



Watertown City Council

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6470

ELECTED OFFICIALS:

Mark S. Sideris,
Council President

Vincent J. Piccirilli, Jr.,
Vice President &
District C Councilor

John M. Airasian,
Councilor At Large

Caroline Bays,
Councilor At Large

John G. Gannon,
Councilor At Large

Anthony Palomba,
Councilor At Large

Nicole Gardner,
District A Councilor

Lisa J. Feltner,
District B Councilor

Emily Izzo,
District D Councilor

CITY COUNCIL MEETING

TUESDAY, JUNE 28, 2022 AT 6:15 PM

**RICHARD E. MASTRANGELO COUNCIL CHAMBER
ADMINISTRATION BUILDING, 149 MAIN STREET
AGENDA**

ACCESS INFORMATION:

- A. The meeting will be televised through WCATV (Watertown Cable Access Television): <http://vodwcatv.org/CablecastPublicSite/?channel=3>
- B. The Public may join the virtual meeting online: <https://watertown-ma.zoom.us/j/92991331344>
- C. Public may join the virtual meeting audio only by phone: (877) 853-5257 or (888) 475-4499 (Toll Free) and enter Webinar ID: 929 9133 1344 #
- D. Public may comment through email: vpiccirilli@watertown-ma.gov

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- 1. ROLL CALL
 - 2. EXECUTIVE SESSION - 6:15 P.M.
 - A. Executive Session To Consider the Purchase, Exchange, Lease, or Value of Real Property as an Open Meeting May Have a Detrimental Effect on the Negotiating Position of the Public Body – 124 Watertown Street – property 118 20
 - 3. RETURN TO SESSION – 7:00 P.M.
 - 4. PLEDGE OF ALLEGIANCE
 - 5. PUBLIC FORUM
 - 6. EXAMINATION OF RECORDS OF PREVIOUS MEETINGS
 - A. Minutes of the City Council Meeting - May 24, 2022
 - 7. PRESIDENT’S REPORT
 - A. Consideration and Action on a Resolution Authorizing a Petition to the General Court for Special Legislation Regarding Acquisition of Property in the City of Waltham
 - 8. MOTIONS, ORDINANCES, ORDER, AND RESOLUTIONS
 - A. First Reading on a Proposed Order Establishing Water and Sewer Rates and Charges for Fiscal Year 2023

- B. Resolution Authorizing a Transfer of Funds in the Amount of \$311,200 from Various Fiscal Year 2022 Electricity and Gas Accounts to the Fiscal Year 2022 ESCO Capital Project Stabilization Fund Account.
 - C. Resolution Authorizing a Transfer of Funds in the Amount of \$27,450 From the Fiscal Year 2022 City Council Reserve Account to the Fiscal Year 2022 Election Equipment Account
 - D. Resolution Authorizing a Transfer of Funds in the Amount of \$29,500 from Various Fiscal Year 2022 Police Department Accounts to the Fiscal Year 2022 Police Vehicle Replacement Account.
 - E. Resolution Authorizing a Transfer of \$75,000 from the Fiscal Year 2022 City Council Reserve Account to the Fiscal Year 2022 Rink Improvements Account.
 - F. Resolution Authorizing a Transfer of \$74,978 from the Fiscal Year 2022 Planned Debt Account to the Fiscal Year 2022 Council Chamber Improvements Account
 - G. Resolution Authorizing a Transfer of \$500,000 from the Fiscal Year 2022 Town Group Health Insurance and School Group Health Insurance Accounts to the Fiscal Year 2022 Transfer to Capital Projects Stabilization Fund Account
 - H. Resolution Authorizing a Transfer of \$15,000 from the Fiscal Year 2022 Veteran's Benefits Account to the Fiscal Year 2022 Purchasing Postage Account
 - I. Resolution Authorizing a Transfer of \$111,880 from the Fiscal Year 2022 Debt Retirement – Planned Debt Account to the Fiscal Year 2022 Transfer to Capital Projects IT Department Account
 - J. Resolution Authorizing a Transfer of \$1,128,109 from the Fiscal Year 2022 Debt Retirement – Planned Debt Account to the Fiscal Year 2022 Transfer to Capital Projects Three Elementary Schools Project Account
9. REPORTS OF COMMITTEES
- A. Committee on Economic Development and Planning Report Regarding Reappointments to the Planning Board
ACTION ITEMS:
 - 1. That the City Council Confirm the Reappointment of Janet Buck to the Planning Board for a Term to Expire on February 15, 2025
 - 2. That the City Council Confirm the Reappointment of Abigail Hammett to the Planning Board for a Term to Expire on February 15, 2025
 - B. Committee on Human Services Report Regarding Appointments to the Watertown Housing Trust
ACTION ITEMS:
 - 1. That the City Council Appoint Cliff Cook to the Watertown Housing Trust for a Term to Expire on June 30, 2024
 - 2. That the City Council Appoint Helen Oliver to the Watertown Housing Trust for a Term to Expire on June 30, 2024
 - 3. That the City Council Appoint Leo Patterson to the Watertown Housing Trust for a Term to Expire on June 30, 2023
 - 4. That the City Council Appoint David Leon to the Watertown Housing Trust for a Term to Expire on June 30, 2023
 - 5. That the City Council Appoint Zoe Weinrobe to the Watertown Housing Trust for a Term to Expire on June 30, 2024
 - 6. That the City Council Appoint Jill Hyde to the Watertown Housing Trust for a Term to Expire on June 30, 2023
 - C. Committee On Public Works Report Regarding the Appointment and Reappointment to the Conservation Committee, Solid Waste Waste and Recycling Advisory

Committee, and the Watertown Environment and Energy Efficiency Committee
ACTION ITEMS:

1. That the City Council Appoint Judy Fallows to the Solid Waste and Recycling Advisory Committee (SWRAC) for a Term to Expire on May 15, 2024; that Alexandra Lahr Be Appointed to SWRAC for a Term to Expire on May 15, 2025; and that Eileen Zubrowski Be Appointed to SWRAC for a Term to Expire on May 15, 2025
 2. That the City Council Appoint Russ Arico to the SWRAC for a Term to Expire on May 15, 2023
 3. That the City Council Reappoint Ed Lewis to the Watertown Environment and Energy Efficiency Committee (WE3C) for a Term to Expire on November 15, 2024 and that Shin Nagpal Be Appointed to the WE3C for a Term to Expire on November 15, 2022
 4. That the City Council Appoint Rachel Danford to the Conservation Commission for a Term to Expire on February 15, 2025 and that Charles Bering Be Reappointed to the Conservation Commission for a Term to Expire on February 15, 2025
 5. That the City Council Appoint Eileen Ryan to SWRAC for a Term to Expire on May 15, 2023 and that Leslie Evans be appointed to SWRAC for a Term to Expire on May 15, 2024
 6. That the City Council Appoint Carina Wallack to the WEC for a Term to Expire on November 15, 2024
10. NEW BUSINESS
 11. COMMUNICATIONS FROM THE CITY MANAGER
 12. REQUESTS FOR INFORMATION/REVIEW OF LIST OF PENDING MATTERS
 13. ANNOUNCEMENTS
 14. PUBLIC FORUM
 15. RECESS OR ADJOURNMENT

**RESOLUTION AUTHORIZING A PETITION FOR SPECIAL LEGISLATION
REGARDING ACQUISITION OF PROPERTY
IN THE CITY OF WALTHAM**

RESOLUTION #

R-

WHEREAS, the City desires to acquire a piece of property shown as “Lot 8” on a plan entitled “Plan of Land Being a Division of Lot 4 Shown on Land Court Plan 15807C Creating Three Lots Waltham Street, Waltham/Watertown, Mass.,” dated June 28, 2012, being Plan 15807D on file with the Middlesex South Registry District of the Land Court, and referred to herein as “Lot 8”, containing valuable open space and recreation resources, including but not limited to Walker Pond; and

WHEREAS, a portion of Lot 8 is located within the City of Waltham; and

WHEREAS, the City is generally precluded from acquiring property located within another municipality; and

WHEREAS, the portion of Lot 8 located in the City of Waltham is integral to the open space and recreation value of the property, as it contains a portion of Walker Pond; and

WHEREAS, the portion of Lot 8 located in Walker Pond located in the City of Waltham is landlocked and has limited value if separated from the primary estate of Lot 8.

NOW THEREFORE BE IT RESOLVED, that the City Council of the City of Watertown hereby authorizes the filing of a petition with the General Court for special legislation to allow for the acquisition by the City of that portion of Lot 8 located in the City of Waltham, as follows:

**AN ACT AUTHORIZING THE CITY OF WATERTOWN TO ACQUIRE
PROPERTY IN THE CITY OF WALTHAM**

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

Section 1. The city of Watertown is hereby authorized to acquire property located in the city of Waltham, for general municipal purposes and active and passive recreation purposes, said property being a portion of the property containing 7.162 acres, more or less, located in the city of Watertown and the city of Waltham shown as “Lot 8” on a plan entitled “Plan of Land Being a Division of Lot 4 Shown on Land Court Plan 15807C Creating Three Lots Waltham Street, Waltham/Watertown, Mass.,” dated June 28, 2012, being Plan 15807D on file with the Middlesex South Registry District of the Land Court, said portion located in the city of Waltham containing 20,596 square feet, more or less.

Section 2. This act shall take effect upon passage.

and

BE IT FURTHER RESOLVED, that the General Court may make clerical or editorial changes of form only to the proposed special act, unless the City Council approves such changes as are consistent with the public purposes of this petition prior to enactment by the General Court.

Council Member

I hereby certify that at a regular meeting of the City Council for which a quorum was present, the above Resolution was adopted by a vote of ___ for and ___ against on _____, 2022.

Mark S. Sideris, Council President

Marilyn Pronovost, Council Clerk

819881/WATR/0103

816530/WATR/0001



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6465
www.watertown-ma.gov
citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Fiscal Year 2023 Water & Sewer Rates

Background

A water and sewer rate study was conducted to provide the City with recommended water and sewer rate changes which will generate sufficient revenue to fund the operational, indirect, debt service and short term and long-term capital improvement costs, while ensuring the enterprise funds continue to maintain healthy retained earnings. At the time of the study the FY2023 water and sewer budgets were not available and therefore were projected based on the FY2022 budgets.

Estimated Expenses and Revenues

Without any changes in revenue, total projected water revenues for FY 2023 are \$7,839,231 and projected expenditures are \$8,898,118, leaving a deficit of over \$1.0 million for FY 2023. In addition, the revenue total does not include liens, which is revenue from prior years that the City has already identified as revenue in those years.

Without any changes in revenue, total projected sewer revenues for FY 2023 are \$10,845,879 and projected expenditures are \$11,357,453, leaving a deficit of over \$500,000 for FY 2023. In addition, the revenue total does not include liens, which is revenue from prior years that the City has already identified as revenue in those years.

The Water Enterprise Fund and the Sewer Enterprise Fund are experiencing budgetary shortfalls because revenue recovered from rates is insufficient to cover expenditures.

Proposed Rates and Charges

In order for the City to target a healthy retained earnings of 15% by FY2027 a water rate increase of approximately 10% and a sewer rate increase of approximately 7% would need to be applied in FY 2023 if no changes to the current rate structure are made. However, we recommend that Watertown change the City's rate structure from a three-tier structure to a four-tier structure, adjust the existing tier limits and utilize funds from the American Rescue Plan Act ("ARPA") to the water and sewer enterprise funds

in to finance infrastructure improvement projects in FY 2023 and FY 2024. Doing so will decrease the FY 2023 rate increases needed to achieve the desired retained earnings.

We are recommending that Watertown allocate approximately \$5,000,000.00 in ARPA funding to the water & sewer enterprise funds, alter the existing rate structure to a 4-tier structure and increase its water and sewer rates as well as service charges by approximately 6.5%, 5.25% and 6% for FY 2023 respectively.

There are several reasons why we are recommending a revised rate structure as well as water and sewer rate increases. They are as follows:

1. The City has been using the water and sewer reserves for capital improvements. There are a number of capital projects planned in the coming years for which the reserves need to be increased and then maintained.
2. As discussed in the past, water sales are dependent on the weather and customer's irrigation needs. A wet summer as seen this past year will result in reduced sales from those we have projected and a concurrent drop in the projected revenues.
3. Covid has also led to reduced consumption, many residents have begun home improvements such as installing low flow utilities in an effort to conserve water.
4. To balance the FY 2023 budgets in order to recover sufficient revenues to support increased water and sewer operating expenses, including increased MWRA assessments.
5. By decreasing the current Tier 1 by 500cf, splitting the current Tier 2 at 5,000cf and lowering the top of Tier 3 to 25,000cf allows tier breaks to be more in line with similar communities' tier breaks. This structure allows the average residential customer to remain in Tier 1, the small commercial customer to fall into Tier 1 or Tier 2, the majority of commercial customers to fall into Tier 3, and the large commercial customer to fall into Tier 4.

Assuming the above, the quarterly water bill for a usage of 1,800cf will increase \$1.40 per quarter, from \$100.58 to \$101.98. The quarterly sewer bill for a typical resident with a usage of 1,800cf will increase \$5.91 per quarter, from \$181.98 to \$187.89. The overall or combined water and sewer bill for a typical resident with a usage of 1,800cf would increase from \$282.56 per quarter to \$289.87 per quarter; for an overall increase of \$7.31 per quarter, or 2.59%. Due to the recommended rate structure changes, the rate increases for larger commercial customers would be higher than that of the typical resident. The quarterly water bill for a commercial customer using 40,000cf with a 1" meter will increase \$1,092.45 per quarter, from 3,586.41 to \$4,678.86. The quarterly sewer bill for a commercial customer with a usage of 40,000cf with a 1" meter will increase \$860.34 per quarter, from \$5,582.20 to \$6,442.54. The overall or combined water and sewer bill for a commercial customer with a usage of 40,000cf with a 1" meter would increase from \$9,168.61 to \$11,121.4 for an overall increase of \$1,952.79 per quarter, or 21.3%.

As can be seen from the quarterly bill calculations, this four-tier structure impacts the smaller residential customers and average residential customers similarly, the smaller and mid-sized commercial customers more, and the new high demand customers the most. This cost impact on the various customer types better aligns with the stress imposed on the distribution system by each customer type.

Tables 1 and 2 below present the current and proposed water and sewer rates, as well as quarterly bill impacts for typical customers, respectively.

Table 1: Current and Proposed Water and Sewer Rates

Base Charge <i>Minimum Charge (Quarterly)</i>	<u>FY 2022</u>		<u>FY 2023</u>		<u>Difference</u>	
	<i>Current</i>		<i>Proposed</i>	\$	\$	%
5/8	\$ 7.88		\$ 8.35		0.47	6.0%
3/4	8.39		8.89		0.50	6.0%
1	9.91		10.50		0.59	6.0%
1 1/4	11.92		12.64		0.72	6.0%
1.5	11.92		12.64		0.72	6.0%
2	17.41		18.45		1.04	6.0%
3	57.98		61.46		3.48	6.0%
4	73.00		77.38		4.38	6.0%
6	108.07		114.55		6.48	6.0%
Volumetric Rate (per Ccf)						
<u>Water</u>						
Tier 1	\$ 5.15		\$ 5.20	\$	0.05	1.0%
Tier 2	8.00		8.10		0.10	1.3%
Tier 3	12.62		10.96		2.96	37.0%
Tier 4	-		14.29		1.67	13.2%
<u>Sewer (100% of Water Consumption)</u>						
Tier 1	\$ 10.11		\$ 10.44	\$	0.33	3.3%
Tier 2	13.07		13.63		0.56	4.3%
Tier 3	17.50		15.23		2.16	16.5%
Tier 4	-		18.64		1.14	6.5%
<u>Combined Rate</u>						
Tier 1	\$ 15.26		\$ 15.64	\$	0.38	2.5%
Tier 2	21.07		21.73		0.66	3.1%
Tier 3	30.12		26.19		5.12	24.3%
Tier 4	-		32.93		2.81	9.3%
<u>Irrigation (all Ccf)</u>	\$ 12.62		14.29		1.67	13.2%

The following Table 2 presents the impact on bills for some typical customers:

Table 2: Quarterly Bill Impacts for Typical Customers										
			Current			Proposed				
<i>M. Size</i>	<i>Customer</i>	<i>Consumption (Ccf)</i>	<i>Water(\$)</i>	<i>Sewer(\$)</i>	<i>Total(\$)</i>	<i>Water(\$)</i>	<i>Sewer(\$)</i>	<i>Total(\$)</i>	<i>Diff. (\$)</i>	<i>Diff. (%)</i>
5/8"	Small User	500	33.63	50.55	84.18	34.36	52.19	86.55	2.37	3%
5/8"	Low-End User	1,000	59.38	101.10	160.48	60.37	104.39	164.75	4.27	3%
5/8"	Avg. Res. User 1	1,800	100.58	181.98	282.56	101.98	187.89	289.87	7.31	3%
5/8"	Avg. Res. User 2	2,800	152.08	283.08	435.16	162.69	301.84	464.53	29.37	7%
5/8"	Low Tier 2 User	4,000	242.38	434.00	676.38	259.89	465.35	725.24	48.86	7%
5/8"	Pizza Place	1,820	101.61	184.00	285.61	103.02	189.98	293.00	7.39	3%
5/8"	Bakery	3,553	206.62	375.58	582.20	223.68	404.44	628.12	45.93	8%
5/8"	Restaurant	4,764	303.50	533.85	837.35	321.77	569.45	891.22	53.86	6%
5/8"	Coffee Shop	7,511	523.26	892.89	1,416.15	616.10	983.94	1,600.04	183.89	13%
1"	Restaurant	14,482	1,082.97	1,804.00	2,886.97	1,382.27	2,045.38	3,427.65	540.68	19%
3/4"	Diner	23,112	1,771.85	2,931.94	4,703.79	2,326.51	3,359.43	5,685.94	982.15	21%
2"	Lg. Commercial User	39,255	3,499.89	5,451.83	8,951.72	4,580.34	6,303.69	10,884.02	1,932.31	22%
5/8"	Avg. Irrig. User	3,500	449.58	-	449.58	508.58	-	508.58	59.00	13%

Therefore, I respectfully request a First Reading on an Order establishing water and sewer rates and charges for Fiscal Year 2023 be placed on the June 28, 2022 City Council Agenda. The Public Hearing and consideration of rate schedules and fees designed to raise sufficient revenues to support the Fiscal Year 2023 operation of the services provided to customers of the City's Water/Sewer System would be scheduled for the July 12, 2022 City Council Meeting.

Thank you for your consideration in this matter.

cc: Gregory M. St. Louis, Superintendent of Public Works
Thomas P. Watkins, Director of Administration and Finance, DPW
Matthew Shuman, City Engineer
Megan Langan, Management Analyst – Water/Sewer Division
Steven Magoon, Acting Deputy City Manager/CD&P Director
Melissa A. Morrissey, City Treasurer/Collector

MEMORANDUM

TO: Gregory St. Louis, Superintendent of Public Works (City of Watertown), Megan Langan, Management Analyst (City of Watertown)

FROM: Matthew Abrahams (The Abrahams Group), Margaret McCarthy, PE (Weston & Sampson)

DATE: May 13, 2022

SUBJECT: Water and Sewer Rate Study 2022

We are pleased to present the following memorandum summarizing the Water and Sewer Rate Study Analysis performed for the City of Watertown ("City") by The Abrahams Group. This Study was performed to provide the City with recommended water and sewer rate changes that will generate sufficient revenue to fund the purchase of water and sewerage treatment from the Massachusetts Water Resource Authority ("MWRA"), operational costs, indirect costs, debt service costs, and short-term and long-term capital improvements and will ensure the water fund and sewer fund continue to maintain healthy retained earnings.

A draft memorandum was provided to the City in March 2022. The City's Committee of the Budget and Fiscal Oversight ("BFO") reviewed the memorandum and the water and sewer rate options included in it. The BFO voted to support Option 3 in the memorandum, which included the addition of a fourth tier in the water and sewer rate structure, rate increases, minimizing Tier 1 increases, and tier threshold changes. This memorandum has been updated to include updated rate recommendations that support the City's final FY 2023 water and sewer budgets, as well as an additional rate option similar to the BFO-supported Option 3 from the original memorandum, but with capital projects financed using funds from the American Rescue Plan Act ("ARPA"). Under the ARPA, which was passed by the federal government in March 2021, Massachusetts state, county, tribal, and local entities will receive federal aid to respond to the public health and economic impacts of the public health emergency created by the COVID-19 pandemic. The funds received through the ARPA can be used to support public health expenditures, address the negative economic impacts caused by the public health emergency, replace lost public sector revenue, provide premium pay for essential workers, and invest in water, sewer, and broadband infrastructure.

Background

The City of Watertown consists of primarily urban commercial and residential development with a population of approximately 35,000, according to the 2020 U.S. Census. The City's Water and Sewer Department,

through the City's Department of Public works ("DPW"), provides services to approximately 9,500 commercial, residential, industrial, and institutional accounts.

The Water and Sewer Department is responsible for providing its customers with drinking water and sewerage collection and conveyance in a cost-effective and environmentally friendly manner that meets EPA and DEP standards.

Water Utility

The City is a member community of the MWRA. The MWRA supplies water to the City, with an average daily demand of 2.46 million gallons per day, per the MWRA's Annual Water Consumption Data dated March 4, 2022. The water is then conveyed to the City's residents through the City's 82 miles of water distribution mains.

Sewer Utility

The City's sewer system consists of approximately 82 miles of sewer mains that transport wastewater to the MWRA's interceptors. The City transports an average daily flow of 2.91 million gallons per day, per the MWRA's Comprehensive Annual Financial Report for the Fiscal Years Ended June 30, 2021, and 2020.

Existing Rate Structure and Charges

The City's water and sewer rates are based on a multi-tier rate structure in which the rate per 100 cubic feet of water increases with consumption. All 9,500 plus residential, commercial, and irrigation accounts are billed quarterly (every three months) which are staggered across each quarter according to the billing cycle.

The City currently has an inclining, three-tier structure for non-irrigation water consumption and sewer flow and a flat fee for irrigation water consumption, as well as meter and fire protection charges. Table 1 shows the current water and sewer rates for fiscal year 2022. Tables 2 and 3 detail current meter and fire service charges, respectively.

Table 1 – FY 2022 Water and Sewer Rates (Effective July 1, 2021)			
Tier	Consumption	Water Rate (per 100 cubic feet)	Sewer Rate (per 100 cubic feet)
1	0-3,000 cu ft	\$5.15	\$10.11
2	3,001-30,000 cu ft	\$8.00	\$13.07
3	Over 30,000 cu ft	\$12.62	\$17.50
Irrigation	All	\$12.62	N/A

Table 2 – FY 2022 Meter Service Charges (Effective July 1, 2021)	
Meter Size (inches)	Rates/quarter
5/8	\$7.88
3/4	\$8.39
1	\$9.91
1 1/4	\$11.92
1 1/2	\$11.92
2	\$17.41
3	\$57.98
4	\$73.00
6	\$108.07

Table 3 – FY 2022 Fire Service Charges (Effective July 1, 2021)	
Service Size (inches)	Rates
2	\$11.49
3	\$40.23
4	\$80.46
6	\$235.62
8	\$499.98
10	\$902.27

Comparison to Neighboring Communities

When considering rate and/or tier changes, comparing the City's rates and tiers to neighboring communities' rates and tiers provides helpful information on how communities measure up. Table 4 below compares water rates by tier and base charges and Table 5 compares sewer rates by tier and base charges. The average customer's bill, based on an industry-standard 2,800 cubic feet of usage, is also included in the tables. Each community in the tables is a member of the MWRA.

Table 4 – Water Rates/Tiers Comparison to Neighboring Communities												
Community	Tiers					Base	Rates					Average Bill
	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5		Tier 1	Tier 2	Tier 3	Tier 4	Tier 5	
Watertown	0-3,000	3,000-30,000	Over 30,000			\$7.88	\$5.15	\$8.00	\$12.62			\$152.08
Waltham	0-2,100	2,100-4,500	4,500-12,000	Over 12,000		\$9.21	\$3.07	\$4.15	\$6.65	\$8.89		\$102.73
Needham	0-600	600-2,700	2,700-4,200	Over 4,200		\$15.00	\$3.18	\$3.39	\$4.26	\$5.24		\$109.53
Lexington	0-4,000	4,000-8,000	Over 8,000				\$4.40	\$6.59	\$8.70			\$123.20
Wellesley	0-500	500-1,200	1,200-2,400	2,400-3,600	Over 3,600	\$9.99	\$2.99	\$3.51	\$5.57	\$7.21	\$9.18	\$145.19
Brookline	0-1,800	Over 1,800				\$31.94	\$2.81	\$7.02				\$152.72
Belmont	0-3,000	Over 3,000				\$20.87	\$6.62	\$7.59				\$206.23
Arlington	0-1,500	1,500-3,000	Over 3,000			\$15.08	\$7.08	\$7.58	\$9.20			\$219.82
Newton	0-1,000	1,000-2,500	2,500-6,000	Over 6,000			\$7.12	\$8.23	\$8.46	\$11.80		\$220.03

Data is per quarter. Tiers are in cubic feet. Rates per 100 cubic feet. Average bill is for usage of 2,800 cubic feet with 5/8" meter.

Table 5 – Sewer Rates/Tiers Comparison to Neighboring Communities												
Community	Tiers					Base	Rates					Average Bill
	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5		Tier 1	Tier 2	Tier 3	Tier 4	Tier 5	
Watertown	0-3,000	3,000-30,000	Over 30,000				\$10.11	\$13.07	\$17.50			\$283.08
Waltham	0-2,100	2,100-4,500	4,500-12,000	Over 12,000		\$5.46	\$5.46	\$7.13	\$10.76	\$13.01		\$170.03
Needham	0-600	600-2,700	2,700-4,200	Over 4,200		\$9.00	\$9.08	\$10.02	\$10.81	\$11.79		\$284.71
Lexington	0-4,000	4,000-8,000	Over 8,000				\$8.34	\$13.61	\$21.64			\$233.52
Wellesley	Flat Rate					\$15.00	\$9.40					\$278.20
Brookline	Flat Rate					\$31.94	\$8.40					\$267.14
Belmont	Flat Rate					\$18.25	\$12.91					\$379.73
Arlington	0-1,500	1,500-3,000	Over 3,000			\$15.08	\$8.34	\$8.89	\$10.78			\$255.75
Newton	0-1,000	1,000-2,500	2,500-6,000	Over 6,000			\$10.98	\$12.85	\$13.80	\$15.87		\$343.95

Data is per quarter. Tiers are in cubic feet. Rates per 100 cubic feet. Average bill is for usage of 2,800 cubic feet with 5/8" meter.

Existing Expenses and Revenues

With an FY 2021 water rate increase of 7.0% and a sewer increase of 9.5%, along with increased consumption due to a dry summer in 2020 and the impact of the COVID-19 pandemic on consumption patterns, FY 2021 ended in surplus for both the water and sewer funds. The water fund's surplus in FY 2021 was \$283,398 and the sewer fund's surplus in FY 2021 was \$270,913.

The City increased water and sewer rates by 3.2% for FY 2022. Primarily due to water consumption for FY 2022 to date trending below FY 2021's consumption, FY 2022 projections show a significant water deficit.

Consumption in FY 2022 is projected to decrease due to a wet summer in 2021 and conservation efforts. The City's MWRA water assessment increased 6.3% from FY 2021 to FY 2022 and water long-term debt more than doubled from \$542,000 in FY 2021 to more than \$1.1 million. FY 2022 projections for sewer show a surplus of about \$200,000, as sewer expenditures in FY 2022 are projected to increase by about 4%, and user charges revenue projects to increase slightly over FY 2021's amount. These projections assume the FY 2022 water and sewer budgets will be fully expended. Assuming retained earnings are used to provide for the water deficit, based on the FY 2022 projections, available retained earnings will be about \$1.5 million for water and about \$1.1 million for sewer.

