unit productivity are the most positive results of a flextime program. Tardiness is virtually eliminated. Employees report that it is much easier for them to combine work and home responsibilities when they are able to schedule their time more flexibly. Avoiding traffic is another major benefit. And, for those offices that serve the public, it is possible to extend service hours because of the availability of staff later in the evening.

9. How is flextime established?

A work unit that is interested in establishing a flextime program should develop a flextime plan after obtaining input from managers, affected employees, and representatives of the bargaining units to which affected employees belong. This plan is submitted to the Human Resources Division for approval. Assistance in developing a flextime plan is available from the Human Resources Division.

10. Can an individual employee be removed from a flextime program?

Yes. Each agency or work unit establishes a procedure to sanction abuse of flextime. "Abuse" is defined as taking advantage of the program, for example by:

- inaccurately filling out the timesheet
- failing to share duties or cover for other employees as required by the flextime arrangement
- decreased productivity when staying late or coming in early, indicating that the employee is not working when others are not around
- habitually working long hours Monday through Thursday and then calling in sick on Friday (this may also be an abuse of sick time).

11. How widely is flextime used in Massachusetts state government?

According to a 1999 survey conducted by HRD, there are at least 7,000 state employees in 49 agencies in the Executive Branch who are participating in flextime plans; at least 8,000 employees in 63 agencies participating in staggered work hours programs; and 3,400 employees participating in compressed workweek programs in 37 agencies.

12. Is flextime a new idea?

No. Flextime was established by legislation for Massachusetts state government in 1974. The idea originated in the 1940's in West Germany, where it was started by a woman who thought staggered work hours could relieve parking lot traffic jams at the factory where she worked. The program was such a success that it was expanded to what we now know as flextime and quickly spread throughout Europe.

The use of flextime also appears to be growing. According to the U. S. Bureau of Labor Statistics, 27.6% of the nation's 1999 work force has a flexible schedule, up from 15% in 1991. The 1996 Mercer Work/Life and Diversity Initiatives Benchmarking Survey, covering 800 organizations and 7 million employees, showed that 94% of them offered flexible scheduling and 76% of those companies rated flexible scheduling as the most important work/life program in recruiting. A 1998 Hewitt Associates survey demonstrated that 79% of 1020 employers offered flextime and 29% offered compressed workweeks. At least 48 states surveyed by HRD in 1999 offered flextime

programs, and a 1997 report on work/life programs in the federal government showed 34% of federal employees participating in flextime programs.

13. Where can I get more information?

Information about flextime is available from the Commonwealth of Massachusetts Human Resources Division, Policy Unit at 617-878-9710.

## SAMPLE GUIDELINES I

The following is an actual flextime program implemented by a State Hospital

### STATE HOSPITAL FLEXTIME POLICY AND PROCEDURES

#### Participation

- The flextime program offered at [State Hospital] is voluntary and available to departments with certain clerical, administrative and professional staff designated by the Appointing Authority. Any employee that wishes to participate must notify their supervisor utilizing the attached Flextime Enrollment Request, and must remain in the program for one month. If an employee chooses to withdraw from the program, they must submit a Flextime Withdrawal Notice (attached) to their supervisor no less than 5 business days before they withdraw.
- The program will be available to those employees working, at a minimum, 7.5 hours per day and 37.5 hours per week.

#### Scheduling

- Any employee who participates in the program must establish a default schedule for the hours that they anticipate working normally. That schedule must be provided to their supervisor in writing no less than five (5) business days before they begin participating in the program. That schedule will not compromise the employee's ability to participate in the program, but will serve as a planning tool for both supervisors and employees in determining office coverage requirements.
- Employees participating in the program may choose to work more than 7.5/8 hours in one day and less than 7.5/8 hours on another day as long as the Department's minimum staffing requirements are maintained in accordance with the [State Hospital] Flextime Schedule (attached) and the employee works their 37.5/8 hours per week.
- The [State Hospital] Flextime Schedule requires all employees to work during the following core hour periods:

9:30 am to 11:30 am (Monday through Friday)

2:00 pm to 3:30 pm (Monday, Tuesday, Thursday and Friday)

The [State Hospital] Flextime Schedule also establishes that Departments maintain the following minimum staffing requirements during certain bandwidths:

By 8:00 am each day – 25% of department staff



By 8:30 am each day – 50% of department staff

Monday, Tuesday, Thursday and Friday:

From 11:30 am until 2:00 pm – 50% of department staff

From 3:30 pm until 4:30 pm – 50% of department staff

From 4:30 pm until 5:00 pm – 25% of department staff

Wednesday:

From 11:30 am until 4:30 pm – 50% of department staff

From 4:30 pm until 5:00 pm – 25% of department staff

- All Administrative Offices must be operational between the hours of 8:00 am to 5:00 pm, Monday through Friday.
- Unless given provisional overtime authorization, any employee participating in the program must limit the total scheduled hours in any one week to thirty-seven and one-half (37.5) if they work a thirty-seven and one-half hour workweek, or forty (40) hours, if they work a forty hour workweek.
- Any flextime hours employee requested to perform overtime must receive a written request signed by a department employee empowered to authorize overtime stating the number of hours to be worked.

#### Timekeeping

- All flextime participants are required to maintain a timesheet that notes all times of arrival and departure from work (including lunch periods). That timesheet will be reviewed and signed by the employee's supervisor weekly.
- All sick leave, vacation time, holidays or other absences authorized or unauthorized for employees participating in the program shall be charged daily on a seven and one-half (7.5) hour basis for a thirty-seven and one-half hour workweek and eight (8) hour basis for a forty (40) hour workweek.

#### Employee Responsibilities

- Employees who participate in the program are required to utilize, at a minimum, one-half hour unpaid time for lunch each day which should be scheduled at the midpoint of the employees shift.
- Employees who participate in the program shall be responsible for adhering to flextime policies and procedures. Failure to meet these requirements may result in the exclusion of an employee from the flexible hours program.

Flexitime Enrollment Request

I \_\_\_\_\_ request to participate in the  
(name)

Flexitime Program commencing on \_\_\_\_\_. I understand  
(date)

that I must stay in the program for one (1) month and thereafter if I wish to withdraw, I must notify my supervisor five (5) days in advance.

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Supervisor's Signature

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Flexitime Withdrawal Request

I \_\_\_\_\_ request to withdraw from the Flexitime Program  
(name)

effective \_\_\_\_\_. My work schedule will revert to Monday through  
(date)

Friday, \_\_\_\_\_ a.m. to \_\_\_\_\_ p.m.  
(time) (time)

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Supervisor's Signature

STATE HOSPITAL  
FLEXTIME  
POLICY AND PROCEDURES

Flextime Hours

Monday, Tuesday, Thursday & Friday

	<b>25%</b>	<b>50%</b>	<b>50%</b>	<b>100%</b>	<b>50%</b>	<b>100%</b>	<b>50%</b>	<b>25%</b>		
<b>7:30</b>	<b>8:00</b>	<b>8:30</b>	<b>9:00</b>	<b>9:30</b>	<b>11:30</b>	<b>2:00</b>	<b>3:30</b>	<b>4:30</b>	<b>5:00</b>	<b>6:00</b>

Wednesday

	<b>25%</b>	<b>50%</b>	<b>50%</b>	<b>100%</b>	<b>50%</b>	<b>50%</b>	<b>50%</b>	<b>25%</b>		
<b>7:30</b>	<b>8:00</b>	<b>8:30</b>	<b>9:00</b>	<b>9:30</b>	<b>11:30</b>	<b>2:00</b>	<b>3:30</b>	<b>4:30</b>	<b>5:00</b>	<b>6:00</b>

## SAMPLE GUIDELINES II

The following is an actual flextime program implemented by an Executive Office

### PROPOSED FLEXTIME POLICY

Flextime, a popular variable work schedule, is an optional program available to employees of the [Executive Office of ]. This is an arrangement where fixed arrivals and departures are replaced by a workweek composed of two types of time, "coretime" and "flexible hours". Coretime is that time during which all employees must be present or they will be charged personal, sick or vacation leave. Flexible hours are those hours during which employees may choose their time of arrival and departure within limits consistent with appropriate office coverage.

All employees interested in participating in this program must complete the Flextime form (Form 3, Appendix C) and receive approval from their Supervisor and the Secretary. All employees participating in the program must work 37.5 hours per week, although employees cannot work beyond their weekly scheduled hours unless they have received written authorization. Flextime employees may work more than 7.5 hours on one day and less than 7.5 hours on another day. Flextime participants may vary their arrivals and departures within certain bandwidths without prior approval from their Supervisors.

#### 1. CORETIME/BANDWIDTHS

Core hours at [Executive Office] are:

MONDAY	9:45 to 11:45 and	2:00 to 4:00
TUESDAY		2:00 to 4:00
WEDNESDAY	9:45 to 11:45 and	2:00 to 4:00
THURSDAY	9:45 to 11:45	
FRIDAY	9:45 to 11:45 and	2:00 to 4:00

Employees may begin their workday as early as 8:00 AM and work as late as 7:00 PM. Some [ Executive Office ] employees are occasionally required to work evenings. On a case by case basis, and with supervisory approval, the bandwidth of working hours for these individuals can be from 8:00 AM until 11:00 PM. This should allow these employees to schedule evening meetings within their normal weekly flextime schedule as long as the total weekly hours do not exceed 37.5 hours.

#### 2. COVERAGE

Each unit of the office must have at least 25% coverage at all times. Flextime employees must cooperate with supervisors to ensure that adequate coverage during office hours, 8:45 to 5:00, is maintained.

### 3. TIME RECORDS

For a Flextime Program to function effectively an accurate means of keeping track of time must be maintained. [Executive Office] time sheets are an important record for all employees but they are a critical document for the flextime participant. Arrival and departures must be recorded as they occur. Failure to record weekly hours appropriately will result in termination from the Flextime Program.

### 4. LUNCH PERIODS

Employees who work at least six hours in one day are required to take a lunch break at least thirty minutes during the mid-day bandwidth of 11:45 AM to 2:00 PM. Lunches cannot be taken during coretime hours. Employees who fail to take the required lunch break will have thirty minutes deducted from daily time.

### 5. SICK LEAVE

Flextime employees who call in sick on Monday through Thursday will have the option of making up all the non-core hours for the day during the remainder of that week. Flextime employees who call in sick on Friday will be charged the difference between the hours worked and 37.5 hours or Friday's coretime hours, whichever is greater. The maximum amount of sick leave that can be credited on a Friday is 10.5 hours.

Employees who report in for a work day and then leave because of illness or to make a medical appointment must use sick leave or personal leave to cover any coretime hours missed. Flextime employees who wish to use both regular hours and sick leave in a day cannot have more than 10.5 hours credited for that day.

