



# SELECT BOARD CALENDAR 12/14/2023 | HYBRID MEETING

OUIMET ROOM ROOM, BROOKLINE GOLF COURSE  
1281 W ROXBURY PARKWAY, CHESTNUT HILL, MA

OR

- Bernard W. Greene  
– Chair
- John VanScoyoc –  
Vice Chair
- Miriam Aschkenasy
- Michael Sandman
- Paul Warren
- Charles Carey –  
Town Administrator

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Attendee via your Confirmation Email:

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NmFyo\\_7\\_w](https://brooklinema.zoomgov.com/webinar/register/WN_YeK41FtwSWWoD_NmFyo_7_w)

To Join by Phone: +1 646 828 7666  
Webinar ID: 160 581 2670

1.                    **ANNOUNCEMENTS/UPDATES**  
                   **9:00 AM**    **Select Board to announce recent and/or upcoming Events of  
Community Interest.**
  
2.                    **SUMMER WORKSHOP RECAP**  
                   **Review of priorities and action items from the summer 2023  
Select Board Workshop.**
  
3.                    **FINANCIAL FORECAST/CIP PRESENTATION**  
                   **9:30 AM**    **Deputy Town Administrator Melissa Goff and Finance Director  
Lincoln Heineman will appear to present the FY2025 Financial  
Forecast and preliminary Capital Improvements Plan.**
  
4.                    **LUNCH**  
                   **11:30 AM**    **The Select Board will pause business to break for lunch.**
  
5.                    **SELECT BOARD PRIORITIES**  
                   **Discussion on the following Town priorities:**  
                   - Sustainability Division  
                   - American Rescue Plans Fund Update

- Office of Housing Stability
- Town/School Partnership

6.

**EXECUTIVE SESSION**

**2:15 PM For the purpose of discussing litigation strategy.**

**For the purpose of discussing strategy regarding upcoming negotiations with Town unions.**

The Town of Brookline does not discriminate on the basis of disability in admission to, access to, or operation of its programs, services, or activities. The Town of Brookline does not discriminate on the basis of disability in its hiring or employment practices. This notice is provided as required by Title II of the Americans with Disabilities Act (ADA) and by Section 504 of the Rehabilitation Act of 1973. Questions, complaints, or requests for additional information may be sent to Sarah Kaplan, Community Relations Specialist and ADA / Section 504 Coordinator. Persons with disabilities who need either auxiliary aids and services for effective communication, written materials in alternative formats, or reasonable modifications in policies and procedures in order to access programs and activities of the Town of Brookline are invited to make their needs and preferences known to the ADA Coordinator. This notice is available in alternative formats from the ADA Coordinator.

## 2.A.



### MINUTES SELECT BOARD WORKSHOP MEETING 07/18/2023 | 9:45 AM BROOKLINE GOLF COURSE

Present: Select Board Member, Bernard Greene, Select Board Member, John VanScoyoc, Select Board Member Miriam Aschkenasy, Select Board Member, Michael Sandman, Select Board Member, Paul Warren  
Rachel Freed, Facilitator

#### MISCELLANEOUS

Question of approving Amendment #3 with Leftfield LLC, for the continuation of the Owner's Project Management services through project completion for the Pierce School in the amount of \$6,750,000.

Approved

Aye: Bernard Greene, John VanScoyoc, Miriam Aschkenasy, Michael Sandman, Paul Warren

Question of approving Amendment #6 with Miller Dyer Spears for the continuation of design services through projection completion for the Pierce School in the amount of \$17,267,439.

Approved

Aye: Bernard Greene, John VanScoyoc, Miriam Aschkenasy, Michael Sandman, Paul Warren

Question of approving Amendment #2 with Consigli Construction Company for continuation of preconstruction services for the Pierce School project in the amount of \$300,000.

Approved

Aye: Bernard Greene, John VanScoyoc, Miriam Aschkenasy, Michael Sandman, Paul Warren

Board member VanScoyoc asked if these items are related to the demolition of the Pierce School. If the estimated costs of the project come up higher than what was budgeted, that will come out of the engineering budget. He would like some clarification on the budget. It was noted there is time to review.

#### CALENDAR

#### INTRODUCTIONS

Select Board Chair, Bernard Greene will introduce Select Board members, staff, and workshop facilitator Rachel Freed from CBI.

Chair Greene reviewed the outline of the meeting. He urged participants to have an open mind as they discuss issues on a broader scale.

#### ICE-BREAKER Q&A

Rachel Freed, the facilitator, provided an outline of the meeting and noted that her role is to help the board focus, gather ideas, and reach the goals of the group.

- Make sure to use time effectively
- Exercise -Set up pairs- one board member has to ask the other one question

## 2.A.

In Select Board

07/18/2023

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### VISION AND MISSION SETTING DISCUSSION

- Are there other principles that the group would like to discuss?
- How did we become separated? Are we all on the same team?
- Identify preconceived principles and promote compromise.
- Goal to bring alignment to the board on what they want to accomplish
- Provide direction, strategy, relay what the board is and what they do
- Provide awareness of the board's duties and set the model and tone
- Promote teamwork and problem-solving
- Create a vision for the town and a mission for the board
- Does there need to be an overarching vision statement from the board
- Where do we want the town to be going and how can the board assist to get there?
- Note that the town is divided on the future growth of the town, housing & development

The board discussed a vision, could it be a simple vision, what is it the board wants to accomplish?

Have a vision for the town first, then the Select Board's vision

Provide a place for people who want to come and feel invited. Not affordable, those who have been here for a long time are finding it hard to stay.

How to make Brookline an attractive place to live and work, and they can actually afford to do so.

How to tailor a vision to reflect Brookline and not a generic version, does a mission statement solve anything?

Provide a big vision looking at a long period of time. What do we want Brookline to look like in ten years?

11:20-11:35 Recess

### SELECT BOARD GOALS AND OBJECTIVES

How to work with staff, boards, and commissions

- To be clear and honest to what the relationship is
- Authentic communication, honest, transparent, and respectful to others
- Define individual board's roles and identify a board member for particular issues i.e. licensing, climate person, (has an interest in the issue) example, similar to the AC subcommittees. Some are formal positions, some are not.
- Communications run through the Town Administrator's office, works well and is effective.
- Select Board's packet process. Efforts to improve the lead time for the public.
- Longer-term agenda published to the public to increase public awareness of issues before the board.
- If there is a draft of what the agenda may look like in future weeks. Some hesitation
- Review of the agenda packet process and the logistics to get things out further in advance. It is a narrow lead time.
- Review of Cambridge's meeting process; all members have the ability to table an item for the next meeting, if more time is required to continue the discussion.
- How does predictability help, how much can be tackled at a meeting? There are open meeting laws to uphold; members cannot discuss issues outside of the meeting.

LUNCH 12-1

### GOALS AND OBJECTIVES CONTINUED

## 2.A.

In Select Board

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### Exercise performed

- Align budget with priorities
- Commercial development expansion
- Good financial stewards, respect financial limitations
- Better utilization of time and resources related to boards and commissions
- Balancing Town and School priorities

### Climate-related goals

- Open position for Sustainability Director, not determined where that position will be located. Provide a list of goals, short-term and long-term. There was a brief discussion on a Sustainability Director. Why did 2 former staff leave the position- it is an unclear reporting position. Define the position and the reporting structure. How to provide support and resources for that position.
- Clarify department duties

### BOARD PROCESSES AND OPERATIONS

#### What can be done to help with efficiencies?

- Can we measure the various department's contributions to town goals?
- Do we want to appoint a charter study commission and start the process?
- Select Board staff process and communications protocol
- Provide a process for operational tasks; public streets, rodents, etc, provide a dashboard
- Steps to accomplish responsibilities.
- Staffing realities- continued vacancies, are those positions necessary? Who determines that? Is this the highest and best use of the Select Board's time?
- Relationship between the Select Board and various commissions. How much interaction is required from the board? Could there be a guiding document, a general plan, particularly for Select Board's committees that clearly delineates this board's expectations for them, particularly when it comes to the development of policy and proposed legislation (Chair Greene will be the point person for this)
- Discussion on how to involve staff in agenda material, allow enough time for board review, etc.

#### Short term

- Initiate a structural deficit plan. Revisit BFAC report?
- Set up budget priorities, and set up a working group for advisement
- Initiate plans to support seniors
- Rationalize climate action
- Ideas for a proposal to improve government
- Initiate charter commission?
- Social services, senior services, housing stability

#### Medium terms

- Increase affordable housing
- Plans of the process to improve government
- Plans for equity inclusion— is there a process? An equity study is starting
- Get community dashboard running – communications

## 2.A.

In Select Board

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- How to use the board's time at Select Board meetings, are we using it effectively and thoroughly? Is it our responsibility to take as much time as we need, what are we not doing that should be part of our job? Engage with dept heads.
- Budget process should that change?
- Provide internal requirements

### WRAP UP

Recommendations from the facilitator:

Get a handle on what to do first, and what steps to take.

Observed a lot of commonly held documents, interests, and principles which is great, the board is ahead of the game on that.

Recommendations focusing on procedure and process.

Engaging with those who have expertise on subject matters.

Can some objectives be implemented into the departmental budget review process? Could interaction and shared goals be highlighted better?

This is a start.

Regroup around the third week of December.

Option to take one or two issues and map it out.

New licensing process - expand to Grant of Location, maybe noise bylaw waivers, could be delegated.

Chair Green ended the meeting at 4:00 pm.

## 2.A.

### Select Board Communications Protocol

DRAFT 9/25/23

All Select Board members are provided with a Town email account. All Town communications conducted via email should be done using this account for security and privacy reasons.

#### Communications to the Select Board

The Select Board welcomes input from the public on issues via the following mediums:

- Brooklinema.gov individual email addresses
- [SelectBoard@brooklinema.gov](mailto:SelectBoard@brooklinema.gov)
- Public Comment at Select Board meetings – via zoom or in person
- Mail, hard copy communications
- Town Hall, 6<sup>th</sup> Floor, Select Board Office

Be advised that any material you send to the Select Board is considered a public record and may be subject to public records requests.

The Select Board encourages civility in discussions as reflected in the Code of Conduct for the Town of Brookline. While you're not required to provide your name, contact information, and home address this can be helpful for Select Board members and Town staff when crafting a response.