The City's FY 2023 water and sewer budgets were integrated into this study. The FY 2023 water budget is \$8,898,118 and the FY 2023 sewer budget is \$11,357,453. The MWRA's preliminary FY 2023 water assessment is \$4,147,401, a slight decrease from the FY 2022 assessment. This decrease is unusual as the water assessment increased 5% on average the five prior years. The MWRA's preliminary FY 2023 sewer assessment is \$6,870,077, a slight increase of 1% from the FY 2022 assessment. The sewer assessment increased 3% on average the five prior years. The MWRA's assessment is the single largest expense for the Water Enterprise Fund and the Sewer Enterprise Fund.

The City plans to invest in infrastructure improvements via its regularly maintained capital improvement plans ("CIPs") over the next five years. Included in the water projections presented, in addition to the funding of the CIP, is funding for capital improvements of \$1 million per year from FY 2023 to FY 2027. Included in the sewer projections presented, in addition to the funding of the CIP, is funding for sewer capital improvements of \$1 million per year from FY 2023 to FY 2027. Funding of these capital improvements would be via long-term debt and are in addition to the City's use of available MWRA grant and loan funding.

Baseline Analysis

Without any changes in revenue (i.e., no rate adjustments), as presented in the baseline financial analysis, total projected water revenues for FY 2023 are \$7,839,231 and projected expenditures are \$8,898,118, leaving a deficit of over \$1.0 million for FY 2023. In addition, the revenue total does not include liens, which is revenue from prior years that the City has already identified as revenue in those years.

Without any changes in revenue (i.e., no rate adjustments), as presented in the baseline financial analysis, total projected sewer revenues for FY 2023 are \$10,845,879 and projected expenditures are \$11,357,453, leaving a deficit of over \$500,000 for FY 2023. In addition, the revenue total does not include liens, which is revenue from prior years that the City has already identified as revenue in those years.

The Water Enterprise Fund and the Sewer Enterprise Fund are experiencing budgetary shortfalls because revenue recovered from rates is insufficient to cover expenditures. The City should strongly consider rate action for FY 2023 and beyond to ensure sufficient revenue is realized from rates. As supported by the BFO, the City should strongly consider updating its tier structure from three tiers to four.

Billing Data Analysis

The City extracted billing information from its Munis billing system and provided the information to The Abrahams Group, which compiled the data into a single Excel model. The model can be used to project water and sewer billings based on rate changes and/or tier changes.

There were 38,217 bills with an FY 2021 bill date from July 1, 2020, to June 30, 2021. Most accounts are residential, accounting for approximately 90% of total bills sent and approximately 85% of consumption. Table 6 below shows a breakdown of the number and percentage of FY 2021 bills by tier.

Table 6 – Bills by Tier		
Tier	# Bills	%
No Usage or Usage < 0	1,528	4.0%
1	29,385	76.9%
2	7,105	18.6%
3	199	0.5%
Total	38,217	100.0%

The total amount billed for water and sewer consumption for FY 2021 was \$17,898,322. The total amount billed for meter service charges was \$357,308. The total amount billed, but not necessarily collected, was \$18,255,631. Table 7 below shows the total billed amounts by tier.

Table 7 – Total Billings and Consumption in FY 2021								
			Water		Sewer		Total	
Tier	Usage (cu. ft.)	% Consumption	Billings	% Billings	Billings	% Billings	Billings	% Billings
1	70,268,297	68.6%	\$3,784,726	54.2%	\$6,876,662	63.0%	\$10,661,387	59.6%
2	20,742,969	20.3%	\$1,760,340	25.2%	\$2,410,743	22.1%	\$4,171,083	23.3%
3	11,364,529	11.1%	\$1,434,204	20.5%	\$1,631,648	14.9%	\$3,065,852	17.1%
Total	*102,375,795	100.0%	\$6,979,269	100.0%	\$10,919,053	100.0%	\$17,898,322	100.0%

*765.82 million gallons of water

Usage Trends

Consumption during FY 2020 and FY 2021, years presumably impacted by the COVID-19 pandemic's impact on consumption patterns, increased after multiple years of decreased consumption. Based on recent trends, and the presumed lessening of the COVID-19 pandemic's impact on consumption patterns, it is very likely that usage for FY 2022 will be lower than usage in recent years. Accuracy with usage estimates is critical to the estimation of future revenues. If usage exceeds projections, the City will generate surplus revenue that can be used to fund future needs or can be used to offset future rates increases. If usage is less than anticipated,

the City may need to adjust its operating expenses, postpone capital improvement projects, and/or utilize reserves. Table 8 shows usage since FY 2015 and projected usage for FY 2022.

Table 8 – Water Usage		
Fiscal Year	Usage	Change
	(Cu. Ft.)	%
2015	105,294,393	-
2016	107,480,202	2.03%
2017	109,147,768	1.53%
2018	104,773,747	-4.01%
2019	103,788,033	-0.94%
2020	105,135,564	1.30%
2021	105,386,263	0.24%
2022	*103,995,613	*-1.32%

* Projected by Weston & Sampson and The Abrahams Group

Options for Rates and Charges

Each of the three options for updated rates and charges included in the original memorandum and this updated memorandum is designed to ensure retained earnings are not depleted from FY 2023 to FY 2027 and to target healthy retained earnings of 15% of total expenditures by the end of the five-year period. The recommended retained earnings balance is between 10% and 25%. The City would ultimately like to target a retained earnings balance of 20% of total expenditures, but, given the current environment, the City is seeking more time to target 20% retained earnings.

Since the analysis conducted was a five-year look-ahead, rates are presented for the next five fiscal years, including FY 2023. Each of these options will help the City achieve its goals of covering actual costs of services, maintaining healthy retained earnings, investing in capital improvements, and ensuring long-term fiscal stability.

Option 1 – Standard Rate Adjustment

Option 1 is designed to change rates and charges only, without changes to the City's rate structure. This is consistent with how the City has changed rates and charges in the recent past.

Option 1 is Option 1 in the March 2022 draft memorandum, but with updated rates to support the final FY 2023 water and sewer budgets, which were not available at the time of the original memorandum's writing.

Increases to rates are presented in Table 9 below:

Table 9 – Proposed Increases					
	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027
Water	10.5%	10.0%	5.5%	5.0%	4.0%
Sewer	7.0%	6.25%	5.5%	5.0%	4.0%

Tables 10 and 11 below present the current rates and charges and proposed FY 2023 rates and charges along with the differences between them. The increases to the meter service and private fire protection charges are not the same as the increases to rates. Table 12 below presents the quarterly bill impact for sample customers.

Table 10 – Current and Proposed Meter Service Charges				
Meter Charge	FY 2022	FY 2023	Difference	
Meter Size	Current	Proposed	\$	%
5/8"	\$7.88	\$8.35	\$0.47	6.0%
3/4"	\$8.39	\$8.89	\$0.50	6.0%
1"	\$9.91	\$10.50	\$0.59	6.0%
1 1/4"	\$11.92	\$12.64	\$0.72	6.0%
1 1/2"	\$11.92	\$12.64	\$0.72	6.0%
2"	\$17.41	\$18.45	\$1.04	6.0%
3"	\$57.98	\$61.46	\$3.48	6.0%
4"	\$73.00	\$77.38	\$4.38	6.0%
6"	\$108.07	\$114.55	\$6.48	6.0%

Table 11 – Volumetric Rates (per 100 cubic feet)					
Tier	Volume	FY 2022	FY 2023	Difference	
Water	(cu. Ft)	Current	Proposed	\$	%
1	0-3,000	\$5.15	\$5.69	\$0.54	10.5%
2	3,001-30,000	\$8.00	\$8.84	\$0.84	10.5%
3	Over 30,000	\$12.62	\$13.95	\$1.33	10.5%
Irrigation		\$12.62	\$13.95	\$1.33	10.5%
Sewer					
1	0-3,000	\$10.11	\$10.82	\$0.71	7.0%
2	3,001-30,000	\$13.07	\$13.98	\$0.91	7.0%
3	Over 30,000	\$17.50	\$18.73	\$1.23	7.0%
Combined					
1	0-3,000	\$15.26	\$16.51	\$1.25	8.2%
2	3,001-30,000	\$21.07	\$22.82	\$1.75	8.3%
3	Over 30,000	\$30.12	\$32.67	\$2.55	8.5%
Irrigation		\$12.62	\$13.95	\$1.33	10.5%

Private Fire Protection				
2"	\$11.49	\$12.18	\$0.69	6.0%
3"	\$40.23	\$42.64	\$2.41	6.0%
4"	\$80.46	\$85.29	\$4.83	6.0%
6"	\$235.62	\$249.76	\$14.14	6.0%
8"	\$499.98	\$529.98	\$30.00	6.0%
10"	\$902.27	\$956.41	\$54.14	6.0%

Table 12 – Bill Impacts for Sample Customers (quarterly)

Meter	Consumption	FY 2022			FY 2023			Difference	
		Water	Sewer	Total	Water	Sewer	Total	\$	%
5/8"	2,500	\$136.63	\$252.75	\$389.38	\$150.98	\$270.44	\$421.42	\$32.04	8.2%
5/8"	4,000	\$242.38	\$434.00	\$676.38	\$267.83	\$464.38	\$732.21	\$55.83	8.3%
5/8"	15,000	\$1,122.38	\$1,871.70	\$2,994.08	\$1,240.23	\$2,002.72	\$3,242.95	\$248.87	8.3%
1"	25,000	\$1,924.41	\$3,178.70	\$5,103.11	\$2,126.47	\$3,401.21	\$5,527.68	\$424.57	8.3%
4"	75,000	\$8,066.50	\$11,707.20	\$19,773.70	\$8,913.48	\$12,526.70	\$21,440.18	\$1,666.48	8.4%

The information presented for Option 1 includes the additional funding of \$1 million in water capital projects per year and the additional funding of \$1 million in sewer capital projects per year. This funding is in addition to what is in the City-maintained water and sewer CIPs.

Option 2 – Removed from Consideration as a Result of the March 2022 BFO Meeting

Option 3 – Creation of 4th Tier & Rate Adjustments

Option 3 is designed to change the City's rate structure from a three-tier structure to a four-tier structure. Adding a fourth tier allows tier breaks to be more in line with similar communities' tier breaks. With this structure, the average residential customer remains in Tier 1, the small commercial customer falls in Tier 1 or Tier 2, most commercial customers fall in Tier 3, and the large industrial customers fall in Tier 4. With the tier adjustments, the increases in the rates per tier are generally lower than they are in Option 1 since usage on bills hits Tiers 2, 3, and 4 more quickly than with the current tier structure.

Option 3 is the BFO-supported Option 3 in the March 2022 draft memorandum, but with updated rates to support the final FY 2023 water and sewer budgets, which were not available at the time of the original memorandum's writing.

Increases to rates, with a focus on minimizing the impact to Tier 1 for FY 2023, are presented in Table 13 below:

Table 13 – Proposed Increases					
	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027
Water	7.5%	7.0%	5.5%	5.0%	4.0%
Sewer	6.0%	5.5%	5.5%	4.5%	4.0%

Tables 14 and 15 below present the current rates and charges and proposed FY 2023 rates and charges along with the differences between them. The increases to the meter service and private fire protection charges are not the same as the increases to rates. Table 16 below presents the quarterly bill impact for sample customers.

Table 14 – Current and Proposed Meter Service Charges				
Meter Charge	FY 2022	FY 2023	Difference	
Meter Size	Current	Proposed	\$	%
5/8"	\$7.88	\$8.35	\$0.47	6.0%
3/4"	\$8.39	\$8.89	\$0.50	6.0%
1"	\$9.91	\$10.50	\$0.59	6.0%
1 1/4"	\$11.92	\$12.64	\$0.72	6.0%
1 1/2"	\$11.92	\$12.64	\$0.72	6.0%
2"	\$17.41	\$18.45	\$1.04	6.0%
3"	\$57.98	\$61.46	\$3.48	6.0%
4"	\$73.00	\$77.38	\$4.38	6.0%
6"	\$108.07	\$114.55	\$6.48	6.0%

Table 15 – Volumetric Rates (per 100 cubic feet)					
Tier	Volume	FY 2022	FY 2023	Difference	
Water	(cu. Ft)	Current	Proposed	\$	%
1	0-2,500	\$5.15	\$5.20	\$0.05	1.0%
2	2,501-5,000	\$8.00	\$8.10	\$0.10	1.3%
3	5,001-25,000	\$8.00	\$11.12	\$3.12	39.0%
4	Over 25,000	\$12.62	\$15.02	\$2.40	19.0%
Irrigation		\$12.62	\$15.02	\$2.40	19.0%
Sewer					
1	0-2,500	\$10.11	\$10.51	\$0.40	4.0%
2	2,501-5,000	\$13.07	\$13.66	\$0.59	4.5%
3	5,001-25,000	\$13.07	\$15.42	\$2.35	18.0%
4	Over 25,000	\$17.50	\$18.81	\$1.31	7.5%

Combined					
1	0-2,500	\$15.26	\$15.71	\$0.45	2.9%
2	2,501-5,000	\$21.07	\$21.76	\$0.69	3.3%
3	5,001-25,000	\$21.07	\$26.54	\$5.47	26.0%
4	Over 25,000	\$30.12	\$33.83	\$3.71	12.3%
Irrigation		\$12.62	\$15.02	\$2.40	19.0%
Private Fire Protection					
2"		\$11.49	\$12.18	\$0.69	6.0%
3"		\$40.23	\$42.64	\$2.41	6.0%
4"		\$80.46	\$85.29	\$4.83	6.0%
6"		\$235.62	\$249.76	\$14.14	6.0%
8"		\$499.98	\$529.98	\$30.00	6.0%
10"		\$902.27	\$956.41	\$54.14	6.0%

Table 16 – Bill Impacts for Sample Customers (quarterly)

Meter	Consumption	FY 2022			FY 2023			Difference	
Size	(cu. ft)	Water	Sewer	Total	Water	Sewer	Total	\$	%
5/8"	2,500	\$136.63	\$252.75	\$389.38	\$138.35	\$262.75	\$401.10	\$11.72	3.0%
5/8"	4,000	\$242.38	\$434.00	\$676.38	\$259.85	\$467.65	\$727.50	\$51.12	7.6%
5/8"	15,000	\$1,122.38	\$1,871.70	\$2,994.08	\$1,452.85	\$2,146.25	\$3,599.10	\$605.02	20.2%
1"	25,000	\$1,924.41	\$3,178.70	\$5,103.11	\$2,567.00	\$3,688.25	\$6,255.25	\$1,152.14	22.6%
4"	75,000	\$8,066.50	\$11,707.20	\$19,773.70	\$10,143.88	\$13,093.25	\$23,237.13	\$3,463.43	17.5%

The information presented for Option 3 includes the additional funding of \$1 million in water capital projects per year and the additional funding of \$1 million in sewer capital projects per year. This funding is in addition to what is in the City-maintained water and sewer CIPs.

Option 4 – ARPA Financing Applied for FY23 & FY24

Option 4 is the BFO-supported Option 3 in the March 2022 draft memorandum, but with updated rates to support the final FY 2023 water and sewer budgets, which were not available at the time of the original memorandum's writing, and with the financing of \$1 million in capital projects in FY 2023 and FY 2024 for both water and sewer via available ARPA funds.

Increases to rates, with a focus on minimizing the impact to Tier 1 for FY 2023, are presented in Table 17 below:

Table 17 – Proposed Increases					
	FY 2023	FY 2024	FY 2025	FY 2026	FY 2027
Water	6.5%	6.25%	5.5%	5.0%	4.0%
Sewer	5.25%	5.0%	4.75%	4.5%	4.0%

Tables 18 and 19 below present the current rates and charges and proposed FY 2023 rates and charges along with the differences between them. The increases to the meter service and private fire protection charges are not the same as the increases to rates. Table 20 below presents the quarterly bill impact for sample customers.

Table 18 – Current and Proposed Meter Service Charges				
Meter Charge	FY 2022	FY 2023	Difference	
Meter Size	Current	Proposed	\$	%
5/8"	\$7.88	\$8.35	\$0.47	6.0%
3/4"	\$8.39	\$8.89	\$0.50	6.0%
1"	\$9.91	\$10.50	\$0.59	6.0%
1 1/4"	\$11.92	\$12.64	\$0.72	6.0%
1 1/2"	\$11.92	\$12.64	\$0.72	6.0%
2"	\$17.41	\$18.45	\$1.04	6.0%
3"	\$57.98	\$61.46	\$3.48	6.0%
4"	\$73.00	\$77.38	\$4.38	6.0%
6"	\$108.07	\$114.55	\$6.48	6.0%

Table 19 – Volumetric Rates (per 100 cubic feet)					
Tier	Volume	FY 2022	FY 2023	Difference	
Water	(cu. Ft)	Current	Proposed	\$	%
1	0-2,500	\$5.15	\$5.20	\$0.05	1.0%
2	2,501-5,000	\$8.00	\$8.10	\$0.10	1.3%
3	5,001-25,000	\$8.00	\$10.96	\$2.96	37.0%
4	Over 25,000	\$12.62	\$14.29	\$1.67	13.2%
Irrigation		\$12.62	\$14.29	\$1.67	13.2%
Sewer					
1	0-2,500	\$10.11	\$10.44	\$0.33	3.3%
2	2,501-5,000	\$13.07	\$13.63	\$0.56	4.3%
3	5,001-25,000	\$13.07	\$15.23	\$2.16	16.5%
4	Over 25,000	\$17.50	\$18.64	\$1.14	6.5%
Combined					
1	0-2,500	\$15.26	\$15.64	\$0.38	2.5%
2	2,501-5,000	\$21.07	\$21.73	\$0.66	3.1%
3	5,001-25,000	\$21.07	\$26.19	\$5.12	24.3%
4	Over 25,000	\$30.12	\$32.93	\$2.81	9.3%
Irrigation		\$12.62	\$14.29	\$1.67	13.2%

Private Fire Protection				
2"	\$11.49	\$12.18	\$0.69	6.0%
3"	\$40.23	\$42.64	\$2.41	6.0%
4"	\$80.46	\$85.29	\$4.83	6.0%
6"	\$235.62	\$249.76	\$14.14	6.0%
8"	\$499.98	\$529.98	\$30.00	6.0%
10"	\$902.27	\$956.41	\$54.14	6.0%

Table 20 – Bill Impacts for Sample Customers (quarterly)

Meter	Consumption	FY 2022			FY 2023			Difference	
Size	(cu. ft)	Water	Sewer	Total	Water	Sewer	Total	\$	%
5/8"	2,500	\$136.63	\$252.75	\$389.38	\$138.35	\$261.00	\$399.35	\$9.97	2.6%
5/8"	4,000	\$242.38	\$434.00	\$676.38	\$259.85	\$465.45	\$725.30	\$48.92	7.2%
5/8"	15,000	\$1,122.38	\$1,871.70	\$2,994.08	\$1,436.85	\$2,124.75	\$3,561.60	\$567.52	19.0%
1"	25,000	\$1,924.41	\$3,178.70	\$5,103.11	\$2,535.00	\$3,647.75	\$6,182.75	\$1,079.64	21.2%
4"	75,000	\$8,066.50	\$11,707.20	\$19,773.70	\$9,746.88	\$12,967.75	\$22,714.63	\$2,940.93	14.9%

The information presented for Option 4 includes the additional funding of \$1 million in water capital projects per year and the additional funding of \$1 million in sewer capital projects per year. This funding is in addition to what is in the City-maintained water and sewer CIPs. For Option 4, the financing of the FY 2023 and FY 2024 water and sewer projects is via available ARPA funds.

Recommendations

It is important to the City that the proposed rate increases are mitigated as much as possible, given the current environment. The City should weigh the different options presented. Option 1 includes the current rate structure and rate increases only. Option 3, which is the option the BFO voted to support in March 2022, now with updated rates, includes a four-tier structure that impacts the smaller residential customers and average residential customers similarly, the smaller and mid-sized commercial customers more, and the large industrial customers the most. Option 4 is Option 3, but with the financing of water and sewer capital projects of \$1 million in FY 2023 and FY 2024 via available ARPA funds, resulting in lower rate increases in the tiers and less impact on customers' bills, when compared to Option 3. *Considering the City is interested in adding a fourth tier and Option 3's impact on different customer types as described, we are recommending the City strongly consider adopting Option 3 in this memorandum if ARPA funding is not available to finance upcoming water and sewer capital projects. If ARPA funding is available to finance water and sewer capital projects in FY 2023 and FY 2024, we are recommending the City strongly consider adopting Option 4 in this memorandum.*

It is important for the City to continue to fund its water and sewer capital improvement plans. The projections in this memorandum include the full funding of the CIPs, as well as funding of additional capital improvements as described.

The projections provided in the memorandum are based on many assumptions. We recommend that the water and sewer analyses conducted for the City are reviewed and updated each year. Assumptions, like, for example, planned expenditures and consumption trends, change year to year and it is important to capture those changes to ensure that the rate plans presented are based on the most accurate information available at the time.

If, in future years, retained earnings projections show balances lower than those acceptable to the industry, the City can look at its planned expenses to see if any can be adjusted for a given year. This review should include any planned debt as the City can choose to push out planned debt a year or two, if necessary.



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

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To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

Please be advised that I have reviewed the Electricity and Gas accounts for all Departments. Attached is a proposed transfer in the amount of \$311,200 from various Departmental Electricity and Gas accounts.

This transfer is done at the end of each Fiscal Year in order to fund the ESCO Capital Project Stabilization Fund.

The current balance in the ESCO Capital Project Stabilization Fund is \$991,818. The proposed transfer of \$311,200 would increase the existing ESCO Capital Project Stabilization Fund to \$1,303,0188.

As you know the FY 23 Debt Service related to the ESCO Project is \$500,938 and the FY 23 General Fund Revenue budget includes a transfer in from the ESCO Capital Project Stabilization Fund of \$500,938.

Therefore, I respectfully request the attached transfer be placed on the June 28, 2022 City Council Agenda.

Thank you for your consideration in this matter.

cc: Honorable School Committee
Honorable Library Board of Trustees
Department Heads
Edward Lewis, Interim Director of Public Buildings, Energy/Project Manager
Heidi Perkins, Director of Finance & Operations

TRANSFER AMOUNT \$311,200

FROM: FY 22 PUBLIC BUILDINGS ELECTRICITY 0119552-520211	\$ 12,000
FY 22 PUBLIC BUILDINGS GAS 0119552-520213	\$ 4,200
FY 22 POLICE ELECTRICITY 0121052-520211	\$ 20,500
FY 22 POLICE GAS 0121052-520213	\$ 17,000
FY 22 FIRE ELECTRICITY 0122052-520211	\$ 11,000
FY 22 FIRE GAS 0122052-520213	\$ 18,900
FY 22 DPW CEMETERY ELECTRICITY 0149152-520211	\$ 2,500
FY 22 DPW CEMETERY HEATING OIL 0149152-520212	\$ 2,000
FY 22 DPW PROP. & BLDGS ELECTRICITY 0149252-520211	\$ 40,000
FY 22 DPW PROP. & BLDGS GAS 0149252-520213	\$ 30,000
FY 22 DPW PARKS GAS 0149552-520213	\$ 5,000
FY 22 COUNCIL ON AGING ELECTRICITY 0154152-520211	\$ 1,500
FY 22 COUNCIL ON AGING GAS 0154152-520213	\$ 1,600
FY 22 LIBRARY ELECTRICITY 0161052-520211	\$ 37,000
FY 22 LIBRARY GAS 0161052-520213	\$ 15,000
FY 22 SKATING RINK ELECTRICITY 0163152-520211	\$ 52,000
FY 22 SKATING RINK GAS 0163152-520213	\$ 6,000
FY 22 SCHOOL VICTORY FIELD LIGHTS 0194000-590977	\$ 35,000
 TO: FY 22 TRANSFER TO ESCO CAP. PROJECT STAB FUND 0194000-596805	 \$ 311,200

I hereby certify to the availability, authority of funding source, mathematical accuracy and appropriate fiscal year.