### 6. VACATION OR PERSONAL LEAVE

Flextime employees can credit up to 7.5 hours of vacation and personal leave per day. Flextime employees who wish to use both regular hours and leave time in one day cannot have more than 10.5 hours credited for that day. Please refer to the [Executive Office] Vacation Policy for a detailed description of the rules governing vacation and personal leave.

### 7. FLEXTIME COMMITTEE

A Flextime Committee will be established to assist in the implementation of the [Executive Office] Flextime Program. The Committee will be chaired by the Secretary

with a representative from the Policy, Program, and Legal Units, the Massachusetts [ ] Center and the [ ] Unit. The Director of Administrative Services will be an ex-officio member of the Flextime Committee. This group will meet as required to effectively monitor and evaluate implementation of the program.

## 8. LATENESS

Flextime employees who sign in after 9:45 a.m. are late for coretime. Employees who arrive after 9:45 a.m. will be considered absent without leave and will be docked for the missing coretime. Employees who are absent without leave may request personal or vacation leave to cover the time absent.

## 9. INFRACTIONS OF FLEXTIME RULES

Flextime employees who are not present during coretime or who fail to work a 37.5 hour week will be subject to the following guidelines:

Third Offense: Employees will receive a memo from the Flextime Committee notifying them of the infraction.

Fifth Offense: Employees will receive another memo warning them that they are in danger of being removed from the Flextime Program

Sixth Offense: Employees will be suspended from the Flextime Program.

Every six months the Flextime Committee will clear all previous offenses and begin new flextime records for all employees. New records will not be established for employees who have been removed from the Flextime Program.

## 10. TERMINATION FROM THE FLEXTIME PROGRAM

Flextime employees who wish to end their participation in the Flextime Program may do so by notifying their Supervisor in writing at least five days before they intend to resume a set schedule.

Employees who have been removed from the Flextime Program because of repeated infractions may request to be reinstated in the Program. The decision to reinstate employees will be made by both the employees' supervisors and the Flextime Committee.

Should the [Executive Office] decide to cancel the Flextime Program, all employees will receive written notice at least five working days before the program is cancelled.

[Executive Office]

FLEXTIME APPROVAL FORM

NAME: \_\_\_\_\_

PROPOSED ARRIVAL/DEPARTURE TIMES, FOR PLANNING PURPOSES ONLY:

Mon

Tues

Wed

Thur

Fri

ARRIVAL \_\_\_\_\_

DEPARTURE: \_\_\_\_\_

EMPLOYEE'S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

SUPERVISOR'S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

SECRETARY'S SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

### SAMPLE GUIDELINES III: COMPRESSED WORKWEEK PILOT

The following is an actual four-day workweek pilot in one unit of a small agency

#### EXPANDED FLEXTIME PROGRAM FOR THE DIVISION OF MANAGEMENT SERVICES

Effective July 14, 1989 - September 30, 1989 the Division of Management Services will be offering an expanded flextime program on a pilot basis. The purpose of this pilot program is to help reduce the usage of sick leave and give added flexibility to employees' schedules. It will be available to management and non-management employees.

The expansion of the current program will allow for employees to elect to work extended days and eliminate core time for a selected day during the week, by adjusting their hours. The intent of this is to allow for employees to schedule doctor and dental visits, as well as other personal business matters during the week without having to utilize sick and other accrued leave time. The employee would complete the attached CORETIME ADJUSTMENT FORM and give it to his or her supervisor no later than the Wednesday before the week requested. This must be approved by both the supervisor and next reporting manager. The Bureau Director receives a copy. In the case of managerial employees all requests must be approved by the Bureau Director and then a copy must be sent to the Deputy Commissioner for Management Services. Any employee who wants to seek approval for leave during what has been known as core time must complete the Coretime Adjustment Form.

If an employee chooses to work four days at 9 hours and 22 minutes long (this does not include the mandatory 30 minute lunch break) then the employee may select one day out of the five in the workweek that would be a day off.

If an employee calls in sick on a day that he/she is scheduled to work 9 hours, 22 minutes, and the time cannot be made up during the regular work hours (8:00 am - 6:00 pm) later in the week, then the employee will be charged 9 hours and 22 minutes sick leave.

Any time a holiday falls on a day the employee would normally work, the employee is given credit for 7 1/2 hours, not 9 hours and 22 minutes. The employee may then choose one of several ways to make up the additional time: he/she may work longer hours for the 3 remaining days of that week's schedule, he/she may come in on the 5th day to work a few hours, he/she may charge the time to personal or vacation leave.

Because this option is a pilot through September 30, 1989, a questionnaire will be given to each person participating to help in the evaluation of the effectiveness in the expanded flextime program.



CORETIME ADJUSTMENT FORM

Name \_\_\_\_\_

WEEK OF \_\_\_\_\_  
Month Day Year

HOURS TO BE WORKED:

DATE

\_\_\_\_\_  
Monday : In Minutes for Lunch Out Total Hours

\_\_\_\_\_  
Tuesday: In Minutes for Lunch Out Total Hours

\_\_\_\_\_  
Wednesday: In Minutes for Lunch Out Total Hours

\_\_\_\_\_  
Thursday: In Minutes for Lunch Out Total Hours

\_\_\_\_\_  
Friday: In Minutes for Lunch Out Total Hours

TOTAL HOURS WORKED FOR WEEK: \_\_\_\_\_

\_\_\_\_\_  
Supervisor's signature/date Manager's signature/date

Cc: Bureau Director (for non-management employees)  
Deputy Commissioner (for managers)

This form must be submitted to your supervisor by Wednesday of the week prior to the request. Manager must submit this form with attendance sheets at the end of the week.

## Sample Letter to Union Presidents Regarding Flextime Plan

[Note: This letter, or a similar one, should be sent to the Presidents of each collective bargaining unit that represents employees who will be affected by the proposed flextime plan.]

Dear \_\_\_\_\_:

The [name of work group, area, or unit involved in the proposed plan] at [name of agency] is considering the implementation of a flextime program.

As a result of our meetings and discussions, the advisory committee which has been exploring the flextime program has developed a proposed flextime plan (attached). We hope that this plan will lead to a flextime program that is successful for both management and employees.

The committee welcomes your input. Please feel free to comment in writing or to call me to set up a time to discuss the proposed plan with me in person. I can be reached at \_\_\_\_\_. If I have not heard from you by \_\_\_\_\_, we will assume that the proposed plan meets with your approval.

Thank you for your consideration.

Sincerely,

---

Flextime Advisory Committee

Encl.

## Sample Letter to Managers Introducing Flextime

Dear Manager:

We are pleased to announce that we have developed a flextime plan for the employees of [name of unit, bureau, division, or whole agency]. The attached plan is the result of extensive discussion and planning. The members of the Flextime Advisory Committee, [name of Agency Head], and the unions representing the employees affected by this plan are all in agreement with it.

Flextime has proven to be a very successful scheduling strategy for over 7,000 Executive Branch employees in over 49 agencies and worksites, as well as in the private sector. Among the many benefits of flextime implementation that have been documented are:

- virtual elimination of tardiness
- reduced use of short-term sick leave
- potential for increased productivity
- improved morale
- reduced staff turnover
- cost-free recruitment strategy

### Flextime program logistics

Managers are responsible for the timely and professional completion of work in their area (bureau, division, etc.). Therefore, managers establish the procedures and limitations of the flextime program in their areas, in accordance with the overall flextime plan.

Managers should meet with the employees in each work area (no more than 5 to 10 people) to review the guidelines for flextime implementation in that area. Among the issues to be addressed are:

- public posting of sign-in sheets
- daily and weekly minimum coverage levels
- back-up system to ensure adequate coverage in all circumstances (illness or unexpected absence of work group members, for example)

### Planning and organizing work under flextime

Because flextime is a change in how people schedule their work time, some of the “fine-tuning” that accompanies such changes may be necessary for both managers and employees when the program first starts. Since employees on flextime typically work more independently (that is, they may work at certain times of the day without immediate supervision), managers may need to plan and organize work a little differently. For example, you may need to change the way you communicate an

important notice (through a memo that circulates to all employees rather than individual conversations) or the way you schedule meetings (to be sure they take place during core time). Your expectations for when work will be completed will need to reflect the flextime arrangements of your staff and you. For example, if you need something by "close of business today," you need to consider if the employee you're asking to do the work planned to leave at 3:30.)

Usually, after flextime has been in place for a while, these changes become part of the routine of the unit. As managers and employees work out these new patterns of work assignment and completion, a new level of mutual trust and respect often evolves. The success of flextime relies on the development of this kind of professionalism. The ultimate test of the success of flextime implementation is the volume and quality of work produced. Often, work units report that productivity and quality of work increase with the introduction of flextime.

### Exclusion and removal from flextime

A manager may deny participation in the flextime program to a particular position or work area, but only with justification. For example, employees who work in the field are not good candidates for flextime, since they are not able to return to the office for core hours. Managers may exclude employees whose presence they feel is critical during standard working hours. An employee with an identified performance problem for which there is an action pending may be deemed ineligible for flextime participation.

In order to ensure that work is completed in a timely and professional manner, managers need to establish procedures for removing an employee or a work area from participation in flextime if the program is being abused.

### Summary

Common sense should prevail when agency needs appear to conflict with the structure of the flextime plan in place.

Communication among employees and managers is essential to the success of flextime. If everyone understands the changes that are required of them, flextime should prove to be a helpful, successful program for everyone.

If you have any questions about the attached plan, please contact \_\_\_\_\_ at \_\_\_\_\_.

We appreciate your interest in and support of this innovative program.

Sincerely,  
Flextime Advisory Committee  
encl.

## Sample Letter to Employees Introducing Flextime

Dear Employee:

We are pleased to announce that we have developed a flextime plan for the employees of [name of unit, bureau, or whole agency]. The attached plan is the result of extensive discussion and planning. The members of the Flextime Advisory Committee, [name of agency head], and the unions representing the employees affected by this plan, are all in agreement with it.

To help you understand more about flextime, a copy of a packet entitled "Common Questions About Flextime" developed by the Human Resources Division is also attached. It explains how the program works.

### Flextime benefits

Flextime has proven to be a successful scheduling strategy for over 7,000 Massachusetts state employees in 49 state agencies, as well as in the private sector. Among the many benefits that employees who use flextime report are:

- a greater sense of control over their work lives
- the ability to schedule various personal appointments without using sick, personal or vacation time (variable arrival and departure times enable employees to schedule appointments at times other than core hours)
- tardiness is virtually eliminated (unless core time is missed)

Flextime enables employees to meet unplanned demands on their time, both personal and job-related. Most employees tend to arrive at and leave work at about the same time every day. However, when the train is late or when your supervisor asks that you stay until 5:30 on a particular day to help get an important mailing out, flextime allows for the time to be made up (to the state in the first example and to you in the second example).