Quality vs. Quantity re: communications to SB

#### Communications from the Select Board

Select Board's shared email account:

- The Select Board Office will forward any emails received to individual Select Board members. Individual Select Board members shall on a rotating schedule take the lead on determining the appropriate response for the emails received.
  - For example, if an email comes in regarding a specific Board or Commission the Select Board member monitoring that week should forward the email to the appropriate board/commission Select Board member liaison
  - This includes all Select Board member assignments – example: warrant articles assigned to Select Board members for presentation at Town Meeting
- Review the Select Board email account calendar.
- This does not preclude a member of the Select Board from responding individually or requesting the item be put before the Select Board on their agenda for further discussion at a future meeting.

## 2.A.

### **Select Board communications to Town Staff:**

Just as the Select Board directs its boards and commissions to speak with one voice, the Select Board should do the same when addressing matters of policy.

- Individual members of the Select Board shall not direct or otherwise influence Town Staff in the performance of their duties
- Select Board Members will often need information from specific Town departments to be informed; Select Board Members seeking such information from Town departments shall email the relevant Department Head and copy the Town Administrator in all cases
- Select Board Members should make requests well in advance of when the information is needed in order to be respectful of Departments busy schedules; Department Heads should appropriately prioritize requests from Select Board Members so they have sufficient time to review the information
- Department Heads shall, wherever appropriate, delegate inquiries to specific technical staff



3.A.

# TOWN OF BROOKLINE



## FY2025 – FY2029 LONG RANGE FINANCIAL PLAN

December 14, 2023

# SUMMARY

- Employee Benefits and Collective Bargaining continue to put pressure on Town and School budgets
- One-time ARPA use coming to an end. Pressure to continue some items after grant period is over.
- Town budget \$581K deficit and the Schools have a FY2025 deficit of approx. \$1.1M (structural deficit).
  - ❑ School Cost pressures: Utilities, Collective Bargaining
  - ❑ Town Cost pressures: Collective Bargaining, Inflation, Trash Removal

# PRIMARY ASSUMPTIONS

## Revenue

- Within the Property Tax projections, \$2.5M assumed for new growth, \$2.1M in out-years
  - FY24 new growth driven by residential growth, especially Hancock Village
- State aid assumes level funding for UGGA, \$50 per pupil for Ch. 70
  - FY23 State budget was 1.5% below benchmark and currently 2.9% below benchmark
- Local Receipts show 5.6% growth in FY25, modest growth in out-years

## Expenditures

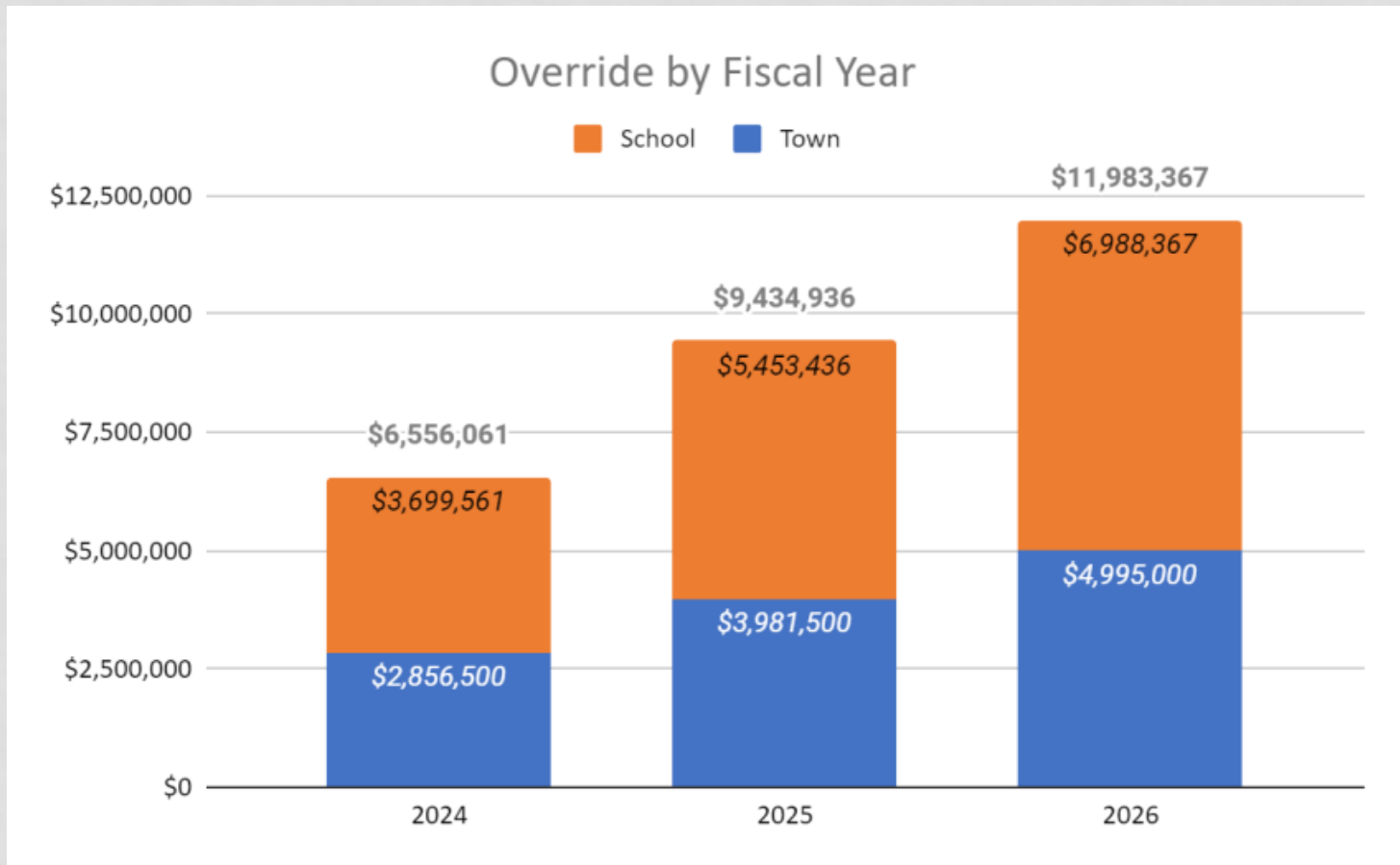
- Town and School budgets assume override growth
  - Need SB direction on salary savings taken in FY24 to fund Police and Fire contracts
- Health Insurance rate increases of 8% in FY25, FY25 -28 assume 5% + continued subscriber growth 30/20 S/T.
- Pension- follows funding schedule based on valuation as of 1/1/22, rate is 7.5%
- 2% Collective Bargaining increases in FY25 – FY29
- Continued funding of OPEB's per the Town's funding schedule.
- All formal Financial Policies (CIP, Free Cash, Reserves) are continued.

# RECENT HISTORY

- In FY12 - FY14, Forecast dynamic of balanced Town budget vs \$1.5M - \$2M+ deficit for Schools.
  - Budgets ultimately balanced by a combination of increases in local revenues, realizing additional State Aid, lower growth in Health Insurance rates, and reductions in the School budget.
- In FY15 “Bridge year” GIC rate savings allowed the town to delay implementation of a Parking Meter rate increase
- FY16-FY18 Three-year funding plan provided \$7.665M of addl. tax capacity (override funds) plus \$2.3M in non-tax revenue primarily from the Parking Meter Rate Increase and Town expenditure reductions
- FY19 - 21 New three-year funding plan disrupted by COVID-19 pandemic in the third year. Reductions to Town and School budgets
- FY22 - Recovery budget with some restorations and growth in revenue
- FY23 – ARPA funds used for School expenses, departmental budgets still constrained under escalating inflationary pressures
- FY24 – Year 1 of 3 year override plan

# FY2024-2026 OVERRIDE

- The override ballot question 2A added \$11.98M to the levy limit between FY24 and FY26
- FY25 increase of \$2.88M (\$1.75M School, \$750K CIP, \$375K Town)



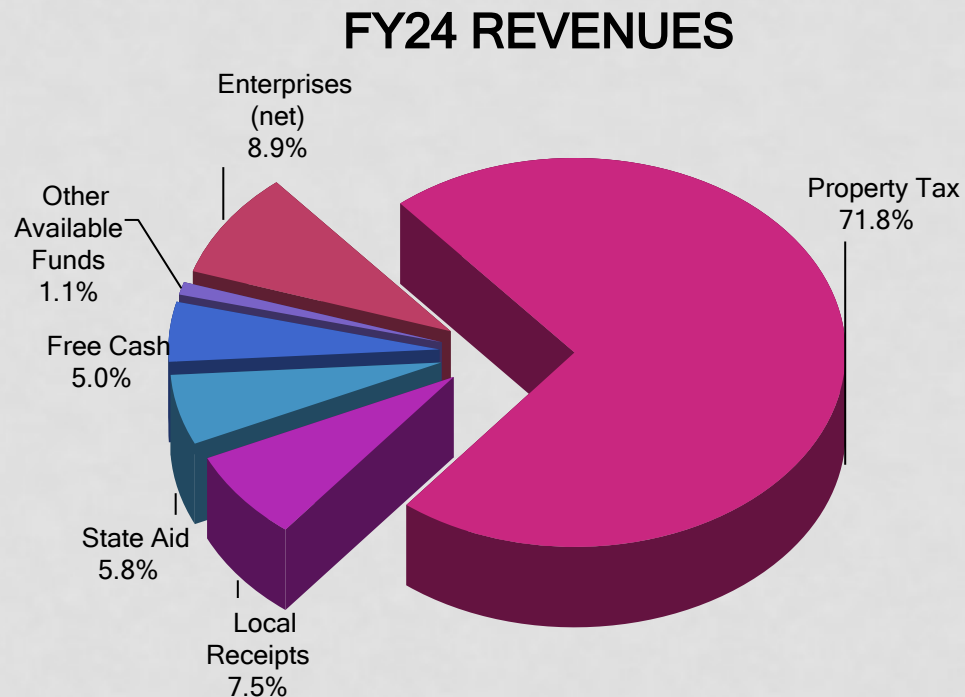
### 3.A.