DATE

TOWN AUDITOR

REVENUE FORECAST

	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
TAXES:					
Prior Year Adjusted Levy Limit	\$ 123,391,323	\$ 134,418,141	\$ 141,778,594	\$ 149,323,059	\$ 157,556,136
Prior Year Amended Growth	\$ 48,627				
Sub-total	\$ 123,439,950	\$ 134,418,141	\$ 141,778,594	\$ 149,323,059	\$ 157,556,136
Add 2.5%	\$ 3,085,999	\$ 3,360,454	\$ 3,544,465	\$ 3,733,076	\$ 3,938,903
New Growth	\$ 7,892,192	\$ 4,000,000	\$ 4,000,000	\$ 4,500,000	\$ 4,500,000
Adjusted Levy Limit	\$ 134,418,141	\$ 141,778,594	\$ 149,323,059	\$ 157,556,136	\$ 165,995,038
Overlay	\$ (1,000,000)	\$ (1,050,000)	\$ (1,050,000)	\$ (1,100,000)	\$ (1,100,000)
NET LEVY LIMIT	\$ 133,418,141	\$ 140,728,594	\$ 148,273,059	\$ 156,456,136	\$ 164,895,038
STATE AID:					
Cherry Sheet Receipts	\$ 13,482,722	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029
TOTAL STATE AID	\$ 13,482,722	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029
LOCAL RECEIPTS:					
Motor Vehicle Excise	\$ 4,100,000	\$ 4,350,000	\$ 4,475,000	\$ 4,600,000	\$ 4,725,000
Meals Excise	\$ 550,000	\$ 650,000	\$ 700,000	\$ 750,000	\$ 800,000
Hotel Excise	\$ 525,000	\$ 675,000	\$ 825,000	\$ 975,000	\$ 975,000
Cannabis Excise		\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000
Penalties & Interest	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000
PILOT	\$ 81,948	\$ 87,088	\$ 87,628	\$ 88,168	\$ 88,708
Commercial Trash	\$ 15,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000
Fees	\$ 8,850,000	\$ 4,500,000	\$ 4,500,000	\$ 4,500,000	\$ 4,500,000
Rentals	\$ 178,312	\$ 227,769	\$ 227,215	\$ 226,644	\$ 226,644
DR-Cemetery	\$ 95,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
DR-Recreation	\$ 420,000	\$ 420,000	\$ 420,000	\$ 420,000	\$ 420,000
Licenses & Permits	\$ 192,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000
Fines & Forfeits	\$ 510,000	\$ 450,000	\$ 450,000	\$ 450,000	\$ 450,000
Investment Income	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000
Sale of Town Property	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Belmont Reimbursement	\$ 76,127	\$ -	\$ -	\$ -	\$ -
Grant/Employee Reimbursements	\$ 25,000	\$ 25,857	\$ 25,857	\$ 25,857	\$ 25,857
TOTAL LOCAL RECEIPTS	\$ 16,123,387	\$ 12,710,714	\$ 13,035,700	\$ 13,360,669	\$ 13,536,209
OTHER FINANCING SOURCES:					
Transfer from Sale of Lots Fund	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Transfer from Parking Meter Fund	\$ 150,000	\$ 150,000	\$ 250,000	\$ 250,000	\$ 250,000
Transfer from Opioiid Settlement Fund		\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000
Transfer from Cemetery Perpetual Care Fund	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Transfer from Capital Projects Stabilization Fund	\$ 500,938	\$ 500,938	\$ 500,000	\$ 500,000	\$ 500,000
Transfer from ESCO Capital Project Stab. Fd.	\$ 5,798,555	\$ 201,000	\$ 494,438	\$ 493,225	\$ 492,125
Transfer from New High School Stabilization Fund	\$ 1,553,006	\$ 1,511,731	\$ 1,511,731	\$ 1,511,731	\$ 1,511,731
Transfer from Water Fund	\$ 1,507,448	\$ 1,397,994	\$ 1,397,994	\$ 1,397,994	\$ 1,397,994
Transfer from Sewer Fund	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
Utilization of Free Cash	\$ 1,500,000	\$ 750,000	\$ -	\$ -	\$ -
Utilization of Overlay Surplus					
TOTAL OTHER FINANCING SOURCES	\$ 13,549,947	\$ 7,106,663	\$ 6,249,163	\$ 6,247,950	\$ 6,246,850
TOTAL REVENUES	\$ 176,574,197	\$ 174,789,000	\$ 181,800,951	\$ 190,307,784	\$ 198,921,126



EXPENDITURE FORECAST

	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
DEPARTMENTAL EXPENDITURES:					
General Government	\$ 7,637,284	\$ 8,339,128	\$ 8,547,606	\$ 8,761,296	\$ 8,980,328
Public Safety	\$ 22,531,829	\$ 22,930,001	\$ 23,503,251	\$ 24,090,832	\$ 24,693,103
Public Works	\$ 6,398,537	\$ 6,870,287	\$ 7,042,044	\$ 7,218,095	\$ 7,398,547
Snow & Ice Removal	\$ 1,500,000	\$ 1,500,000	\$ 1,500,000	\$ 1,500,000	\$ 1,500,000
Waste Disposal	\$ 3,692,300	\$ 4,432,925	\$ 4,654,571	\$ 4,887,300	\$ 5,131,665
Health & Human Services	\$ 1,558,727	\$ 1,615,679	\$ 1,656,071	\$ 1,697,473	\$ 1,739,909
Library	\$ 3,439,679	\$ 3,626,206	\$ 3,716,861	\$ 3,809,782	\$ 3,905,027
Recreation	\$ 897,247	\$ 979,567	\$ 1,004,056	\$ 1,029,158	\$ 1,054,887
Education	\$ 53,755,121	\$ 55,636,550	\$ 57,583,829	\$ 59,599,263	\$ 61,685,237
TOTALS	\$ 101,411,724	\$ 105,930,342	\$ 109,208,289	\$ 112,593,198	\$ 116,088,706
STATE ASSESSMENTS					
	\$ 3,028,130	\$ 3,164,445	\$ 3,249,675	\$ 3,337,204	\$ 3,427,094
PENSION & OPEB COSTS:					
Pension	\$ 7,509,084	\$ 1,125,000	\$ 1,125,000	\$ 1,125,000	\$ 1,125,000
OPEB	\$ 6,698,124	\$ 13,709,426	\$ 9,519,420	\$ 6,844,806	\$ 3,459,275
TOTALS	\$ 14,207,208	\$ 14,834,426	\$ 10,644,420	\$ 7,969,806	\$ 4,584,275
INSURANCE & EMPLOYEE BENEFITS					
	\$ 18,316,330	\$ 19,129,850	\$ 20,482,838	\$ 21,935,708	\$ 23,495,902
DEBT AND INTEREST:					
Permanent Debt/Interest	\$ 5,910,189	\$ 6,158,914	\$ 5,833,306	\$ 5,374,325	\$ 3,722,550
ESCO - Permanent Debt/Interest	\$ 505,938	\$ 500,938	\$ 494,438	\$ 493,225	\$ 492,125
Three Elem. School Proj. - Permanent Debt/Interest	\$ 8,370,221	\$ 8,155,150	\$ 7,902,900	\$ 7,425,650	\$ 7,179,650
Three Elem. School Proj. - Authorized/Unissued	\$ 1,438,143	\$ 2,810,424	\$ 5,013,775	\$ 4,893,338	\$ 4,772,900
New High School Project - Authorized/Unissued	\$ 597,334	\$ 1,016,945	\$ 5,238,905	\$ 8,511,206	\$ 12,263,175
Street & Sidewalk - Auth/Unissued & Planned	\$ 1,249,625	\$ 1,347,500	\$ 2,915,000	\$ 3,835,100	\$ 4,766,400
Other Debt - Authorized/Unissued & Planned	\$ 1,154,915	\$ 2,952,092	\$ 4,625,997	\$ 6,385,028	\$ 7,465,275
Cost of Certifying Bonds	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
TOTALS	\$ 19,231,365	\$ 22,946,963	\$ 32,029,321	\$ 36,922,872	\$ 40,667,075
CAPITAL PROJECTS:					
City Capital Projects	\$ 1,951,154	\$ 1,145,000	\$ 470,000	\$ 495,000	\$ 495,000
School Capital Projects	\$ 5,362,221	\$ 310,000	\$ 295,000	\$ 280,000	\$ 230,000
Street & Sidewalk Improvements	\$ 1,170,400	\$ 1,228,920	\$ 1,290,366	\$ 1,354,884	\$ 1,422,628
TOTALS	\$ 8,483,775	\$ 2,683,920	\$ 2,055,366	\$ 2,129,884	\$ 2,147,628
TOTAL EXPENDITURES					
	\$ 164,678,532	\$ 168,689,945	\$ 177,669,909	\$ 184,888,673	\$ 190,410,680
OTHER FINANCING USES & MISC:					
Town Council Reserve	\$ 1,960,990	\$ 2,152,000	\$ 2,300,000	\$ 2,450,000	\$ 2,600,000
Transfers to Enterprise Funds	\$ 270,675	\$ 249,000	\$ 256,470	\$ 264,164	\$ 272,089
Transfer to Acquisition Land/Open Sp. Stabilization	\$ 1,500,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000
Transfer to New High School Stabilization Fund	\$ 3,000,000	\$ 1,983,055	\$ -	\$ -	\$ -
Transfer to Unfunded Pension Stabilization Fund	\$ 5,000,000	\$ -	\$ -	\$ -	\$ -
Transfer to SPED Stabilization Fund	\$ -	\$ -	\$ 250,000	\$ 250,000	\$ 250,000
Transfer to Affordable Housing Trust	\$ 164,000	\$ 215,000	\$ 130,000	\$ 130,000	\$ 130,000
Miscellaneous	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL OTHER FINANCING USES	\$ 11,895,665	\$ 6,099,055	\$ 4,186,470	\$ 4,344,164	\$ 4,502,089
TOTAL EXP. & OTH. FIN. USES					
	\$ 176,574,197	\$ 174,789,000	\$ 181,856,378	\$ 189,232,837	\$ 194,912,769
TOTAL REVENUES					
	\$ 176,574,197	\$ 174,789,000	\$ 181,800,951	\$ 190,307,784	\$ 198,921,126
SURPLUS/(DEFICIT)					
	\$ (0)	\$ (0)	\$ (55,428)	\$ 1,074,947	\$ 4,008,357
PRIOR YEAR BALANCE BUDGET ASSUMPTION					
	\$ (0)	\$ 0	\$ 0	\$ 55,428	\$ (1,074,947)
REMAINING SURPLUS/(DEFICIT)					
	\$ (0)	\$ 0	\$ (55,428)	\$ 1,130,374	\$ 2,933,411



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6465
www.watertown-ma.gov
citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

Attached please find correspondence from Janet M. Murphy, City Clerk/Chief Election Officer regarding the need to replace election equipment soon and preferably in advance of the September 6th Preliminary State Election.

Therefore, given all of the above, I respectfully request the attached transfer be placed on the June 28, 2022 City Council Agenda.

Thank you for your consideration in this matter.

cc: Board of Election Commissioners
Janet M. Murphy, City Clerk/Chief Election Officer
Steven Magoon, Acting Deputy City Manager/CD&P Director
Sharon Gallagher, Assistant City Auditor
Melissa A. Morrissey, City Treasurer/Collector

TRANSFER AMOUNT \$27,450

FROM: FY 22 CITY COUNCIL RESERVE
0111152-570780

\$ 27,450

TO: FY 22 ELECTION EQUIPMENT
0194000-596506

\$ 27,450

I hereby certify to the availability, authority of funding source, mathematical accuracy and appropriate fiscal year.

DATE _____

CITY AUDITOR



CITY OF WATERTOWN

Office of the City Clerk

Administration Building

149 Main Street

Watertown, Massachusetts 02472

Janet M. Murphy
City Clerk/Chief Election Officer

Telephone (617) 972-6486

Fax (617) 972-6595

14 June 2022

Mr. Thomas Tracy, Acting City Manager
149 Main Street
Watertown, MA 02420

Dear Mr. Tracy,

I am writing on behalf of the City Clerk's Office and the Board of Election Commissioners to request a capital expenditure for the purchase of new election equipment for the City.

As is the case with everything, there have been numerous advances/improvements in election equipment and systems over the past several years. LHS Associates, the vendor we have used for most of our election equipment through the years, began offering Poll Pads for election use several years ago. There are now more than 175 cities and towns across the Commonwealth using Poll Pads for their elections.

Poll Pads are an e-poll book for paperless voter check-in and will replace the outdated paper list, which is often the cause of long lines at the polls and inefficient election record keeping. The average voter check-in time with Poll Pads is 15 seconds. It provides 2 ways to look up a voter. There is virtually zero room for error. And, after the election, it provides totals and turnout data in minutes as opposed to days. A huge bonus for the Clerk's Office!

We are requesting funds for the purchase of 18 Poll Pads and corresponding printers, which will allow for one per precinct, with 6 additional as backup/reinforcement. We will begin using them with the upcoming Primary Election in September. They will be used both for Early Voting as well as Election Day Voting.

Watertown is a city on the move and our poll workers should have the most current, up-to-date equipment available to them at all elections. I believe this equipment upgrade will show our voters that we are committed to providing them with the safest, most secure voting experience.

We thank you for your consideration of this request.

Sincerely,

Janet M. Murphy
City Clerk

Christopher Dunn
Chair, Watertown Election Commission



Company Address 10 Manor Parkway, Unit B
Salem, NH 03079
US

Created Date 6/1/2022
Quote Number 00000591

Contact Information

Prepared By Brenda Merritt-L'Italien
Title Director of Business Development
Phone (978) 651-2511
Email bcm@lhsassociates.com

Customer Name Watertown
Contact Name Janet Murphy
Title Town Clerk
Email townclerk@watertown-ma.gov

Address Information

Bill To Name Watertown
Bill To 149 Main Street
Watertown, MA 02472

Product Code	Product	Product Description	Sales Price	Quantity	Total Price
PP-001	Poll Pad Bundle	Includes: iPad WiFi 32gb (MP2F2LL/A), 10-Foot Charger, Transport Case, Stand, Stylus, 1st Year Software License, MDM Enrollment, and Basic Poll Pad Manager	\$1,225.00	18.00	\$22,050.00
PP-004	Poll Pad Star Micronics Receipt Printer	TSP65411	\$300.00	18.00	\$5,400.00

Subtotal \$27,450.00
Total Price \$27,450.00

Signature

By signing below, you are acknowledging that the above pricing is accurate and within budget, and that you are ready to move forward with the official purchase and contract initiation:

Customer Signature: _____

Printed Name & Title: _____

Date: _____

Anticipated First Use Date: _____



Thomas J. Tracy
Acting City Manager

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Phone: 617-972-6465
www.watertown-ma.gov
citymgr@watertown-ma.gov

To: Honorable City Council

From: Thomas J. Tracy, Acting City Manager

Date: June 23, 2022

RE: Agenda Item – Transfer of Funds Request

As you may recall, at the June 2, 2022 Police Department Budget Hearing I stated the additional funding request for the Vehicle Replacement Account has not been included and it was my intention to address the funding request prior to the end of Fiscal Year 2022 utilizing available Police Department monies with the approval of the Honorable City Council.

Therefore, pursuant to that statement and the attached correspondence from Thomas F. Rocca, Provisional Chief of Police, I respectfully request the attached transfer be placed on the June 28, 2022 City Council Agenda.

Thank you for your consideration in this matter.

cc: Thomas F. Rocca, Provisional Chief of Police
Steven Magoon, Acting Deputy City Manager/CD&P Director
Melissa A. Morrissey, City Treasurer/Collector
Brian Wyncoop, Purchasing Agent

TRANSFER AMOUNT \$29,500

FROM: FY 2022 POLICE VEHICLE MAINTENANCE \$ 5,000
0121052-520245

FY 2022 POLICE CRIME PREVENTION SUPPLIES \$ 5,000
0121052-550580

FY 2022 POLICE PART TIME SALARIES \$ 9,500
0121051-510112

FY 2022 POLICE FULL TIME SALARIES \$ 10,000
0121051-510111

TO: FY 2022 POLICE VEHICLE REPLACEMENT \$ 29,500
0121058-580869

I hereby certify to the availability, authority of funding source, mathematical accuracy and appropriate fiscal year.

6/22/22
DATE

[Signature]
TOWN AUDITOR



WATERTOWN POLICE DEPARTMENT

THOMAS F. ROCCA
CHIEF OF POLICE

MEMORANDUM

TO: THOMAS J. TRACY, ACTING CITY MANAGER

FROM: THOMAS F. ROCCA, PROVISIONAL CHIEF OF POLICE

DATE: JUNE 28th, 2022 

SUBJECT: ACCOUNT TRANSFER – FY22

The police department has identified monies in order to purchase a vehicle for departmental use. At this time, I am requesting a transfer of funding from the following appropriations budget accounts to the Fiscal 2022 Vehicle Replacement Account – 0121058-580869. The individual amounts requested from each account are listed as follows:

One Vehicle

0121052-520245	Vehicle Maintenance	\$5,000.00
0121052-550580	Crime Prevention	\$5,000.00
0121051-510112	Part Time Salaries	\$9,500.00
0121051-510111	Full Time Salaries	<u>\$10,000.00</u>
Total amount of transfers requested:		\$29,500.00

I am requesting your assistance in placing this transfer request before the Honorable City Council for its review and action. Please contact me with any questions and I thank you for your attention to this matter.

TFR;jp

**REQUEST FOR ADDITIONAL FUNDING
FISCAL YEAR 2023**

1. DEPARTMENT

POLICE DEPARTMENT

2. SHORT DESCRIPTION/TITLE

Replacement Vehicle
Unmarked Police Cruiser

3. FUNDING AMOUNT REQUESTED

\$29,500

ACCT CODE	DESCRIPTION/POSITION	COST/SALARY
012058/580869	One replacement pre-owned unmarked cruiser- to update fleet.	\$29,500
TOTAL REQUEST		\$29,500

4. Justification/Impact

Unmarked Cruiser:

The department is continuing to identified unmarked cruisers which need replacement. These cruisers are older model year vehicles and more prone to repair and safety issues. The FY23 vehicle we have identified as a need for replacement will be a fifteen-year-old 2007 Ford Fusion with over 60,000 miles.

In lieu of a replacement schedule for our unmarked vehicles as recommended by the Public Safety Matrix study, we have been annually identifying one unmarked vehicle that needs replacement. We believe, if allowed to replace one unmarked vehicle each year for the next several continuous years we can safely and cost effectively meet this departmental need. The schedule would then be modified, to replacing an unmarked vehicle every second or third budgetary year, when need presents.



Thomas J. Tracy
Acting City Manager

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citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 22, 2022
RE: Agenda Item – Transfer of Funds Request

As you recall, on January 25, 2022, the proposed Fiscal Year 2023-2027 Capital Improvement Program (CIP) was submitted pursuant to the provisions of the Watertown Home Rule Charter and the City Council Resolution on the Fiscal Year 2023 Budget Process.

The Council's Committee on Budget and Fiscal Oversight met several times thereafter developing conceptual recommendations for presentation to the Honorable City Council for their review and adoption. On March 22, 2022, the Honorable City Council adopted thirty-four (34) conceptual recommendations on the Fiscal Year 2023-2027 CIP.

One of the conceptual recommendations reads in part as follows:

21. Proceed with the FY22 \$330,000 proposed loan order or transfer of funds for Skating Rink Improvements, consisting of:

- Ammonia Detection System (\$65,000)
- Rink Boards Replacement (\$265,000)

For additional background purposes, attached please find correspondence from Daniel F. Brothers, Skating Rink Manager, regarding proposed improvement of \$75,000 for the Ammonia Detection System at the John A. Ryan Arena.

Therefore, given all of the above, I respectfully request the attached transfer be placed on the June 28, 2022, City Council Agenda.

Thank you for your consideration in this matter.

cc: Steven Magoon, Director of Community Development and Planning/Acting Deputy City Manager
Daniel F. Brothers, Skating Rink Manager
Peter Centola, Recreation Director
Brian Wyncoop, Purchasing Agent
Mark R. Reich, Esquire, KP Law

TRANSFER AMOUNT \$75,000

FROM: FY 22 CITY COUNCIL RESERVE
0111152-570780

\$ 75,000

TO: FY 22 RINK IMPROVEMENTS
0163158-580840

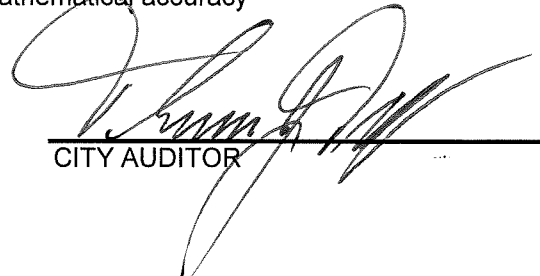
\$ 75,000

I hereby certify to the availability, authority of funding source, mathematical accuracy
and appropriate fiscal year.

DATE

6/22/22

CITY AUDITOR



Memo

To: Thomas Tracy, Acting City Manager
From: Daniel Brothers, Skating Rink Director
cc: Sharon Gallagher, Peter Centola, Marsha Osmond, JoAnna Hand
Date: June 22, 2022
Re: Capital Items – FY22 – Ammonia Detection System

Sir, in the FY22 Capital Improvement Program, there is a project that is currently approved and awaiting funding.

The approval for an updated ammonia detection system with appropriate ventilation is ready to be completed. This was recommended as a result of the audit we had performed to meet compliance with requirements of the Environmental Protection Agency. The cost of this would be approximately \$75,000 (up a bit with supply issues).

I appreciate the consideration on this item.

Please feel free to contact me if you need any other information or have questions.

Many regards,

Daniel F. Brothers, Skating Rink Director



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6465
citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

Attached please find email correspondences from Christopher L. McClure, Chief Information Officer regarding audio-visual improvements to the Council Chamber.

As indicated in Mr. McClure's email, an assessment was conducted of the AV equipment in the Council Chamber. The Information Technology Department coordinated with Watertown Cable Access Corporation (WCA-TV) to ensure any recommendations were compatible with their equipment and planned upgrades. WCA-TV has an additional \$60,000 upgrade project planned for this summer to improve their cameras, audio, and cabling. While the initial cost of the City AV proposal does seem high, these upgrades are necessary to upgrade the Council Chamber.

Therefore, given all of the above, I respectfully request the attached transfer be placed on the June 28, 2022 City Council Agenda.

Thank you for your consideration in this matter.

cc: Christopher L. McClure, Chief Information Officer
Watertown Cable Access Corporation (WCA-TV)
Helen Chatel, Executive Director, WCA-TV
Melissa A. Morrissey, City Treasurer/Collector

TRANSFER AMOUNT \$74,978

FROM: FY 22 PLANNED DEBT
0171000-590927

\$ 74,978

TO: FY 22 COUNCIL CHAMBER IMPROVEMENTS
0194000-530345

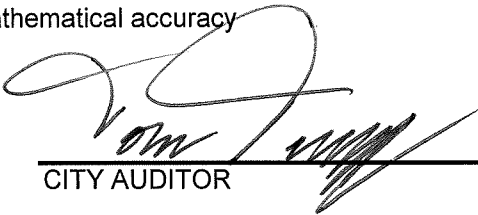
\$ 74,978

I hereby certify to the availability, authority of funding source, mathematical accuracy
and appropriate fiscal year.

DATE

6/22/22

CITY AUDITOR



Hand, JoAnna

From: Tracy, Tom
Sent: Wednesday, June 22, 2022 3:37 PM
To: Hand, JoAnna
Subject: FW: Town Council AV Upgrade
Attachments: GP3363-Watertown Town Hall Upgrade.pdf

From: McClure, Christopher <cmcclore@watertown-ma.gov>
Sent: Thursday, June 2, 2022 10:36 AM
To: Tracy, Tom <ttracy@watertown-ma.gov>
Subject: FW: Town Council AV Upgrade

Tom,

At the request of you and the City Council president, we conducted an assessment of the AV equipment in the Council Chambers.

We coordinated with WCATV to ensure any recommendations were compatible with their equipment and planned upgrades.

WCATV has an additional \$60,000 upgrade project planned for this summer to improve their cameras, audio, and cabling.

While the initial cost of the City AV proposal does seem high, these upgrades are necessary to upgrade the Council Chambers.

Some key line items:

4 TH-86CQE1W Panasonic 86" Professional Display \$ 4,084.00 \$ 16,336.00

These displays are significantly larger than the current displays, which will allow better visibility from around the room. They are also professional displays meaning that they are brighter with more features and designed for extended use.

5 60-1631-53 Extron DTP2 HDMI Receivers \$ 704.00 \$ 3,520.00
1 60-1631-52 Extron DTP2 HDMI Transmitter \$ 696.00 \$ 696.00
1 60-1382-93A Extron 8x6 Switcher Scaler with Integrated 100W amp, LL \$ 15,360.00 \$ 15,360.00
2 60-1741-52 Extron HDMI DTP2 Transmitter Wall Plate \$ 920.00 \$ 1,840.00
1 60-1565-02 Extron TLP Pro 1025M 10" Touch Panel \$ 2,584.00 \$ 2,584.00
1 60-1559-02 Extron TLP Pro 525T 5" Touch Panel \$ 1,656.00 \$ 1,656.00

The Extron equipment allows all displays to be powered on and controlled by multiple control screens around the room. Displays can be powered on and off. Inputs and outputs can be controlled. This will make it easy to send presentations to all screens for example and switch back to Zoom.

1 DCI2X300-U-USFX Crown DCi 2|300 300W Amplifier \$ 1,163.00 \$ 1,163.00
1 FBX2410-U Sabine 2 Channel Feedback Exterminator \$ 422.50 \$ 422.50
1 60-1681-01 Extron HDMI Audio De-Embedder \$ 736.00 \$ 736.00
1 60-190-10 Extron Rack Shelf for Above \$ 139.25 \$ 139.25
1 60-692-20 Extron 1x6 Audio Distribution Amp \$ 400.00 \$ 400.00
1 LS-55-072/216 Listen Technology Assisted Listening System \$ 2,094.25 \$ 2,094.25

The audio gear will allow us to amplify speakers in the room to in-room speakers, making it easier for people to hear. Most importantly, it allows us to add an Assisted Listening System, which is a huge ADA upgrade.

1 Install-PW labor \$ 16,050.00 \$ 16,050.00

As you know that room is very difficult to work in. That is why the labor costs are so high.

Thank you,



MA State Contract OFF-50

Prepared For:

Christopher McClure
Town of Watertown
Watertown, MA
cmcclure@watertown-ma.gov

Date: 5.13.2022
Quote: GP3363
Valid For: 30 Days
Terms N30
Prepared By: Gary Pink

Qty		Model	Description	Price		Ext
4	TH-86CQE1W		Panasonic 86" Professional Display	\$	4,084.00	\$ 16,336.00
4	XTM1U		Chief X-Large Fusion Micro-Adjustable Tilt Wall Mount	\$	364.00	\$ 1,456.00
1	TH-43CQ2U		Panasonic 43" Professional Display w/Tuner	\$	772.75	\$ 772.75
1	MWRUB		Chief Medium Flat Panel Swing Arm	\$	548.00	\$ 548.00
5	60-1631-53		Extron DTP2 HDMI Receivers	\$	704.00	\$ 3,520.00
1	60-1631-52		Extron DTP2 HDMI Transmitter	\$	696.00	\$ 696.00
1	60-1382-93A		Extron 8x6 Switcher Scaler with Integrated 100W amp, LL	\$	15,360.00	\$ 15,360.00
2	60-1741-52		Extron HDMI DTP2 Transmitter Wall Plate	\$	920.00	\$ 1,840.00
1	60-1565-02		Extron TLP Pro 1025M 10" Touch Panel	\$	2,584.00	\$ 2,584.00
1	60-1559-02		Extron TLP Pro 525T 5" Touch Panel	\$	1,656.00	\$ 1,656.00
1	Airtame 2		Airtame Wireless HDMI over WiFi-Gov pricing	\$	449.00	\$ 449.00
1	60-1490-02		Extron eLink 100 T US Transmitter	\$	443.75	\$ 443.75
1	60-1490-03		Extron eLink 100 R US Receiver	\$	481.25	\$ 481.25
4	CONTROL 25AV		JBL Control 25AV Surface Mount Speaker-Black	\$	202.50	\$ 810.00
2	ControlCRV		JBL Control CRV Corner Mount Speaker-Black	\$	234.75	\$ 469.50
1	DCI2X300-U-USFX		Crown DCi2 300 300W Amplifier	\$	1,163.00	\$ 1,163.00
1	FBX2410-U		Sabine 2 Channel Feedback Exterminator	\$	422.50	\$ 422.50
1	60-1681-01		Extron HDMI Audio De-Embedder	\$	736.00	\$ 736.00
1	60-190-10		Extron Rack Shelf for Above	\$	139.25	\$ 139.25
1	60-692-20		Extron 1x6 Audio Distribution Amp	\$	400.00	\$ 400.00
1	LS-55-072/216		Listen Technology Assisted Listening System	\$	2,094.25	\$ 2,094.25
8	TM-UT1-AC2CH-BLK		FSR Under Table Power w/USB	\$	353.00	\$ 2,824.00
2	SSPC-25		Laird 25' Extension Power Box	\$	183.25	\$ 366.50
1	SSPC20A-35		Laird 35' 20A Extension Power Box	\$	219.75	\$ 219.75
						\$ -
1	Install-PW		Take down and replace existing monitors, Install new monitor in managers office. Install speakers on wall and under tables. Run new wiring to monitors, control panels, speakers. Install remaining gear in rack and wire. Mount	\$	16,050.00	\$ 16,050.00
						\$ -
						\$ -
						\$ -

Ockers Company

830 West Chestnut Street, Brockton, MA 02301
Phone 781-769-7810 Fax 781-769-5750

		under table power. Run to main outlet. Program iListen and			\$	-
		remotes. Program Extron System. Testing and Training			\$	-
1	CCP	Cables, Connectors, Parts		\$ 1,675.00	\$	1,675.00
1	SH	Manufacturer Incoming Freight		\$ 1,465.00	\$	1,465.00
		Package Total			\$	74,977.50

Ockers Company
830 West Chestnut Street, Brockton, MA 02301
Phone 781-769-7810 Fax 781-769-5750



Thomas J. Tracy
Acting City Manager

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Phone: 617-972-6465
www.watertown-ma.gov
Citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

As you are aware, as indicated in the attached excerpt from the Fiscal Year 2023 Budget Message and Revenue Forecast, transfers of \$500,000 annually from the Capital Projects Stabilization Fund began in Fiscal Year 2006 and will continue through Fiscal Year 2026. In order to continue the annual transfer of \$500,000 beyond Fiscal Year 2026, we will look for opportunities to make transfers to this Stabilization Fund in an effort to support capital projects included in the five-year General Fund Capital Improvement Program which totals \$377,277,700 for Fiscal Year 2023-2027.

Therefore, in order to continue the annual transfer of \$500,000 from the Capital Projects Stabilization Fund through Fiscal Year 2027 to support capital projects, I respectfully request the attached transfer be placed on the June 28, 2022 City Council Agenda.

Thank you for your consideration in this matter.

cc: Honorable School Committee
Honorable Library Board of Trustees
All Department Heads

TRANSFER AMOUNT \$500,000

FROM: FY 22 TOWN GROUP HEALTH INSURANCE \$ 250,000
0191200-510180

FY 22 SCHOOL GROUP HEALTH INSURANCE \$ 250,000
0191200-510181

TO: FY 22 TRANSFER TO CAP PROJ. STABILIZATION FUND \$ 500,000
0194000-596802

I hereby certify to the availability, authority of funding source, mathematical accuracy
and appropriate fiscal year.