### Flextime program logistics

Your supervisor or manager will work with each small work group (no more than 5 to 10 people) to establish the procedures and limitations of the flextime program in that work area, in accordance with the overall flextime plan. Your supervisor will meet with you to review the guidelines for flextime implementation in your area. Among the issues to be addressed are:

- public posting of sign-in sheets
- daily and weekly minimum coverage levels
- a back-up system to make sure the area is always covered, even if someone is ill or unexpectedly absent

## Planning and organizing work under flextime

Implementation of flextime may require some changes to be made by supervisors and employees in the way work is accomplished in your area. At certain times of the day, employees may be working alone or under the supervision of someone to whom they usually do not report. But employees are expected to continue their work at a consistent level of quality in order to meet the work area's timelines and productivity goals. To accommodate these new working patterns, work may be planned and organized a little differently at the beginning of the program.

Usually, after flextime has been in place for a while, these changes become part of the routine of the unit. Employees often report that they appreciate the new level of responsibility which flextime affords them. As managers and employees work out these new patterns of work assignment and completion, a new level of mutual trust and respect tends to evolve. The success of flextime relies on the development of this kind of professionalism.

Common sense should prevail when agency needs appear to conflict with the structure of the flextime plan. Your manager is responsible for the timely and professional completion of the work in his or her area, and will modify the flextime program as necessary to ensure that the volume and quality of work accomplished remain the same.

## Removal and exclusion from flextime

Managers can remove individual employees or work groups from the flextime program if they are found to be abusing (taking advantage of) the program. Abuse includes inaccurately completing timesheets, failing to share duties or provide backup as agreed, not working up to capacity when unsupervised, and demonstrating certain patterns of absence. Managers can also exclude employees from flextime because their presence is felt to be critical during standard working hours. An employee with an identified performance problem for which there is an action pending may be deemed ineligible for flextime participation.

## Summary

Communication among employees and managers is essential to the success of flextime. If everyone understands the changes that are required of them, flextime should prove to be a helpful, successful program for everyone.

If you have any questions about the attached plan, please contact \_\_\_\_\_ at \_\_\_\_\_. We appreciate your interest in and support of this innovative program.

Sincerely,  
Flextime Advisory Committee  
encl.

SAMPLE

MANAGERS' EVALUATION OF PILOT FLEXTIME PROGRAM

[Name of agency, division, bureau or worksite] has been conducting a pilot flextime program since [date of pilot program implementation]. The Flextime Advisory Committee is interested in your feedback about the program. The responses to this evaluation will be used to modify the flextime procedures as necessary to make the program more effective. Please answer these questions and return the completed questionnaire to [appropriate person or location] by [date].

Your responses will be treated confidentially. If there are specific issues which you would like a member of the Committee to follow up on, please fill in your name and office phone at the bottom of the form. Thank you for your time and your support of our flextime program.

\* \* \* \* \*

1. How many employees are in the work area you manage?
2. How many employees are participating in the flextime program?  
If everyone is not participating, list reasons for exclusion from flextime:
3. Describe any problems you have encountered with coverage under flextime:  
  
Describe any problems you have encountered with employee attitudes under flextime:
4. Describe any successful strategies for dealing with problems resulting from flextime implementation:
5. Is your perception that your employees appreciate this benefit? What feedback suggested this?

6. Has tardiness been eliminated in your work area?
7. Has the productivity level of your work area been maintained since flextime was implemented?

Has productivity increased? Explain.

8. Have you had to remove any individuals from flextime program participation due to abuse of the program?
9. Have you reviewed your work area's flextime program?

How often are reviews scheduled?

When did the reviews begin?

10. Any additional comments or questions about the flextime program:

Your name (optional): \_\_\_\_\_

Office phone: \_\_\_\_\_



SAMPLE

EMPLOYEES' EVALUATION OF PILOT FLEXTIME PROGRAM

[Name of agency, division, bureau or worksite] has been conducting a pilot flextime program since [date of pilot program implementation]. The Flextime Advisory Committee is interested in your feedback about the program. The responses to this evaluation will be used to modify the flextime procedures as necessary to make the program more effective. Please answer these questions and return the completed questionnaire to [appropriate person or location] by [date].

Your responses will be treated confidentially. If there are specific issues which you would like a member of the Committee to follow up on, please fill in your name and office phone at the bottom of the form. Thank you for your time and your support of our flextime program.

1. How many employees are there in your immediate work group (that is, using the same sign-in sheet)?
2. Do you enjoy participating in flextime?
3. Do you usually arrive at work about the same time every day?
4. Which of these professional benefits have you gotten from your flextime participation? (Please check all that apply and then comment or add your own.)

\_\_\_\_more work accomplished during early morning/late afternoon "quiet time"

\_\_\_\_eliminating work backlog

\_\_\_\_increased perception of respect and appreciation

\_\_\_\_less time spent on phone with family members

Others, comments:

5. Which of these personal benefits have you gotten from your flextime participation? (Please check all that apply and then comment or add your own)
- increased ability to meet family/personal needs (such as attending school conferences, waiting for home repairs, scheduling car service, etc.)
  - ability to go to the doctor or dentist without using sick leave
  - less stress about arriving at work late due to commuting problems
  - increased use of public transportation during off-peak hours
  - time to pursue other interests such as an exercise or educational program
- Others, comments:

6. Have you encountered any work scheduling, communication or coverage problems that you feel were due to flextime? Explain.

How did you resolve these problems?

7. Do you have any suggestions for improving flextime in your work area?
8. Would you recommend flextime programs for other employees and agencies in state government?
9. Do you have any additional comments or suggestions?

Your name (optional): \_\_\_\_\_

Office phone: \_\_\_\_\_

FLEXIBLE HOURS PLAN APPROVAL REQUEST

Send to: Policy Unit
Human Resources Division
One Ashburton Place, Room 301
Boston, Massachusetts 02108

Agencies must submit a separate request form for each collective bargaining unit, and one for managers/confidential employees.

Agency Secretariat Bargaining Unit # Or Mgt/Confidential

Division/Bureau/Unit

Address

Flexible Hours Contact Person Telephone

- 1. All represented unions must have the opportunity to take part in the planning of your flextime plan. Have they been involved in organizing the plan you are submitting?
2. How many employees are participating?
3. List the individuals serving on the committee which formed your flextime plan, including union presidents, staff or field representatives, or their designees:
4. What is the bandwidth for your plan: From: To: Monday through Friday
5. What are the core hours for your plan: Morning: From: To: Afternoon: From: To:
6. What is the lunch break span for your plan: From: To: Note that the law requires that employers provide at least 30 minutes for a lunch break.

7. What is the minimum percent or number of employees required to be present:  
 From the start of the work day (example, 8:45 A.M.) to the start of core hours: \_\_\_\_\_  
 During lunch break: \_\_\_\_\_  
 From the end of core hours to the end of the work day (example, 5:00 P.M.): \_\_\_\_\_
  
8. Is adequate supervision present during the entire length of the bandwidth? \_\_\_\_\_
  
9. What are the different types of employees enrolled in your plan (example, clerical, technical, etc)? \_\_\_\_\_  
 \_\_\_\_\_
  
10. What type of record keeping does your plan call for (example, sign-in sheets)?  
 \_\_\_\_\_  
 \_\_\_\_\_
  
11. Do you have special procedures for overtime (any time worked beyond 40 hours, with prior approval by, or a written request from, management)?  
 \_\_\_\_\_  
 \_\_\_\_\_
  
12. Are there any limitations on the plan (example, are there any individuals whose job responsibilities demand they be present only during standard office hours)?  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

I hereby certify that all provisions of the Regulations Governing Flexible Hours Programs for state employees will be observed in the implementation of this proposed plan.

Approved by \_\_\_\_\_ Date \_\_\_\_\_

Human Resources Division Approval

Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Director, Policy

Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Director, Office of Employee Relations

Signature \_\_\_\_\_ Date \_\_\_\_\_  
 Chief Human Resources Officer



**FY24 Project Requests by funding Source**

Sum of Cost	Column Labels		Borrowing					Borrowing Total	Free Cash					Free Cash Total	Grant	Grant Total	Water Funds			Water Funds Total	Grand Total		
	ARPA	ARPA Total	FY24	FY25	FY26	FY27	FY28	FY24	FY25	FY26	FY27	FY28	FY24	FY25	FY26	FY27	FY28	FY24	FY27	FY28			
Class A Uniforms for Honor Guard Unit and Command Staff Personnel.								\$ 8,836					\$ 8,836										\$ 8,836
Portable Radio Replacement							\$ 300,000	\$ 300,000															\$ 300,000
Police Vehicle Radio Systems (10 yr. plan, specific year?) cruisers									\$ 34,000				\$ 34,000										\$ 34,000
<b>Vehicle / Equipment</b>				\$ 180,000			\$ 500,000	\$ 680,000	\$ 237,587	\$ 106,000	\$ 121,000	\$ 100,000	\$ 215,000	\$ 779,587									\$ 1,459,587
1998 Bob Cat									\$ 75,000				\$ 75,000										\$ 75,000
2002 Chevy Dump (GVW 36,000), 601				\$ 180,000				\$ 180,000															\$ 180,000
2004 COMPRESSOR										\$ 30,000			\$ 30,000										\$ 30,000
2014 John Deer Stander 48" Mower										\$ 15,000			\$ 15,000										\$ 15,000
2014 Silverado Pick-up, 609										\$ 45,000			\$ 45,000										\$ 45,000
2015 LEAF VACUUM													\$ 40,000										\$ 40,000
2015 Silverado Dump, 605												\$ 100,000	\$ 100,000										\$ 100,000
2015 SILVERADO Pick-up, 606												\$ 60,000	\$ 60,000										\$ 60,000
2016 MINI EXCAVATOR							\$ 120,000	\$ 120,000															\$ 120,000
2017 John Deer Stander48" Mower												\$ 15,000	\$ 15,000										\$ 15,000
2017 PETERBILT (GVW 3600), 603							\$ 190,000	\$ 190,000															\$ 190,000
2018 John Deer Zero Turn 48" Mower												\$ 25,000	\$ 25,000										\$ 25,000
2021 Trackless Equipment Lease Payment									\$ 31,000	\$ 31,000			\$ 62,000										\$ 62,000
2022 200/XP Bandit Industries Hand-Fed Chipper									\$ 49,000				\$ 49,000										\$ 49,000
2022 CHEV. DUMP - 1 TON, 610												\$ 75,000	\$ 75,000										\$ 75,000
2023 Chevrolet Pick-up Truck with plow									\$ 60,000				\$ 60,000										\$ 60,000
2023 Chevrolet Trailblazer SUV									\$ 27,489				\$ 27,489										\$ 27,489
Year 3 lease payment on Trackless Municipal Tracker									\$ 31,000				\$ 31,000										\$ 31,000
2011 INTERNATIONAL DUMP, 602 (GVW 36,000)							\$ 190,000	\$ 190,000															\$ 190,000
Police Lease payment for 3rd year of the three-year lease administrative vehicle. (Chevy)									\$ 15,000				\$ 15,000										\$ 15,000
2023 Durango/Equipment and Markings - Police									\$ 55,098				\$ 55,098										\$ 55,098
<b>Water</b>																	\$ 135,000	\$ 27,000	\$ 336,000	\$ 498,000			\$ 498,000
Epoxy coat 2002 Iron Rail Tank																				\$ 275,000			\$ 275,000
Replace 2016 Pick-up																			\$ 27,000				\$ 27,000
Replace 2018 Utility Truck																			\$ 61,000				\$ 61,000
Reserve Account																	\$ 35,000						\$ 35,000
Water System Survey																	\$ 100,000						\$ 100,000
(blank)																							
(blank)																							
<b>Grand Total</b>		\$ 1,457,000	\$ 1,457,000	\$ 836,333	\$ 380,000	\$ 400,000	\$ 125,000	\$ 1,075,000	\$ 2,816,333	\$ 417,463	\$ 470,291	\$ 278,990	\$ 214,000	\$ 415,000	\$ 1,795,744	\$ 300,000	\$ 300,000	\$ 135,000	\$ 27,000	\$ 336,000	\$ 498,000		\$ 6,867,077