	2024	2025	2026	2027	2028	2029
<b>REVENUE</b>						
Property Taxes	297,988,918	313,138,448	331,717,419	347,985,080	358,524,810	369,394,263
Local Receipts	30,028,757	31,718,810	32,642,895	32,973,294	33,315,133	33,658,542
State Aid	23,966,611	24,319,611	24,919,064	25,533,503	26,163,303	26,808,848
Other Available Funds	4,407,669	4,390,155	4,175,175	4,344,704	4,537,824	4,742,556
Free Cash	20,008,705	16,800,000	5,567,519	5,765,733	5,926,815	5,926,815
<b>TOTAL REVENUE</b>	<b>376,400,659</b>	<b>390,367,024</b>	<b>399,022,072</b>	<b>416,602,315</b>	<b>428,467,885</b>	<b>440,531,024</b>
\$\$ Increase	26,759,944	13,966,365	8,655,048	17,580,243	11,865,571	12,063,139
% Increase	7.7%	3.7%	2.2%	4.4%	2.8%	2.8%
<b>EXPENDITURES</b>						
Departmental	90,741,569	94,402,821	96,492,369	98,983,406	101,166,969	103,393,371
Schools	130,702,376	137,701,490	143,263,044	149,529,825	156,098,954	163,585,218
Non-Departmental - Benefits	80,044,128	84,760,257	90,005,787	96,593,749	103,117,410	110,878,363
Non-Departmental - General	6,382,149	3,769,968	3,812,946	2,866,956	2,909,776	2,988,175
Non-Departmental - Debt Service	36,093,387	38,310,079	45,686,439	52,033,755	54,603,036	54,470,088
Non-Departmental - Reserve Fund	3,069,471	3,245,681	3,398,144	3,531,933	3,637,089	3,745,099
Special Appropriations (CIP)	18,781,566	19,838,407	10,432,078	11,762,292	10,641,845	12,129,580
Non-Appropriated	10,586,014	9,999,338	10,238,267	10,483,169	10,734,194	10,991,494
<b>TOTAL EXPENDITURES</b>	<b>376,400,659</b>	<b>392,028,042</b>	<b>403,329,075</b>	<b>425,785,086</b>	<b>442,909,273</b>	<b>462,181,388</b>
\$\$ Increase	26,759,944	15,627,383	11,301,032	22,456,011	17,124,187	19,272,115
% Increase	7.7%	4.2%	2.9%	5.6%	4.0%	4.4%
<b>CUMULATIVE SURPLUS/(DEFICIT)</b>		<b>(1,661,018)</b>	<b>(4,307,003)</b>	<b>(9,182,771)</b>	<b>(14,441,388)</b>	<b>(21,650,364)</b>
<b>DEFICIT AS A % OF OP REV</b>		<b>-0.4%</b>	<b>-1.1%</b>	<b>-2.2%</b>	<b>-3.4%</b>	<b>-5.0%</b>
<b>Total Town Surplus / (Deficit)</b>	<b>0</b>	<b>(581,520)</b>	<b>(577,409)</b>	<b>(2,373,995)</b>	<b>(4,158,612)</b>	<b>(6,627,228)</b>
<b>Total School Surplus / (Deficit)</b>	<b>0</b>	<b>(1,079,498)</b>	<b>(3,729,593)</b>	<b>(6,808,777)</b>	<b>(10,282,775)</b>	<b>(15,023,136)</b>

\*NOTE: Free cash not certified for FY25 use.

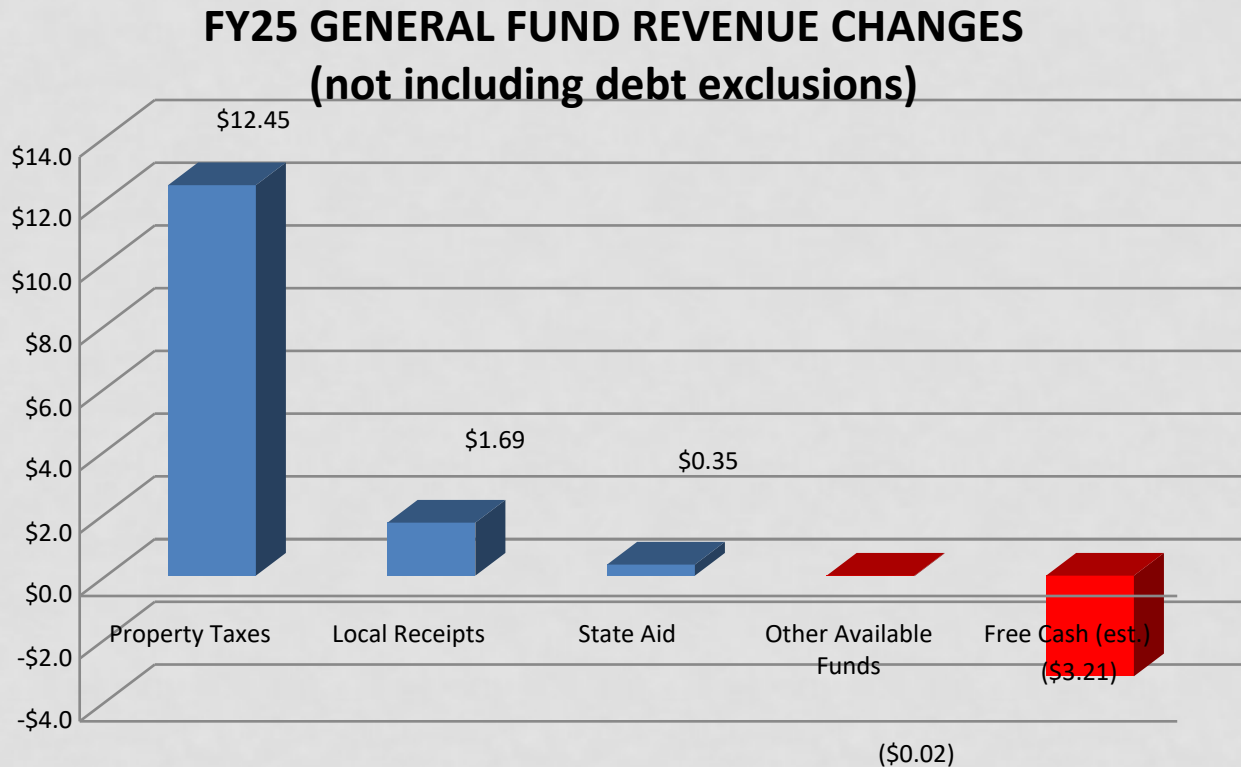
# GENERAL FUND REVENUE COMPOSITION

- In FY24, Property Taxes comprise almost  $\frac{3}{4}$ 's of the Town's General Fund revenue and over 80% of Operating Revenue



# GENERAL FUND REVENUE SUMMARY

- Total FY25 increase in revenue of \$11.3M (3.2%)



In the out-years, annual operating revenue increases of 3+%



# PROPERTY TAXES

- In FY25, increase \$15.1 million (5.1%)

<b>PROPERTY TAXES</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
Prior Year Levy Limit	260,823,641	282,862,062	292,433,613	301,844,454	311,490,565	321,377,829
2 1/2 % Increase	6,520,591	7,071,552	7,310,840	7,546,111	7,787,264	8,034,446
New Growth	3,534,463	2,500,000	2,100,000	2,100,000	2,100,000	2,100,000
General Override	11,983,367					
<b><i>SUB-TOTAL ANNUAL LEVY LIMIT</i></b>	<b>282,862,062</b>	<b>292,433,613</b>	<b>301,844,454</b>	<b>311,490,565</b>	<b>321,377,829</b>	<b>331,512,275</b>
Excess Capacity	(5,427,306)	(2,548,431)				
<b><i>ANNUAL LEVY LIMIT</i></b>	<b>277,434,756</b>	<b>289,885,182</b>	<b>301,844,454</b>	<b>311,490,565</b>	<b>321,377,829</b>	<b>331,512,275</b>
Debt Exclusion (Debt Service Costs)	20,554,161	23,253,266	29,872,965	36,494,515	37,146,981	37,881,988
<b>ANNUAL LEVY</b>	<b>297,988,918</b>	<b>313,138,448</b>	<b>331,717,419</b>	<b>347,985,080</b>	<b>358,524,810</b>	<b>369,394,263</b>
\$\$ Increase	16,609,641	15,149,530	18,578,971	16,267,661	10,539,730	10,869,452
% Increase	5.9%	5.1%	5.9%	4.9%	3.0%	3.0%

# DEBT EXCLUSION

<b>DEBT EXCLUSION</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
Debt Exclusion (Debt Service Costs)						
<u>Actual-</u>						
Florida Ruffin Ridley School (2015) 1st borrowing	2,171,943	2,176,193	2,172,693	2,171,693	2,172,943	2,176,193
Florida Ruffin Ridley School (2015) 2nd borrowing	616,163	617,163	617,413	616,913	615,663	618,663
High School (2018) 1st borrowing	946,338	944,838	947,338	948,588	948,588	947,338
High School (2018) 2nd borrowing	1,013,994	1,015,994	1,016,744	1,016,244	1,014,494	1,016,494
High School (2018) 3rd borrowing	7,264,013	7,266,263	7,265,013	7,265,013	7,265,763	7,261,763
Driscoll School (2019) 1st borrowing	1,353,194	1,351,944	1,354,194	1,354,694	1,353,444	1,355,444
High School (2018) 4th borrowing	1,562,075	1,563,475	1,563,475	1,562,075	1,564,275	1,564,875
Driscoll School (2019) 2nd borrowing	4,560,544	4,562,344	4,560,144	4,558,944	4,563,544	4,563,544
Newbury College (2020)	757,275	757,775	757,275	760,775	758,025	759,275
Driscoll School (2021) Geothermal	308,625	305,875	307,875	309,375	305,375	306,125
<u>Projected-</u>						
Fire Station Renovations (1st borrowing \$18M)		1,309,332	1,309,332	1,309,332	1,309,332	1,309,332
Fire Station Renovations (2nd borrowing \$14M)			1,018,369	1,018,369	1,018,369	1,018,369
Fire Station Renovations (3rd borrowing \$14M)				1,018,369	1,018,369	1,018,369
Fire Station Renovations (4th borrowing \$9M)					654,666	654,666
Fire Station Renovations (5th borrowing \$10M)						727,407
Pierce School (1st borrowing \$19M)		1,382,072	1,382,072	1,382,072	1,382,072	1,382,072
Pierce School (2nd borrowing \$77M)			5,601,031	5,601,031	5,601,031	5,601,031
Pierce School (3rd borrowing \$77M)				5,601,031	5,601,031	5,601,031
	<b>20,554,161</b>	<b>23,253,266</b>	<b>29,872,965</b>	<b>36,494,515</b>	<b>37,146,981</b>	<b>37,881,988</b>
<b>ANNUAL LEVY</b>	<b>297,988,918</b>	<b>313,138,448</b>	<b>331,717,419</b>	<b>347,985,080</b>	<b>358,524,810</b>	<b>369,394,263</b>
Debt exclusion as % Of Levy	6.9%	7.4%	9.0%	10.5%	10.4%	10.3%