6/22/22
DATE

[Signature]
CITY AUDITOR

Capital Projects Stabilization Fund

As you recall and as stated in the Fiscal Year 2019 Budget Message dated May 1, 2018, the original North East Solid Waste Committee Agreement (NESWC) expired in September 2005 and the City has executed three Post 2005 Agreements through Fiscal Year 2020. As a result of these actions and the foresight the City had in funding the significant costs of the NESWC Agreement, transfers of \$500,000 annually from the Capital Projects Stabilization Fund began in Fiscal Year 2006 and will continue through Fiscal Year 2020.

In order to continue the annual transfer of \$500,000 beyond Fiscal Year 2020, we looked for opportunities to make transfers to this Stabilization Fund in an effort to support Capital Projects.

On July 10, 2018, the Honorable City Council appropriated \$500,000 to this Stabilization Fund in order to continue the annual transfer of \$500,000 through Fiscal Year 2021.

On October 23, 2018, the Honorable City Council approved a Proposed Amendment to the Fiscal Year 2019 Budget that included an appropriation of \$500,000 to this stabilization fund in order to continue the annual transfer of \$500,000 through Fiscal Year 2022.

On June 25, 2019, the Honorable City Council appropriated \$500,000 to this Stabilization Fund in order to continue the annual transfer of \$500,000 through Fiscal Year 2023.

On November 12, 2019, the Honorable City Council approved a Proposed Amendment to the Fiscal Year 2020 Budget that included an appropriation of \$500,000 to this stabilization fund in order to continue the annual transfer of \$500,000 through Fiscal Year 2024.

On July 14, 2020, the Honorable City Council appropriated \$500,000 to this Stabilization Fund in order to continue the annual transfer of \$500,000 through Fiscal Year 2025.

On June 22, 2021, the Honorable City Council appropriated \$500,000 to this Stabilization Fund in order to continue the annual transfer of \$500,000 through Fiscal Year 2026.

In order to continue the annual transfer beyond Fiscal Year 2026, we will look for opportunities to make transfers to this Stabilization Fund in an effort to support capital projects.

REVENUE FORECAST

ASSUMPTIONS:

Real Estate and Personal Property taxes are increased 2.5% per year. New growth is projected to be \$4,000,000 in FY 2023 and FY 2024; and \$4,500,000 for FY 2025 and FY 2026. Funding for the Optional Tax Exemption for homeowners at 100% over the statutory level is included in the overlay adjustment.

State Aid is based upon the recommendations contained in the House Ways and Means Committee (HWM). In subsequent years, State Aid is level funded at the projected FY 2023 amount.

The majority of Local Receipts are projected to remain constant or increase 2.5% annually. Inspection Fees are projected at \$2,750,000 and Investment Income is projected at \$250,000 annually through FY 2026.

Motor Vehicle Excise is increased by \$250,000 in FY 2023 and is projected to increase \$125,000 annually from FY 2024 through FY 2026. Meals Excise is increased by \$100,000 to \$650,000 in FY 2023; and increase \$50,000 annually from FY 2024 through FY 2026. Hotel Excise is projected at \$675,000 in FY 2023; and is projected to increase \$150,000 annually for FY 2024 and FY 2025.

Payment in Lieu of Taxes (PILOT) is projected at \$87,088 in FY 2023 as a result of the sale of Tufts Health Building to a taxable entity.

Other Financing Sources reflect transfers; from the Cemetery Perpetual Care Expendable Trust Fund and the Sale of Lots Fund to partially offset the Department of Public Works Cemetery Budget; from the Water and Sewer Enterprise Funds to cover applicable indirect costs; and from the Parking Meter Fund to partially offset the Parking Lots and Meters Budget.

Utilization of Free Cash is recommended at a level of \$2,000,000 annually through FY 2026 which includes \$250,000 annually for the Special Education Stabilization Fund for FY 2024 through FY 2026.

→ Transfer from the Capital Projects Stabilization Fund is projected at \$500,000 annually through FY 2026, which represents the current balance of the Fund. Transfer from the ESCO Capital Project Stabilization Fund includes projected funds from departmental energy savings, rebates and grants.

REVENUE FORECAST

	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
TAXES:					
Prior Year Adjusted Levy Limit	\$ 123,391,323	\$ 134,418,141	\$ 141,778,594	\$ 149,323,059	\$ 157,556,136
Prior Year Amended Growth	\$ 48,627				
Sub-total	\$ 123,439,950	\$ 134,418,141	\$ 141,778,594	\$ 149,323,059	\$ 157,556,136
Add 2.5%	\$ 3,085,999	\$ 3,360,454	\$ 3,544,465	\$ 3,733,076	\$ 3,938,903
New Growth	\$ 7,892,192	\$ 4,000,000	\$ 4,000,000	\$ 4,500,000	\$ 4,500,000
Adjusted Levy Limit	\$ 134,418,141	\$ 141,778,594	\$ 149,323,059	\$ 157,556,136	\$ 165,995,038
Overlay	\$ (1,000,000)	\$ (1,050,000)	\$ (1,050,000)	\$ (1,100,000)	\$ (1,100,000)
NET LEVY LIMIT	\$ 133,418,141	\$ 140,728,594	\$ 148,273,059	\$ 156,456,136	\$ 164,895,038
STATE AID:					
Cherry Sheet Receipts	\$ 13,482,722	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029
TOTAL STATE AID	\$ 13,482,722	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029	\$ 14,243,029
LOCAL RECEIPTS:					
Motor Vehicle Excise	\$ 4,100,000	\$ 4,350,000	\$ 4,475,000	\$ 4,600,000	\$ 4,725,000
Meals Excise	\$ 550,000	\$ 650,000	\$ 700,000	\$ 750,000	\$ 800,000
Hotel Excise	\$ 525,000	\$ 675,000	\$ 825,000	\$ 975,000	\$ 975,000
Cannabis Excise		\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000
Penalties & Interest	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000
PILOT	\$ 81,948	\$ 87,088	\$ 87,628	\$ 88,168	\$ 88,708
Commercial Trash	\$ 15,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000
Fees	\$ 8,850,000	\$ 4,500,000	\$ 4,500,000	\$ 4,500,000	\$ 4,500,000
Rentals	\$ 178,312	\$ 227,769	\$ 227,215	\$ 226,644	\$ 226,644
DR-Cemetery	\$ 95,000	\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000
DR-Recreation	\$ 420,000	\$ 420,000	\$ 420,000	\$ 420,000	\$ 420,000
Licenses & Permits	\$ 192,000	\$ 200,000	\$ 200,000	\$ 200,000	\$ 200,000
Fines & Forfeits	\$ 510,000	\$ 450,000	\$ 450,000	\$ 450,000	\$ 450,000
Investment Income	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000	\$ 250,000
Sale of Town Property	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000
Belmont Reimbursement	\$ 76,127	\$ -	\$ -	\$ -	\$ -
Grant/Employee Reimbursements	\$ 25,000	\$ 25,857	\$ 25,857	\$ 25,857	\$ 25,857
TOTAL LOCAL RECEIPTS	\$ 16,123,387	\$ 12,710,714	\$ 13,035,700	\$ 13,360,669	\$ 13,536,209
OTHER FINANCING SOURCES:					
Transfer from Sale of Lots Fund	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
Transfer from Parking Meter Fund	\$ 150,000	\$ 150,000	\$ 250,000	\$ 250,000	\$ 250,000
Transfer from Opioid Settlement Fund		\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000
Transfer from Cemetery Perpetual Care Fund	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
Transfer from Capital Projects Stabilization Fund	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000
Transfer from ESCO Capital Project Stab. Fd.	\$ 505,938	\$ 500,938	\$ 494,438	\$ 493,225	\$ 492,125
Transfer from New High School Stabilization Fund	\$ 5,798,555	\$ 201,000	\$ -	\$ -	\$ -
Transfer from Water Fund	\$ 1,553,006	\$ 1,511,731	\$ 1,511,731	\$ 1,511,731	\$ 1,511,731
Transfer from Sewer Fund	\$ 1,507,448	\$ 1,397,994	\$ 1,397,994	\$ 1,397,994	\$ 1,397,994
Utilization of Free Cash	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000	\$ 2,000,000
Utilization of Overlay Surplus	\$ 1,500,000	\$ 750,000	\$ -	\$ -	\$ -
TOTAL OTHER FINANCING SOURCES	\$ 13,549,947	\$ 7,106,663	\$ 6,249,163	\$ 6,247,950	\$ 6,246,850
TOTAL REVENUES	\$ 176,574,197	\$ 174,789,000	\$ 181,800,951	\$ 190,307,784	\$ 198,921,126

→ Transfer from Capital Projects Stabilization Fund
 Transfer from ESCO Capital Project Stab. Fd.



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6465
www.watertown-ma.gov
citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

Enclosed please find correspondence from Brian Wyncoop, Purchasing Agent, regarding the need for additional funding of the Purchasing Postage Account for the remainder of the Fiscal Year.

Therefore, I respectfully request the attached transfer be placed on the June 23, 2022, City Council Agenda.

Thank you for your consideration in this matter.

cc: Steven Magoon, Acting Deputy City Manager/CD&P Director
Brian Wyncoop, Purchasing Agent
Sharon Gallagher, Assistant City Auditor

Transfer Amount \$15,000

From: FY 2022 Veteran's Benefits \$ 15,000
0154352-570770

To: FY 2022 Purchasing Postage \$ 15,000
0113852-530342

I hereby certify to the availability, authority of funding source, mathematical accuracy and appropriate fiscal year.

6/23/22
Date

[Signature]
City Auditor



CITY OF WATERTOWN

Office of the Purchasing Agent
Administration Building
149 Main Street
Watertown, Massachusetts 02472

Brian Wyncoop
Purchasing Agent

Telephone (617) 972-6414

June 23, 2022

Mr. Thomas Tracy - Acting City Manager
149 Main Street
Watertown, MA 02472

Dear Mr. Tracy,

I am writing on behalf of the Purchasing Department to request a transfer of funds for the Postage expenses for the City of Watertown.

As you are aware, my department is in charge of the postage mailings for all of City Hall, Real Estate & Property tax bills, and monthly Water & Sewer bills. As we are finishing up FY2022, we would like sufficient funds in the meter to cover the remaining postage requests for the remainder of this fiscal year.

As you may not be aware, the USPS is increasing the cost of postage on July 10, 2022. The cost of a First-Class Mail Forever Stamp will increase from 58 cents to 60 cents. The cost of a First Class Metered Stamp (what Watertown uses) will increase from 53 cents to 57 cents.

I am kindly requesting a transfer of \$15,000 to fund the meter in the machine. If this transfer is approved, I plan on immediately sending a check to our postage vendor to replenish the balance and fulfill our remaining requirements for FY2022.

If you have any questions about this request, please don't hesitate to contact me.

Thank you for your consideration of this request.

Sincerely,

Brian Wyncoop
Purchasing Agent



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6465
citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

As you recall, on January 25, 2022 the Proposed Fiscal Year 2023-2027 Capital Improvement Program (CIP) was submitted pursuant to the provisions of the Watertown Home Rule Charter and the City Council Resolution on the Fiscal Year 2023 Budget Process.

The Council's Committee on Budget and Fiscal Oversight met several times thereafter developing conceptual recommendations for presentation to the Honorable City Council for their review and adoption. On March 22, 2022, the Honorable City Council adopted thirty-four (34) conceptual recommendations on the Fiscal Year 2023-2027 CIP.

One of the conceptual recommendations reads in part as follows:

18. Proceed with the FY22 \$700,000 proposed loan order or transfer of funds for Information Technology, consisting of:
- Document Scanning @ 100,000

As a follow-up to that conceptual recommendation and for additional background purposes, attached please find email correspondences from Christopher L. McClure, Chief Information Officer.

The intent had been to bring forward a proposed loan order for this project. At this time, monies are available to fund the project from the Debt Retirement Planned Debt Account as a result of not moving forward with some items in Fiscal Year 2022.

The utilization of unspent Debt Retirement account monies for the acquisition of capital equipment items is consistent with the Honorable City Council's Ongoing Budget Policy Guideline to make annual capital expenditures (including debt and exclusive of the school Building for the Future Initiative funding and enterprise funds) equal to at least 7.5 – 8% of the operating budget in order to maintain and improve its infrastructure, facilities, and equipment.

Therefore, given all of the above, I respectfully request the attached transfer be placed on the June 28, 2022 City Council Agenda.

Thank you for your consideration in this matter.

cc: Christopher L. McClure, Chief Information Officer
Department Heads

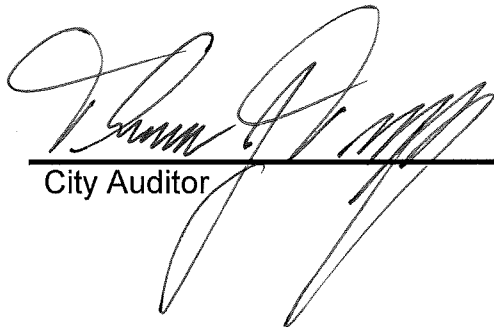
Transfer Amount \$111,880

From: FY 2022 Debt Retirement - Planned Debt \$ 111,880
0171000-590927

To: FY 2022 Transfer To Capital Projects - IT Dept. \$ 111,880
0193059-596511

I hereby certify to the availability, authority of funding source, mathematical accuracy and appropriate fiscal year.

6/22/22
Date



City Auditor

Hand, JoAnna

From: Tracy, Tom
Sent: Wednesday, June 22, 2022 4:25 PM
To: Hand, JoAnna
Subject: FW: Document Management Project Funding
Attachments: WATERTOWN,CITY OF'22[24802].docx

From: McClure, Christopher <cmclure@watertown-ma.gov>
Sent: Thursday, June 2, 2022 10:18 AM
To: Tracy, Tom <ttracy@watertown-ma.gov>
Subject: Document Management Project Funding

Tom,

Please see the City-Wide Document Audit Report.

I am seeking funding of phase one summarized on page 66:

ARCHIVES PROJECT COST SUMMARY

(excluding maps & plans)

- 1. EQUIPMENT (69 SECTIONS SHELVING), INCLUDING INSTALLATION & SHIPPING = \$41,262.00.**
- 2. SUPPLIES (BOXES/LABELS/DATABASES), INCLUDING SHIPPING = \$12,148.00.**
- 3. LABOR (SUPERVISOR/STAFFERS), INCLUDING EXPENSES = \$58,470.00.**

PROJECT GRAND TOTAL = \$111,880.00

This will empty most of the old police station and get all of our archives organized. This will allow us to destroy documents per the retention schedule, organize, and optimize storage for the remainder.

This will also create a document database and ongoing plan as we prepare for our scanning projects.

GENERAL RECOMMENDATIONS

Recommendations that pertain to *several* different areas are outlined in this section, and to avoid redundancy, they will be referred to by number throughout this report.

1. “Hanging Folders” - Wherever possible, we urge the elimination of hanging or suspended folders. Such folders are simply **too** expensive and take up **too** much space! In fact, if all of the *paper* were removed from a drawer full of hanging folders, **the drawer would still be 40% full!!**

Happily, there are ways to accomplish the *same* neatness that is provided by hanging folders! Use of *sturdy* folder stock, folders with *vertical grain*, and *file organizers* are some of the alternatives - all covered in this report!!

2. File Organizers – A brochure is enclosed that illustrates this *ingenious* device! Folders are kept neat – **no** “slouching”, **no** “slumping”, **no** “sliding”!! An organizer should be placed in *each and every* drawer!!!

3. Purging – Simply put, ***you need to do some (“everywhere”!)***. “Old” information *and* “duplicated” information should be purged from ***many*** of the various files. Legal battles have often been lost over a *poor* choice of words in a document that was not even necessary to keep! Whether an organization is big or small, it is *imperative* that all records flow smoothly through three steps on a planned time schedule:

A. A period of active use - when references are frequent and immediate access is important.

B. A period of storage - during which the records are retained for occasional

reference and/or for legal reasons. Any records scheduled for *permanent* retention, of course, will either remain in the storage area or be microfilmed.

C. Destruction - after records have served their full purpose and are no longer needed.

If records are not maintained according to the preceding, the organization will be faced with one *or* more of the following problems (*many of which you experience!*):

- an unmanageable “tangle” of papers within the files
- *wasted* clerical effort searching for information
- loss of important operating information
- extravagant use of high cost office space *and* equipment
- possible loss of key information in defending your organization against legal actions *or* governmental inquiries

At the risk of sounding like common “scolds”, we must point out that ***much*** of your file space could be reclaimed by simply **purging** *old, irrelevant, and useless* documents, which can either be destroyed immediately or at least transferred to the archives, thus “freeing up” space and making the files more manageable.

4. Color-Coding - Color-coding is the assignment of color to a number, letter, *or* particular item that shows meaning. In filing, assignment of a color for each number 0 through 9, *or* for each letter A through Z, aids in filing and retrieval of all types of hard copy files. By putting these colors (letters, numbers, designators) in a *particular* position on a file folder, a “color/block” pattern is formed. When these patterns of color are broken, a “misfile” has occurred!

In retrieving a file, color recognition *speeds* “look-up” time, *facilitates* “refiling”, and “misfiles” are virtually *non-existent* because of the ease of spotting a file when it

is out of order. A good color-coded filing system *can* work for several of your files, and in most cases, pays for itself in less than a year due to the time saved in filing and retrieval with *no* “misfiles”!

5. Subject Filing – This system is one of the most interesting filing systems, but perhaps the least understood. With a subject file, the names of individuals, firms, or locations are ***not*** the determining factors; the filing “key” is the subject matter about which the papers pertain. The topic that is covered in the documents is the all important “key” to subject filing, *regardless* of the person or place involved, although a cross-reference is often advisable.

The importance of retrieval knowledge is certainly as great when using subject indexing as in any other type of filing. To understand “how” material will be requested requires a *thorough* guidance from someone who is completely familiar with your operation.

The recipient of each piece of mail, letter, report, or memo is responsible for underlining the subject for filing purposes, and the person designated for doing the filing should then file alphabetically, taking care to operate within existing captions. For example, an index guide might say “Assessing”, folders following might say “Activity Reports”, “Correspondence”; another index guide might say “Fire Department”, folders might say “Call Reports”, “Training”, and so on. A little practice will *greatly* improve the skills of true subject filing!

6. “Charge-Out” System - The successful operation of *any* filing system, big or small, is dependent upon the proper use of a **charge-out system**. Lack of control over the removal of files ***is*** definitely a problem! Either top or end tab “OUT” guides should be ordered “as needed” with the letters *OUT* appearing on the outer

edge of the guide, *clearly visible*, thereby expediting the return of the folders to the file - and in the right place! The purpose of the guides is not only to tell you “who” has a folder but, they *also* facilitate file reference and “re-filing”, *as well as* help to eliminate “misfiling” - ***their use simply needs to be enforced!!***

7. Index Guides – The purpose of index guides is to *reduce* the amount of time involved in making references to the file. AND, they *also* help to *reduce* “mis-filing”!

ARCHIVES

The city does **not** have a formal records retention program in place – **no** “customized” written retention schedule, **no** index or cross-reference system, **no** locator system, **no** destruction program.

Overall responsibility for the archives has not been delegated to anyone in particular. The individual departments are “more or less” responsible for purging and boxing up their own records, *as well as* for labeling the boxes. **AND**, there are **no** “standards” in terms of boxes *or* indexing, and **no** procedures for either adding *or* removing records to and from the various storage areas!

Records are stored in a wide variety of boxes, *many* 24 inches deep and too heavy, “**tons**” of odd size boxes/some standard size, several “oversized”/3 cube boxes/“bins”, as well as *many* assorted vertical/lateral file cabinets, “**tons**” of three-ring binders, some assorted ledger card files, *many* computer printout binders, lots of bound/metal post ledger books, “**tons**” of assorted rolled/folded plans **AND**, lots of “batches”/“piles”! Indexing on the boxes, etc., *also* varies a great deal: title/date(s) *or*, title/year(s) *or*, title only *or*, department/title only *or* – “lots” of our favorite! – ***nothing at all!!***

If all of the above weren’t bad enough, the indexing often appears on the top *or* side of the box *or* on the “end” of the box *facing in* on shelving, ***so you can’t even see it when boxes are “stacked” or arranged on shelves!*** Sometimes the contents of boxes does **not** even correspond to the indexing, and in other cases, boxes include a *really* “mixed bag” of documents – “**hodgepodge**”!! Labels on folders within boxes have *often* just “**fallen off**”, making it difficult to

even identify records. Some boxes have *also* been left “open” after review, *many* more boxes have just been “broken open” *or* “crushed” due to stacking, lots of “*broken*” and “*missing*” box lids **AND**, in some areas, aisle space is *often* “blocked” by boxes/“junk”, making reference extremely difficult – **and “physical”!** There are *also* some supplies and décorations stored amongst the records in *several* areas.

The following archival records are all stored on-site **BUT**, they are “spread out” between four locations and **ten** separate areas within these locations!

CITY HALL - Records are “spread out” between *at least* seven separate areas at city hall. We began our inventory in the basement, and then worked our way “up” to the third floor!

(A) Large Basement Vault – This is a Herring-Hall-Marvin vault, and the entrance is approximately 79”high x 30”wide/inner dimensions are approximately 208”wide x 217”deep/ceiling height, about 105”. This vault is simply a “**MESS**”! We had to move records/boxes/*ballot boxes* out of the way in order to complete our inventory!! The majority of the records is stored in 28 large metal cabinets arranged *two high*, surrounding the vault (4 *more* cabinets hold election equipment/“junk”):

- 26 = 2-door cabinets, 36”wide x 25 ¼”deep
- 2 = 1-door cabinets, 24”wide x 25 ¼”deep

Many more records, along with supplies and equipment, are just “piled” in the middle of the vault, and right in front of the cabinets, *generally* “blocking access” to the cabinets on the bottom! There are *also* lots more old ledger books arranged “way up on top” of these cabinets!!

Our inventory revealed the following records:

- approximately 589 assorted size bound books (approximately 1,132")/
some metal post: marriage intentions, back to early 1900's-1990's (*at least!*); cemetery accounts, 1909-1951; cash/cash receipts, 1915-17/1920's-1980; BOH minutes, 1950's; general cash, 1930's-1960's; real estate/personal property commitment lists, 1940's-1960's; water cash, 1940's-1960's; MVE commitments, 1930's-1960's; abatements, 1920's-1950's; valuation books/lists, early 1900's/1950's; warrant books, 1914-1930's; collector's books, 1800's; poll taxes, 1920's-1960's; treasurer cash, 1959-1964; payroll registers, 1974; department of streets/expenses, back to early 1900's; cemetery payroll, 1900-06; highway payroll, 1920's-1930's; letters, *etc.!*

- 2 odd boxes (**1 "broken" lid**), 1 3 cube: contracts, 1990-91/1993-95
- 1 3 cube box (**no lid**): town/school contracts & agreements, 1980's; skating rink, 1987-89; legal files, 1970's; claim files, 1980's, etc.
- 1 3 cube box, 1 odd: *more* claim files, 1981-1996
- approximately 199 computer printouts, 15x11/lots "loose" pages (approximately 700"), 2 odd boxes: payroll registers, 1969-1991; check registers, 1978-1979/1991; warrant detail, 1985-87; payroll checks, 1986-87; retirement register, 1981-84; bill detail, 1986; monthly payroll, 1993; deduction registers, 1974-75; payroll change forms, 1969-1971; school terms/payroll time sheets, 1969; W-2's/payroll tax reports, 1980's; bond register/deduction registers/payroll quarterly analysis, 1970's; retirement recons, 1984-85; government payroll, 1969, *etc.!*
- 1 legal size expansion wallet (approximately 2"): payroll reports, 1979
- 2 odd boxes (**1 "broken"**)/15x11 computer sheets: payroll tax/edit/etc. reports, 1979-1980 (*at least!*)

- 1 odd box (**"taped"**), 2 standard: town council tapes, 1992-2004
- 11 check size boxes, "loose" batch (approximately 4"): *more* W-2's, 1974-

1979/1981-1995

- 4 check size boxes, 1 odd: cancelled checks/*some* payroll, **1996-99**
- 2 standard boxes (**"taped"**): community development, #31800-0018 (?)
- 3 standard boxes: legal files (returned from K&P)
- 1 odd box (**"crushed"**): treasurer receipts, **1997-98 (at least!)**
- 2 odd boxes: *more* licenses (common vic/motor vehicle/etc.), 1980's
- 2 24 inch boxes: health department nuisance complaints, **back to 1970's-**

1980

- 2 odd boxes: burial permits, back to 1800's-1970's (*at least!*)
- 2 odd boxes: burial removal permits, 1967-1980
- 1 odd box: bank statements, **1975**
- 1 24 inch box: notes issued books, 1960's-1970's
- 1 check size box: tax title 6x4 cards
- 5 odd boxes (**1 no lid, 1 "broken" lid**), 1 3 cube, 1 small *plastic bin*, 1

35"wide bookcase (approximately 343"): IT computer cartridges/tapes

- 2 odd boxes, 1 small, 1 standard, 3 24 inch: clerk receipt books,

2006-2020

- 65 standard boxes (**3 "crushed", 3 "broken" lids**), 3 odd: licensing files,

1986/1992-2017

- 3 3 cube boxes (**1 "broken"**): daily receipts, **FY'00-01**
- 1 standard box: MVE reports, **1994-95**
- 1 standard box: ?

- 2 standard boxes/clerk: claims, 2003-06
- 1 odd box: burial permits/disposal-removal-transport
- 1 standard box: cash receipts, **2000-01**
- "stacks" (approximately 6"): payroll salary CD's, 1964
- "stacks" (approximately 38"): payroll vouchers, **1950's-1960's**
- 2 books/"stubs" (approximately 2"): retirement system membership certificates, 1940's-1950's
- 3 binders (approximately 3"): retirement system balance sheets, 1930's-1940's
- 2 odd **"giftwrapped packages"**: retirement vouchers, 1942-45/1960's; check stubs, **1966-69**
- "pile" (approximately 10"): workers comp payroll ledger sheets/housing authority payroll sheets, 1950's-1960's
- 2 manila folders (approximately 2"): workers comp correspondence, **1957**
- **1958**/retirement board minutes, 1960's
- "stack" (approximately 10") of assorted license books (billiards & pools/junk collector/lodging/common vic/amusement/auto, etc.), back to 1970's (*at least!*)
- "batches" (approximately 10") of manila folders: liquor license violations, 1966-1987
- 1 odd box: *more* payroll registers, 1979 (*at least!*)
- 1 "notebook" (approximately 1"): checkbook/stubs, **1915!**
- "bundles"/"stacks" (approximately 149"): 4 ½x7 "time accounting books", **back to 1930's-1950's!**

- 25 “large” mag tapes/cassettes (approximately 56”): some payroll/
W-2’s/etc., back to 1980’s!

- 1 odd box: consumer loan files, **1960’s-1970’s!**
- “bundles”/“piles” (approximately 130”): expense & appropriation 6x4
cards/some 8x5 school federal lunch cards, **1967**
- 2 3-ring binders (approximately 7”): comprehensive management plan,
1997/land disposition agreement, 1998

(B) Town Clerk’s Office – Archival records as well as the majority of the vital records are housed in a Diebold vault. The entrance is approximately 78”high x 32”wide, and the inner dimensions are approximately 148”wide x 196”deep/ceiling height, about 107 ½”.

Most of the records are stored on eight sections of “old” steel shelving with additional records stored in lots of metal ledger card size drawers/few letter size drawers, book rollers, as well as a few boxes/binders “stacked” one on top of the other, as well as right on the floor.