**From:** [Steve Poulos](#)  
**To:** [Michelle McGovern](#)  
**Subject:** FW: exemptions  
**Date:** Friday, January 20, 2023 8:35:42 AM  
**Attachments:** [CLAUSE 22 CHART.pdf](#)  
[ADDITIONAL EXEMPTION.pdf](#)

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**From:** Therese Fontaine  
**Sent:** Thursday, January 19, 2023 4:29 PM  
**To:** Steve Poulos <SPoulos@wenhamma.gov>  
**Subject:** exemptions

Hi Steve,

I finished going through the local options and it appears that the only veterans exemptions that were adopted by the town are 1) MV exemption for POW and 2) Clause 22G which the town acceptance describes as: rendering the spouse of a veteran with title to the domicile to be eligible for an exemption. It's actually an exemption allowing veterans to qualify for an exemption (if they would otherwise qualify) who have put their home in a trust and not made themselves a trustee.

It would appear that Clauses 22 and 22E (which have been receiving exemptions) were never adopted at town meeting. I am hoping this is incorrect, but I did not see them listed on the adoptions or local options on the town website.

Here is the list of exemptions that we would want to put on a warrant for town meeting:

17F – the exemption amount of \$175 can be increased by the COLA every year

22, subsections a-g - \$400 exemption for veterans with a disability rating, purple heart, spouses, and surviving spouses. \$400 is the max.

22A, 22B, 22C, 22D, 22E, and 22F (22D is full tax exemption for widows if the veteran died as a "proximate result of their service connected disability". This is fully reimbursed by the State.)

22A is \$750, 22B is \$1,250, 22C is \$1,500, 22E is \$1,000

Maybe adopt 22G with the proper wording, if necessary (I haven't had a chance to research the actual warrant article from town meeting)

22H is a full property tax exemption for Gold Star Parents. This is not reimbursed by the State. We may not want to adopt that one or at least not yet.

**Chapter 59, Section 5C1/2 is the additional exemption of up to 100% (there are lots of restrictions so I have attached the law which also has an example sheet). The Town can vote to adopt this and vote on the additional percentage.**

Sorry to get this to you so late. I will continue to research and please let me know if I can answer any questions before or during the workshop.

*Terry*

Therese A. Fontaine, M.A.A.  
Executive Assistant to the Wenham Board of Assessors  
Town of Wenham  
138 Main Street  
Wenham, MA 01984  
Tel: (978) 468-5520 ext. 5  
Fax: (978) 468-8014  
Email: [tfontaine@wenhamma.gov](mailto:tfontaine@wenhamma.gov)  
Town Website: [www.wenhamma.gov](http://www.wenhamma.gov)



**TABLE 6. Exempt Persons – Applicants (Table from DLS Course 101 Handbook, Chapter 7)  
Veterans under Clauses 22, 22A, 22B, 22C, 22D, 22E, 22F and 22H<sup>1</sup>**

CLAUSE	TYPE	AMOUNT <sup>2</sup>	VETERAN	SPOUSE	SURVIVING SPOUSE	SURVIVING PARENT
22(a)	Veterans with minimum 10% service-connected disability	\$400	X			
22(b)	Veterans of certain pre-World War I conflicts	\$400	X			
22(c)	Veterans awarded purple hearts	\$400	X			
22(d)	Spouses (when property is owned by spouse, not veteran) and surviving spouses of Clause 22(a) – (c) veterans or of soldiers and sailors who died serving in certain 22(b) pre-World War I conflicts	\$400		X	Until remarriage	
22(e)	Gold star parents	\$400				X
22(f)	Surviving spouses of World War I veterans whose whole estate, less mortgage balance on property, does not exceed \$20,000	\$400			Until remarriage	
22A	Veterans who lost, or had permanent loss of use of, one hand, foot or eye in the line of duty or who were awarded the Congressional Medal of Honor, Distinguished Service Cross, Navy Cross or Air Force Cross  Prisoners of war [FY2020 – BRAVE Act]	\$750	X	X	X	
22B	Veterans who lost, or had permanent loss of use of, two hands, feet or eyes in the line of duty	\$1250	X	X	X	
22C	Veterans with 100% disability in the line of duty and whose domicile is specially adapted housing acquired with assistance from VA	\$1500	X	X	X	

<sup>1</sup> Clause 22H added by BRAVE ACT

<sup>2</sup> With the exception of Clauses 22(a-f), 22D and 22H, if the property is greater than a single-family house, the applicant receives an exemption for only that portion that corresponds to the segment occupied.

CLAUSE	TYPE	AMOUNT <sup>3</sup>	VETERAN	SPOUSE	SURVIVING SPOUSE	SURVIVING PARENT
22C	Veterans with 100% disability in the line of duty and whose domicile is specially adapted housing acquired with assistance from VA	\$1500	X	X	X	
22D	Surviving spouses (who have never remarried) of active-duty military personnel (including National guardsmen on active duty) or veterans who (1) died as a proximate result of injuries sustained or diseases during active duty, or (2) went missing in action and are presumed to have died. [NEW – FY2018 - HOME Act]	Full			Until remarriage	
22E	Veterans with 100% disability in the line of duty (annual certificate required)	\$1000	X	X	X	
22F	Paraplegic veterans Veterans with 100% disability for service-connected blindness. [NEW – FY2018 - HOME Act]	Full	X	X	X	
22G	<b>Local acceptance</b> - Persons otherwise eligible for a Clause 22, 22A, 22B, 22C, 22D, 22E or 22F exemption when legal title is held by a trustee, conservator or other fiduciary for the person's benefit [NEW – FY2020 – BRAVE Act]	\$400 - Full	X	X	X	
22H	<b>Local acceptance</b> - Surviving parents or guardians of active-duty military personnel (including National guardsmen on active duty) or veterans who (1) died as a proximate result of injuries sustained or diseases during active duty, or (2) went missing in action and are presumed to have died. [NEW – FY2020 – BRAVE Act]	Full				X

<sup>3</sup> With the exception of Clauses 22(a-f), 22D and 22H, if the property is greater than a single-family house, the applicant receives an exemption for only that portion that corresponds to the segment occupied.

**Part I**

ADMINISTRATION OF THE GOVERNMENT

**Title IX**

TAXATION

**Chapter 59**

ASSESSMENT OF LOCAL TAXES

**Section 5C1/2**ADDITIONAL EXEMPTION ALLOWED NOTWITHSTANDING  
PROHIBITION OF FIRST PARAGRAPH OF SEC. 5

Section 5C1/2. In a city or town that accepts this section and is certified by the commissioner to be assessing all property at full and fair cash valuation, a taxpayer who otherwise qualifies for an exemption pursuant to any clause specifically listed in the first paragraph of section 5 for which receipt of another exemption on the same property is prohibited, shall be granted an additional exemption that shall be uniform for all exemptions and the amount of which shall not exceed 100 per cent of the exemption for which the taxpayer qualifies, as may be determined by the legislative body of the city or town, subject to its charter, not later than the beginning of the fiscal year to which the tax relates. Notwithstanding any provision of this chapter to the contrary, the exemption shall be in addition to any exemption allowable pursuant to said section 5; provided, however, that in no instance shall the taxable valuation of the property, after all applicable exemptions, be reduced below 10 per cent of its full and fair cash valuation, except through the applicability of clause Eighteenth of said section 5; and provided, further, that the additional exemption shall not result in any taxpayer paying less than the taxes paid

in the preceding fiscal year. Acceptance of this section by a city or town shall not increase the amount that it otherwise would have been reimbursed by the commonwealth pursuant to the respective clause.

**HOUSE . . . . . No. 3732**

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**The Commonwealth of Massachusetts**

PRESENTED BY:

***Kate Lipper-Garabedian***

*To the Honorable Senate and House of Representatives of the Commonwealth of Massachusetts in General Court assembled:*

The undersigned legislators and/or citizens respectfully petition for the adoption of the accompanying bill:

An Act authorizing the establishment of a mean tested senior citizen property tax exemption.

PETITION OF:

NAME:	DISTRICT/ADDRESS:	DATE ADDED:
<i>Kate Lipper-Garabedian</i>	<i>32nd Middlesex</i>	<i>2/3/2021</i>
<i>Jason M. Lewis</i>	<i>Fifth Middlesex</i>	<i>2/23/2021</i>
<i>Brian W. Murray</i>	<i>10th Worcester</i>	<i>2/24/2021</i>
<i>Josh S. Cutler</i>	<i>6th Plymouth</i>	<i>2/26/2021</i>
<i>Carol A. Doherty</i>	<i>3rd Bristol</i>	<i>2/26/2021</i>
<i>Adam J. Scanlon</i>	<i>14th Bristol</i>	<i>4/15/2021</i>
<i>Tram T. Nguyen</i>	<i>18th Essex</i>	<i>4/29/2021</i>

**HOUSE . . . . . No. 3732**

By Mrs. Lipper-Garabedian of Melrose, a petition (accompanied by bill, House, No. 3732) of Kate Lipper-Garabedian and others relative to authorizing the establishment of a means tested senior citizen property tax exemption. Revenue.

**The Commonwealth of Massachusetts**

**In the One Hundred and Ninety-Second General Court  
(2021-2022)**

An Act authorizing the establishment of a mean tested senior citizen property tax exemption.

*Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same, as follows:*

1 SECTION 1. With respect to each qualifying parcel of real property classified as class  
2 one, residential in the jurisdiction there shall be an exemption from property tax in an amount to  
3 be annually by the local board of assessors as provided in section 3. The exemption shall be  
4 applied to the domicile of the taxpayer only. For purposes of this act, "parcel" shall be a unit of  
5 real property as defined by the local board of assessors under the deed for the property and shall  
6 include parcels defined as condominium units. The exemption provided for herein shall be in  
7 addition to any and all other exemptions allowed by the General Laws.

8 SECTION 2. Real property shall qualify for the exemption pursuant to section 1 if all of  
9 the following criteria are met:-

- 10 (1) The qualifying real property is owned and occupied by a person whose prior year's  
11 income made them eligible and did receive the circuit breaker income tax credit pursuant to  
12 subsection (k) of section 6 of chapter 62 of the General Laws; (2) The qualifying real property is

13 owned by a single applicant age 65 or older at the close of the previous year or jointly by persons  
14 either of whom is age 65 or above at the close of the previous year, if the joint applicant is 60  
15 years or older; (3) The qualifying real property is owned and occupied by the applicant or joint  
16 applicants as their domicile; (4) The applicant has had been domiciled and owned a home in the  
17 jurisdiction for at least 10 consecutive years before filing an application for exemption; and (5)  
18 The local board of assessors has approved the application.

19 SECTION 3. The board of assessors shall annually set the exemption amount provided  
20 for in section 1 provided that, the exemption amount is set at a rate of anywhere from one-half  
21 but not to exceed twice the amount of a received senior circuit breaker income tax credit  
22 pursuant to subsection (k) of section 6 of chapter 62 of the General Laws for which the applicant  
23 qualified in the previous year. The total amount exempted by this act shall not exceed one  
24 percent of the total tax levy and be allocated proportionally within the tax levy on all residential  
25 taxpayers.

26 SECTION 4. A person who seeks to qualify for the exemption pursuant to section 1  
27 shall, before the deadline established by the board of assessors, file an application, on a form to  
28 be adopted by the board of assessors, with the supporting documentation of the applicant's  
29 income and assets as described in the application. The application shall be filed each year for  
30 which the applicant seeks the exemption. The board of assessors may deny an application for  
31 exemption pursuant to section 1 if they find the applicant has excessive assets that place the  
32 applicant outside the category of intended recipients of the senior exemption created by this act.

33           SECTION 5. A person who seeks to qualify for the exemption pursuant to section 1, but  
34 also receives a MGL 59 s 5 Clause 41A Tax Deferral, shall have their eligibility reviewed by the  
35 board of assessors to determine the amount of circuit breaker credit.

36           SECTION 6. No exemption shall be granted under this act until the department of  
37 revenue certifies a residential tax rate for the applicable tax year where the total exemption  
38 amount is raised by a burden shift within the residential tax levy.



## Optional Additional Exemption Example

Assumes Adopted for First Use in FY2016

### Impact on Existing Personal Exemption Recipients

	FY 2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022
<b>Assessed Tax</b>	\$1000	\$1050	\$1075	\$1100	1200	1300	1400	1500
<b>Personal Exemption (Clause 22)</b>	(400)	(400)	(400)	(400)	(400)	(400)	(400)	(400)
<b>Net Tax After Exemption</b>	600	650	675	700	800	900	1000	1100
<b>Additional Exemption Voted (100%)</b>		400	400	400	400	400	400	400
<b>Additional Exemption Allowed</b>		(50)	(75)	(100)	(200)	(300)	(400)	(400)
<b>Amount Due<sup>1</sup></b>	600	600	600	600	600	600	600	700

### Impact on New Personal Exemption Recipients

	FY 2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022
<b>Assessed Tax</b>	\$1000	\$1050	\$1075	\$1100	1200	1300	1400	1500
<b>Personal Exemption (Clause 22)</b>	0	(400)	(400)	(400)	(400)	(400)	(400)	(400)
<b>Net Tax After Exemption</b>	1000	650	675	700	800	900	1000	1100
<b>Additional Exemption Voted (100%)</b>		400	400	400	400	400	400	400
<b>Additional Exemption Allowed</b>		(0)	(25)	(50)	(150)	(250)	(350)	(400)
<b>Amount Due<sup>2</sup></b>	1000	650	650	650	650	650	650	700

<sup>1</sup> Cannot be less than tax on 10% of domicile's assessed valuation

<sup>2</sup> Cannot be less than tax on 10% of domicile's assessed valuation

	BUDGET 2023	Estimated BUDGET 2024	Forecasted 2025	Forecasted 2026	Forecasted 2027	
<b>REVENUE</b>						
Prior Year Levy Limit	\$ 18,484,071	\$ 19,328,402	\$ 19,961,612	\$ 20,610,652	\$ 21,563,718	
Prop 2.5	\$ 462,102	\$ 483,210	\$ 499,040	\$ 515,266	\$ 539,093	
New Growth	\$ 382,229	\$ 150,000	\$ 150,000	\$ 150,000	\$ 150,000	
				\$ 287,799	\$ 595,099	
<i>Current Year Levy Limit</i>	<u>\$ 19,328,402</u>	<u>\$ 19,961,612</u>	<u>\$ 20,610,652</u>	<u>\$ 21,563,718</u>	<u>\$ 22,847,910</u>	2.5% + New Growth
Debt Service Excluded Debt	\$ 563,553	\$ 563,553	\$ 563,553	\$ 563,553	\$ 563,553	
STATE AID	\$ 268,933	\$ 268,934	\$ 275,657	\$ 282,549	\$ 289,613	2.5% Annually = 5 year
LOCAL RECEIPTS & Water Offset	\$ 2,695,826	\$ 2,615,847	\$ 2,668,164	\$ 2,721,527	\$ 2,775,958	2% Annually
FREE CASH	\$ -	\$ -	\$ -	\$ -	\$ -	
Abatement Reserve	\$ (195,000)	\$ (195,000)	\$ (195,000)	\$ (195,000)	\$ (195,000)	
OTHER AVAIL	\$ 131,000	\$ 6,000	\$ 6,000	\$ 6,000	\$ 6,000	
<b>TOTAL REVENUE (Net of Enterprise)</b>	<b>\$ 22,792,714</b>	<b>\$ 23,220,946</b>	<b>\$ 23,929,027</b>	<b>\$ 24,942,347</b>	<b>\$ 26,288,033</b>	
<b>EXPENDITURES</b>						
EDUCATION	\$ 11,900,790	\$ 11,969,703	\$ 12,747,734	\$ 13,576,336	\$ 14,458,798	6.5%
GENERAL GOVERNMENT	\$ 1,593,540	\$ 1,777,275	\$ 1,830,593	\$ 1,885,511	\$ 1,942,076	3%
PUBLIC SAFETY	2,655,569	2,728,001	2,809,841	2,894,136	2,980,960	3%
PUBLIC WORKS & FACILITIES	\$ 1,505,045	\$ 1,561,885	\$ 1,608,742	\$ 1,657,004	\$ 1,706,714	3%
HUMAN SERVICES	\$ 190,864	\$ 202,524	\$ 208,600	\$ 214,858	\$ 221,303	3%
CULTURE & RECREATION	\$ 1,125,419	\$ 1,142,169	\$ 1,176,434	\$ 1,211,727	\$ 1,248,079	3%
Salary and Utility Reserve	\$ -	\$ 146,750	\$ 100,000	\$ 100,000	\$ 100,000	
Pension Liability	\$ 924,637	\$ 1,019,175	\$ 1,121,093	\$ 1,233,202	\$ 1,356,522	10% actuarial estimat
Group Insurance/Medicare	\$ 972,543	\$ 1,069,798	\$ 1,176,778	\$ 1,294,456	\$ 1,423,901	10% 3 year average
OPEB	\$ 80,000	\$ 90,000	\$ 100,000	\$ 110,000	\$ 120,000	
General Insurance	\$ 180,000	\$ 189,000	\$ 194,670	\$ 200,510	\$ 206,525	3%
Water Department	\$ 660,193	\$ 561,931	\$ 578,789	\$ 596,153	\$ 614,037	3%
Excluded DEBT PAYMENTS	\$ 563,553	\$ 563,553	\$ 563,553	\$ 563,553	\$ 563,553	
<i>SUBTOTAL Less Debt</i>	<i>\$ 21,788,600</i>	<i>\$ 22,458,211</i>	<i>\$ 23,653,273</i>	<i>\$ 24,973,892</i>	<i>\$ 26,378,917</i>	
<b>TOTAL EXPENDITURES</b>	<b>\$ 22,352,153</b>	<b>\$ 23,021,764</b>	<b>\$ 24,216,826</b>	<b>\$ 25,537,445</b>	<b>\$ 26,942,470</b>	
<b>Surplus/ (deficit)</b>	<b>\$ 440,561</b>	<b>\$ 199,182</b>	<b>\$ (287,799)</b>	<b>\$ (595,099)</b>	<b>\$ (654,437)</b>	
<b>OVER RIDE-Estimated Residential Impact per 100,000</b>			<b>\$ 30</b>	<b>\$ 61</b>	<b>\$ 67</b>	
Debt Exclusion - School Fields tot. 10m 10yrs		\$ 470,000	\$ 470,000	\$ 470,000	\$ 470,000	
Estimated Residential Impact per 100,000		\$ 42	\$ 42	\$ 42	\$ 42	
Debt Exclusion- New School 40m 30yrs			\$ 1,500,000	\$ 1,500,000	\$ 1,500,000	
Estimated Residential Impact per 100,000			\$ 160	\$ 160	\$ 160	
Debt exclusion- Town Capital needs 800k 10yrs		85000	85001	85002	85003	
Estimated Residential Impact per 100,000		\$ 9	\$ 9	\$ 9	\$ 9	
Free Cash Cert		\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	
250k FC Reserve Policy		\$ (250,000)	\$ (250,000)	\$ (250,000)	\$ (250,000)	
Free Cash Available for TM Appropriation		\$ 750,000	\$ 750,000	\$ 750,000	\$ 750,000	
Stabilization Contribution		\$ (100,000)	\$ (100,000)	\$ (100,000)	\$ (100,000)	
Capital Article (non excluded)		\$ (410,000)	\$ (300,000)	\$ (300,000)	\$ (300,000)	
Fields Stabilization Match		\$ (250,000)				
Police Back Pay		\$ (50,000)				
<b>Net After Appropriation</b>		<b>\$ 190,000</b>	<b>\$ 600,000</b>	<b>\$ 600,000</b>	<b>\$ 600,000</b>	

**Town of Wenham, MA**  
**\$24,000,000 School 30yrs Level Debt Service**  
**Est. Town's Share of TPC = \$40M & 40% MSBA**  
**Interest Estimated, Subject to Change**