# 3.A. STATE AID

- In FY25, assuming level-funding for UGGA and \$50/per pupil for Chapter 70

	<u>2024</u>	<u>2025</u>	<u>2026</u>	<u>2027</u>	<u>2028</u>	<u>2029</u>
<i>General Government Aid</i>	7,671,128	7,671,128	7,860,875	8,055,365	8,254,717	8,459,054
Unrestricted General Gov't Aid	7,589,864	7,589,864	7,779,611	7,974,101	8,173,453	8,377,790
Veterans' Benefits	81,264	81,264	81,264	81,264	81,264	81,264
<i>School Aid</i>	16,130,636	16,483,636	16,893,342	17,313,291	17,743,739	18,184,947
Chapter 70	16,035,247	16,388,247	16,797,953	17,217,902	17,648,350	18,089,558
Charter Tuition Assesment Reimb.	95,389	95,389	95,389	95,389	95,389	95,389
<i>Tax Abatement Aid</i>	19,423	19,423	19,423	19,423	19,423	19,423
<i>Offset Aid (Libraries)</i>	145,424	145,424	145,424	145,424	145,424	145,424
<b>TOTAL STATE AID</b>	<b>23,966,611</b>	<b>24,319,611</b>	<b>24,919,064</b>	<b>25,533,503</b>	<b>26,163,303</b>	<b>26,808,848</b>
\$\$ Increase	735,619	353,000	599,453	614,439	629,800	645,545
% Increase	3.2%	1.5%	2.5%	2.5%	2.5%	2.5%

# LOCAL RECEIPTS

- In FY25, an increase of \$1.6M (5.6%)
  - Primary driver is hotel/motel excise

<b>LOCAL RECEIPTS</b>	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
Motor Vehicle Excise (MVE)	6,200,000	6,300,000	6,426,000	6,554,520	6,685,610	6,819,323
Local Option Taxes	3,700,000	4,780,000	4,866,000	4,953,720	5,043,194	5,134,458
Licenses & Permits	1,114,250	1,114,250	1,114,250	1,114,250	1,114,250	1,114,250
Parking / Court Fines	2,200,000	2,400,000	3,000,000	3,000,000	3,000,000	3,000,000
General Government	4,089,700	4,129,243	4,169,296	4,209,866	4,250,962	4,292,593
Interest Income	897,978	920,428	943,439	967,024	991,200	1,015,980
PILOT's / 121A's	1,893,044	1,930,904	1,969,522	2,008,913	2,049,091	2,090,073
Refuse Fee	4,203,009	4,203,009	4,203,009	4,203,009	4,203,009	4,203,009
Departmental & Other	5,730,776	5,940,976	5,951,380	5,961,992	5,977,816	5,988,857
<b>TOTAL LOCAL REVENUE</b>	<b>30,028,757</b>	<b>31,718,810</b>	<b>32,642,895</b>	<b>32,973,294</b>	<b>33,315,133</b>	<b>33,658,542</b>
\$ \$ Increase	1,287,953	1,690,053	924,085	330,399	341,839	343,409
% Increase	5.3%	5.6%	2.9%	1.0%	1.0%	1.0%

In the out-years, avg annual increase of approx. 1.6%

# OTHER AVAILABLE FUNDS

- A decrease of \$17K(0.4%)
  - Shows loss of HCA funds, but new Opioid funding

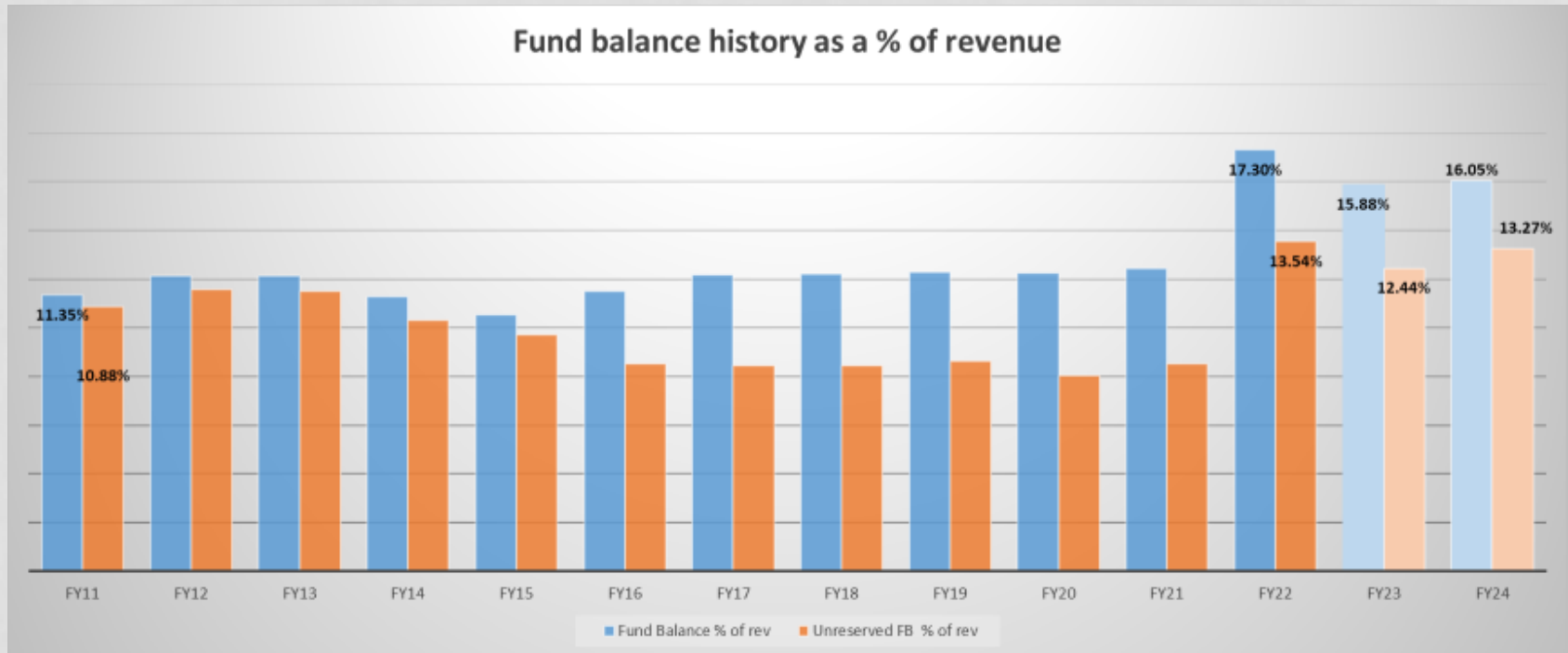
	<u>2024</u>	<u>2025</u>	<u>2026</u>	<u>2027</u>	<u>2028</u>	<u>2029</u>
Opioid / HCA Stabilization Funds	683,639	500,000	150,000	150,000	150,000	150,000
Walnut Hill Cemetery Fund	100,000	100,000	100,000	100,000	100,000	100,000
Golf Enterprise Fund Reimbursement	260,238	251,369	264,159	277,841	292,478	308,138
Recreation Revolving Fund Reimbursement	610,811	671,892	668,468	691,457	729,420	769,825
Water and Sewer Enterprise Fund Reimbursement	2,752,981	2,866,894	2,992,547	3,125,405	3,265,926	3,414,594
<b>TOTAL OTHER AVAILABLE FUNDS</b>	<b>4,407,669</b>	<b>4,390,155</b>	<b>4,175,175</b>	<b>4,344,704</b>	<b>4,537,824</b>	<b>4,742,556</b>
\$\$ Increase	49,821	(17,514)	(214,981)	169,530	193,119	204,733
% Increase	1.1%	-0.4%	-4.9%	4.1%	4.4%	4.5%

# FREE CASH

- Needs to be Certified
- Free Cash is used in accordance with the Town's Free Cash Policies:
  1. Budget Reserve – ¼ of the annual “Reserve Fund”
  2. Unreserved Fund Balance / Stabilization Fund – maintain at a minimum of 10% of revenue
  3. Liability / Catastrophe Fund – maintain at 1% of net revenue
  4. CIP – bring CIP funding up to 7.5% from the 6% CIP Policy
  5. Affordable Housing Trust Fund – deposit if the fund balance is less than \$5M
  6. Special Use – augment trust funds for fringe benefits, unfunded liabilities related to employee benefits, and other one-time uses, including additional funding for the CIP