The dimensions of the shelving are as follows:

- 5 sections = 87”high x 36”wide x 12 ¼”deep/8 tiers
- 2 sections = 87”high x 30”wide x 12 ¼”deep/8 tiers
- 1 section = 87”high x 30”wide x 15”deep/7 tiers

Our inventory of the vault revealed the following records:

- 67 ledger card files, documentation *often* filed in kraft “triple-fold” envelopes, **back to 1700’s-early 1900’s (unless otherwise noted)**: 13=betterment streets/petitions, etc., A-Z by street; 1=certificates of title, some A-Z by street;

1=park department lands/school department lands, A-Z; 1=storm drain agreements, A-Z by street; 1=Metropolitan Park; 1= agreements/contracts; 1=poa's/trust agreements; 1=pole locations/tracks/car stops, etc.; 18=treasurer orders/taxes/bonds/town meeting warrants/*various* committee reports/school committee annual reports; 1=building inspection reports; 1=contracts (fuel, gasoline, brick, cement, kerosene, etc.); 1=bills to town from *various* departments (**1892!**); 1=public utilities (Boston Edison, NE Telephone, Boston Gas) conduit agreements, etc.; 1=railroads (contracts, mortgages/releases, etc.); 1=referendum elections/annual warrants, 1950's-1980's; 2=town meeting warrants, 1853-1925/1970's-1980's; 1=bonds, back to 1980's-current; 1=reports of committees; 1=street/roofing bonds, back to 1800's-1970's; 1=civil service; 1=fish & game licenses, 1940's-1987; 1=bylaws & regs/reports & special legislation; 1=perambulation of town bounds, 1910-1985; 2=street betterments, A-Z; 2=organizations/appointments/retirements/vacancies/oaths of office, back to early 1900's-1966 (at least!); 1=county commissioner's orders, 1950's-1970's/dogs, 1940's-1988/incomplete birth designations, back to 1950's; 1=few deeds/few CD's (George Whiltie); 1=IT back-up tapes; 1=pensions/list of industries/miscellaneous; 1= "old" contracts; 1=*more* county commissioner orders/DPW agreements re: streets, back to early 1900's-1970's; 1=petitions; 1=collectors deeds; 1=town meeting members (vacancies, correspondence, etc.); easements/deeds/orders of taking, **1960's**

- approximately 508 bound ledger books, *assorted* sizes (**and condition!**), *some* in 6 odd boxes/bins, 99 three-ring binders: births/birth certificates, 1851-2020; births/deaths/marriages, 1693-1823/1737-1853/1844-1851; index of births, 1850-1975; intention of marriage, 1851/1890-1898/1990-2020; marriage records;

index to births/marriages/deaths, back to 1630; deaths/death certificates, 1851-2020; marriages/marriage licenses, certificates, 1851-1968/1970-2020; index to marriages, 1844-56/1850-1911/1927; index to deaths, 1851-1962/1995-2005; street/sidewalk assessments, 1932-1958; rebellion record; general registrar of voters, back to 1800's; soldiers records, 1861-65; town meeting minutes/records, back to 1600's; selectmen's records, back to early 1900's-1970's (*at least!*); town council records, 1980's-2013 (*at least!*); Watertown records, back to early 1900's (*at least!*); pole locations; layout of streets, 1926-1932; business designations; business certificates, 2001-03; board of appeals, 1992-2005; Watertown ordinances; street list (acceptance, betterments, public ways, private ways); ordinances & resolutions, 1981-84; report of state auditor, 1926; birth/marriage/death depositions

- 3 letter size drawers, 1 odd box: town council VHS tapes, 1994-99
- 2-door cabinet/10 binders, *back to 1800's*: street index/general correspondence relating to betterments/sidewalk orders; zoning by-law, voted/approved, 1970-71; fed liens/releases, 1960's-1980's (+ small 2 inch "batch"/1 2 inch accordion pocket); general bylaw amendments; building/wire/purchase department bylaws; rules & regs, Chapter 3; ***microfilm inventory!***
- approximately 25 *more* assorted three-ring binders/bound reports, 1 expansion pocket: amendments for traffic rules & orders, 1980-?; election results, 1995-2018; town clerk proposed/adopted budget, ***FY'92***; traffic amendments, 1951-1975, etc.
- approximately 25" of wire bound reports: zoning ordinances, 1980's-1990's; financial statements, 1980's-2005; annual budgets, 1990's-2021

- 1 large metal drawer/1 three-ring binder: town clerk election accounts,

FY'99-00

- 1 large metal drawer (approximately 8"): budgets, **2003-2012 (at least!)**
- 1 odd box: "removed from bulletin board", 2014
- 1 standard box, 4 odd: ?
- 4 small boxes: marriage & death indexes, 2000-01
- 1 odd box, 1 24 inch: burial permits, *some* 1984-86
- 1 "batched", *bulging* folder: marriage depositions
- 1 "bulging" folder (approximately 3"): marriage depositions
- 24 *more* 3-ring binders (approximately 93"): BOA, 2000-05; street list/
betterments/public ways/private/ordinances; BOA accessory apartments, 1997;
special permits, 1997-99; street index general correspondence re: liens/better-
ments/sidewalk orders, back to 1960's (*at least!*); building bylaws, 1940-41;
streets/ways *not* accepted; bylaw amendments, back to early 1900's, etc.
- 1 standard *plastic bin*: completed vote by mail applications
- 1 standard box: receipt books, 2021
- 1 odd box: marriage worksheets, 2018-20
- "loose" (approximately 4"): street # assignments, 1990's-2020
- 1 expansion wallet (approximately 3"): fed/state liens
- 1 large metal drawer (approximately 15"): payroll time sheets, **2007-08/
2012**; payroll registers/15x11, 1995-2001; poll workers payroll, 2013/2015/2018
- 1 24 inch box: bids/poll taxes/permission to carry revolver/transport liquor/
driving & riding club applications/leases/pole locations/petitions/utility public hear-
ings, etc., back to early 1900's

- 1 24 inch box/"**hodgepodge**": 2 bound books=gasoline permits, early 1900's/assessor tax books, back to 1799/few physician license books, 1980's/**few** folded plans, *etc.!*

(C) Town Auditor's Office – A few archival records are stored throughout this space *as well as* in a small vault within the department, and ***beneath a "tarp" in the hallway right outside of the department!***

Within the office, boxes are simply "stacked" in *any* available space - ***on the floor, under tables, on top of file cabinets, etc.!*** Most of the vault space was eliminated by the installation of the elevator many years ago, leaving an area approximately 64 ½"wide x 122 ½"deep/ceiling height, about 132". Now, new pipes for the air conditioning system are "shrinking" the space *even more!*

Within the vault, some records are arranged on one section of wire rack shelving, 71 ½"high x 48"wide x 18"deep/6 tiers, with additional boxes just "stacked" one on top of the other, right on the floor.

Our inventory revealed the following records throughout the department and the vault:

- 2 standard boxes: health info, FY'10-12
- 7 3 cube boxes: cash proofs/receipts/etc., 2006-07/2013
- 1 standard box: GIC starts, FY'20-?
- 8 standard boxes **(2 no lids)**: payroll, 2015-19
- 1 standard box: deposits, 2017-18
- 1 expansion pocket (approximately 3"): recreation "old" OBRA, 2018-19
- 1 odd *plastic bin*, 3 standard boxes **(1 "broken")**: *more* retiree files, A/H/P

& A-Z school

- 1 odd *wire basket*: social security/Medicare documentation, 2019-20

(*at least!*)

- 1 standard box (***no lid***): retirement board/payment detail, 2019-20
- 4 odd boxes, 1 standard (***no lids***): *more* warrants, FY'19
- 3 standard boxes, 1 2-drawer vertical cabinet: time sheets/W-2's, 2019
- 1 2-drawer vertical cabinet: AP, FY'17
- 1 standard box: weekly payroll sheets, 2017
- 1 standard box (***no lid***): W-2's/1095's, 2019-2021
- 1 standard box (***no lid***): W-2's, 2011; W-2's/1099R's/1095's, 2017-19
- 2 standard boxes: W-2's, 2006/2008-10/2013-16
- 1 standard box: ? (Medicaid fees, **2002**/grants, **1990's**/chapter 90, 1997-

2001, *at least*/scholarship fund, **1990's**, etc.!))

- 2 standard boxes: ?
- 1 standard box (***no lid***): *few* folders, 1099R non-contributions, 2007-08

Next stop, the *hallway* (***beneath a "tarp"!***) - Most of the boxes here are arranged on two more sections of *wire rack* shelving, with additional boxes just "stacked" one on top of the other right next to the shelving:

- 16 odd boxes (***no lids***), 3 standard: *more* warrants, FY'19-21
- 1 odd box: "specials"
- "stack" (approximately 28") of "*loose*" documents/hanging folders: Medicare

B reimbursements/warrants, FY'14/FY'16-17

- 1 odd box (***no lid***): time sheets, FY'20
- 1 standard box: payroll, 2020

- 2 standard boxes: ?
- 3 odd boxes (**1 no lid/1 "broken"**): deposits, some 2019
- 1 standard box: GIC paid invoices (including MTR's)
- 1 odd box, 1 standard: 1099's, 2007-09/+ various other years!
- 1 standard box: treasurer receipts, 2018-19
- 1 standard box: manual pay, FY'15 (*at least!*)
- 4 standard boxes (**1 no lid**): paid invoices (*some* insurance/cafeteria plan),

FY'15-19

- 1 standard box, 1 odd: GIC bills/paid invoices, FY'15/FY'18-20
- 4 standard boxes (**no lids/3 "broken"**): *more* retiree files, A-Z (**"hodge-podge"!**)
- 1 standard box: audit, FY'14
- 1 odd box (**no lid**): OBRA (inactives)/payroll deductions

(D) Treasurer/Collector's Office - Archival records are stored in *two* old vaults along with some current records. The entrances to the vaults are 78"high x 35"wide, and overall inner dimensions are approximately 128"wide x 159"deep for the *large* vault/84"wide x 56"deep for the *small* vault with ceiling heights, approximately 132". Boxes of records are either arranged on a variety of shelving or, **again** just "stacked" right on the floor, five to seven high - **blocking access to records on book rollers!**

large vault

- 3 sections wire shelving=84"high x 36"wide x 24"deep/4 tiers
- 4 sections *old* steel shelving with book rollers=99"high x 26"wide x

18"deep/16 tiers

- 1 section *old* steel shelving=52 ½"high x 36"wide x 18"deep, "stacked"
on top of 2-door cabinet, 40 ½"high x 36"wide x 32"deep

small vault

- 1 section *wooden* shelving=74"high x 49"wide x 12"deep/33 *narrow*
shelves for binder storage

Our inventory revealed the following records housed in the large vault (with some supplies "mixed in"):

- approximately 268 assorted size bound books (approximately 636"):
real estate valuations/commitments, 1980's-1990's; abatements, 1970's/2000-2001; MVE commitments, 1940's-1980's; water & general cash, 1960's- 1980's; personal property commitments, 1980's; receipts, 2000-03/2017-18, *etc.!*

- 1 *box cover*: tax bill affidavits of mailing, **2002-03 (at least!)**
- 1 *box cover*: W-4's, **back to 1990's-2004 (at least!)**
- 17 standard boxes, 16 check size: day work (payments/bills), FY'14-

FY'20

- 1 check size box: tickets, FY'21
- 6 standard boxes: MLC's, FY'16-19
- 5 standard boxes: monthly bank/"miscellaneous" records, FY'17-18
- 2 standard boxes: paid/dismissed tickets, 2011/2018
- 1 standard box: month end reports, FY'16
- 8 standard boxes: signed warrants, FY'18-20
- 22 standard boxes: turnovers, 2014-20
- 1 standard box: AP cash disbursement journals, 2017

- 13 standard boxes: day work (Munis) printouts/reports/sheets, 2014-2015/2017-18

- 1 standard box: Kelly & Ryan monthly reports
- 1 standard box: AP disbursements (unsigned) warrants, 2018
- 58 standard boxes (***“inaccessible”!***): ?
- 1 standard box: bankruptcy files
- 1 standard box: Kelly & Ryan weekly turn-ins, FY’14-18
- 1 standard box: Kelly & Ryan weekly turn-ins/MVX refunds, FY’16-17
- 1 standard box: payroll warrants, FY’17
- 2 standard boxes: bank statements/payroll & warrant files, 2019
- 1 standard box: AP warrants/check registers, FY’16
- 1 standard box: signed warrants/check registers, 2017
- 1 standard box: AP signed warrants, FY’16
- 2 standard boxes: special receipts, FY’15-16
- 1 standard box: refunds, 2014-16
- 2 standard boxes: payroll sheets, FY’18-19
- 2 standard boxes: overs/shorts, 2014-16
- 1 standard box: refunds/misapplied payments, FY’16-17
- 1 standard box: bank statements, FY’17
- 1 standard box: returned checks, 2013-17
- 1 standard box: unsigned warrants
- 1 standard box: tax commitments, FY’02
- 4 standard boxes: tax titles redeemed/takings, FY’11 & prior
- 4 standard boxes: *more* warrants, FY’15

- 4 standard boxes: payroll/payroll warrants, FY'14-16
- 4 check size boxes: parking tickets, 2015-16/2019-20
- 20 check size boxes: MVX lockbox, FY'14-19

Additional archival records are stored right in the department, just outside Melissa's office. These boxes are arranged on four sections of *wire rack* shelving, 108"high x 30-48"wide x 18"deep/7 tiers, and our inventory in this area revealed the following records:

- 12 standard boxes: signed warrants, FY'20-22
- 6 standard boxes: day work, CHS/lockbox, FY'20
- 12 standard boxes: turnovers, FY'20-21
- 2 standard boxes, 4 odd (***couldn't access!***): ?
- 32 check size boxes, 6 standard: day work, FY'21
- 2 standard boxes: parking, FY'21
- 2 standard boxes: MLC's, FY'20
- 1 standard box: payroll accounting sheets, FY'21
- 2 standard boxes: unsigned warrants, FY'21
- 1 standard box: refunds real estate/water & sewer, 2018-20
- 1 standard box: MVX refunds, 2014

Our inventory of records housed in the small vault revealed the following:

- approximately 96 computer printouts, 15x11/11x8 ½, *some* continuous form/lots of "*loose*" pages (approximately 387"): payroll registers/earnings, 1989/1997-99/2002; warrants, 2002/2009-2014; auto paid commitments, 1990's; withholding reports, 1990's/2002-03; quarterly wage reports, 1990's; commitment detail, 1983/1987/1991-93; CHS collector, 2020-21; MVX, 1997, etc.

- approximately 74 assorted 3-ring binders (approximately 246"): tax titles, FY'00-03/FY'07-16; Munis payroll, 2007-2011; lockbox, FY'17; MVX/boat, FY'17-2018; monthly retirement, 2004-2013; real estate/personal property, FY'96/FY'98/FY'03-06/FY'08/FY'10-11/FY'13; CHS/lockbox MVX, 2017-18; AP, 2006; MVX/excise/boat, 2019-20; Century Bank, 2019-2021; excise commitment sheets, 1997; delinquent taxes, 2004; BRC financials, 1984-2005, etc.

- 2 check size boxes, few "loose" W-2's, 1991/1996-99

- several small expansion wallets (approximately 16"): federal taxes, 1989-1997; school internal account, 2000-03; state withholding, 1982-1995; United Fund/fed tax quarterly forms, 1981-88

- "loose" folders/pockets (approximately 18"): fed tax retirement, 2000/2005; meals tax, 2005/2009-10; state withholding, 2000/2002-03/2009-10; fed withholding, 2007/2009-10; retirement checking account, 2003-04; *more* W-2's, 2004; retirement tax payments, 1997-98; fed tax payments, 2002-03

- approximately 36 assorted size bound books (approximately 75")/*some* metal post: accounting, 1970's-1980's; real estate/personal property commitments, 1970's-1981; cash, 1960's-2013; retirement, 1990-91

- 1 standard box (***no lid***): *more* tax title/takings records, back to 1970's-2013 (*at least!*); budget comparison reports, 2020

- 1 standard box (***no lid***): MVE commitment books, 2006-07

- 6 standard boxes, 1 large box/*several* large kraft envelopes (approximately 7"): ?

- "loose" papers (approximately 2"): city/investment statements, 2008-2010

- **5 "old" mag tapes: W-2's, 1980's-1990's**

- 3 kraft envelopes (approximately 10"): land court final disposition/fore-closure decrees; W-4's, **1983**
- few "loose" wire bound reports (approximately 3"): excise tax due/refund reports, 2016-18
- 5 standard boxes: tax title records/redemptions, 2000 & prior/2001-05
- 1 standard box ("**crushed**"): DPW design/expansion project (CO's, etc.), 2004-05
- 1 standard box: bond issues/bans/loan orders, 1972-1999
- 1 standard box: water & sewer commitments/letters/abatements, FY'08-FY'15
- 3 standard boxes: new police station
- 1 standard box: library/DPW improvements & various town buildings, 2001-02
- 1 standard box (**no lid**): MIIA insurance, 2003-2014
- 1 standard box: "**do not discard**"!?
- 1 standard box: "2020" (?)
- 1 standard box (**no lid**)/5 3-ring binders: MVX lockbox, 2016; MVX/boat, FY'14-16; Century, FY'18
- 1 standard box: loan orders/bonds, 2003-06
- 1 standard box: NESWC files

Lastly, the following archival boxes are arranged on top of the file cabinets right in Kathy's office:

- 2 standard boxes: bank statements/payroll & warrant weekly sheets, 2017-18

- 1 standard box: unsigned warrants
- 9 standard boxes: ?
- 1 standard box: assorted taxes (state withholding/fed/retirement/meals...), 2001-07/2014
- 2 standard boxes (***no lids***), 1 odd: annual budgets, 2010-18
- 1 standard box: Munis reports, 2014-15
- 1 standard box: *more* W-2's, 2000-02
- 1 standard box (***no lid***): payroll, FY'16
- 2 standard boxes: payroll warrant accounting sheets, *some* FY'17
- 1 standard box: employment tax refund
- 1 standard box (***no lid***): bank statements, FY'16
- 1 standard box (***no lid***), "stack" (approximately 10"): bankruptcy notices

(E) Retirement Department – Archival records are stored in a small room adjoining the office. The entrance is approximately 43 ½"wide, and the inner dimensions are approximately 148"wide x 77"deep/ceiling height, "huge"! Boxes and "piles" of folders/papers are arranged on three "old" sections of steel shelving, 98"high x 13"deep, one section 30"wide/two sections 42"wide. There are also several vertical file cabinets here with boxes "stacked" right on top!

Our inventory revealed the following records:

- 3 24 inch boxes: retirement system Core fixed/INTL RFP's, 2014
- 2 24 inch boxes: medical records
- 1 4-drawer unit: 1 drawer=inactive member files/"miscellaneous" pending (vested members deferring retirement/creditable service requests denials, 2002-

2017/transfer in requests-no membership record, 2010-2022/members “miscellaneous” correspondence, **1998-2016**/creditable service completed/non-membership service, 1999-2021/inactive members/no enrollment forms completed, A-Z); 3 drawers=closed files, A-Z

- approximately 12 3-ring binders (approximately 40”): pension payroll reports, 2003/PAF’s, 1998-2002/annual PERAC schedules, 2000-05, etc.

- approximately 32 computer printout binders, 11/8 ½ & 15x11 (approximately 90”): monthly cash books/annual reports, 2008-13; journals/gl’s, 2007; bank composite custody statements, 2010; retiree “miscellaneous” reports, 1991-2010; member reports, 1998-2005; pension payroll, 2000-09; retiree appropriations, 1987; treasurer warrants, 2010; payroll contributions, 1990/1995, etc.

- 2 standard boxes: Watertown hi-yield

- 3 24 inch boxes (**1 “broken”/2 no lids**), 2 standard (**no lids**): retiree refunds/transfers files, A-Z, 2003-2015 (*at least!*)

- 3 standard boxes: deceased members, A-Z, 2017-2020

- 2 standard boxes: year end files (“to be checked”), **1997-2021**

- “piles” (approximately 176”) of assorted “loose” reports/folders/papers: Fisher Investments, 2012; value added real estate/Core Plus RFP/hi-yield fixed income RFP’s, 2017; annuity savings records, 1999/2002-08 (*at least!*); pension/payroll warrants, 2001/2005-09/2011-13 (*at least!*); annual statement balance sheets/journal entries, 2003; 1040 recons, 2004; annual statement worksheets, 2004/2014; supplementary schedules, 2007-08; allowance pay cards, **1990’s-2008 (at least!)**; cash books/trial balance, 2001; journal entries, 2004-06; recons, 2000; gl’s, **2001-06 (at least!)**; annual reports, 1987-88; housing redevelopment

correspondence, **1970's-1980's**; retirement board annual statements, 2002-07 (*at least!*); appropriations, 1980's; *more* treasurer warrants, **1999-2000**, etc.!

- 1 standard box: assorted contracts/info
- 1 24 inch box (**"broken"**): investment confirms, 2003/salary info (various departments)/school job descriptions/2 % change sheets
- 1 odd box, 3 large bound books (**couldn't access**): ?
- 1 odd box: hearing decision files
- "stack" (approximately 5") of injury reports, **back to 1998-2002 (at least!)**/

appointment confirmation letters, **1990's**

- 3 odd boxes (**1 "broken"**): 9 ½x6 ½ employment history cards, **back to early 1900's!**

- 1 standard box: 1099R info, 1997-?
- 3 standard boxes: retirement small cap equity, 2017
- 2 standard boxes: value added real restate RFP, 2018
- 1 standard box: international small cap
- 1 standard box: global fixed income, 2017
- 1 24 inch box: large cap Core RFP's, 2014
- 1 24 inch box: international equity RFP's, 2014
- 1 4-drawer unit: 3 drawers=A-Z "general/miscellaneous" files, **2002-2020 (at least!)**; 1 drawer=RFP auditing, **2006-08**/fixed income & large cap equity files, 2014/Core equity, 2008/retirement board reports, 2006-08/*more* assorted RFP files, **back to 2000 (at least!)**

- 1 4-drawer unit: 1 drawer=group insurance commission payments, 2011/closed attorney AP collection files, **back to 1990's**/AP, 2012-13; 1 drawer= few

non-contributory retiree 1099 files, **back to 1990's**; 1 drawer=indemnification files/employees; 1 drawer="stack" of *more* investment info, **back to 2003 (at least!)**

- 1 4-drawer unit: 1 drawer=*more* AP, 2016-2022; 1 drawer=assorted chapter files (Act of 1997, etc.)/PERAC investment info, **back to 1990's**; 1 drawer=correspondence, **back to early 1900's**/NCPERS info, **back to 1990's, etc.**; 1 drawer="stacks" of *more* investment reports, **back to 2008 (at least!)**

- 1 4-drawer unit (2 "empty" drawers): 1 drawer=*more* assorted chapter files/annual statements, 2008-2012/assorted insurance files/lots of "miscellaneous" correspondence, **back to 2002 (at least!)**; 1 drawer=*more* A-Z "general/miscellaneous" files, **back to 1990's!**

(F) **Third Floor Vault** - The entrance to this Herring-Hall-Marvin vault is 78"high x 30" wide, and inner dimensions are approximately 160"wide x 128"deep/ceiling height, about 83". Archival records are arranged on 12 sections of assorted steel shelving and some "old" wooden shelving:

- 10 sections of shelving with steel posts/*wooden* tiers: 76"high x 36"wide x 18"deep/6 tiers
- 2 sections "old" steel shelving=48"high x 24"wide x 18"deep/3 tiers
- "built-in" unit, 24 *wooden cubbies* of various sizes=83"high x 78"wide x 29"deep

More boxes are just "stacked" on the floor, **blocking aisles and access to records** on the shelving!

Our inventory here revealed the following records:

- 33 standard boxes, 1 odd: legal files (lots K&P)

- 1 standard box: town manager #7 (?) (facility assessment studies, **2004-2009**/recount file, 2008/attendance reports, 2016-20)
- 1 24 inch box/assessor: budgets, FY'16-FY'18
- 1 standard box, 3 24 inch, 1 3 cube, 2 odd (**no lid**): ?
- 1 standard box: housing files (consolidated plans/Nichols Ave. environmental reports/1st time homebuyer set-ups)
- 1 standard box: Coolidge School project files, 2003-07
- 1 standard box (**"broken" lid**): K&P legal bills, 2015-20
- 1 24 inch box (**"broken" lid**): housing info (paid off 1st time homebuyer loans/"old" capers, 2009 & prior/WHP documents, 2000 & prior)
- 1 24 inch box/CD&P: grants, 2006/2009; inclusionary zoning bylaw-background info; senior center; home consortium mutual coop agreements, 2002-03; analysis of impediments, 2008; Archstone & Watertown Sq. Apartments/regulatory documents
- 2 bound books (approximately 3"): debt records, early 1900's; Coolidge School grades, **late 1800's!**
- 1 check size drawer: 6x4 sewer index cards
- 1 check size drawer: 6x4 civil service personnel cards, "active"/terminated (employment/salary history), **back to early 1900's**
- 4 odd boxes (**3 no lids/1 "broken"**): treasurer receipts, **1986-87/1992-94**
- 8 24 inch boxes (**1 "crushed"**), 1 standard: payroll/payroll earnings, 1991-1994
- 6 standard boxes, 1 3 cube/town manager: letters/memos, **2003/2006-08**
- 1 standard box/town manager: H-N general files

- 5 wire bound reports, 2 “loose” hanging folders (approximately 10”): boards/committees press releases, lists of members & budgets, 2002-08/arena specs, 1971/stormwater management report, 1974

- 1 standard box: Cable Access legal services, 2002-04 (*at least!*)

- 1 3 cube box: fire – MWRA, 2002

- 1 standard box (***no lid***): town manager staff meetings, **1999-2006**/police correspondence, **2007**/town council minutes, resolutions & orders, 2007/school committee, 2006, etc.

- 2 standard boxes, 1 3 cube: *more* boards & committees (press releases/members/board of assessor/board of appeals)

- 1 standard box: Patterson case documents, 1992

- 1 odd box: state of the town (luncheons...), **2008-10 (*at least!*)**

- 1 odd box/town manager: town council meetings, 2010-12

- 1 odd box: Harvard MOU (tax agreement), 2002

- 1 24 inch box: I & E’s (income/expenses), **1998-2000**

- 1 3 cube/building: Coolidge School, 2003

- 1 odd box: “old” VCR tapes

- 1 odd box (***“broken”***)/only 3 hanging folders (approximately 5”): Arsenal

Dev. Corp., 2001

- 1 standard box: E. Jr. HS/Brigham House/Connector

- 1 odd box: tree inventory, 1978

- approximately 41 rolled maps/plans

- 1 standard box: town council packets, 2007

- approximately 9 assorted size bound books (approximately 25”): abatement

certificates, back to early 1900's-1990's (*at least!*)

- approximately 17 computer printouts, 15x11 (approximately 43"): *some* tree work (**hard to access!**); payroll registers, 1970's-1990's; revaluations, FY'89; general government warrants, 1993-94; monthly pension reports, 1970's

- 2 standard boxes, 3 odd/town manager: "miscellaneous" files/pending, *some* 2003 (?)

- 1 standard box/town manager: NESWC (solid waste committee), 2002-04
- 1 standard box: MBTA police, **1995**
- 1 odd box: budget books/presentation & CIP presentation, 2005-06
- 1 odd box (**no lid**): folded maps
- 2 standard boxes: labor distribution/payroll deduction reports, 1993
- **3 "old" mag tapes!**
- approximately 14 bound books (approximately 23"): building/plumbing inspector records, 1892-1908; deferred assessment revenue, early 1900's; bills receivable, **1970's**; abatements, 1980s; trial balance, **1930's-1970's**; payroll (?)