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total	Est. Tax Rate Impact per \$1,000	Est. Residential Impact per \$100,000
05/15/2022	-	-	-	-	-	-	-
11/15/2022	-	-	600,000.00	600,000.00	-	-	-
05/15/2023	360,000.00	5.000%	600,000.00	960,000.00	-	-	-
06/30/2023	-	-	-	-	1,560,000.00	1.61	160.79
11/15/2023	-	-	591,000.00	591,000.00	-	-	-
05/15/2024	380,000.00	5.000%	591,000.00	971,000.00	-	-	-
06/30/2024	-	-	-	-	1,562,000.00	1.61	160.99
11/15/2024	-	-	581,500.00	581,500.00	-	-	-
05/15/2025	400,000.00	5.000%	581,500.00	981,500.00	-	-	-
06/30/2025	-	-	-	-	1,563,000.00	1.61	161.10
11/15/2025	-	-	571,500.00	571,500.00	-	-	-
05/15/2026	420,000.00	5.000%	571,500.00	991,500.00	-	-	-
06/30/2026	-	-	-	-	1,563,000.00	1.61	161.10
11/15/2026	-	-	561,000.00	561,000.00	-	-	-
05/15/2027	440,000.00	5.000%	561,000.00	1,001,000.00	-	-	-
06/30/2027	-	-	-	-	1,562,000.00	1.61	160.99
11/15/2027	-	-	550,000.00	550,000.00	-	-	-
05/15/2028	460,000.00	5.000%	550,000.00	1,010,000.00	-	-	-
06/30/2028	-	-	-	-	1,560,000.00	1.61	160.79
11/15/2028	-	-	538,500.00	538,500.00	-	-	-
05/15/2029	485,000.00	5.000%	538,500.00	1,023,500.00	-	-	-
06/30/2029	-	-	-	-	1,562,000.00	1.61	160.99
11/15/2029	-	-	526,375.00	526,375.00	-	-	-
05/15/2030	510,000.00	5.000%	526,375.00	1,036,375.00	-	-	-
06/30/2030	-	-	-	-	1,562,750.00	1.61	161.07
11/15/2030	-	-	513,625.00	513,625.00	-	-	-
05/15/2031	535,000.00	5.000%	513,625.00	1,048,625.00	-	-	-
06/30/2031	-	-	-	-	1,562,250.00	1.61	161.02
11/15/2031	-	-	500,250.00	500,250.00	-	-	-
05/15/2032	560,000.00	5.000%	500,250.00	1,060,250.00	-	-	-
06/30/2032	-	-	-	-	1,560,500.00	1.61	160.84
11/15/2032	-	-	486,250.00	486,250.00	-	-	-
05/15/2033	590,000.00	5.000%	486,250.00	1,076,250.00	-	-	-
06/30/2033	-	-	-	-	1,562,500.00	1.61	161.04
11/15/2033	-	-	471,500.00	471,500.00	-	-	-
05/15/2034	615,000.00	5.000%	471,500.00	1,086,500.00	-	-	-
06/30/2034	-	-	-	-	1,558,000.00	1.61	160.58
11/15/2034	-	-	456,125.00	456,125.00	-	-	-
05/15/2035	650,000.00	5.000%	456,125.00	1,106,125.00	-	-	-
06/30/2035	-	-	-	-	1,562,250.00	1.61	161.02
11/15/2035	-	-	439,875.00	439,875.00	-	-	-
05/15/2036	680,000.00	5.000%	439,875.00	1,119,875.00	-	-	-
06/30/2036	-	-	-	-	1,559,750.00	1.61	160.76
11/15/2036	-	-	422,875.00	422,875.00	-	-	-
05/15/2037	715,000.00	5.000%	422,875.00	1,137,875.00	-	-	-
06/30/2037	-	-	-	-	1,560,750.00	1.61	160.86
11/15/2037	-	-	405,000.00	405,000.00	-	-	-
05/15/2038	750,000.00	5.000%	405,000.00	1,155,000.00	-	-	-
06/30/2038	-	-	-	-	1,560,000.00	1.61	160.79
11/15/2038	-	-	386,250.00	386,250.00	-	-	-
05/15/2039	790,000.00	5.000%	386,250.00	1,176,250.00	-	-	-
06/30/2039	-	-	-	-	1,562,500.00	1.61	161.04
11/15/2039	-	-	366,500.00	366,500.00	-	-	-
05/15/2040	825,000.00	5.000%	366,500.00	1,191,500.00	-	-	-
06/30/2040	-	-	-	-	1,558,000.00	1.61	160.58
11/15/2040	-	-	345,875.00	345,875.00	-	-	-
05/15/2041	870,000.00	5.000%	345,875.00	1,215,875.00	-	-	-
06/30/2041	-	-	-	-	1,561,750.00	1.61	160.97
11/15/2041	-	-	324,125.00	324,125.00	-	-	-
05/15/2042	910,000.00	5.000%	324,125.00	1,234,125.00	-	-	-
06/30/2042	-	-	-	-	1,558,250.00	1.61	160.61
11/15/2042	-	-	301,375.00	301,375.00	-	-	-
05/15/2043	960,000.00	5.000%	301,375.00	1,261,375.00	-	-	-
06/30/2043	-	-	-	-	1,562,750.00	1.61	161.07
11/15/2043	-	-	277,375.00	277,375.00	-	-	-
05/15/2044	1,005,000.00	5.000%	277,375.00	1,282,375.00	-	-	-
06/30/2044	-	-	-	-	1,559,750.00	1.61	160.76
11/15/2044	-	-	252,250.00	252,250.00	-	-	-
05/15/2045	1,055,000.00	5.000%	252,250.00	1,307,250.00	-	-	-
06/30/2045	-	-	-	-	1,559,500.00	1.61	160.73
11/15/2045	-	-	225,875.00	225,875.00	-	-	-
05/15/2046	1,110,000.00	5.000%	225,875.00	1,335,875.00	-	-	-
06/30/2046	-	-	-	-	1,561,750.00	1.61	160.97
11/15/2046	-	-	198,125.00	198,125.00	-	-	-
05/15/2047	1,165,000.00	5.000%	198,125.00	1,363,125.00	-	-	-
06/30/2047	-	-	-	-	1,561,250.00	1.61	160.92
11/15/2047	-	-	169,000.00	169,000.00	-	-	-
05/15/2048	1,225,000.00	5.000%	169,000.00	1,394,000.00	-	-	-
06/30/2048	-	-	-	-	1,563,000.00	1.61	161.10
11/15/2048	-	-	138,375.00	138,375.00	-	-	-
05/15/2049	1,285,000.00	5.000%	138,375.00	1,423,375.00	-	-	-
06/30/2049	-	-	-	-	1,561,750.00	1.61	160.97
11/15/2049	-	-	106,250.00	106,250.00	-	-	-
05/15/2050	1,350,000.00	5.000%	106,250.00	1,456,250.00	-	-	-
06/30/2050	-	-	-	-	1,562,500.00	1.61	161.04
11/15/2050	-	-	72,500.00	72,500.00	-	-	-
05/15/2051	1,415,000.00	5.000%	72,500.00	1,487,500.00	-	-	-
06/30/2051	-	-	-	-	1,560,000.00	1.61	160.79
11/15/2051	-	-	37,125.00	37,125.00	-	-	-
05/15/2052	1,485,000.00	5.000%	37,125.00	1,522,125.00	-	-	-
06/30/2052	-	-	-	-	1,559,250.00	1.61	160.71
<b>Total</b>	<b>\$24,000,000.00</b>	<b>-</b>	<b>\$22,832,750.00</b>	<b>\$46,832,750.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

**NOTES:**

FY22 Assessed Valuation: #####

**Town of Wenham, MA**  
**\$24,000,000 School 30yrs Equal/Declining Debt Service**  
**Est. Town's Share of TPC = \$40M & 40% MSBA**  
**Interest Estimated, Subject to Change**