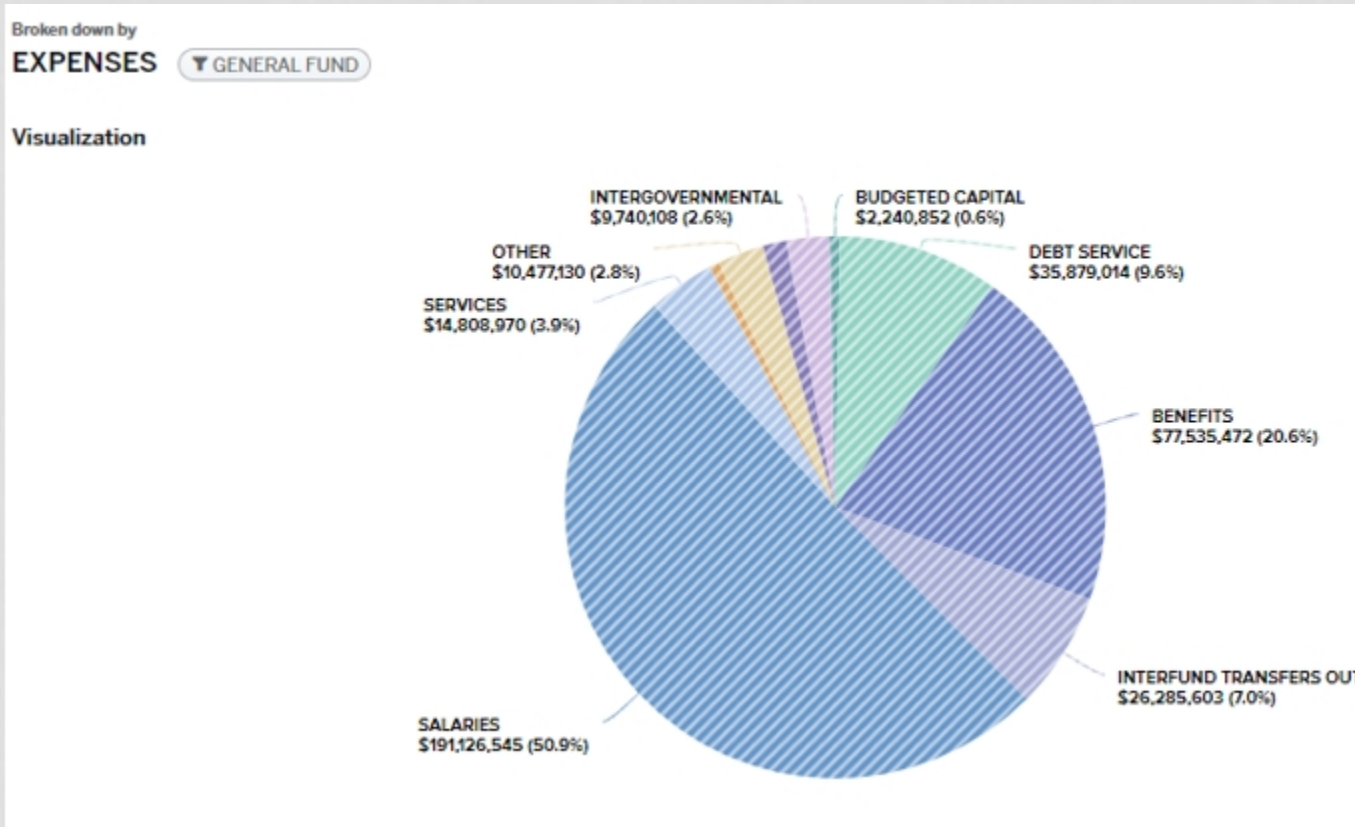
# FUND BALANCE

- Ratings agencies look for a Aaa-rated community to have a ratio of Fund Balance as a percentage of revenue of approx. 10%
- Year-End FY22 = 13.54%
- FY23 TBD



# GENERAL FUND BUDGET

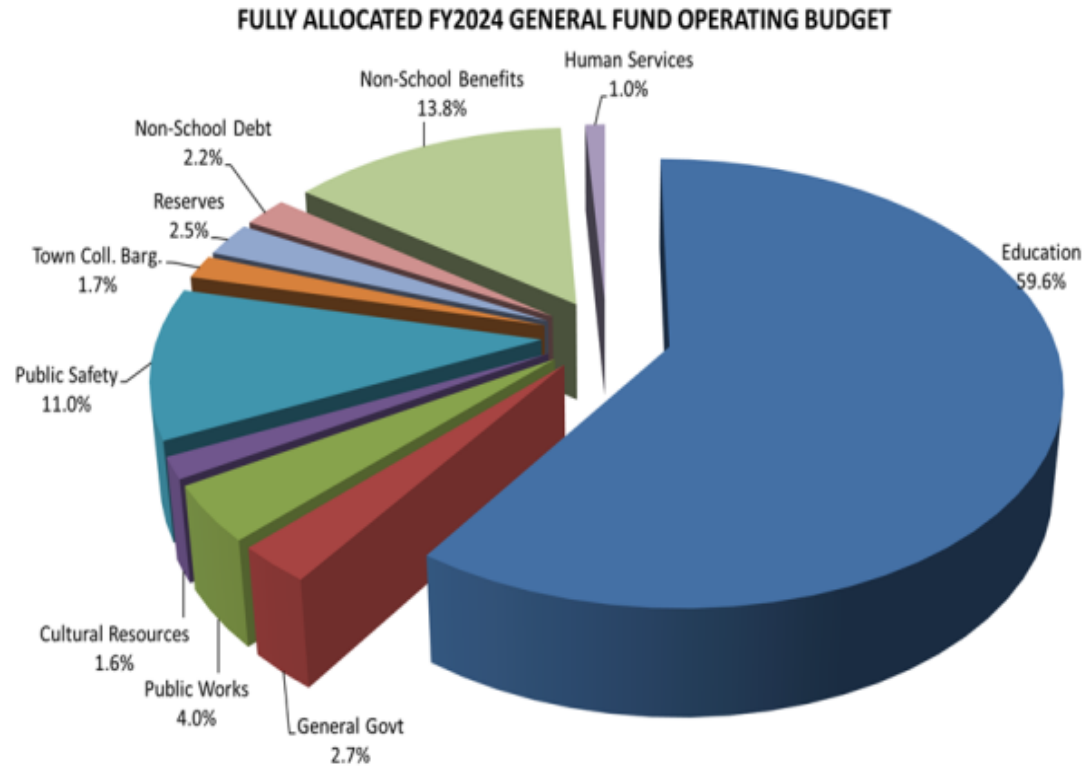
- In FY24, total General Fund budget of \$375M
- Personnel costs (wages + benefits) comprise 72% of the Operating Budget





# FULLY-ALLOCATED EXPENDITURES

- In FY24, expenses associated with Education comprise 59.6% of the Operating budget
- The next largest areas are Public Safety and non-School Benefits



# EXPENDITURE SUMMARY

- For FY25, est. total increase in expenditures of \$15.6M (4.2%)



In the out-years, annual increase average 5.1%

# TOWN / SCHOOL SPLIT

	<u>FY24</u>	<u>FY25</u>
<b>REVENUE</b>	\$376,400,659	\$390,367,024
<b>NON-DEPARTMENTAL FIXED COSTS</b>	\$154,956,714	\$159,923,731
<b>AVAILABLE FOR TOWN/SCHOOL</b>	\$221,443,945	\$230,443,293
<b>APPLY PRIOR YEAR % TO AVAILABLE FUNDS</b>		\$ 94,429,251
		\$ 136,014,042
<b>ADJUST ALLOCATED COSTS FOR SERVICES*</b>	\$ 1,458,367	\$ (607,950) Town adjustments
<i>(Utilities, R&amp;M, Payroll, IT, Purchasing)</i>	\$ (1,458,367)	\$ 607,950 School adjustments
<b>TOWN</b>	<b>\$90,741,569</b>	<b>\$93,821,301</b>
<b>SCHOOL</b>	<b>\$130,702,376</b>	<b>\$136,621,992</b>
TOWN	41.0%	40.7%
SCHOOL	59.0%	59.3%

*\*FY24 adjusts for one time funds for building maintenance folded into allocation. FY25 directs school override funds and group health savings to school budget.*

### 3.A.

# BENEFITS

- Total estimated FY25 increase of \$4.7M (5.9%)
- Assuming 8% for Group Health plus 50 enrollees
- Continuation of OPEB funding plan

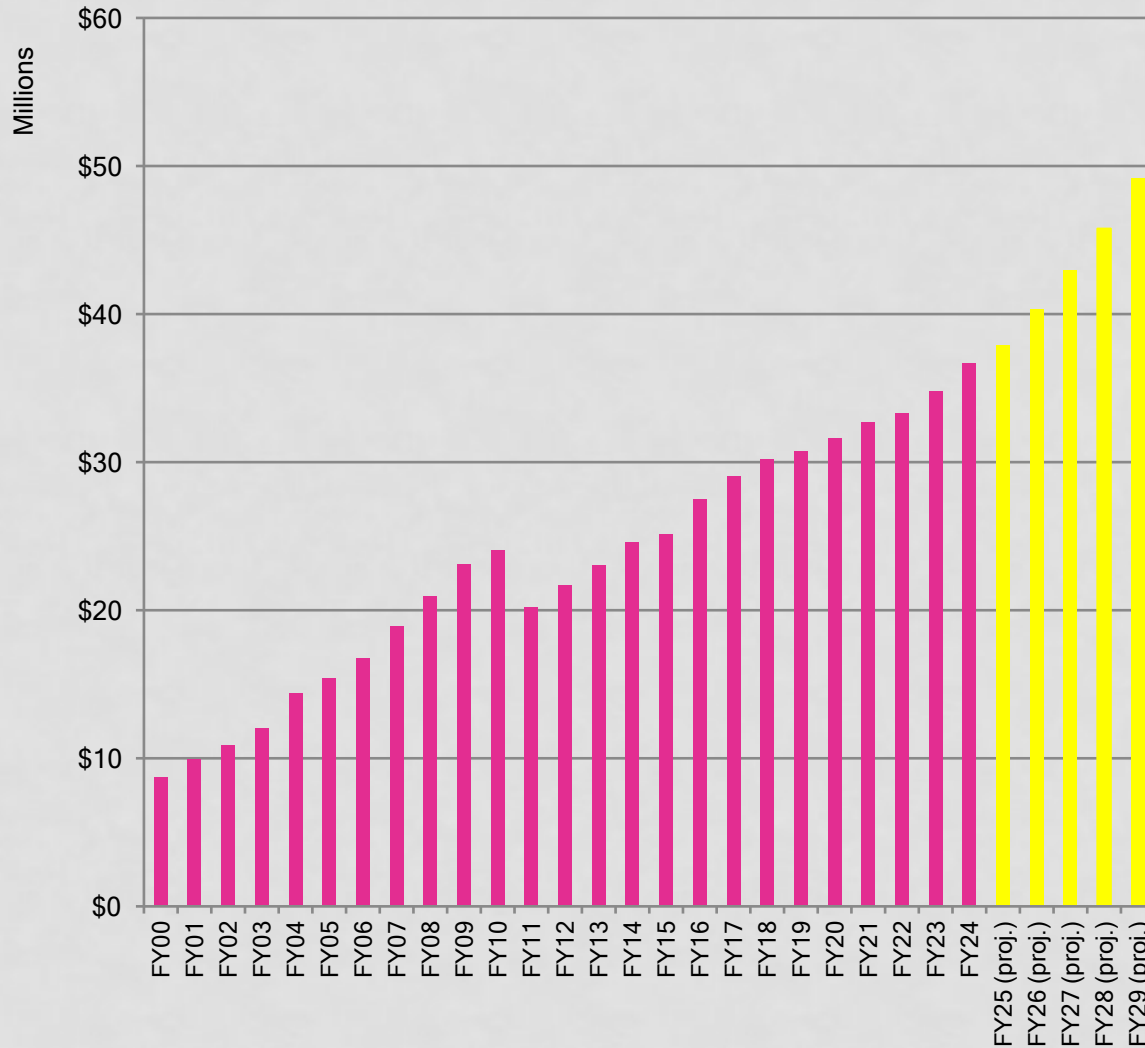
	<b>2024</b>	<b>2025</b>	<b>2026</b>	<b>2027</b>	<b>2028</b>	<b>2029</b>
Pensions	33,015,439	35,488,687	38,277,350	41,424,489	44,597,215	48,354,017
Group Health	36,676,277	37,885,148	40,320,921	42,974,953	45,772,411	49,205,342
Retiree Group Health Trust Fund (OPEB's)	4,681,980	4,931,980	5,181,980	5,431,980	5,681,980	5,931,980
Group Life	145,000	148,625	152,341	156,149	160,053	164,054
Disability Insurance	46,000	46,000	46,000	46,000	46,000	46,000
Workers' Compensation	2,193,656	2,200,000	2,255,000	2,311,375	2,369,159	2,428,388
Public Safety IOD Medical Expenses	275,000	850,000	350,000	350,000	350,000	350,000
Unemployment Compensation	0	0	0	250,000	250,000	250,000
Medical Disabilities	40,000	40,000	40,000	40,000	40,000	40,000
Medicare Coverage	2,970,776	3,169,818	3,382,196	3,608,803	3,850,593	4,108,583
<b>TOTAL</b>	<b>80,044,128</b>	<b>84,760,257</b>	<b>90,005,787</b>	<b>96,593,749</b>	<b>103,117,410</b>	<b>110,878,363</b>
\$\$ Change	4,678,078	4,716,130	5,245,529	6,587,962	6,523,661	7,760,953
% Change	6.2%	5.9%	6.2%	7.3%	6.8%	7.5%