- 1 standard box: town manager W-2's, 2004
- 1 standard box/town manager : AT&T/Verizon, **FY'04**
- 5 24 inch boxes: planning board, 1990-2000 (?)
- 4 24 inch boxes: planning board budgets, **FY'93-FY'00**
- 1 24 inch box/planning: Fillipello & parks
- 2 standard boxes/planning: fire stations (#1 - #3)
- 1 standard box/planning: "miscellaneous" (?)
- 1 24 inch box/community development: discharge or forgiven "HI" loans
- 1 standard box: legal services vouchers (K&P), **FY'05-09/FY'13**; council

chamber ceiling, **FY'05**

- 1 odd box: capital improvement, FY'07-FY'11/pre-budget overview, FY'07
(*at least!*)/ethics seminar

- 1 24 inch box: "HI" loans (project paperwork/discharges)
- 1 3 cube box: gl analysis, **FY'94 (*at least!*)**
- 2 odd boxes/community development: block grant paperwork, 2003-05
- 1 4-drawer vertical cabinet: 2 drawers=Arsenal Park assorted files (permits/
time sheets/schedule of payments/correspondence field inspections, *etc.*), **back to**
1970's-1990's ; 1 drawer=assorted "old" video tapes, **1990's**; 1 drawer=assorted
reports (GSA/environmental/water quality, *etc.*!), **1990's**

- 1 3 cube box: "ledgers" (?)
- 2 standard boxes: assessor deeds & probates
- 1 standard box/town manager: A-Per general files, 2007
- 1 standard box (***no lid***)/town manager: **"hodgepodge"!?**
- 4 standard boxes/town manager: box #3,#4,#5,#6 (?)/contracts, 2004-06
- 1 standard box (***"broken"***)/town manager: A-K general files, 2008
- 1 odd box: Harvard warrants/bills, **2001-02**; WCATV, **2005-2010**
- 1 24 inch box/town manager: I-cubed public safety study, 2018-20
- 4 24 inch boxes (**1 "*broken*" lid**)/town manager: box #1,#2,#3,#4 (?)
- 1 24 inch box: budget books
- 1 odd box: Comcast
- 1 standard box (***no lid***)/town manager: police station, 2012 (*at least!*)
- 1 24 inch box (***"broken"*** lid)/town manager: organizational study, 2014
- 2 standard boxes: *more* town counsel packets, 2008-09

- 1 standard box: "miscellaneous items", 2007 (?)
- 1 standard box: water/sewer rates
- 2 standard boxes/town manager: memos, **2008-09**
- 3 3 cube boxes/veterans: department files (?)/CD's & tapes/binders &

information

- 2 3 cube boxes ("**broken**")/town manager: *some* Pur-W general files,

2002

- 1 standard box: Melanson & health
- 1 standard box (**no lid**)/town manager: bills, **FY'08-09**
- 1 standard box/town manager: legal files
- 1 standard box/town manager: DPW address changes/faxes, 2000
- 3 3 cube boxes/town manager: *some* B-Fax general files, 2002
- 1 odd box/town manager: message books, **2004-05 (at least!)**/warrants,

2000-03

- 1 standard box ("**broken**")/town manager: clerk – DPW, 2000
- 1 odd box/town manager: "speeches", **back to 1990's!**
- 1 odd box: Matrix
- 1 standard box: community foundation memos, **2009**/Watertown Sq.

community development, 2003/school contracts, 2000-07

- 2 standard boxes: budgets, **FY'96-FY'10**
- 1 odd box/town manager: Army Corp. of Engineers, NE District, 2002
- 1 odd box/town manager: legal services RFP, **2001**

And, just outside this vault, there is a large wooden bin holding approximately 65 *more* assorted rolled maps/plans!

(G) Community Development & Planning (3rd Floor Storage Room

("old" bathroom!) – Many years ago, this bathroom was "converted" to *much* needed storage space, and the dimensions are approximately 104"wide x 95"deep/ceiling height, about 99". Records are arranged on four sections of sturdy steel shelving, 17*5"high x 36"wide x 24"deep/6 tiers.

Our inventory revealed the following records:

- 2 odd boxes: ZBA minutes, 1964-1994
- 6 odd boxes (**1 "broken"/no lids**), 1 24 inch (**no lid**): BOA decisions, #1 - #2915
- 2 standard boxes: 555 Pleasant St. (?)
- 2 large expansion wallets (approximately 6"): 2 Rosary Dr. litigation
- 1 standard box (**no lid**): assorted property slides
- 2 standard boxes/75 Stanley Ave. (Cohen/Beacon Residential): 40B special permit
- 2 standard boxes: Arts Center
- 2 24 inch boxes, 1 small: ZBA meeting tapes, 1979-1999/2005-07
- 3 standard boxes/57 Stanley Ave.: litigation/40B/special permit
- 1 odd box: ?
- approximately 800-1,000 (**at least!**) assorted size rolled maps/plans (2 sections shelving), 1 24 inch box, 2 "huge" *plastic bins*, 9 *large* bound books: ID tags are used to identify each plan, 1984-87/*few* 2001-04
- 1 3 cube box/7 8 ½x11 computer printouts: ZBA minutes/agendas (+ tapes), 1994-2004
- 2 standard boxes: WADC planning files (Arsenal)

- 1 odd *plastic crate*, 1 odd box (***no lid***), 2 standard (***1 no lid***): ? (***not accessible!***)

- “stack” (approximately 12”), 6 odd boxes: building permit supplements, 1994-2002/2006 (*at least!*)

- 2 bound books (approximately 3”): general register of voters, early 1900’s

A few additional archival records are located outside the 3rd floor vault and the storage room, in the *hallway* where the planning file cabinets are located. Our inventory here revealed the following records:

- 1 4-drawer vertical file cabinet (1 drawer=supplies/2 “empty” drawers): driveway approvals, 1990-2005; approximately 12 ½”

- 1 4-drawer vertical file cabinet (1 “empty” drawer): sign permits issued, 1988-2014; approximately 51”

AND, the following records are simply “piled” *on top* of the planning cabinets:

- 3 3-ring binders (approximately 7”): Arsenal traffic study, 2016

- **“hodgepodge”** of assorted size maps/plans: 18 *large* flat plans/7 *large* rolled plans/“bulky” folded plans, approximately 10”/plus, 10 *more* plans *right on the floor!*

- 3 24 inch boxes, 1 standard: vouchers, 2013-14

- 13 standard boxes (*some* no lids): warrants, 2013-14

- 2 standard boxes (**“broken”**): health bills, **FY’07/FY’09**

- 1 standard box: BCBS

Last stop here, archival records are stored in *Steve’s office/conference room*, *many* of which are housed in glass front bookcases arranged along one wall. Our inventory throughout this area revealed the following:

- approximately 160 assorted rolled maps/plans: 3 *wooden bins*/some arranged *on top* of glass bookcases (lots of additional rolled plans can be found right in Steve's office...)

- 14 bound books (approximately 21"): planning board minutes, 1979-2008
- approximately 75 assorted 3-ring binders (approximately 168")/lots of wire bound reports/few "*loose*" hanging folders (approximately 12"): Saltonstall Park/Arsenal Park, back to 1980's (*at least!*); inventory of buildings, 1999; historical buildings; lots of environmental reports/comprehensive site assessments/growth management plan/inspection reports/soil removal/Army Materials Tech Lab/site assessment/etc., **back to 1990's (at least!)**

- 14 small boxes, "stacks" (approximately 48") of planning board meeting tapes, back to 1980's - 2005 (*at least!*)

- lots of annual town reports (approximately 25"), back to 1970's (*at least!*)
- 1 odd box/12 *more* 3-ring binders: water authority minutes, 1966-1980's
- "pile" (approximately 12") of assorted reports/manuals, **back to 1980's**

(H) FIRE DEPARTMENT - The majority of the fire department archival records is stored in an *attic*, which is accessed by a "drop-down" stairway in the second floor hallway. Shelving is not installed, and "piles" of boxes are simply arranged *right on the floor*.

Our inventory here revealed the following records:

- 17 2-drawer 6x4 card files (2 *empty* drawers/1 "jammed" ?): 2 drawers=leave of absence requests, A-Z, **back to 1960's-1970's**; 9 drawers=oil storage tanks, A-Z by name; 10 drawers=oil storage tanks, A-Z by street; 3 drawers=fire

records, A-Z by street, *back to 1912 (at least!)*; 3 drawers=fire records, A-Z; 1 drawer=inspection reports, 1963-65; 2 drawers=fire marshal reports, 1960-1970's; 1 drawer=smoke detector notifications, A-Z by street, 1980's

- 3 24 inch boxes (**1 "broken" lid**), 4 3 cube (**"broken" lids**): basic incident reports, 1976-1980/1990-92

- 6 24 inch boxes: incident reports, 1981-1990

- 7 24 inch boxes (**2 "broken" lids**), 5 standard, 2 3 cube: ambulance run reports, **1978-1982/1986-2002/2004-07/2010-11**

- 1 standard box: EMS records, **1996-98**

- 1 standard box: treasurer reports, 1983-2001/correspondence, **1991-2000**/fire watch details, **1997-2000**/smoke detector inspections, 2002

- 1 24 inch box, 2 standard (**1 "broken" lid**): daily shift reports, **1991-94/2009-2014**

- 1 24 inch box (**"broken" lid**): *more* basic incident reports, **1993**/past permits, 1990-96

- 1 24 inch box: cash receipts, **1983-1995**

- 1 24 inch box (**"broken"**): "old" training manuals, **back to 1995**

- 1 standard box: "old" computer books/programs, **back to 1980's (at least!)**

- 1 odd box (**"broken" lid**): ? (attendance records, **1980s-1990**/emergency planning meeting records, **1990**/Raytheon title III regs, 1990's, *etc.*)

- 1 small box: cash receipt books, **1990's-2000**

- 2 standard boxes (**no lids**): underground storage tanks, A-Z by street (applications/permits/*etc.*)

- 1 standard box (***no lid***): boiler & tank permits/oil burner installs, A-Z by street, 2001; tank removals, 1998-2001; oil burner permits, 1984-87/1999-2000; tank removals/permits, 1997; removals & transports, 2000; storage tank reporting forms, 1996; removals/installs, 1988-1994; recovery permits/tank modifications, 1993

- 1 standard box (***“crushed”***): burned/recovered MV reports, 1990's-2000; incident reports, 1993-96; alarm inspection reports, 2000-01; expired policies, **1990's/2000-01**; MV fires disposition, 1980's-1990's; sprinkler permits, 1977-78; “miscellaneous” permits, 1998-99; *few* more ambulance run reports, **1997-98**

- 1 “huge” bound book: town maps

- 1 standard box: *more* ambulance run reports/claims requests, **2003**

- 1 standard box (***“broken”***): tank truck inspections, 1997/2000-01; billing info/Raytheon details/claims file/building 311 lava storm, 2001; inactive permits, 1999-2006 (*at least!*); flame resistance file, back to 1990's; fireworks permit, 1994; dumpster permits, 1997-98; quarterly inspection reports/complaint forms, 1990's; fire investigation, 1996-97

- 1 standard box: legal request for records, 2014-16

- 1 24 inch box: “old” literature & publications, ***back to 1950's (at least!)***

- 1 odd box (***“taped”***): chief's office renovations

- 1 odd box: chief's office/Comstar ambulance billings, etc., **2004-06**

(at least!)

- 1 standard box: EMS, patient refusals, 2011-15

- 1 standard box: EMS fare sheets, **2013-16**

- approximately 6 rolled maps/plans

- 1 3 cube box: payroll registers, 1993-98
- 1 3 cube box ("**broken**"): daily reports, all stations, 1995-98
- 1 standard box: Comstar, 1991-92/proposed budget books, **FY'94-97/**

station 3 floor repair project

- 1 standard box: station renovations, 1989-1991/CEM plans, 1991-92
- 1 24 inch box: uniform account (**paid invoices**), **1994-98**
- 2 odd boxes: "old" budget stuff, **FY'02-14**; CIP, FY'98-99/FY'01; quarterly reports, 2010-11; AARA documents, FY'11, etc.
- 1 odd box: "old" files, ? (DPW smoke testing, 2002/faxes, **2004-05**/uniform billings, **FY'03**/school fire drills, **2001**/MIIA insurance, **2008**/NEARC meetings, 2008/FEMA, 2011, etc.)
- 1 2-drawer vertical cabinet (1 "empty" drawer)/11 assorted bound, metal post ledger books (approximately 14"): call logs, 1970/1980's-1993; accounting, 1911-1920's/1960's-1980's
- 1 6x4 metal drawer: civil defense (supplies/inventory...), **1960's-1980's**
- 1 24 inch box (**no lid**): more "**hodgepodge**" from chief's office (budgets, **back to 1970's...etc.!**)
- 1 3 cube box (**no lid**)/"**hodgepodge**": insurance policies, **back to 1970's - 1980's**; FEMA expenses/civil defense assorted files, **1980's-1990's**; oath/application forms, 1950's-1970's; applications auxiliary fund, **1974-75**; centrifugal pump certification sheets, **1954**; fallout shelter supplies/loss reports, **1970's**; fallout shelter surveys/maps, etc.
- 1 24 inch box (**no lid**)/"**hodgepodge**": 8 more bound books (approximately 11")/call logs, 1970's-1980's; complaints/follow-up, **1983**; correspond-

ence, **1970's/1983-84**; deputy chief vacations, **1966, etc.!**

- 1 3 cube box (**no lid**)/3-ring binders: civil defense deputy director hand-books, 1982/*more* maps...

- 1 3 cube box (**no lid**): approximately 15 *more* rolled plans/*more* "old" chief's files (surplus property files, **1970's-1980's**/warning system, **1960's-1970's**, *etc.*/supplies "mixed in" ...)

- 1 3 cube box (**no lid**): *more* civil defense binders/literature

- 1 3 cube box ("**broken**"): 9 *more* bound books (approximately 12")=call logs, 1970's-1980's (*at least!*)/cash books, 1983-87; *several* folders=elderly housing plans, 1982/flammable storage licenses, 1960's-1970's/fire lane ordinance, 1984/underground storage applications, 1980, *etc.*

- **2 odd boxes, 1 24 inch: adding machine tapes, 1997-2003!**

- 1 standard box: suppression reports/fire alarm reports, etc., 2012-18

- 2 standard boxes: *more* suppression reports/"miscellaneous" incidents by address, 2003-2013 (*at least!*)

- 1 standard box: fire prevention "miscellaneous" ?

- 1 standard box: fire prevention receipt books, 2014-20 (*at least!*)

- 1 standard box (**no lid**): *more* flammable storage licenses/by street, back to 1950's (*at least!*)

- 1 standard box: "old" vehicles/stations/incidents

- 2 standard boxes ("**broken**"): budget worksheets/transfer requests/etc.,

FY'88-FY'02

- 1 standard box/*more* "old" chief's office: LEPC meetings, 1991-92/

Worcester fire, 1999-2000/website purchase orders, 2003/assorted storm files,

back to 1990-2003/town EAP, 2001, *etc.*

- 1 standard box (**"broken"**)/*more* "old" chief's files: subject/"miscellaneous" files, **back to 1990's-2003 (at least!)**

- 1 standard box: Safe program, 1995-99/transfers, **1990-99/civil defense, 1990-97**

- 4 standard boxes: daily reports, 1989-1990/1999-2004 (*at least!*)

- 1 standard box: LEPC data/tier II annual reports/past CEM plans/hazardous materials annex, 1987-2001 (**"destroy 2007"!**)

- 1 standard box (**"broken" lid**): "old" CI files (emergency management), 1990's-2003 (*at least!*)

- 1 standard box: Friday warrants, 1988-present

- 1 standard box: *more* "chief's office" files (**couldn't access!**)

- 1 standard box: job bids/insurance claims/crashes, **2000-2011**

- 2 3 cube boxes (**1 "broken" lid/1 no lid**): incident run 6x4 cards, 1989-1992

- 1 3 cube box (**"broken"**): *more* leave request 6x4 cards/forms, 1970's-1990's (*at least!*)

- 1 3 cube box (**no lid**)/"hodgepodge": correspondence, **1990**; licensing board, 1989-1990 (applications/etc.); *more* basic incident reports, 1977/few 1980's

- 1 3 cube box: payroll/time sheets, **1990-98**

- 1 24 inch box: "old" ConEd/DEFIB purchase orders, 2001-2011; assorted attendance rosters/training, **2008-11 (at least!)**

- 1 3 cube box: assorted albums/newscippings

- 1 3 cube box ("**broken**"): "miscellaneous" files, **back to 1970's**

(at least!)

- 1 3 cube box: bank statements/few cancelled checks, **1990's**
- 1 2-drawer vertical cabinet (1 "empty" drawer): Relief Association,

1950's-1960's

Small Closet 2nd Floor Hallway – A few archival records are stored in three assorted 4-drawer vertical file cabinets:

- 1 unit: 1 drawer=schedule of bills payable (purchase orders/invoices), 2015-18; 1 drawer=Friday warrants, 2016-20; 2 drawers=daily reports, **1982-88**
- 1 unit (locked): 3 drawers=EMS; 1 drawer=ambulance run/request reports, 2008-09
- 1 unit: 1 drawer=2 3-ring training binders (FEMA), **2004-05**/ICS exam info & emails, **2006**/assorted training info & forms, **2000-06**; 1 drawer=fire contracts, back to 1970's-1980's/overtime pay sheets, private detail lists, & staff worksheets, 2021-22/staff exemption lists, 2016-2021/7 bound books (approximately 8")=OT & incidents, 1989-1990/OT, 1985-89 & 1991-2003; 1 drawer=few lannetta "old" files (student guide/quotes, few proposals, work orders...), **1990's-2005 (at least!)**; 1 drawer/"**hodgepodge**": 1 3-ring binder=circuit ready, 1996/lots of literature!

Small Closet 1st Floor Hallway

- 1 4-drawer vertical cabinet: 1 drawer=*more* permits (candles/cut & weld/ alarm system/fire suppressor/propane/sprinklers/tank removals*/burner installs/ "miscellaneous"), 2014/treasurer reports-master box payments*-fire detail payments, 2014/3 small books=receipts, 2004-2014; 1 drawer=*more* permits, same as above (fire watch detail*/hood & duct system, 2011-13)/annual reports, 2010-

2013/treasurer report, 2011/incident report requests, incomplete claim requests, 2008-12/fire watch detail, 2012-13; 1 drawer=same as above drawers, 2008-10/annual reports, 1978-2007/"old" lockbox order forms/asbestos abatements, 2001-2008/tent permits, 2006; 1 drawer=same as * above, 2005/burner inspections, 2004-2005/payments to treasurer, **2002-04**/fire marshall memos, **2000-04**/annual permits expired, 2002/*more* annual reports, 2004/burner installs & tank removals, 2002...

- 1 large bound book (***couldn't access***): ?
- 1 standard box: hood inspections, 2009/sprinkler test & inspections, 2009
- 2011/fire alarm records, 2010-11/asbestos (Arsenal St.), 2004/truck inspections, 2006/170 Galen St. inspection/fire alarm test & inspection, 2011
- 2 standard boxes: fire prevention (?)
- 2 standard boxes: "old" quarterly reports (1 Acton St. – 51 Spring St.)
- approximately 22 *more* assorted rolled plans

(I) **DPW** – The *majority* of the archival records is stored in the basement "mechanical" room with most of the boxes/bins/etc. arranged on 25 sections of "flimsy" wire rack shelving, 72"-74 ½"high x 47 ½"-48"wide x 18"deep. Additional records are stored in five assorted file cabinets.

The entrance as you "step up" into the room is approximately 81 ¼"high x 42 ¼"wide, and the *usable* inner dimensions are approximately 220"wide x 345" deep/ceiling height, ranges from 82"-84" (*lots* of overhead pipes).

Our inventory throughout this area revealed the following records:

- 1 standard box: work orders, 2020

- 14 standard boxes (**1 “crushed”**), 2 3 cube, 2 24 inch, 6 odd (**1 “broken”/**

3 “broken” lids): payroll (pay reports/attendance/time sheets), FY’05-FY’21

- 1 standard box: FEMA
- 1 standard box: Eversource, 2020
- 1 standard box, 1 odd: deposits, FY’11/FY’20
- 9 24 inch boxes, 13 standard (**1 “broken” lid**), 3 3 cube (boxes/bins):

AP, **FY’07-FY’19**

- 3 standard boxes: time cards, **1999-2003/2015-18 (at least!)**
- 1 standard box: attendance, 2014-19
- 3 standard boxes: completed work orders, FY’10-11/FY’15
- 1 standard box: NStar paid bills, **FY’12**
- 1 odd box, 3 standard, 1 3 cube *plastic bin*: cemetery receipts, **back to**

early 1900’s-FY’17

- 2 3 cube boxes: water billing ledgers, 2004-10/2014-15
- 1 locked Sentry safe: ?
- 1 odd box: Brite Lites, **2003-09**
- 1 “overflowing” standard box (**no lid**), 2 3 cube: water billing registers,

FY’06/FY’10-12 (*at least!*)

- 1 odd box/water department: irrigation system applications, 2010-15 (*at least!*)/abatements, FY’15

- 1 3 cube *plastic bin*/"**hodgepodge**": cemetery burial permits, 1988-89/1997-2007; pest control 3-ring logbook, 2008-16 (*at least!*); utilities permit 3-ring logbook, 2007-13; *more* cemetery receipts, **1990’s-2002 (at least!)**; initial burials, 2002-2003; cemetery certified mail payment receipts, **2001-03**

- 1 standard box (**“crushed” lid**): composting receipts to treasurer, **FY’97-FY’01**; budgets, **FY’01/FY’04-05**; payments to treasurer, **2002-05**; NStar statements, **2001 (at least!)**; transfer requests, **1995-2001**; purchase orders, **2005**, etc.!

- 1 standard box: daily call in sheets, **2001-03**/newsbox payments & violations, **1999-2002**

- 1 odd box: **“Jenny’s emails, 2014-16”!**

- 1 odd box: work orders (service tracking forms), 2014-15

- 2 3-ring binders (approximately 6”): “old” manuals

- 2 24 inch boxes: UB ledgers (water/sewer billings), FY’16-17

- 1 odd box: ? (weather reports, **2020-21, at least!**)

- 1 odd box (**“crushed”**): phone message books, **2003-05 (at least!)**/more “old” weather reports, **2004-05**

- 1 odd box (**“crushed”**): work order forms, **1999-2000 (at least!)**/Bacher maintenance catch basin cleaning, **1999**/truck 60 daily logs, 2002

- 5 “loose” bound books (approximately 5”): attendance records highway department, **1987-1992/DPW, 1993-94**town, **1995-96**

- 1 2-door storage cabinet, 36”x18”: 26 *more* bound books/*few* small 3-ring binders (approximately 34”)=*daily diaries*, 1982/1988-2000; 6 15x11 computer printouts/”*piles*” of “loose” sheets (approximately 20”)=*labor distribution*, **FY’99**/payroll registers, FY’98-99/FY’04

- “stack” (approximately 5”) of kraft envelopes: *more* “old” weather reports/*payroll/faxes/attendance/vacation requests*, **1993-94**

- 1 3 cube *plastic bin*: work orders (weights & measures/truck 60/water

quality/property & buildings/parks/highway/cemetery, etc.), **2009**

- 1 standard box (**no lid**): budgets, **FY'10-12**; assorted deposits (weights & measures/sewer/trash/white goods/compost bins/property damage/backflow)/OT reimbursements, etc., FY'15; work order requests/Wilmington wiring, FY'11, *etc.*

- 1 3 cube *plastic bin*: budgets, **FY'03/FY'05/FY'10**; MS4 permit info; traffic rules & ordinances, 1991; "old" sewer specs; sewage management planning, 2000; DPW organization study

- 1 3 cube *plastic bin*: assorted deposits (weights & measures/property damage/white goods/recycle/water tests/compost bins/street permits, *etc.*), **FY'08-FY'10**

- 1 24 inch box ("**broken**")/"**hodgepodge**": department correspondence, **1980's-1990's**; Watertown St. reconstruction, **1990's**; tonnage sheets for white goods, FY'00

- 1 3 cube box ("**broken**"): schedule of payments to treasurer, **1996-97**; correspondence (Boston Gas/Boston Edison/Merit gas station/highway funding/Pleasant St./federal aid project, *etc.*)/incident reports, **1990's**

- 1 3 cube *plastic bin*: billing registers, **FY'08**; datapak reads, **FY'04-08**

- 1 4-drawer 36"wide lateral cabinet (1 "empty" drawer): job descriptions/resumes, **back to 1990's** (approximately 18"); attendance records/payroll totals/attendance sheets, **1999-2000** (approximately 34")

- 1 4-drawer 36"wide lateral cabinet: weekly payroll totals/attendance sheets, **2001-05** (approximately 91"); 15x11 payroll register sheets, 2001-03/labor distribution, 2001 (approximately 31"); *few* "miscellaneous" files, retro pay/rates/

OT paid by others...2001 (approximately 2")

- 1 odd box: 2-3 family tier changes, 6/08
- 4 3 cube boxes: health department emergency management (manuals)
- 1 24 inch box, 1 standard: NStar/Allied Waste AP, FY'13/FY'18
- 1 24 inch box: "old" receipt books, **2012-2020**
- 1 odd box: water quality monitoring of outfalls, 2011-14/MS4 annual reports, 2012-14/MWRA, 2011-14
- 2 3 cube boxes: water & sewer ledgers, FY'18
- 1 4-drawer 36" lateral cabinet, 4 3 cube *plastic bins*: paid invoices, A-Z,

1995-2007

- 1 3 cube box: fire department repairs/hydrant flushing, **1998-2012**
- 1 standard box: sewage house line back-up charge slips, 2011-18/T60 daily logs, 2015-18/OT back-up slips, 2005-2017
- 1 standard box (**no lid**)/water & sewer: payroll/attendance/vacation, 2017
- 2020; roll call sheets/street opening permits, 2019
- 1 standard box: street opening permits, 2020/T60 daily logs, 2019-20
- 1 standard box: "EP at home" (flyers/info sheets...)
- 1 standard box (**water damage!**): **"Sue White's bookcase"!** ?
- 1 standard box: "Lori" ? (assorted wire bound reports – sewer contract, 2011/stormwater management study, 1998/environmental, 2008/budget, 2015-2016/Waltham St. Apartments NOI, 2011/inflo & infiltration analysis, 2000, *etc.*)
- 1 3 cube box: water billing registers, 2007/worksheets for billing, **2004-2006** test run cycles
- 1 standard box: ? (3-ring binders=traffic signal inventory, 2006/OM muni-

cipal services, 2004, etc.)

- 1 standard box: *more* "Lori" ? (3-ring binders=Pleasant St. specs, 2007; manhole inspections, 1997; inflow & infiltration analysis *again*/King St. & Chapman St. inspection report, 2000, etc.)

- 3 3 cube *plastic bins*: water cycle billing reports, 2005; daily route report/mobile missed report/quarterly test runs, 2004-05

- 1 3 cube box: water billing change orders, 2017-20

- 1 3 cube box: final charge proof register, 2020-21

- 1 3 cube box: **"Mary's desk miscellaneous"!?**

- 1 odd box (**"broken" lid**): Mass Install, 2020

- 3 3 cube boxes: charge proof registers (water billings), 2018-20

- 1 3 cube box: **"from CG/MH"** (water billing cycles, 2017-19, *at least!*)

- 2 3 cube boxes: final reads, A-Z, 2014-20

- 2 3 cube boxes, 2 odd (**1 "broken" lid**), 2 standard: water cycle billings, 2002-2018

- 1 3 cube box: finals, FY'10-13; usage reports, FY'10-12; back-up sewer charges, 2009-12; cash deposits, **FY'08-10**; gasoline, 2011-15; town buildings, FY'09-10; commitments/abatements, 2014; lifeline, FY'09-11

- 1 standard box: final reads, 2012/address changes, 2015-16

- 1 standard box: highway water/cemetery work orders, 2017-18

- 1 3 cube box: payroll, FY'17/calendar & attendance, 2016

- 1 standard box: highway work orders wire, 2017-18/"all other" work orders, 2019

- 1 24 inch box (**no lid**), 1 3 cube *plastic bin*: assorted "old" VCR tapes

- 1 24 inch *plastic bin (no lid)*, 1 standard: MV liability claims, 2000-2012
- 4 standard boxes (**3 “broken”**): cycle meter cards/work order forms, 1999-2001 (*at least!*)

- 1 standard box: “Sue’s chapter 90 files”, **back to 1990’s-2002 (at least!)**
- “pile” (approximately 5”) of “loose” manila folders: dumpster permits, 1995
- 2000/bid package front end loader, **1998**/voided applications/correspondence, *and so on!*

- 1 odd box: DPW construction /correspondence, 2004
- 2 standard boxes (**1 no lid/1 “broken” lid**): highway/forestry service tracking forms, 2000-03 (*at least!*)

- 1 24 inch box (**“crushed”**), 1 standard: *more* phone message books, **1990’s/2014-17**

- 1 standard box: *more* street permits, 2020-21
- 1 standard box: highway logbooks (diaries), 1998-2014
- 1 standard box: sidewalk repair contracts, 2000-2014
- 1 standard box: road work contracted, 1998 (A.R. Belli)/2000-01 (RPI)
- 1 standard box: permanent patching of utility trenches/permits, 1996-2000/2003-04/2006/2011-14
- 1 standard box: road work contracts, 2002/2006-07/2009-11
- 2 odd boxes (**1 “crushed”**): abatements/commitments, FY’03-04/FY’10-FY’12
- 1 odd box (**“crushed”**)/“hodgepodge”: water rates, 1988-1990/weather services, etc.