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total	Est. Tax Rate Impact per \$1,000	Est. Residential Impact per \$100,000
05/15/2022	-	-	-	-	-	-	-
11/15/2022	-	-	600,000.00	600,000.00	-	-	-
05/15/2023	800,000.00	5.000%	600,000.00	1,400,000.00	-	-	-
06/30/2023	-	-	-	-	2,000,000.00	2.06	206.14
11/15/2023	-	-	580,000.00	580,000.00	-	-	-
05/15/2024	800,000.00	5.000%	580,000.00	1,380,000.00	-	-	-
06/30/2024	-	-	-	-	1,960,000.00	2.02	202.01
11/15/2024	-	-	560,000.00	560,000.00	-	-	-
05/15/2025	800,000.00	5.000%	560,000.00	1,360,000.00	-	-	-
06/30/2025	-	-	-	-	1,920,000.00	1.98	197.89
11/15/2025	-	-	540,000.00	540,000.00	-	-	-
05/15/2026	800,000.00	5.000%	540,000.00	1,340,000.00	-	-	-
06/30/2026	-	-	-	-	1,880,000.00	1.94	193.77
11/15/2026	-	-	520,000.00	520,000.00	-	-	-
05/15/2027	800,000.00	5.000%	520,000.00	1,320,000.00	-	-	-
06/30/2027	-	-	-	-	1,840,000.00	1.90	189.65
11/15/2027	-	-	500,000.00	500,000.00	-	-	-
05/15/2028	800,000.00	5.000%	500,000.00	1,300,000.00	-	-	-
06/30/2028	-	-	-	-	1,800,000.00	1.86	185.52
11/15/2028	-	-	480,000.00	480,000.00	-	-	-
05/15/2029	800,000.00	5.000%	480,000.00	1,280,000.00	-	-	-
06/30/2029	-	-	-	-	1,760,000.00	1.81	181.40
11/15/2029	-	-	460,000.00	460,000.00	-	-	-
05/15/2030	800,000.00	5.000%	460,000.00	1,260,000.00	-	-	-
06/30/2030	-	-	-	-	1,720,000.00	1.77	177.28
11/15/2030	-	-	440,000.00	440,000.00	-	-	-
05/15/2031	800,000.00	5.000%	440,000.00	1,240,000.00	-	-	-
06/30/2031	-	-	-	-	1,680,000.00	1.73	173.15
11/15/2031	-	-	420,000.00	420,000.00	-	-	-
05/15/2032	800,000.00	5.000%	420,000.00	1,220,000.00	-	-	-
06/30/2032	-	-	-	-	1,640,000.00	1.69	169.03
11/15/2032	-	-	400,000.00	400,000.00	-	-	-
05/15/2033	800,000.00	5.000%	400,000.00	1,200,000.00	-	-	-
06/30/2033	-	-	-	-	1,600,000.00	1.65	164.91
11/15/2033	-	-	380,000.00	380,000.00	-	-	-
05/15/2034	800,000.00	5.000%	380,000.00	1,180,000.00	-	-	-
06/30/2034	-	-	-	-	1,560,000.00	1.61	160.79
11/15/2034	-	-	360,000.00	360,000.00	-	-	-
05/15/2035	800,000.00	5.000%	360,000.00	1,160,000.00	-	-	-
06/30/2035	-	-	-	-	1,520,000.00	1.57	156.66
11/15/2035	-	-	340,000.00	340,000.00	-	-	-
05/15/2036	800,000.00	5.000%	340,000.00	1,140,000.00	-	-	-
06/30/2036	-	-	-	-	1,480,000.00	1.53	152.54
11/15/2036	-	-	320,000.00	320,000.00	-	-	-
05/15/2037	800,000.00	5.000%	320,000.00	1,120,000.00	-	-	-
06/30/2037	-	-	-	-	1,440,000.00	1.48	148.42
11/15/2037	-	-	300,000.00	300,000.00	-	-	-
05/15/2038	800,000.00	5.000%	300,000.00	1,100,000.00	-	-	-
06/30/2038	-	-	-	-	1,400,000.00	1.44	144.30
11/15/2038	-	-	280,000.00	280,000.00	-	-	-
05/15/2039	800,000.00	5.000%	280,000.00	1,080,000.00	-	-	-
06/30/2039	-	-	-	-	1,360,000.00	1.40	140.17
11/15/2039	-	-	260,000.00	260,000.00	-	-	-
05/15/2040	800,000.00	5.000%	260,000.00	1,060,000.00	-	-	-
06/30/2040	-	-	-	-	1,320,000.00	1.36	136.05
11/15/2040	-	-	240,000.00	240,000.00	-	-	-
05/15/2041	800,000.00	5.000%	240,000.00	1,040,000.00	-	-	-
06/30/2041	-	-	-	-	1,280,000.00	1.32	131.93
11/15/2041	-	-	220,000.00	220,000.00	-	-	-
05/15/2042	800,000.00	5.000%	220,000.00	1,020,000.00	-	-	-
06/30/2042	-	-	-	-	1,240,000.00	1.28	127.80
11/15/2042	-	-	200,000.00	200,000.00	-	-	-
05/15/2043	800,000.00	5.000%	200,000.00	1,000,000.00	-	-	-
06/30/2043	-	-	-	-	1,200,000.00	1.24	123.68
11/15/2043	-	-	180,000.00	180,000.00	-	-	-
05/15/2044	800,000.00	5.000%	180,000.00	980,000.00	-	-	-
06/30/2044	-	-	-	-	1,160,000.00	1.20	119.56
11/15/2044	-	-	160,000.00	160,000.00	-	-	-
05/15/2045	800,000.00	5.000%	160,000.00	960,000.00	-	-	-
06/30/2045	-	-	-	-	1,120,000.00	1.15	115.44
11/15/2045	-	-	140,000.00	140,000.00	-	-	-
05/15/2046	800,000.00	5.000%	140,000.00	940,000.00	-	-	-
06/30/2046	-	-	-	-	1,080,000.00	1.11	111.31
11/15/2046	-	-	120,000.00	120,000.00	-	-	-
05/15/2047	800,000.00	5.000%	120,000.00	920,000.00	-	-	-
06/30/2047	-	-	-	-	1,040,000.00	1.07	107.19
11/15/2047	-	-	100,000.00	100,000.00	-	-	-
05/15/2048	800,000.00	5.000%	100,000.00	900,000.00	-	-	-
06/30/2048	-	-	-	-	1,000,000.00	1.03	103.07
11/15/2048	-	-	80,000.00	80,000.00	-	-	-
05/15/2049	800,000.00	5.000%	80,000.00	880,000.00	-	-	-
06/30/2049	-	-	-	-	960,000.00	0.99	98.95
11/15/2049	-	-	60,000.00	60,000.00	-	-	-
05/15/2050	800,000.00	5.000%	60,000.00	860,000.00	-	-	-
06/30/2050	-	-	-	-	920,000.00	0.95	94.82
11/15/2050	-	-	40,000.00	40,000.00	-	-	-
05/15/2051	800,000.00	5.000%	40,000.00	840,000.00	-	-	-
06/30/2051	-	-	-	-	880,000.00	0.91	90.70
11/15/2051	-	-	20,000.00	20,000.00	-	-	-
05/15/2052	800,000.00	5.000%	20,000.00	820,000.00	-	-	-
06/30/2052	-	-	-	-	840,000.00	0.87	86.58
<b>Total</b>	<b>\$24,000,000.00</b>	<b>-</b>	<b>\$18,600,000.00</b>	<b>\$42,600,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

**NOTES:**

FY22 Assessed Valuation: #####

**Town of Wenham, MA**  
 \$24,000,000 School 20yrs Level Debt Service  
 Est. Town's Share of TPC = \$40M & 40% MSBA  
 Interest Estimated, Subject to Change

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total	Est. Tax Rate Impact per \$1,000	Est. Residential Impact per \$100,000
05/15/2022	-	-	-	-	-	-	-
11/15/2022	-	-	540,000.00	540,000.00	-	-	-
05/15/2023	765,000.00	4.500%	540,000.00	1,305,000.00	-	-	-
06/30/2023	-	-	-	-	1,845,000.00	1.90	190.16
11/15/2023	-	-	522,787.50	522,787.50	-	-	-
05/15/2024	800,000.00	4.500%	522,787.50	1,322,787.50	-	-	-
06/30/2024	-	-	-	-	1,845,575.00	1.90	190.22
11/15/2024	-	-	504,787.50	504,787.50	-	-	-
05/15/2025	835,000.00	4.500%	504,787.50	1,339,787.50	-	-	-
06/30/2025	-	-	-	-	1,844,575.00	1.90	190.12
11/15/2025	-	-	486,000.00	486,000.00	-	-	-
05/15/2026	875,000.00	4.500%	486,000.00	1,361,000.00	-	-	-
06/30/2026	-	-	-	-	1,847,000.00	1.90	190.37
11/15/2026	-	-	466,312.50	466,312.50	-	-	-
05/15/2027	915,000.00	4.500%	466,312.50	1,381,312.50	-	-	-
06/30/2027	-	-	-	-	1,847,625.00	1.90	190.43
11/15/2027	-	-	445,725.00	445,725.00	-	-	-
05/15/2028	955,000.00	4.500%	445,725.00	1,400,725.00	-	-	-
06/30/2028	-	-	-	-	1,846,450.00	1.90	190.31
11/15/2028	-	-	424,237.50	424,237.50	-	-	-
05/15/2029	995,000.00	4.500%	424,237.50	1,419,237.50	-	-	-
06/30/2029	-	-	-	-	1,843,475.00	1.90	190.00
11/15/2029	-	-	401,850.00	401,850.00	-	-	-
05/15/2030	1,040,000.00	4.500%	401,850.00	1,441,850.00	-	-	-
06/30/2030	-	-	-	-	1,843,700.00	1.90	190.03
11/15/2030	-	-	378,450.00	378,450.00	-	-	-
05/15/2031	1,090,000.00	4.500%	378,450.00	1,468,450.00	-	-	-
06/30/2031	-	-	-	-	1,846,900.00	1.90	190.36
11/15/2031	-	-	353,925.00	353,925.00	-	-	-
05/15/2032	1,135,000.00	4.500%	353,925.00	1,488,925.00	-	-	-
06/30/2032	-	-	-	-	1,842,850.00	1.90	189.94
11/15/2032	-	-	328,387.50	328,387.50	-	-	-
05/15/2033	1,190,000.00	4.500%	328,387.50	1,518,387.50	-	-	-
06/30/2033	-	-	-	-	1,846,775.00	1.90	190.34
11/15/2033	-	-	301,612.50	301,612.50	-	-	-
05/15/2034	1,240,000.00	4.500%	301,612.50	1,541,612.50	-	-	-
06/30/2034	-	-	-	-	1,843,225.00	1.90	189.98
11/15/2034	-	-	273,712.50	273,712.50	-	-	-
05/15/2035	1,300,000.00	4.500%	273,712.50	1,573,712.50	-	-	-
06/30/2035	-	-	-	-	1,847,425.00	1.90	190.41
11/15/2035	-	-	244,462.50	244,462.50	-	-	-
05/15/2036	1,355,000.00	4.500%	244,462.50	1,599,462.50	-	-	-
06/30/2036	-	-	-	-	1,843,925.00	1.90	190.05
11/15/2036	-	-	213,975.00	213,975.00	-	-	-
05/15/2037	1,415,000.00	4.500%	213,975.00	1,628,975.00	-	-	-
06/30/2037	-	-	-	-	1,842,950.00	1.90	189.95
11/15/2037	-	-	182,137.50	182,137.50	-	-	-
05/15/2038	1,480,000.00	4.500%	182,137.50	1,662,137.50	-	-	-
06/30/2038	-	-	-	-	1,844,275.00	1.90	190.09
11/15/2038	-	-	148,837.50	148,837.50	-	-	-
05/15/2039	1,545,000.00	4.500%	148,837.50	1,693,837.50	-	-	-
06/30/2039	-	-	-	-	1,842,675.00	1.90	189.92
11/15/2039	-	-	114,075.00	114,075.00	-	-	-
05/15/2040	1,615,000.00	4.500%	114,075.00	1,729,075.00	-	-	-
06/30/2040	-	-	-	-	1,843,150.00	1.90	189.97
11/15/2040	-	-	77,737.50	77,737.50	-	-	-
05/15/2041	1,690,000.00	4.500%	77,737.50	1,767,737.50	-	-	-
06/30/2041	-	-	-	-	1,845,475.00	1.90	190.21
11/15/2041	-	-	39,712.50	39,712.50	-	-	-
05/15/2042	1,765,000.00	4.500%	39,712.50	1,804,712.50	-	-	-
06/30/2042	-	-	-	-	1,844,425.00	1.90	190.10
<b>Total</b>	<b>\$24,000,000.00</b>	<b>-</b>	<b>\$12,897,450.00</b>	<b>\$36,897,450.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

**NOTES:**

FY22 Assessed Valuation: #####

**Town of Wenham, MA**  
**\$24,000,000 School 20yrs Equal/Declining Debt Service**  
**Est. Town's Share of TPC = \$40M & 40% MSBA**  
**Interest Estimated, Subject to Change**