# BENEFITS – MAJOR ACCOUNTS

- **Health Insurance (\$37.8M)**
  - Assuming an 8% rate increase
  - Assuming 50 new subscribers (20 T / 30 S)
  - Total increase of \$1.2 million
  - Each 1% increase in rates equals ~\$348,000
- **Pensions (\$35.4M)**
  - For FY25, increase of \$2.5M based on funding schedule
  - Annual appropriation increases 7.85% continues to put strain on future budgets
- **OPEB's (\$4.9M)**
  - During FY21-22 paused \$150K annual increase, resumed in FY23 and onward
  - Increase operating budget funding from \$4.7M to \$4.9M
  - Continue assessing special revenue funds

# BENEFITS – GROUP HEALTH

## GROUP HEALTH APPROPRIATION



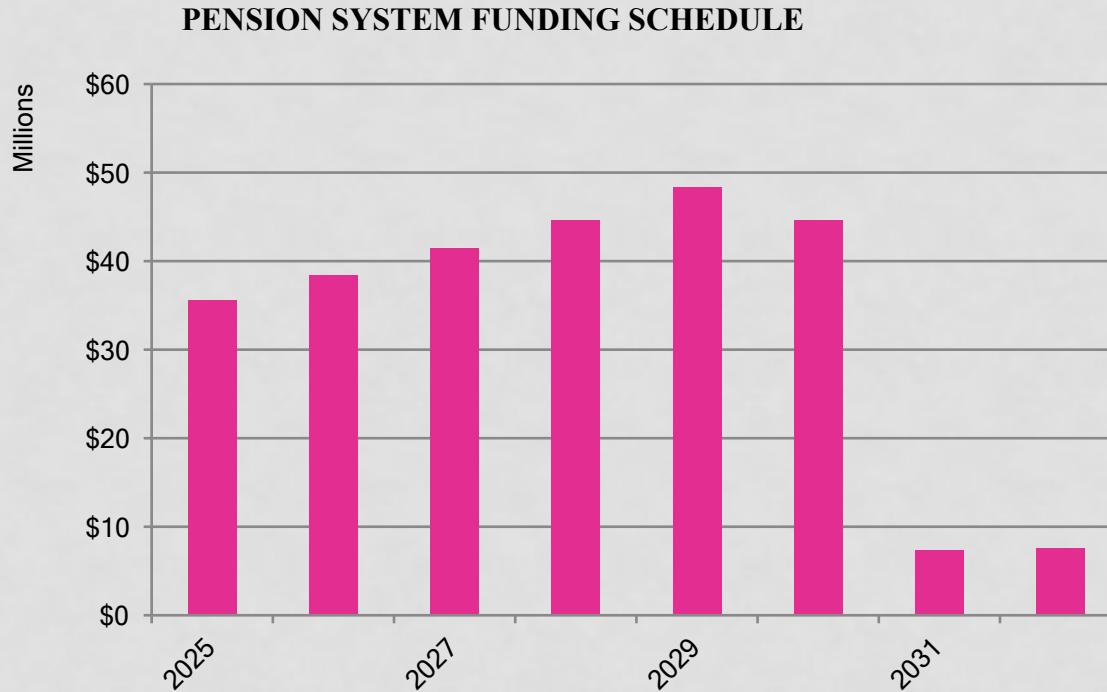
# OPEBS

- Continue:
  - Increasing funding from operating revenue by \$250K / yr, from \$4.4M in FY24 to \$4.7M in FY25
  - Assessing special revenue funds with personnel
  - Using the “run-off” from funding for Non-Contributory retirees (included in Operating Revenue)

	<u>2024</u>	<u>2025</u>	<u>2026</u>	<u>2027</u>	<u>2028</u>	<u>2029</u>
Special Rev Funds	248,888	248,888	248,888	248,888	248,888	248,888
Operating Revenue	4,433,092	4,683,092	4,933,092	5,183,092	5,433,092	5,683,092
<b>TOTAL</b>	<b>4,681,980</b>	<b>4,931,980</b>	<b>5,181,980</b>	<b>5,431,980</b>	<b>5,681,980</b>	<b>5,931,980</b>
\$\$ Change	250,000	250,000	250,000	250,000	250,000	250,000
Percentage Change	5.6%	5.3%	5.1%	4.8%	4.6%	4.4%

# PENSION FUNDING

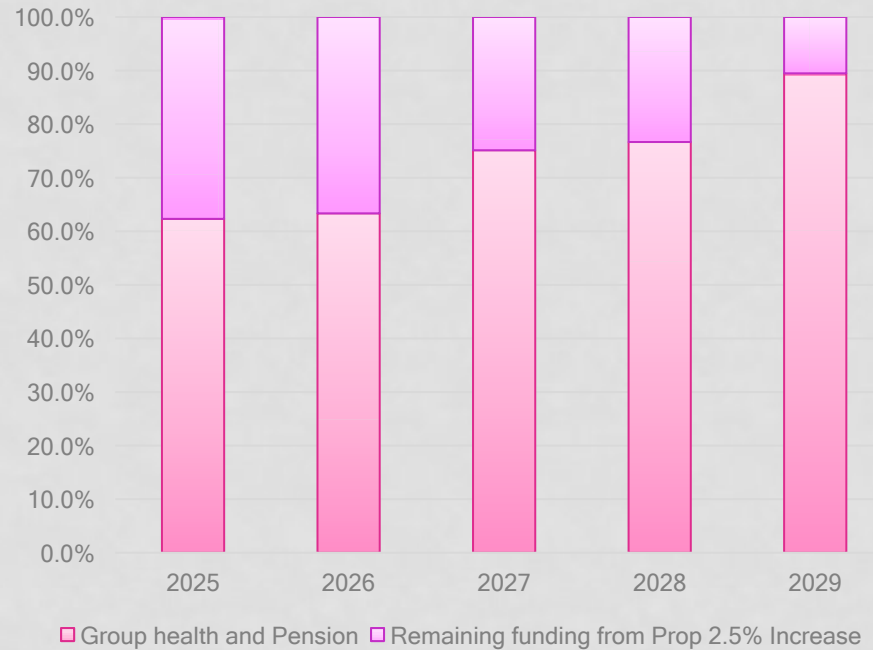
- Full funding date of 2030
- Rate of Return 6.9% (was 7.2%)
- FY25 increase of \$2.5M (7.5%)





# ANNUAL INCREASE IN BENEFITS

- The annual increase in appropriations for Pensions and Health Insurance is absorbing much of the annual 2 ½% increase in Prop Taxes
- Doesn't account for other increases, such as OPEB's
- Figures assume 8% FY25, and average 6.4% out- years Heath Insurance cost