- 1 odd box (**no lid**): water reports, 2001-02

- 1 3 cube *plastic bin (no lid)*: abatements/commitments, FY'07-09; consumptions, 1999-2007; town building reports/water rate schedules, 2000-07; gasoline tickets, 2009

- 1 standard box: assorted water reports/cycle test runs/detail route reports, etc., 2005-06 (*at least!*)

- 3 odd boxes (**1 "broken"**), 1 3 cube: terminated employee files, **back to 1980's**

- 1 "overflowing" standard box/4 15x11 computer printouts: billing registers, FY'04

- "stack" (approximately 7") of manila folders/"loose" documents: stormwater management/agenda files, 2011-13; ordinance for erosion control, 2014, etc.

- 2 3-ring binders (approximately 4"): recycling, 2010-12

- 3 large bound books (approximately 6"): Ridgelawn Cemetery

- 5 3 cube *plastic bins*: *more* cemetery record bound books/deeds, etc., back to early 1800's-2009 (*at least!*)

- 2 standard boxes, 1 3 cube: Allied Waste/Eversource paid bills, FY'15/ FY'19

- 1 3 cube box (**"crushed"**): closed circuit TV inspection files, **1990's**; NE stormwater reports, **2003-04 (at least!)**; street/sidewalk permit applications, 1990's, etc.

- 1 standard box: **"old files"!? (Parker St. drainage, 2001/Sea Consultants & DPW building committee minutes/correspondence, 2001-04 (at least!); Mall site improvements, 2002; recycling assorted files, back to 1990's/VHB evaluation,**

1997, etc.)

- 1 standard box: ?
- 1 3 cube box, 1 24 inch: "old" town manager/town hall files, **back to 2001-**

2019 (?)

- 1 odd box: *more* weather reports, **2014**
- 1 3 cube *plastic bin* ("**broken**" lid): schedule of bills payable/warrants,

1994-95

- 1 standard box: "old" vehicle purchases, **pre-2015**
- 1 standard box: various contracts, FY'10-11
- 1 3 cube *plastic bin*: cemetery records, 2006-09/back-up disks, 2003-05/

carry-over purchase orders, **2005-06**

- 1 3 cube box: detail reports, 2009
- 1 4-drawer vertical cabinet (hallway): "old" payment authorizations, **1970-**

1980's; financial reports/correspondence/bulletins/WAAUC meeting minutes & reports/recreation area picnic use & files, *etc.*, **1970's**

- 1 4-drawer vertical cabinet (hallway) (2 "empty" drawers): MWRA sewer use discharge permits, back to 1990's-2003 (*at least!*)

A few more archival records are located in the *second floor "archive/map-plan" room*:

- approximately 105 assorted size bound books (approximately 95"): annual reports//computation/calc books/sewer index/betterments/plan indexing/estimates/highway department, **back to 1800's-1980**

- 11 3-ring binders (approximately 30"): Main St. contract documents, 2014/sewer replacement, Edenfield & Fifield notes...

- approximately 10 cardboard magazine files/lots “loose” (approximately 100”) wire bound reports: studies/specs/contracts/evaluations/pm’s, etc., **back to 1970’s-2005 (at least!)**

- 1 standard box: Stantec/Spring St. sewer project, 2008
- 1 Global 4-drawer lateral unit (1 “empty” drawer): 28 *more* bound books – *rough shape* (approximately 56”): sewer applications, **back to 1800’s-1950’s (at least!)**; index house connections; WPA plans; 1 folder=engineering department “old” index file, **1935**

- 1 4-drawer wooden card file/16”deep: 5x3 cross-reference, A-Z general plans

- 1 2-drawer metal card file/12 ½”deep: *few* 5x3 building/*few* municipal cross-reference cards

- 2 2-drawer wooden card files/14”deep: 5x3 land court, A-Z/sewer & drain profiles, A-Z/notebooks

- 1 2-drawer wooden card file/16”deep: street A-Z files/street layout files

- 1 Global 4-drawer lateral unit (1 “empty” drawer): street files, A-Z

- 1 Global 4-drawer lateral unit (2 “empty” drawers): contract documents, *few* 2001/2006/2008, 2014-2021; 54”

- 1 Y&E 5-drawer check file/2 rows per drawer: field books/sewer connection books/house location books, **back to 1897**

- 1 Y&E 4-drawer vertical unit (1 drawer=supplies): 2 drawers=“old” registry plans (section 1-16); 1 drawer=“old” land court plans (section 1-16)

- 1 4-drawer vertical cabinet (1 “empty” drawer): “old” A-Z subject files (accidents/contracts/easements/estimates/flood control/bid prices/traffic commission/

town counsel/sewage/sidewalks, etc.), **back to 1950's-1980's (at least!)**

- 1 standard box/"**hodgepodge**": "old" project files
- 3 standard boxes: *more* street files (maps/plans only)
- 1 standard box: ?
- 1 standard box: "**Sue's Pleasant St.**"!
- 2 standard boxes (**no lids**): *more* "old" specs/proposals/contracts, etc.,

back to 1960's (at least!)/few 2008-2011

(J) **"OLD" POLICE STATION** - Throughout the *first floor*, archival records are stored between three offices, with **no** particular "rhyme or reason! Boxes are simply "stacked" one on top of the other, *many* "falling over"!! In fact, records stored in one of these three rooms are *completely* "**inaccessible**"!!! Boxes have simply been "*tossed*"/"*pushed*"/"*shoved*" inside this space, leaving **NO** aisle space, **NO** ability to access these records with boxes "stacked" five-seven high!!!! *Many* of the boxes throughout *all* three rooms have "**water damage**", *most* boxes have either "broken" lids or, *no lids at all* **AND**, *many* of the boxes are "broken"/even "crushed" with records *falling out onto the floor*. If all of that weren't bad enough, indexing on the boxes is *extremely* poor – **if it exists at all!**

Our inventory throughout the first floor revealed the following records:

- 25 24 inch boxes, 5 odd, 4 3 cube, 9 standard: "old" voter registration cards (inactive/deceased), **back to early 1900's-1990's (at least!)**
- 6 3 cube boxes, 22 24 inch/assorted size bound books: mortgage/personal property (chattel mortgages, bills of sale, assignments...)/Acts & Resolves/pole locations/Town of Watertown history, etc., **back to 1800's-early 1900's (some**

“mold”!)

- 4 24 inch boxes: vouchers, **1977/1991-92**
- 1 3 cube box/4 15x11 computer printouts: retirement payroll contributions,

1998 (at least!)

- **4 24 inch boxes: more “old” mag tapes!**
- 3 3 cube boxes, 3 standard, 1 24 inch: legal files/general, 1970’s-1990’s

(at least!)

- 1 3 cube box/town clerk: assorted bylaws, back to early 1900’s
- 13 3 cube boxes, 7 24 inch, 3 standard: licenses/licensing board,

1975-1991

- 2 3 cube boxes, 1 standard: payroll registers, 1991/1993
- 7 24 inch boxes, 3 3 cube: town attorney
- 1 24 inch box: “letters”/gasoline applications & correspondence, etc.,

early 1900’s

- 1 24 inch box: industrial accident files, **1970’s (at least!)**
- 1 24 inch box: purchasing (?)
- 1 3 cube box, 1 24 inch: claims/accidents, 1970’s
- 6 3 cube metal drawers (**“broken”**): payroll vouchers, **1940’s-1960’s**
- 1 24 inch box: “old” community development files, 1980’s
- 1 3 cube box: time sheets/”miscellaneous” vendor reports, **1995**
- 1 3 cube box: Arsenal project files, 1970’s ***(at least!)***
- 1 odd box/”**hodgepodge**”: few more pole location bound books/license

book stubs (amusement/common vic...), 1980’s-1990’s

- 1 standard box: town manager general/”miscellaneous” files, **1990**

- 1 standard box: liquor licenses, 1971-77
- 1 24 inch box: *more* claims files, 1970's/payroll register, 1992
- 1 24 inch box: Watertown Sq. renovation project phase II
- 1 standard box: school/library payroll register, 1985
- 1 24 inch box: "town clerk" (?)
- 1 24 inch box: *more* bylaws/code books
- 1 3 cube box: vendors, **1988-1991**
- 1 odd box: program registrations, **2006**
- 1 standard box: MV commitments, 2001
- 1 standard box, 1 3 cube: 15x11 general government payrolls, 1980's
- 1 standard box: payroll labor distribution, **1994**
- 1 3 cube box: Sped student files
- 1 3 cube box: payroll deduction register, **1988**
- 20 24 inch boxes, 13 standard, 10 3 cube, 2 standard *plastic bins*, "pile"

(approximately 10") of *loose* papers: ?

- 1 24 inch box: town manager files ("miscellaneous" police), **2002**
- approximately **275** "unidentified" *assorted size* boxes/*plastic bins*

(couldn't access): ?!

On the *second floor*, the following archival records are stored along with **"TONS"** of assorted size *rolled maps and plans*. Most of the records and plans are stored in a small room, arranged on seven sections of "old" assorted metal shelving (*lots "rusty"!*). A few more plans and records are arranged on one more "rusty" section of shelving just outside this room along with a few more boxes "stacked" on the floor. The *majority* of the plans has round ID tags referencing

address and/or year, sometimes both, title only, and more recent plan tags often reference a number/year/address.

Our inventory throughout the second floor revealed the following records:

- approximately **2,396** maps/plans (*some* in “bad” shape!) arranged on shelving: “1” 1924/*some* 1960’s/1977-1981/1983/1994-2015

- 1 24 inch *plastic bin*, 1 large box, 10 large **“plastic trash bags”**: *more* rolled plans!

- 2 standard *plastic bins*: ?

- 2 standard *plastic bins*: workers comp affidavits, 2013-14 (*at least!*)

- “stacks” (approximately 52”) of “old” reports, 1 odd box: fire station, 1998/ church renovations, 1993/DPW study, 1997/handicap access project manual, 1995/Fowle high school/Arts Center/Hosmer connector/380 & 555 Pleasant St....

- 15 assorted 3-ring binders (approximately 42”): U.T.S./Boys & Girls Clubs/SWPPP construction, 2007/AT&T Arsenal St./invoices, schedules, contracts, etc./270 Pleasant St. specs, 2011/Arsenal Dev., 1998-2002/Perkins School close-out, 2010, *etc.*

- 1 odd box: **“hodgepodge”!**?

- 6 standard boxes: electrical permits, A-Z, 2003-05/2010-“present”

- 1 standard box: 6x4 wiring/electrical inspection cross-reference cards

RECOMMENDATIONS

The establishment and maintenance of a comprehensive record retention program *is* an absolute necessity. Constantly changing laws and regulations, *as well* as new methods of automating records, all combine to “fog the air”. No outside consultant can actually solve the problem.

We have reviewed the state record retention schedules **AND**, there are really three big problems: (1) schedules are not “all-inclusive” – some records discovered during our inventory are not even referenced; (2) terminology and indexing are **often** inconsistent; (3) you are not adhering to **many** of these guidelines!

The bottom line is that a proper retention schedule should be created *and* “customized” to include not only information that is covered by laws/regulations but, *additional* information that is actually reflected in your files. **AND**, the terminology needs to be standardized – it is **not** unusual to find a record referenced by **more than one name** – CONFUSING! *If* you adopt our upcoming recommendations, then this step would be addressed as part of the labor. Our archives supervisors can be *extremely* helpful during any conversion, as they are trained to assist in “weeding through” the gray areas. Necessary questions would be asked in order to determine the necessity of retaining certain documents and for how long, such as alternative “back-up” documents, level of reference, and so on.

Next topic, **microfilming**. Simply put, any either semi-permanent or permanent records *are* “ideal” candidates for filming! **AND**, you have earned a “**GOLD STAR**” here for having microfilmed some of the *older* vital records, along with a few “miscellaneous” categories. Back in 2008, there were 430 rolls of film stored

at the library, 143 pertaining to vitals. During our inventory, we discovered several *more proper* film candidates located throughout the various storage areas:

- payroll/payroll registers/employee earnings records
- minutes to meetings
- zoning/BOA case files
- liquor licenses
- building permits
- pole locations
- fire daily call logs
- fire history cards
- terminated employee files
- tax titles/tax takings
- burial permits
- legal files
- vital records
- historical bound books
- *etc.*

By filming the preceding list of records, you not only preserve the *integrity* of these documents, but you would *also* “free up” the equivalent of approximately **four-eight** sections of shelving at the same time – ***“WOW”!***

Our suggestion is that you establish a yearly budget for microfilming to address the backlog, and turn the filming over to us, as no one on your staff has time to undertake such a project. Our costs for regular microfilming are \$54.94 per thousand documents/\$49.40 per thousand documents *automatic feed*, and \$21.10

per duplicate roll (*second original!*), which should be created for security purposes and stored off-site. The filming cost *also* includes the proper destruction of documents upon approval from the state. Any preparation work (removal of staples, paper clips, reordering of material, repairing tears, etc.) is billed at \$215.00 per day. This last step can be eliminated by having your own staff prep the material before we take it to our lab.

Next, proper indexing should *always* be completed when filming is done. It is absolutely imperative that targets and indexing of rolls and boxes be done as a matter of routine. A history of transactions is totally useless if it is impossible to find anything! When we do microfilming for our customers, the camera operator feeds a target into the camera *every ten feet*. Thus, a "ten-point indexing system" is established. For example, the top of the box would be labeled with the roll number and the contents of the roll: "Roll #117 - Minutes to Meetings, 1991". The ten reference points would then be listed on the label applied to the side of the box as follows:

- | | |
|---------|-----------|
| 1. 1/91 | 6. 7/91 |
| 2. 2/91 | 7. 9/91 |
| 3. 4/91 | 8. 10/91 |
| 4. 5/91 | 9. 11/91 |
| 5. 6/91 | 10. 12/91 |

Now let's talk about the legality of microfilm as it pertains to the storage of hard copy records that have been filmed. You will be happy to hear that there is a statute that has been adopted by *all* 50 states, which says that microfilm is legal, *with the exception of original loan notes* and with a few big "ifs":

1. filming is done in a business like manner

2. film is indexed, cross-referenced, and labeled properly
3. appropriate facilities are provided for preserving and inspecting
filmed records
4. adequate equipment for viewing the records is available

Some of the "ifs" are rather vague, but the key point is that film must be in-
dexed, labeled, and stored properly so that reference is fast and efficient. ***If*** this is
the case, *then there is no need to keep both the hard copy records and the pro-*
cessed film of the same records! We also want to point out that ***you are much better***
off destroying records when you can as opposed to holding on to them in-
definitely!! As long as you have the records (hard copy, film, e-mail, fiche, disk,
scanned image, etc.), the records can be subpoenaed, and you could be subject to
fines, and so on. In addition, "unnecessary" time is spent researching information
that ***you shouldn't have anyway!*** All of these things can be avoided by adopting
and following a formal schedule of retention.

Archival records should be stored in a central location(s) whenever possible.
AND, with a realistic microfilm program along with an honest approach to ***purging***
the archives, the amount of shelving and the number of boxes required *could be*
greatly reduced!

However, there is a series of problems with the manner in which records are
currently being stored. Let us list some of the more *obvious* ones:

1. proper indexing is ***not*** done
2. there is ***no*** location index
3. destruction dates are ***not*** assigned
4. *many* boxes are too long and too heavy to allow

for easy access and reference

5. box numbers are **not** assigned
6. “stacked” boxes/binders/”loose” documents *really* difficult to reference
7. too many “*space-consumptive*” file cabinets!

Now, let us look at some “step-by-step” solutions. Number one is to have our records supervisor and staffers re-box records (as needed), and index those items which need to be retained according to guidelines. Any candidates for microfilm will be identified, and what is “left over” will simply be set aside for destruction (*with your approval, of course!*). This would include going through **all** of the records outlined in the preceding inventory section!

Material to be saved should then be boxed in *standard records cartons*, which are “human-engineered”. We *strongly* recommend a **15x12x10** box with lid for many reasons:

- lid type boxes make references *infinitely* easier
- boxes are much lighter *and* easier to handle, and *at the same time*, strong and durable
- ability to store both letter and legal size
- maximum space utilization
- when purchased in lots, they cost only a fraction of what you pay for those 24 inch deep boxes

A “**pat on the back**” here, as at least *some* of your records are already stored in the appropriate size box – approximately 500! All of these boxes will simply be incorporated into the *new* archives system “as is”, only correcting indexing where necessary.

The next step is to establish **and** maintain a proper indexing system, *as well*

as procedures for adding and retrieving records to and from storage. AND, based on the size of your archives, our “**computerized indexing and retrieval system**” is definitely the answer! An alphabetical listing of records, cross-reference listing by box number, department listings, destruction schedule are only *some* of the reports included in our archival three-ring binder with a companion disk as an option. We have brought along a sample log as part of our demonstration.

We also want to mention that it is not necessary for boxes to be returned to the *same* place on the shelving from which they were removed. The archival log can actually be used as a "locator record", allowing you to place a box being returned in the first available space, thereby saving time. *The location is simply changed in the log!*

Based on the number of people and offices involved in your archives, another important component of the system is the use of a records transfer/request form, which would accompany each box forwarded to storage. The archives staff would record the box number on this form, and then return a copy of the form to the department. This procedure would enable departments to request boxes *by number*, thereby eliminating the need to search for records by title, which is *very* confusing. People often request records by the wrong titles, and there are often *multiple* boxes with the same title, both of which result in a *lot* of wasted time searching for records! We have brought along a sample form for your review.

In any case, it is crucial that either a person or "team" of people be delegated the responsibility of maintaining the archives system – ***someone needs to “own it”!*** Anyone needing access to the storage area, *or* who needs to add material to the archives, must check with the person(s) responsible for the log book ***before*** accessing

the stored records in order for a proper inventory to be maintained.

Once boxed, material should be stored on "real" archives shelving for maximum space utilization and ease of finding, 76"high x 42"wide x 15-30"deep. Your *existing* shelving throughout ***all*** of the areas that we reviewed is simply ***not*** conducive to proper archival storage ***and***, some of those "flimsy"/"rusty" sections should just be eliminated! The amount of *new* shelving and the number of boxes required depends on how "ruthless" you are with ***purging***. Since we could not possibly know just how much - ***if anything!*** - you intend to discard, or how much material will be microfilmed, we have outlined the equipment and supplies that would be necessary if you decided to retain everything, "as is".

Having said that, our recommendation is the purchase of **69** sections of *standard* archives shelving to be installed as follows: DPW basement, 26 sections; city hall/basement vault, 15 sections; treasurer/collector vaults, 7 sections; third floor vault, 6 sections; fire department attic *or* basement, 5 sections; clerk's vault, 4 sections; building department vault, 3 sections; retirement department storage room, 3 sections. Each of these sections will be able to hold four adjustable shelves: 43 sections, capacity of 1,848 boxes (24-48 per section)/26 sections, capacity of 936 boxes (36 per section), for a *total* capacity of 2,784 boxes. Total cost of the new equipment, *including installation and shipping*, is \$40,227.00.

Labor to dismantle any of the *existing* shelving and to remove those cabinets from the basement vault at city hall is quoted on a "per diem" basis due to all of the variables. However, this is a task that you may choose to have your *own* staff complete.

In any case, we want to stress that you ***do*** have sufficient room for a proper

records storage system on-site! AND, by adopting our preceding recommendations, you will not only “recapture” all of the wasted space created by those “old” metal cabinets in the basement vault and the *inefficient* shelving installed throughout *several* areas **but**, all of the “clutter” currently spread out through “10” separate storage areas, *as well as all of the departments we visited*, will *also* be **eliminated!!** Your archival records will be consolidated between five main locations and three smaller areas, thereby freeing up space “**everywhere**” for more efficient use, and allowing you to *finally* establish proper control and security over your records.

Now, the *really* “**GOOD NEWS**” is that both the shelving *and* the number of stored boxes could be **greatly** reduced **IF** our recommendations regarding the microfilming of records previously listed, *as well as the destruction of old records* that have already *surpassed* the retention guidelines, are adopted! For example: paid invoices/bills/grants/warrants, *back to 1990’s*; payroll vouchers, *back to 1940’s*; correspondence, *back to early 1900’s*; civil service applications/expenses, *back to 1980’s*; budgets/bank statements/insurance files, *back to 1970’s*; treasurer receipts/cancelled checks, *back to 1980’s*; “old” bids/proposals/studies/projects, *back to 1960’s*; nuisance complaints/ambulance run reports, *back to 1970’s*; **town manager “speeches”, back to 1990’s**; voter registration cards, *back to early 1900’s*; “old” time accounting books/time cards/sheets, *back to 1930’s*; cash proofs, *back to 2006*; job resumes/applications, *back to 1990’s*; contracts/vendor reports, *back to 1980’s*, just to name a few! Between filming and destruction, at least the equivalent of 600 standard size boxes of records are involved - **WOW!!** A more precise count would be determined by our archives staff.

Labor to convert the records will require an estimated 86 days with our ar-

chives supervisor (43 days), who is billed at \$675.00 per day, plus expenses, and two of our staffers (45 days), who are each billed at \$535.00 per day, plus expenses. Such labor will include creating new boxes, indexing, incorporating about 500 *existing standard* size boxes into the new system, reorganizing all boxes/books, etc. onto *new* shelving, and reviewing all boxes for microfilm and destruction candidates. The computerized indexing system will *also* be created for *both* city hall (including DPW) and the fire department, a locator record will be included for each box, and any costs for disposal, etc., will be on a "pay as you go" basis.

You will also need to purchase several supply items: (1) 1,524 15x12x10 boxes at \$3.85 each; (2) 500 box labels at \$42.35 per C (*allows you to easily re-use boxes*); (3) 8 1/2x11 transfer/request forms/3 "kits" at \$55.30 each; (4) security tape, \$78.00; (5) computerized indexing system/log book, \$850.00 (fire department)/1,800.00 (city hall/DPW).

All staffers should be instructed on the proper packing and indexing of a box (***no more indexing top/side of the box!***), and prior to a box being placed in storage, a log entry must be made. While on the topic of proper packing, we *also* want to point out that only the *same* categories of records should be stored together in the same box (***no more "hodgepodge"!***). Each record category "should have" its own specific retention period, and unless the period is the same, the various records should ***not*** be stored together in the same box!

Before the conversion is complete, our supervisor will conduct a meeting for your employees in order for you to be able to maintain and perpetuate the system. Once the system is "up and running", our supervisor should then be scheduled once every six months - a year to "**audit**" the system and keep you "on track".

Lastly, we want to comment on all of those **maps/plans** – *many* rolled or just “loosely” filed, *many* folded, *many* more boxed, and still *more* plans stored in “cubbies” and assorted file cabinets!

To assist with the “challenge” of managing such files, we have created a filing system and database *specifically* to address maps and plans, which we will demonstrate for you! And, due to *all* of the variables involved in such a project, labor is always quoted on a “per diem” basis. The best approach for beginning such a project is to have our staff scheduled for ten days, for example, to get the project “up and running”. After this time, we would then be able to estimate remaining labor, which could also be done in “phases”.

Based on ten days, our supervisor would be assigned for three days at \$675.00 per day/staffer for seven days at \$535.00 per day, *both* plus expenses. Equipment and supplies to get this project underway would include the following:

- A. 5 sections of 42x30 shelving/capacity, 160 plan boxes, at \$2,990.00, including installation/shipping
- B. 140 plan boxes at \$3.85 each, plus shipping
- C. box labels/shelf clips, \$250.00
- D. map/plan database, \$1,800.00

ARCHIVES PROJECT COST SUMMARY

(excluding maps & plans)

1. EQUIPMENT (69 SECTIONS SHELVING), INCLUDING INSTALLATION & SHIPPING = \$41,262.00.
2. SUPPLIES (BOXES/LABELS/DATABASES), INCLUDING SHIPPING = \$12,148.00.
3. LABOR (SUPERVISOR/STAFFERS), INCLUDING EXPENSES = \$58,470.00.

PROJECT GRAND TOTAL = \$111,880.00

ASSESSOR'S OFFICE

There are six main categories of records in this area: (1) property files, (2) condo deeds/masters, (3) ABC files, (4) exemption files, (5) personal property tax files, (6) abatement files.

Property Files – There is a total of approximately 11,122 properties (383 streets), which represents about 1,122 new properties added over the last 14 years. All property information has been computerized since 2004/deeds, since 1974. We also want to point out that the staff audited these files in 2006 to insure that there was a pocket on file for each and every property – *at that time, “100% accuracy”!*

The property files are arranged alphabetically by street name/numerical order within, and the documentation is set up in a *variety* of letter size manila *expansion pockets* with a straight edge/“cut down” front flap/center thumb cut, *majority* reinforced back flap, two inch expansion (***some “torn”!***). Standard white labels are applied along the back flap in *various* positions, and they reference printed address/parcel ID #.

Material is *loosely* filed within the pockets, and a sampling of the documentation revealed the following:

- 8x5 white/11x8 ½, white-buff-green-etc., property evaluation or field cards (*many 2-sided/some 2 pages*)
- copies of deeds/unit deeds (multiple pages)
- address changes
- correspondence
- 11x8 ½ white valuation worksheets/cards (2-sided)

- returned tax bills/mail
- petitions for name change
- 11x8 ½ property valuation forms
- copies of death certificates/naturalization certificates/trust documents

(multiple pages)

- residential exemption forms (multiple pages)
- 6x4 buff deed cards (info thru 1989-90, computerized thereafter)
- documentation detail reports (multiple pages)

There are “**tons**” of staples used throughout the material/*some* binder and paper clips, as well as rubber bands “wrapped around” some pockets, wire bound reports throughout the files, some “sticky notes” attached to documents, few *folded* papers, several large *folded plans*, and the average number of documents per pocket is 10-15 (with *some* exceptionally high counts of 100-200!).

Index guides are not installed **but**, Smead letter size salmon “OUT” cards/top tab *are* “available for use”! These files are generally accessed by the three-four people in the assessor’s office, *as well as* employees from other departments (particularly zoning), on a regular basis.

The file pockets are housed in 20 4-drawer letter/legal size *standard steel* vertical file cabinets of various makes and sizes, which are arranged in the center of the room.

Units 1-8 are arranged in one row.