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total	Est. Tax Rate Impact per \$1,000	Est. Residential Impact per \$100,000
05/15/2022	-	-	-	-	-	-	-
11/15/2022	-	-	540,000.00	540,000.00	-	-	-
05/15/2023	1,200,000.00	4.500%	540,000.00	1,740,000.00	-	-	-
06/30/2023	-	-	-	-	2,280,000.00	2.35	235.00
11/15/2023	-	-	513,000.00	513,000.00	-	-	-
05/15/2024	1,200,000.00	4.500%	513,000.00	1,713,000.00	-	-	-
06/30/2024	-	-	-	-	2,226,000.00	2.29	229.43
11/15/2024	-	-	486,000.00	486,000.00	-	-	-
05/15/2025	1,200,000.00	4.500%	486,000.00	1,686,000.00	-	-	-
06/30/2025	-	-	-	-	2,172,000.00	2.24	223.86
11/15/2025	-	-	459,000.00	459,000.00	-	-	-
05/15/2026	1,200,000.00	4.500%	459,000.00	1,659,000.00	-	-	-
06/30/2026	-	-	-	-	2,118,000.00	2.18	218.30
11/15/2026	-	-	432,000.00	432,000.00	-	-	-
05/15/2027	1,200,000.00	4.500%	432,000.00	1,632,000.00	-	-	-
06/30/2027	-	-	-	-	2,064,000.00	2.13	212.73
11/15/2027	-	-	405,000.00	405,000.00	-	-	-
05/15/2028	1,200,000.00	4.500%	405,000.00	1,605,000.00	-	-	-
06/30/2028	-	-	-	-	2,010,000.00	2.07	207.17
11/15/2028	-	-	378,000.00	378,000.00	-	-	-
05/15/2029	1,200,000.00	4.500%	378,000.00	1,578,000.00	-	-	-
06/30/2029	-	-	-	-	1,956,000.00	2.02	201.60
11/15/2029	-	-	351,000.00	351,000.00	-	-	-
05/15/2030	1,200,000.00	4.500%	351,000.00	1,551,000.00	-	-	-
06/30/2030	-	-	-	-	1,902,000.00	1.96	196.04
11/15/2030	-	-	324,000.00	324,000.00	-	-	-
05/15/2031	1,200,000.00	4.500%	324,000.00	1,524,000.00	-	-	-
06/30/2031	-	-	-	-	1,848,000.00	1.90	190.47
11/15/2031	-	-	297,000.00	297,000.00	-	-	-
05/15/2032	1,200,000.00	4.500%	297,000.00	1,497,000.00	-	-	-
06/30/2032	-	-	-	-	1,794,000.00	1.85	184.90
11/15/2032	-	-	270,000.00	270,000.00	-	-	-
05/15/2033	1,200,000.00	4.500%	270,000.00	1,470,000.00	-	-	-
06/30/2033	-	-	-	-	1,740,000.00	1.79	179.34
11/15/2033	-	-	243,000.00	243,000.00	-	-	-
05/15/2034	1,200,000.00	4.500%	243,000.00	1,443,000.00	-	-	-
06/30/2034	-	-	-	-	1,686,000.00	1.74	173.77
11/15/2034	-	-	216,000.00	216,000.00	-	-	-
05/15/2035	1,200,000.00	4.500%	216,000.00	1,416,000.00	-	-	-
06/30/2035	-	-	-	-	1,632,000.00	1.68	168.21
11/15/2035	-	-	189,000.00	189,000.00	-	-	-
05/15/2036	1,200,000.00	4.500%	189,000.00	1,389,000.00	-	-	-
06/30/2036	-	-	-	-	1,578,000.00	1.63	162.64
11/15/2036	-	-	162,000.00	162,000.00	-	-	-
05/15/2037	1,200,000.00	4.500%	162,000.00	1,362,000.00	-	-	-
06/30/2037	-	-	-	-	1,524,000.00	1.57	157.08
11/15/2037	-	-	135,000.00	135,000.00	-	-	-
05/15/2038	1,200,000.00	4.500%	135,000.00	1,335,000.00	-	-	-
06/30/2038	-	-	-	-	1,470,000.00	1.52	151.51
11/15/2038	-	-	108,000.00	108,000.00	-	-	-
05/15/2039	1,200,000.00	4.500%	108,000.00	1,308,000.00	-	-	-
06/30/2039	-	-	-	-	1,416,000.00	1.46	145.94
11/15/2039	-	-	81,000.00	81,000.00	-	-	-
05/15/2040	1,200,000.00	4.500%	81,000.00	1,281,000.00	-	-	-
06/30/2040	-	-	-	-	1,362,000.00	1.40	140.38
11/15/2040	-	-	54,000.00	54,000.00	-	-	-
05/15/2041	1,200,000.00	4.500%	54,000.00	1,254,000.00	-	-	-
06/30/2041	-	-	-	-	1,308,000.00	1.35	134.81
11/15/2041	-	-	27,000.00	27,000.00	-	-	-
05/15/2042	1,200,000.00	4.500%	27,000.00	1,227,000.00	-	-	-
06/30/2042	-	-	-	-	1,254,000.00	1.29	129.25
<b>Total</b>	<b>\$24,000,000.00</b>	<b>-</b>	<b>\$11,340,000.00</b>	<b>\$35,340,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

**NOTES:**

FY22 Assessed Valuation: #####

**Town of Wenham, MA**  
**\$3,300,000 Athletic Field 10yrs Level Debt Service**  
Interest Estimated, Subject to Change

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total	Est. Tax Rate Impact per \$1,000	Est. Residential Impact per \$100,000
05/15/2022	-	-	-	-	-	-	-
11/15/2022	-	-	66,000.00	66,000.00	-	-	-
05/15/2023	275,000.00	4.000%	66,000.00	341,000.00	-	-	-
06/30/2023	-	-	-	-	407,000.00	0.42	41.95
11/15/2023	-	-	60,500.00	60,500.00	-	-	-
05/15/2024	285,000.00	4.000%	60,500.00	345,500.00	-	-	-
06/30/2024	-	-	-	-	406,000.00	0.42	41.85
11/15/2024	-	-	54,800.00	54,800.00	-	-	-
05/15/2025	300,000.00	4.000%	54,800.00	354,800.00	-	-	-
06/30/2025	-	-	-	-	409,600.00	0.42	42.22
11/15/2025	-	-	48,800.00	48,800.00	-	-	-
05/15/2026	310,000.00	4.000%	48,800.00	358,800.00	-	-	-
06/30/2026	-	-	-	-	407,600.00	0.42	42.01
11/15/2026	-	-	42,600.00	42,600.00	-	-	-
05/15/2027	320,000.00	4.000%	42,600.00	362,600.00	-	-	-
06/30/2027	-	-	-	-	405,200.00	0.42	41.76
11/15/2027	-	-	36,200.00	36,200.00	-	-	-
05/15/2028	335,000.00	4.000%	36,200.00	371,200.00	-	-	-
06/30/2028	-	-	-	-	407,400.00	0.42	41.99
11/15/2028	-	-	29,500.00	29,500.00	-	-	-
05/15/2029	350,000.00	4.000%	29,500.00	379,500.00	-	-	-
06/30/2029	-	-	-	-	409,000.00	0.42	42.15
11/15/2029	-	-	22,500.00	22,500.00	-	-	-
05/15/2030	360,000.00	4.000%	22,500.00	382,500.00	-	-	-
06/30/2030	-	-	-	-	405,000.00	0.42	41.74
11/15/2030	-	-	15,300.00	15,300.00	-	-	-
05/15/2031	375,000.00	4.000%	15,300.00	390,300.00	-	-	-
06/30/2031	-	-	-	-	405,600.00	0.42	41.80
11/15/2031	-	-	7,800.00	7,800.00	-	-	-
05/15/2032	390,000.00	4.000%	7,800.00	397,800.00	-	-	-
06/30/2032	-	-	-	-	405,600.00	0.42	41.80
<b>Total</b>	<b>\$3,300,000.00</b>	<b>-</b>	<b>\$768,000.00</b>	<b>\$4,068,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

**NOTES:**

FY22 Assessed Valuation: #####

**Hilltop Securities**  
Public Finance

**Town of Wenham, MA**  
**\$3,300,000 Athletic Field 10yrs Equal/Declining Debt Service**  
**Interest Estimated, Subject to Change**

**Debt Service Schedule**

Date	Principal	Coupon	Interest	Total P+I	Fiscal Total	Est. Tax Rate Impact per \$1,000	Est. Residential Impact per \$100,000
05/15/2022	-	-	-	-	-	-	-
11/15/2022	-	-	66,000.00	66,000.00	-	-	-
05/15/2023	330,000.00	4.000%	66,000.00	396,000.00	-	-	-
06/30/2023	-	-	-	-	462,000.00	0.48	47.62
11/15/2023	-	-	59,400.00	59,400.00	-	-	-
05/15/2024	330,000.00	4.000%	59,400.00	389,400.00	-	-	-
06/30/2024	-	-	-	-	448,800.00	0.46	46.26
11/15/2024	-	-	52,800.00	52,800.00	-	-	-
05/15/2025	330,000.00	4.000%	52,800.00	382,800.00	-	-	-
06/30/2025	-	-	-	-	435,600.00	0.45	44.90
11/15/2025	-	-	46,200.00	46,200.00	-	-	-
05/15/2026	330,000.00	4.000%	46,200.00	376,200.00	-	-	-
06/30/2026	-	-	-	-	422,400.00	0.44	43.54
11/15/2026	-	-	39,600.00	39,600.00	-	-	-
05/15/2027	330,000.00	4.000%	39,600.00	369,600.00	-	-	-
06/30/2027	-	-	-	-	409,200.00	0.42	42.18
11/15/2027	-	-	33,000.00	33,000.00	-	-	-
05/15/2028	330,000.00	4.000%	33,000.00	363,000.00	-	-	-
06/30/2028	-	-	-	-	396,000.00	0.41	40.81
11/15/2028	-	-	26,400.00	26,400.00	-	-	-
05/15/2029	330,000.00	4.000%	26,400.00	356,400.00	-	-	-
06/30/2029	-	-	-	-	382,800.00	0.39	39.45
11/15/2029	-	-	19,800.00	19,800.00	-	-	-
05/15/2030	330,000.00	4.000%	19,800.00	349,800.00	-	-	-
06/30/2030	-	-	-	-	369,600.00	0.38	38.09
11/15/2030	-	-	13,200.00	13,200.00	-	-	-
05/15/2031	330,000.00	4.000%	13,200.00	343,200.00	-	-	-
06/30/2031	-	-	-	-	356,400.00	0.37	36.73
11/15/2031	-	-	6,600.00	6,600.00	-	-	-
05/15/2032	330,000.00	4.000%	6,600.00	336,600.00	-	-	-
06/30/2032	-	-	-	-	343,200.00	0.35	35.37
<b>Total</b>	<b>\$3,300,000.00</b>	<b>-</b>	<b>\$726,000.00</b>	<b>\$4,026,000.00</b>	<b>-</b>	<b>-</b>	<b>-</b>

**NOTES:**

FY22 Assessed Valuation: #####

**Hilltop Securities**  
 Public Finance