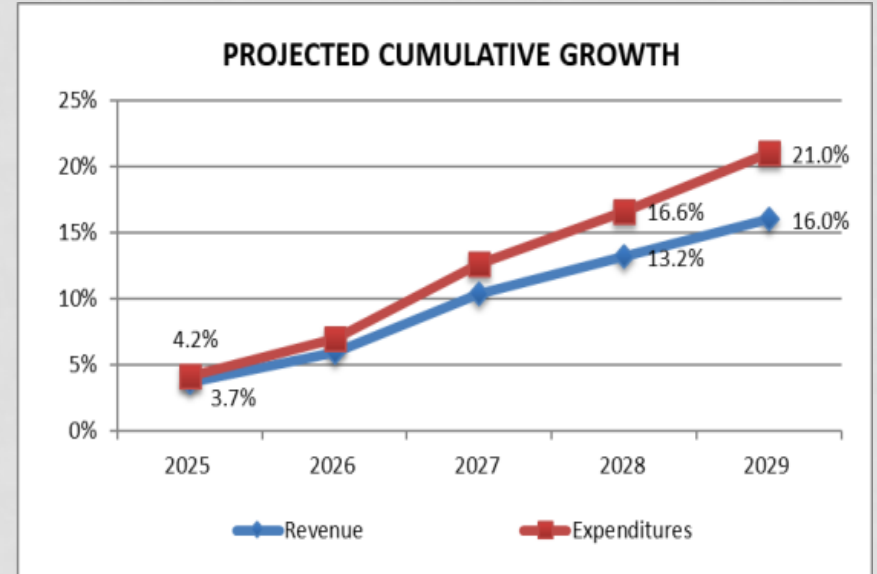
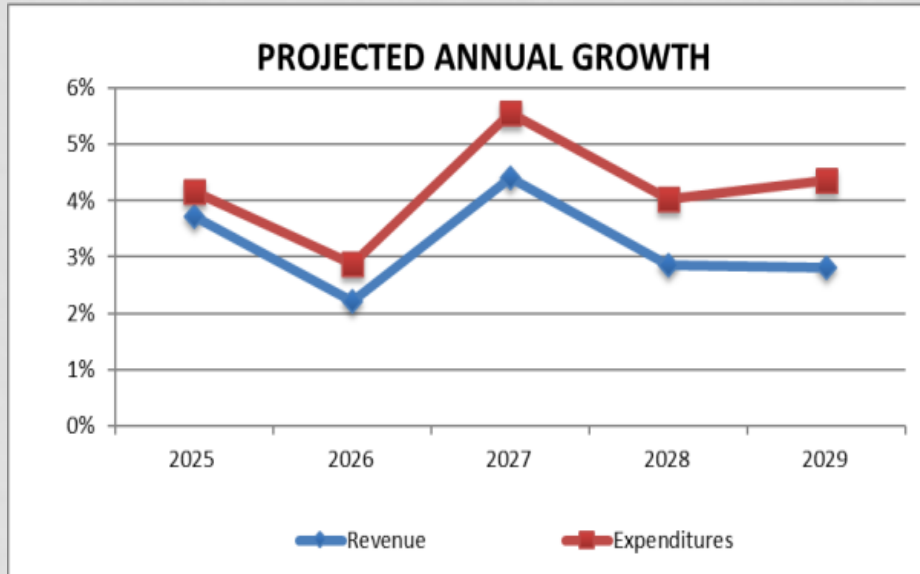
# DEBT SERVICE / TAX-SUPPORTED CIP

- All years of Forecast follow CIP Policies
- In FY25, the “6% Policy” total increases \$1.05M
- In FY25, new debt service for Robinson Playground, Murphy Playground, Pierce, Fire Renovations
  - Plan on Spring, 2024 bond sale
  - Alston Settlement funded within CIP (FY25 impact is \$1.3M).
- FY25 revenue financed projects include
  - Comprehensive Plan
  - Fire Apparatus Rehab
  - Street Rehabilitation
  - School Rehab/Upgrade
- In the out-years, Debt Service supports:
  - Larz Anderson Park
  - Amory Park
  - Davis Path Footbridge

# NON-APPROPRIATED

	<u>2024</u>	<u>2025</u>	<u>2026</u>	<u>2027</u>	<u>2028</u>	<u>2029</u>
STATE ASSESSMENTS						
County Assessments	1,134,411	1,162,771	1,191,841	1,221,637	1,252,177	1,283,482
Air Pollution Dist.	36,224	37,130	38,058	39,009	39,985	40,984
MAPC	36,351	37,260	38,191	39,146	40,125	41,128
MBTA	6,085,273	6,237,405	6,393,340	6,553,173	6,717,003	6,884,928
Boston Metro	1,569	1,569	1,569	1,569	1,569	1,569
SPED	53,486	54,823	56,194	57,599	59,039	60,514
RMV Surcharge	49,680	49,680	49,680	49,680	49,680	49,680
School Choice Sending Tuition	85,794	85,794	85,794	85,794	85,794	85,794
Charter School Sending Tuition	134,711	134,711	134,711	134,711	134,711	134,711
<b>TOTAL STATE ASSESSMENTS</b>	<b>7,617,499</b>	<b>7,801,143</b>	<b>7,989,377</b>	<b>8,182,318</b>	<b>8,380,082</b>	<b>8,582,790</b>
Cherry Sheet Offsets	145,424	145,424	145,424	145,424	145,424	145,424
Overlay	2,798,091	2,027,771	2,078,466	2,130,427	2,183,688	2,238,280
Tax Titles/Deficits/Judgments	25,000	25,000	25,000	25,000	25,000	25,000
<b>TOTAL</b>	<b>10,586,014</b>	<b>9,999,338</b>	<b>10,238,267</b>	<b>10,483,169</b>	<b>10,734,194</b>	<b>10,991,494</b>
\$\$ Change	1,112,101	(586,676)	238,929	244,902	251,025	257,300
Percentage Change	11.7%	-5.5%	2.4%	2.4%	2.4%	2.4%

# FUTURE REVENUE & EXPENDITURE GROWTH



# AMERICAN RESCUE PLAN ACT

- Potential to free up some Revenue Replacement with opportunity to reclassify projects under new eligible categories in Surface Transportation, Housing, and Natural Disasters

	<u>PROJECTS</u>	<u>OBLIGATED</u>	<u>EXPENDED</u>
<b><u>TOWN</u></b>			
Public Health	16	2,430,315	698,737
Negative Economic Impact	18	4,375,959	578,704
Public Sector Capacity & Administration	25	4,470,767	1,986,005
Premium Pay	1	5,590,945	5,874,945
Infrastructure	2	561,000	138,751
Revenue Replacement	18	8,834,728	4,468,982
<b>SUBTOTAL</b>	<b>80</b>	<b>26,263,714</b>	<b>13,746,124</b>
<b><u>SUB-RECIPIENT</u></b>			
Public Health	2	1,050,040	455,991
Negative Economic Impact	26	16,402,004	1,475,668
Public Sector Capacity	1	475,000	0
<b>SUBTOTAL</b>	<b>29</b>	<b>17,927,044</b>	<b>1,931,659</b>
<b>TOTAL</b>	<b>109</b>	<b>44,190,759</b>	<b>15,677,783</b>

# POTENTIAL FUTURE REVENUE

- Parking meter rates
- Refuse fee
- ARPA Round 3
- Community Preservation Act
- Other Grant opportunities

# LONGER-TERM QUESTIONS

- **Given our limited available funds, what initiatives should we prioritize with existing resources?**
  - Social services (housing stability)
  - Sustainability
  - Other Select Board priorities
- **What other means can we use to incentivize smart, sustainable, & equitable economic development that diversifies our tax base while maintaining Brookline's character?**
  - Business Improvement Districts (BIDs)
  - Linkage Fees
  - DBE Partnerships

# END OF YEAR ACCOMPLISHMENTS

**Buildings:** implemented 2 different green energy codes; oversaw kickoff of large-scale capital projects (firehouses; Pierce School) and major milestones in others (Driscoll School)

**Council on Aging:** secured and implemented earmarks for transportation planning & operational goals; continued expanding services at Senior Center

**Diversity, Equity, Inclusion & Community Relations:** completed language access plan as part of continued efforts to make town services more accessible

**Finance:** created payroll division; launched crucial DBE disparate impact study, continued exploring expansion of low income tax relief

**Fire:** implemented novel PFAS safety agenda; provided emergency management coordination across multiple events

**Health:** completed major cannabis use study; launched community services inventory; led efforts to create regional health cooperative; implemented rodent control action plan w/DPW

**Human Resources:** began implementation of new training platform; presided over reclassification or creation of multiple new positions

**Information Technology:** upgraded critical hardware & software infrastructure while concurrently responding to 1000s of discrete user issues

**Libraries:** increased provision of community-related services at all three branches (“library of things”, etc.)

**Planning:** helped develop community-driven MBTA Communities Act compliance plan; kicked off formal Comprehensive Plan process by soliciting bids; maintained & grew community parklet program w/DPW

**Police:** significantly increased recruitment; expanded social services operations to ensure first responders conscientiously address mental health & other crises

**Public Works:** completed numerous major transportation- and water/sewer-related capital projects, incl. Carlton St. Footbridge

**Town Clerk:** ran numerous municipal elections w/expanded voting opportunities; increased digitization efforts

**Town Counsel:** managed increased workload (school records requests, etc.) to provide significant cost savings; won numerous cases/arbitration actions

**Recreation:** increased & diversified use of existing properties (golf course, fields); multiple successful large-scale community events incl. Brookline Day returning to Coolidge Corner



5.A.

**TOWN of BROOKLINE**  
*Massachusetts*



**CHARLES CAREY**  
TOWN ADMINISTRATOR

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**To:** Select Board  
**From:** Charles Carey, Town Administrator  
**Date:** December 13, 2023  
**Subject:** Proposed Sustainability & Natural Resources Division Update

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At your meeting on November 28, we discussed a draft white paper that called for the establishment of a Sustainability & Natural Resources Division (“Sustainability Division” or just “the Division”) within the Department of Public Works (“DPW”).

The white paper envisioned that the Division would bring over certain positions now housed in the Division of Parks and Open Space such as the Conservation Administrator and the override-funded Urban Forestry Master Plan team, enhance the salary of the Sustainability Director position that currently resides in the Department of Planning and Community Development (“Planning”). It would also create two new roles: a Deputy Division Director who would serve as both a project manager and grant administrator; and a Public Sustainability Coordinator who would oversee both the Town’s messaging on sustainability and public-facing projects (such as educational efforts on heat pump and green roof adaptation).

On the whole, the envisioned additional cost to the Town’s annual operating budget for the Division was estimated to reach \$348,446 in FY2027, when the Division would reach its maximum capacity. In terms of funding for the additional costs of the division, the white paper called for a mix of funding from a \$0.25 parking meter rate increase, two one-time federal grant sources, and Community Preservation Act (“CPA”) funds. The white paper suggested that the Division be treated as a pilot with the balance of the funds from non-revenue sources to be placed on the ballot as part of an anticipated operating override in 2027.

Your preliminary feedback was very helpful, and focused on two key concerns. The first was the addition of new full-time employees for a pilot program, particularly if the Division had the possibility of ceasing or reducing operations if an operating override failed. The second was the use of one-time funds to cover operating costs, even on a temporary basis. I agree that both concerns are serious ones that warrant further discussion by the Board.

One potential way of assuaging both concerns would be to eliminate the position of Public Sustainability Coordinator and spread its responsibilities across other roles. In terms of finances, this would reduce the total expansion request to below \$300,000 in FY27 dollars. In calculating

potential added revenue from an increase of \$0.25 to parking meter rates, our most recent estimates suggest the Town side of the budget would realize approximately \$300,000 in gains. In practical terms, this would mean the entirety of the meter revenue increase would be spent on sustainability. There are many other departments whose operations could benefit from a broader distribution of increased revenues; if this is the Town's paramount priority, you may wish to provide it that level of support at the outset.

Another option would be to authorize the movement of the Sustainability Director position and creation of the new division, but pause further hires until the new Director had time to return to the Board with a mid- to long-range vision of the Division's efforts beginning in FY26. Were the Board to take this path, I worry that the workload would be unmanageable for the new Director and lead us back to our current situation. As you can see from the draft workplan developed by DPW and attached to this memo, there is a large amount of work involved in setting up this Division for success in its first 12 months.

A third option would be a hybrid of these two options: authorize the transfer, position regrading, and hiring of the Director now; as well as the hiring of the Deputy Director and funding of the non-personnel budget in FY25. (The Deputy Director position could theoretically be hired on a one-year contract basis, though I worry this would limit the pool of applicants.) Incorporate a requirement that the Division report back to you at next year's Budget Workshop regarding its mid- to long-range goals, with the knowledge that the Climate Action Plan would still be under development as of that date. Use that proposal to inform the allocation of FY26 resources to the Division.

The additional cost to undertake that third option in the FY25 budget would be approximately \$157,000, of which \$120,751 could be paid with the IJA block grant discussed in the previous memo and the remaining \$36,249 could potentially be realized in the short term by utilizing funds set aside for salary adjustments in the override plan. Alternatively, the Board could ask the Transportation Board to approve the parking meter rate increase to \$2.00/hr and fund the full amount with that revenue, leaving the remainder on hold so that the actual impact to revenues and total amount potentially available for use in FY26 is more clear.

I look forward to discussing this matter further with you at your workshop on December 14. It is my hope that by the end of our conversation that we have sufficient guidance to finalize a job description for the new Division's director to be placed on the Human Resources Board's agenda for January.

#### **END OF DOCUMENT**

cc: Melissa Goff, Deputy Town Administrator for Policy & Fiscal Affairs  
Erin Chute, Commissioner of Public Works

## **Sustainability & Natural Resources Division 24-Month Work Plan – DRAFT**

### **Month 1-3: Foundation and Assessment**

- Establish the Division’s mission, vision, and goals
- Conduct a comprehensive assessment of current municipal policies, practices, plans, and infrastructure related to climate and sustainability
- Identify and hold interviews with key stakeholders, community groups, boards & commissions, Department leads, and experts for a baseline assessment of current sustainability work, goals, knowledge, and resource gaps
- Conduct an assessment of the current workload and areas needing support within the Sustainability Division, based upon former/current projects, initiative & expectations, and outside of the Division, but supporting sustainability and climate goals for the Town.
- Conduct a SWAT analysis to better understand how the Sustainability Division can support town strengths, gaps, and skills to deliver on sustainability goals and expectations
- Identify opportunities for maximizing Division efficiency and impact
- Finalize job descriptions and skill sets required for the two new positions.
- Commence update of the Town’s Open Space Plan with a focus on climate action and resiliency. The work of this plan related to climate will fold into the updated Climate Action Plan that will follow this effort.
- Establish and chair an internal Climate and Sustainability Working Group with representation from all Departments as appropriate. Establish meeting schedule for larger (quarterly) and smaller (monthly) subset of the group, specific topics for discussion and set expectations, goals, and deliverables for each group.
- Assess project and program opportunities that are in alignment with existing plans such as the Commonwealth’s Climate Action Plan, Massachusetts Integrated State Hazard and Climate Adaptation Plan, the Town’s Hazard Mitigation Plan, Brookline’s Urban Forest Climate Resiliency Plan, Brookline’s Zero Waste Framework, Brookline’s Stormwater Management Plan, Brookline’s Open Space Plan, and the Town’s

## 5.A.

Comprehensive Plan. Identify and communicate with stakeholders responsible for implementation of these various action plans and determine the role of the Sustainability Division in realizing the goals in each of those plans

### **Month 4-6: Strategy Development**

- Develop a strategic work plan for the Division outlining short-term and long-term objectives for climate action and sustainability based on the assessment of current Town-wide plans, stakeholder interviews, ongoing sustainability initiatives and an understanding of impact, feasibility, and community needs.
- Assist ZEAB in the development of a strategic work plan that aligns with and supports the Division's goals and work.
- Include the update of the Climate Action Plan as a top priority in both plans and develop a timeline, process, and support needed to update the Climate Action Plan.
- Begin outlining policies and programs to address identified work areas.
- Initiate the hiring process, including job postings, recruitment and outreach, and candidate evaluation.
- Interview potential candidates and select individuals who align with the department's goals, possess relevant skills, and show dedication to climate and sustainability initiatives.
- Begin identifying major state and federal funding opportunities to support sustainability, climate resiliency, climate readiness, and Net Zero across all Departments.

### **Month 7-12: Implementation Phase 1**

- Commence the process to update the Climate Action Plan (this work will be supported by the new staff, once in place, and consultant services)

## 5.A.

- Launch pilot programs focused on waste reduction, energy efficiency, fleet electrification, climate resiliency, flood mitigation, green infrastructure or renewable energy development
- Collaborate with local businesses, schools, and residents to increase awareness and engagement in sustainable practices.
- Establish baseline metrics and tracking systems to measure the Division's impact
- Facilitate a comprehensive onboarding process for the new hires, acquainting them with the Department's goals, ongoing projects and the Town's organizational culture.
- Provide new staff training sessions on municipal policies and organizational structure, sustainability practices, and any specialized skills needed for their roles.
- Integrate new team members into ongoing projects and help familiarize them with key stakeholders and sustainability work underway within the Town.
- Develop staff work plans to streamline workflows, enhance project management and demonstrate return on investment.
- Submit, track and manage relevant grants.
- Launch the MVP 2.0 process so that Brookline is eligible for future MVP Action Grants.

### **Month 13-18: Expansion & Outreach**

- Scale successful pilot programs across Town departments and organizations.
- Initiate partnerships and collaborate with neighboring cities, regional agencies, and nonprofits to amplify efforts and implement best practices and policies
- Organize and host community events, workshops, and educational campaigns to promote sustainability awareness and behavior change.
- Based upon the outcome of the Climate Action Plan focus on grants, policy development and technical implementations.
- Complete Climate Action Plan Update.

### **Month 19-24: Innovation & Evaluation**

- Conduct a comprehensive evaluation of the Division's initiatives, measuring against established metrics.
- Adjust strategies and policies based upon feedback, lessons learned, and new developments in sustainability practices.
- Evaluate the impact of the new positions on departmental and town efficiency, project outcomes, grants/funding, and community engagement.
- Identify and plan for continued professional development opportunities to further enhance the expertise of the team.
- Begin implementation of the CAP

Throughout this timeline, continuous communication with stakeholders, regular reporting on progress, and fostering a culture of sustainability within Brookline will remain integral.

5.A.

**TOWN of BROOKLINE**  
*Massachusetts*



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**To:** Select Board  
**From:** Charles Carey, Town Administrator  
**Date:** December 13, 2023  
**Subject:** Housing Stability Office Update

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In the spring of this year, Town Meeting passed a by-law establishing an Office of Housing Stability (“OHS”) within Town government. That by-law permitted significant discretion in identifying the mission and makeup of that office, but emphasized the importance of the Town providing a meaningful social service function in the sphere of housing.

Over the summer, I established a task force to build out OHS, consisting of the Deputy Town Administrator and Assistant Town Administrator for Operations as well as representatives from the Planning, Health, Police, Building, and IT Departments; the Office of Diversity, Equity, Inclusion and Community Relations; the Senior Center/Council on Aging; and Town Counsel’s office. We discussed how OHS would fit in with broader plans to provide increased social service support throughout the community. The Health Department is currently conducting a community inventory of existing local and regional social service providers with an eye towards matching needs identified in the recent community needs assessment with existing resources as well as identifying/prioritizing unmet needs.

Given that ongoing broader work, we elected to follow a three-step model for OHS:

Step I: Provide a single-point “community clearinghouse” of information about housing resources, readily accessible on the Town website.

Step II: Create a single-point system for receiving, routing, tracking, referring and resolving housing-related complaints to various Town departments.

Step III: Upon completion of the community services inventory, identify which unmet housing-related needs the Town would be best equipped to resolve and modify the services of the Housing Recovery Office accordingly.

Step I was completed in August, and the Office’s website is accessible here: <https://www.brooklinema.gov/230/Brookline-Housing-Stability-Resources>.

We are now in the process of completing Step II. We have identified the existing Acela case-management platform now in use by various departments for online permitting as a good candidate for the platform on which to build out a housing complaint process. As conceived, there will be an easy-to-access complaint/question form accessible both from the Town's main website and BrookOnLine's home page. The system will categorize and route any submissions to the appropriate Town department for resolution—i.e., someone concerned about a structurally unsafe living situation would be routed to the Inspectional Services Division of the Buildings Department, while someone with a landlord-tenant dispute would be referred to known outside service providers since the Town cannot mediate such disputes.

Simultaneously, we are developing a “no wrong door” procedure to ensure that individuals who lack internet access or the facility to use the online system will have a means of ensuring their issues are heard, categorized, and routed appropriately. We are working closely with the ADA Coordinator, and will partner as well with the incoming Language Access Coordinator, to provide meaningful support to all populations in Town.

At present, we anticipate the community services inventory to conclude in the summer of next year. At that point, we will move into Step III, analyzing the unmet needs in the housing field and discussing how best to address them. It is important to emphasize that the Town cannot, by law, provide many direct support services such as rent abatement or landlord-tenant mediation. But where possible, the Town can build strong support networks with community partners to ensure those services are provided.

Potential sources of funding for increased Housing Stability Office activities include Community Preservation Act or Affordable Housing Trust funds, in addition to one-time grants. If a decision is made to seek out those funds, it will come as part of the FY2026 budget cycle.

#### **END OF DOCUMENT**

cc: Melissa Goff, Deputy Town Administrator for Policy & Fiscal Affairs  
Devon Fields, Assistant Town Administrator for Operations