1. Hon legal size unit, 52”high x 18 ¼”wide x 28 ¾”deep/capacity, 26 ¾”/key lock top right

A. 1 Acton St. – 12 Andrew St.; 19 ¼”

- B. 1 Angela Lane – 198 Arlington St.; 17 $\frac{3}{4}$ "
 - C. 201 Arlington St. – 390 Arsenal St.; 20"
 - D. 395 Arsenal St. – 26 Avon Rd.; 23"
2. same as unit 1
- A. 12 Bacon St. – 52-54 Beacon Pk.; 22 $\frac{3}{4}$ "
 - B. 9 Beachwood Ave. – 456 Belmont St. Unit 24; 24"
 - C. 468 Belmont St. – 46 Berkeley St.; 22"
 - D. 2 Bigelow Ave. – 135 Boyd St.; 23"
3. Steelcase letter size unit, 52 $\frac{1}{4}$ "high x 15"wide x 28 $\frac{1}{4}$ "deep/capacity, 26 $\frac{1}{4}$ "/key
lock top right
- A. 5 Boylston St. Unit 5 – 104 Bradford Rd.; 24 $\frac{1}{4}$ "
 - B. 6 Bradshaw St. – 139 Brookline St.; full
 - C. Brown St. – 62 Carey Ave. Unit 11; 24 $\frac{1}{2}$ "
 - D. 63 Carey Ave. – 59 Chandler St.; 22"
4. same as unit 3
- A. 5 Channing Rd. – 54 Charles St.; 22 $\frac{1}{2}$ "
 - B. 30 Charles River Rd. – 33 Church Lane; 23 $\frac{1}{4}$ "
 - C. 1 Circuit Lane – 324 Common St.; 23"
 - D. 9 Commonwealth Rd. – 131 Coolidge Ave. Unit 528; full
5. same as unit 4
- A. 131 Coolidge Ave. Unit 621 – 151 Coolidge Ave. Unit 710; 24 $\frac{1}{2}$ "
 - B. 199 Coolidge Ave. Unit 101 – 126 Coolidge Hill Rd.; 25"
 - C. 12 Copeland St. – 86-88 Cypress St.; 22"
 - D. 90 Cypress St. Unit 1 – 213-219 Dexter Ave.; 24 $\frac{1}{4}$ "

6. letter size unit, 52 ½"high x 15"wide x 28 ¼"deep/capacity, 26"/key lock top right

- A. 3 Downey St. – 75-77 Edenfield Ave.; 21 ½"
- B. 78 Edenfield Ave. – 122 Edward Rd.; 23 ½"
- C. 6 Eliot St. – 21 Essex St.; 19"
- D. 12-10 Evans St. – 39 Falmouth Rd.; 21 ½"

7. same as unit 6 ("missing" key lock)

- A. 48 Fayette St. - 37 Fifth Ave.; 17 ½"
- B. 12 Fitchburg St. – 45 Frank St.; 20 ½"
- C. Franklin St. – 99 Galen St. Unit 2; 19 ¼"
- D. 100 Galen St. – 122 Garfield St.; 18 ½"

8. same as unit 6

- A. 4 Garnett St. – 63 Grandview Ave.; 21"
- B. Grant Ave. – 15 Green St. Terrace; 15"
- C. Grenville Rd. – 48 Hardy Ave.; 19"
- D. 7 Harnden Ave. – 59 Hersom St.; 23"

Units 9–16 are arranged in a row directly opposite units 1-8.

9. Cole Steel letter size unit, 52 ¼"high x 15"wide x 28 ¾"deep/capacity, 26 ¼"/key

lock top right & A/center rod projections

- A. Highland Ave. – 99 Hillside Rd. Unit 2; 21"
- B. 100 Hillside Rd. – 98 Hovey St.; 23 ¼"
- C. 9-11 Howard St. – 165 Irving St.; 22"
- D. 5 James St. – 42-40 Kimball Rd.; 22"

10. same as unit 6

- A. 6 King St. – 162 Langdon Ave.; 23"

- B. 3 Laurel St. – 199 Lexington St.; 21 ¼"
 - C. 203 Lexington St. – 74 Lincoln St.; 17 ½"
 - D. 8 Linden St. – 98 Lovell Rd.; 20 ½"
11. same as unit 6
- A. 101 Lovell Rd. – 82 Main St.; 22 ¼"
 - B. 92-100 Main St. – 587 Main St.; 20"
 - C. 590 Main St. – 212 Maplewood St.; 23"
 - D. 5 Marcia Rd. – 99 Melendy Ave.; 20 ¼"
12. Steelcase letter size unit, 52"high x 15"wide x 28 ¾"deep/capacity, 26 ½"/key
lock top right
- A. 3 Melville Terrace – 145 Morse St.; 21 ½"
 - B. 9-11 Morton St. – 195 Mt. Auburn St.; 23"
 - C. 200 Mt. Auburn St. – 579 Mt. Auburn St. Unit 2; 22 ½"
 - D. 601-613 Mt. Auburn St. – 40 Nash St.; 17"
13. same as unit 12
- A. Nichols Ave. – 351 No. Beacon St.; 20"
 - B. 3 Nyack St. – 74 Olcott St.; 20"
 - C. 1 Oliver Rd. – 399 Orchard St.; 21 ½"
 - D. 11 Otis St. – 17 So. Park St.; 19 ½"
14. same as unit 6
- A. 7 Parker St. – 75 Pearl St.; 17"
 - B. 9-11 Pequossette St. – 79 Pierce Rd.; 23"
 - C. 80 Pierce Rd. – 42 Pine St.; 15"
 - D. Pleasant St. – 279 Pleasant St.; 20"

15. same as unit 6
- A. 290 Pleasant St. Unit 101 – 121 Poplar St.; 25"
 - B. 3 Porter St. – 80 Prospect St.; 18"
 - C. 4 Puritan Rd. – 62 Quimby St.; 18 ½"
 - D. 1 Quincy St. Unit 1 – 3 Repton Circle Unit 3215; 17 ½"
16. Hon letter size unit, 52"high x 15"wide x 28 ½"deep/capacity, 26 ¾"/ley lock top right
- A. 3 Repton Circle Unit 3301 – 12 Rifle Ct.; 23 ½"
 - B. 6 Riverside St. – 139 Riverside St.; 20 ½"
 - C. 12 Robbins Rd. – 74 Russell Ave.; 21"
 - D. 77 Russell Ave. – 125 Rutland St.; 14 ½"

Units 17-20 are arranged "back to back" with units 9-12.

17. Hon letter size unit, 52"high x 15"wide x 26 ½"deep/capacity, 24 ½"/key lock top right
- A. 8 St. Mary's St. – 299 School St.; 21"
 - B. 304 School St. – 46 Spring St.; 20 ¼"
 - C. 52-54 Spring St. – 79 Spruce St.; 20"
 - D. 80 Spruce St. – 182 Standish Rd.; 18"
18. Hon letter size unit, 52"high x 15"wide x 25 ¼"deep/capacity, 23"/key lock top right
- A. 16-18 Stanley Ave. – 119 Summer St.; 20"
 - B. 125 Summer St. – 257 Sycamore St.; 19"
 - C. 440 Talcott Ave. – 92 Townly Rd.; 16 ½"
 - D. 10-12 Union St. – 190 Walnut St.; 19 ½"

19. Anderson Hickey letter size unit, 52"high x 15"wide x 26 $\frac{3}{4}$ "deep/capacity, 25"
 - A. Waltham St. – 251 Warren St.; 21 $\frac{1}{4}$ "
 - B. 6-8 Warwick Rd. Unit 1 – 77 Watertown St.; 21"
 - C. 81-83 Watertown St. – 311 Waverley Ave.; 21 $\frac{1}{2}$ "
 - D. Wayne Ave. – 284 Westminster Ave.; 20 $\frac{1}{2}$ "
20. same as unit 19
 - A. 4 Wheeler Lane – 32 Whites Ave. Unit 6608; 20 $\frac{1}{2}$ "
 - B. 32 Whites Ave. Unit 7701 – 10 Williams St. Unit 79; 20"
 - C. 10 Williams St. Unit 80 – 99 Winsor Ave.; 20"
 - D. 102 Winsor Ave. – 11 Yukon Ave.; 20 $\frac{1}{4}$ "

Master Condo Deeds are arranged in *two* separate A-Z files, one straight A-Z file for *large* condos/1 A-Z file for *small* condos, set up in the same manner as the property files. In any case, documentation is set up in a *variety* of legal size manila folders with second/third cut assorted undercut top tabs, even though the *majority* of documentation is "letter size". The street address is *usually* printed on standard white labels applied to the tabs, *some* handwritten. The manila folders are then "bulk-filed" in legal size green *hanging folders/no* tabs. Folders hold the same documentation as previously specified for the property files along with lots of *folded* drawings.

These deed files are housed in four assorted Hon standard steel lateral file cabinets, which are arranged "back-to-back" with units 1-8/no index guides.

21. 3-drawer unit, 40 $\frac{3}{4}$ "high x 30"wide x 19 $\frac{1}{4}$ "deep/capacity, 27"/key lock top center
 - A. large condos: Arsensal Plaza Condo – Village Condos/small condos: 11-15 Adams St. – 133-135 Boylston St.; full
 - B. 141-143 Boylston St. – 71 Commonwealth Rd.; full

- C. 261-263 Commonwealth Rd. – 106 Franklin St.; ***jammed full***
- 22. same as unit 21
 - A. 21-25 French St. – 51 Jefferson St.; ***jammed full***
 - B. 69-71 Jensen Rd. – 540 Mt. Auburn St.; ***jammed full***
 - C. 591 Mt. Auburn St. – 128-130 Putnam St.; full
- 23. 2-drawer unit, 28 ¼"high x 36"wide x 19 ¼"deep/capacity, 33"/key lock top center
 - A. 555 Pleasant St. (***"misfile"***)/28-34 Quimby St. – 254-256 Sycamore St.
("misfiles"); 30"
 - B. 156-158 Sycamore St. – 155 Worcester St.; 26 "
- 24. same as unit 23 (most current files)
 - A. 43-45 Bates Rd. (***"misfile"***) – 33-35 York Ave.; 22"
 - B. "miscellaneous"

ABC Files are arranged in another separate A-Z file with *some* of the documentation set up in *more* assorted legal size manila folders (same as condo files), and *some* of the documentation simply "batched" together with rubber bands/"bulk-filed" in *hanging folders*, no tabs.

ABC files are housed in two Global 2-drawer standard steel lateral file cabinets, 27"high x 30"wide x 18"deep/capacity, 26 ½"/key lock top center/no guides.

- 25. A. Addgene, Inc. – Historical Society of Watertown; full
- B. Kids in Common, Inc. – Mt. Auburn Hospital; full
- 26. A. Partners Healthcare System – Rosary Literary Society; 17"
- B. Satelife – Waltham Community, Inc./Jewish Community Day School/Iranian Assoc. of Boston; 23"

Units 21-26 are arranged "back to back" with units 1-8.

Exemption Files – Residential property files are arranged A-Z/by year, but all other categories are arranged by application number. In any case, documentation is “bulk-filed” in letter size manila folders, which are then “bulk-filed” in *more* hanging folders, no tabs/no index guides.

Files are housed in one Hon 3-drawer lateral file cabinet located right outside of Earl’s office, 40 ¾”high x 42”wide x 19 ¼”deep/capacity, 38 ¾”/key lock top center.

27. A. FY’22 residential, A-Z/few duplicates, declines/CPA, #2-#86/surviving spouse or minor, #1-21/senior, #2-#17/veteran 22D, A-Z/veteran 22E, A-Z/veteran 22, A-Z/blind, #1-26; 25 ½”

B. FY’21 residential, A-Z/declines/surviving spouse or minor, A-Z (“misfiles”)/seniors, A-Z/veteran 22, A-Z/veteran 22E, A-Z/veteran 22D, A-Z/blind, A-Z/CPA, A-Z/more declines; FY’20 blind.../CPA.../veteran.../senior.../surviving spouse or minor.../veteran again... “hodgepodge”!; 34”

C. FY’20 residential, A-Z; FY’19 residential.../CPA.../senior.../veteran.../blind surviving spouse or minor... “hodgepodge”!; FY’18 residential, A-Z/veterans, A-Z/veterans again, A-Z/blind, A-Z/elderly, A-Z/senior, A-Z/CPA, “hodgepodge”!; FY’17 residential... “hodgepodge”!/veterans, A-Z/seniors, A-Z/blind, A-Z; FY’16 surviving spouse or minor, A-Z; 35”

Personal Property Tax Files are located right in Earl’s office with documentation simply “bulk-filed” in *more* letter size *hanging folders/no* tabs, filed by year/account number within. Documentation within the folders pertains to the current year and one year prior, and it includes tax returns/form lists, 2 pages-2 sided/11x8 ½ valuation sheets. There are lots of staples used throughout the material.

These folders are housed in one Hon 2-drawer lateral file cabinet, 28 ¼”high

x 36"wide x 19 ¼"deep/capacity, 32 ¾"/key lock top center. No index guides.

28. A. 2020: #2 - #4633; 20 ½"

B. 2019: #59 - #4614/2018: #2 - #4511; 31 ½"

And, the most current tax files are simply "stacked" in one standard size box:

2021, #97 - #4695; 13 ½" *plus* a "stack" (approximately 5") "to be interfiled"!

Abatement Files are *also* located right in Earl's office with documentation *once again* "bulk-filed" in letter size *hanging folders/no* tabs. However, files here are arranged chronologically by "number", and they are housed in two 2-drawer lateral file cabinets, 28 ¼"high x 30"wide x 19 ½"deep/capacity, 27 ¼"/key lock top center.

29. A. 2021/2020 abatements; 12"

B. "miscellaneous"

30. A. 2018-2019 abatements; 10"

B. 2012-2018 abatements; full

Excise abatements are set up in the same manner as noted above, but manila folders are used as "index guides"! These files are housed in one Hon 4-drawer letter size vertical file cabinet located next to Cass' desk, 52"high x 15"wide x 26 ¾"deep/capacity, 25 ½"/key lock top right.

31. A. 2021 abatements, A-Z; 19 ½"

B. leasing company files

C. 2020 abatements, A-Z; 13 ½"

D. empty

Lastly, we noted the following archival records stored in this area, with books housed in the glass cabinet by Cass' desk/boxes stored in the cabinet beneath the customer counter at the front of the office:

- 18 wire bound books/36 large bound books, approximately 90": real estate valuations, FY'98-FY'08/personal property valuations, FY'96-FY'05
- 1 small expansion pocket: abatements granted, **1926!**
- 3 standard boxes: excise abatements, A-Z, 2018/A-Z, 2019
- 2 standard boxes: excise abatements, S-Z, 2017/leasing files
- 1 standard box (**"broken" lid**): boat excise, 2000-2017
- 1 standard box: excise abatements/leasing files, 2019

RECOMMENDATIONS

The goals that we have kept in mind as we considered the alternatives are:

1. space reduction and utilization
2. accuracy and efficiency
3. allowance for growth
4. accessibility and convenience for users
5. cost justification
6. speed of retrieval
7. built-in tools for future file management

The information that follows will enable you to fulfill and achieve all of these goals!

As outlined in the preceding inventory section, there are “**90**” drawers holding assorted street files, which should *obviously* continue to be arranged A-Z by street name/numerical order within; however, a **color-coded alpha-numeric** system is *definitely* the “way to go” here for the sake of accuracy and efficiency! Having said that, all of the property street files *and* the condo deed files will be interfiled, creating “**one**” big alpha-numeric system versus three separate files that exist now. A combination of folders and expansion pockets “as needed” will be used to appropriately accommodate the amount of documentation for each file. The manila expansion pockets presently in use for *all* of these files are simply “overkill” in *most* cases, thereby consuming valuable file space! The majority of your street files holds an average of 10-15 documents only.

AND, you can even take the color-coding one step further by adding a “color Tabbie” to the folder edge to indicate small and large condo deed files. This system

of signaling files is being used by many of our clients, *and they all swear by it!*

Our next recommendation pertains to the folders. The *majority* of the documentation will be transferred to *new* letter size sturdy 14-point blue folders based on the document counts *and* to the fact that these files are *also* considered to be permanent. All folders will have a "cut down" front flap, and a right end tab to *properly* accommodate *shelf* filing.

For those really "bulky" files noted throughout the inventory, the *expansion pockets* will be used, which come in assorted sizes to accommodate the need. Some of our customers simply use these pockets to hold only those "cumbersome" folded plans! New pockets will *also* come with a "cut down" front flap and a *right end tab*. We have brought along some samples for your perusal.

Once all of the various folders and pockets are created, the next step is the application of a colored alpha label, one label per folder/pocket. The 26 letters of the alphabet are each assigned a color, and the same color is repeated more than once; but, like colors are differentiated by a stripe. The result, 12 *solid* colored labels and 14 *striped and colored* labels!

The alpha label applied to each folder/pocket identifies the *first* letter of a street name, and the placement of the label *alternates* between the top and the bottom along the side of the folder/pocket. For example, "A" is applied to the top edge, "B" to the bottom edge, "C" to the top edge, and so on. This procedure will not only assist in filing and retrieval *but*, it will also help to prevent "misfiling"!

To *further* "fine tune" the system, each digit of the address will *also* be identified using white numerical labels applied in the center of the folder/pocket end tab. And, standard white labels will be appropriately applied in the upper right hand corner

of the back flap with street address neatly typed (*or, laser printed!*).

The successful operation of this filing system, *and any filing system*, is dependent upon the proper use of a “**charge-out system**”. Red vinyl "OUT" guides should be ordered which are made with two “pockets” - one for interim filing for when a folder/pocket is off the shelf, and one for a 5x3 requisition slip indicating “who” has the file. The letters "OUT" appear on the outer edge of the guide, ***clearly visible***, thereby expediting the return of the folders/pockets to the file - **and in the right place!** The purpose of the guides is not only to tell you “who” has a file but, they *also* facilitate file reference and re-filing, ***as well as*** help to eliminate “misfiling”!

The final step here is the addition of letter size green pressboard index guides with third cut black metal *horizontal* end tabs in the #1 position. A guide will be created for *each and every* street with tab inserts referencing neatly typed or printed street names. Secondary guides may be added “as needed” for those streets with a large number of properties (for example: Arsenal St., Mt. Auburn St.).

Our next topic pertains to equipment, and due to your limited space, the ***open shelf movable*** filing method is definitely the answer! To assist you with your decision-making process, please make reference to the following chart. It shows the physical characteristics of your *present* system (units 1-24):

1. floor space used	=	154.7 square feet
2. filing capacity	=	2,365 filing inches
3. filing inches consumed	=	1,912 filing inches
4. available expansion	=	453 filing inches

We would install 14 sections of letter size, 36 inch wide shelving, seven tiers high, which will hold 3,430 filing inches and require *only* 61.6 square feet. In other

words, such a system would provide you with approximately an additional 1,518 filing inches over the 1,912 inches presently *consumed* for files - about 78% growth! *AND*, at the same time, *reduce* your floor space requirement by ***more than half*** - a “walloping” 93 square feet!! *MAGIC!!!*

We would install two 4x3 *bi-files*, each with four stationary sections in back, and three *movable* sections/on tracks in front of the four. Approximately 79 inches in height, 148 inches in width, and 30 inches in depth will be needed for each bi-file. Total cost for the equipment, including installation and shipping, is \$26,680.00.

The following supplies and labor will need to be ordered for conversion:

- | | | | |
|----|-----------|---|------------|
| A. | 8 bxs. | #61757 letter size horizontal end tab blank index guides. Cost, \$125.90 per box. Total cost, | \$1,007.20 |
| B. | 100 | #FST1514TY letter size 1 ¾ inch expansion pockets, <i>right end tab</i> , “cut down” front flap. | \$ 285.00 |
| C. | 100 | #FST1524TY letter size 3 ½ inch expansion pockets, same as B. | \$ 318.00 |
| D. | 12,500 | #S-1600 letter size 14-point <i>blue</i> colored folders, “cut down” front flap, <i>right end tab</i> . Cost, \$433.60 per M. Total cost, | \$5,420.00 |
| E. | 45 rls. | #11830 series <i>plain</i> numerical labels, 0-9. Cost per roll, \$7.60. Total cost, | \$ 342.00 |
| F. | 9 bxs. | #5366 white pressure-sensitive labels. Cost, \$235.00 per box. Total cost, | \$2,115.00 |
| G. | 130 pkgs. | Alpha Kolor I tabs at \$4.60 per pkg. Total cost, | \$ 598.00 |
| H. | 100 | #VS-168 letter size red vinyl “OUT” guides, right | |

		end tab.	\$ 140.00
I.	500	5x3 requisition slips.	\$ 56.00
J.	2 bxs.	#1600 series Tabbies to signal categories at \$23.85 each. Total cost,	\$ 47.70
K.	Labor to convert. It will be necessary to laser print (<i>or, type!</i>) address labels and apply to new folders/pockets – approximately 11,122 labels. Documentation will be converted from old folders/pockets to <i>new</i> folders/pockets, “as is”. Colored alpha tabs and numeric labels will be applied, and all folders/pockets will be re-arranged, creating <u>one</u> large alpha-numeric file. Finally, index guides will be installed, folders/pockets re-filed properly onto new equipment, and your staff will be trained in the maintenance and perpetuation of the new system.		

We would assign one of our records management supervisors, who is billed at \$470.00 per day, plus expenses, and one of our staffers, who is billed at \$418.00 per day, plus expenses, on a “per diem” basis due to *all* of the variables to complete the conversion for you. However, for budgetary purposes, we recommend that you begin with *at least* 20 days, and then once we are “up and running”, we will be able to provide you with a target date for completion.

The remaining files in units 25-31 do **not** warrant any type of fancy color-coded filing system. Therefore, we refer you to the General Recommendations section, as the *majority* of them apply here: #1, #2, #3, #6, #7. **AND**, the most important

step here is #3 – “**purging**”! Once the purge step is completed, the amount and costs of the following supply items, as well as labor, can be determined:

- A. file organizers
- B. pressboard folders (ABC files)
- C. “miscellaneous” folders (abatement/exemption files)
- D. expansion pockets (personal property tax file)
- E. index guides

Lastly, the *archival records* presently stored in cabinets beneath the customer counter should be incorporated with the *new* archives system outlined in the preceding section.

COMMUNITY DEVELOPMENT/PLANNING & ZONING

At the time of our visit, you had already decided to *consolidate* the planning and zoning files, and in fact, Josh has already begun this task! Not only is he consolidating the two files but, he is *also* “purging” *duplicate* documents at the same time!! Therefore, we have included the inventory for both departments in this section, and the recommendations obviously reflect a “combined file”.

PLANNING - There are three main categories of records in this area, which include planning board street files, administrative records, and archival records. Hav- in3dg said that the *planning board files* are arranged alphabetically by street name/ \S2Ggtf4B+/numerical order within, and the 43documentation is set up in a *variety* of letter size manila and colored folders with third cut/*some* second cut assorted undercut “bat-tered” top tabs, *some* reinforced back flaps. Standard labels are *sometimes* applied to the tabs, but indexing is *usually* just *handwritten* right on the tabs, and it references address/*often* “VAR”, “SPF”, “SP”, “SR”, and so on. “ZBA and PB” along with the year and the case number are *also* referenced. Almost all of these folders are then individually filed in colored letter size *hanging folders* with colored plastic tabs added in assorted positions across the back flap. Tab inserts *also* reference typed or *hand-written* property address.

A sampling of the documentation within these folders revealed the following, *majority* of documents loosely filed except for “timetables” stapled in the #3 position:

- lots of pictures
- staff reports (multiple pages)
- reports of planning board (multiple pages)

- petitions for special permit (legal size, multiple pages)
- petitions for variance (legal size)
- memos (multiple pages)
- lots of *folded* drawings (**“bulky”**!)
- notices of decision (multiple pages)
- BOA certificates of granting variance & special permits
- correspondence
- ZBA/BOA decisions
- abutters decision/certifications
- permission to inspect premises/waiver
- application prep checklist & authorization to file
- floor plans
- copies of building permit applications
- etc.

During our inventory, we couldn't help but notice lots of *duplication* throughout the files (for example: *two* copies of same decision!). **AND**, the copies are not necessarily filed together!

There are **“tons”** of staples/paper clips/binder clips used throughout the material, some *folded* documents as previously noted, many wire bound reports included throughout the files AND, those folded drawings simply “catch” in drawers when opened! The document counts are really “all over the place” here, ranging from 45 – 165 (*plus drawings!*), with *multiple* folders for some addresses.

Neither index *nor* “OUT” guides are used here, and these files are generally accessed by five people on a regular basis.

The street files are housed in a battery of **18** Hon 5-drawer letter size *standard steel* vertical file cabinets, 60"high x 15"wide x 26 ½"deep/capacity, 24 ½ (reduced due to *hanging folders!*)/key lock top right.

1. A. empty
 - B. 6 Acton St. – 17 Appleton St.; 11"
 - C. 15 Arden Rd. – 7A/8A Ashland St.; ***jammed full***
 - D. empty
 - E. 120 Arlington St. – 319 Arlington St.; 10 ½"
2. A. 311 Arsenal St. *only*; 18" (***out of order!***)
 - B. 24 Arsenal St. – 214-298 Arsenal St., 268 Arlington St. (***"misfile"!***); ***jammed, jammed full***
 - C. Lot 1038 Arsenal, 279-281 Arsenal St. (***"misfile"!***) – 450 Arsenal St.; 22 ½"
 - D. 455-465 Arsenal St. – 485 Arsenal St.; full
 - E. 485 Arsenal St. – 570 Arsenal St.; 15 ½"
3. A. 615 Arsenal St. – 21-33 Ashland St.; 17"
 - B. empty
 - C. 672 Belmont St. – 97 Belmont St (***"misfile"!***); 14 ¼"
 - D. 174 Belmont St. – 1084 Belmont St.; 24"
 - E. 1047-1049 Belmont St. (***"misfile"!***) – 49 Buick St.; full
4. A.-B. empty
 - C. California St. – 75 Capital St.; 5 ½"
 - D. 206-207 Carey Ave. – 10 Chestnut St.; ***jammed full***
 - E. 30-34 Chestnut St. – 18 Conant Rd.; full
5. A. empty

- B. 48 Coolidge Ave. – 152-154 Cypress St.; full
 - C. empty
 - D. 12 Dana Terrace – 11 Dwight St., 156-158 Cypress St (*“misfile”!*); 14”
 - E. 32 Edenfield Ave. – 65 Elton Ave.; 24”
6. A. 19 Emerson Rd. - 63 Everett Ave.; 12 ½”
- B. empty
 - C. 11 Fairfield St. – 9-11 Fuller Rd.; 21 ½”
 - D. 11 Galen St. – 12 Gill Rd.; 23”
 - E. 16 Gleason St. – 205 Grove St.; full
7. A.-B. empty
- C. 21-23 Hall Ave. – 50 Hunt St.; full
 - D. Lot B Irma Ave. – 16 Jensen Rd.; 15 ½”
 - E. 66-68 Katherine Rd. – 89 King St.; 10”
8. A.-B. empty
- C. 3-5 Ladd St. – 318 Lexington St. (*“misfile”!*); 20 ¼”
 - D. 249 Lexington St. – 69 Lowell Ave.; 15”
 - E. empty
9. A. empty
- B. 86 Madison Ave. – 410 Main St. (*“misfile”!*); 22”
 - C. 401-405 Main St. – 600 Main St.; 21”
 - D. 622-624 Main St. – 74 Morse St.; 13”
 - E. 101-103 Morse St. – 89 Mt. Auburn St.; 16”
10. A. empty
- B. 120 Mt. Auburn St. – 341 Mt. Auburn St.; full

- C. 375 Mt. Auburn St. – 658 Mt. Auburn St.; 21”
 - D. 583-591 Mt. Auburn St. (**“misfile”!**), 627 Mt. Auburn St. (**“misfile”!**) – 805 Mt. Auburn St.; 20 ½”
 - E. 805 Mt. Auburn St. – 61-63 Myrtle St.; 11 ½”
11. A. 11 Nichols Ave. – 145-7 Nichols Ave.; 16 ½”
- B. 21 No. Beacon St. – 175 No. Beacon St.; full
 - C. 216 No. Beacon St. – 383 Orchard St.; 16”
 - D.-E. empty
12. A. empty
- B. Lot B Palfrey St. – 29 Parker St.; 16 ½”
 - C. 28-30 Pariler St. – 70 Phillips St., 497 – 501 Pleasant St. (**“misfile”!**); 16”
 - D. 30 Piermont St. – 192 Pleasant St.; full
 - E. 141 Pleasant St. (**“misfile”!**) – 313 Pleasant St.; 15”
13. A. 340 Pleasant St. – 414 Pleasant St.; 14”
- B. 385 Pleasant St. (**“misfile”!**) – 483 Pleasant St.; 18”
 - C. 498 Pleasant St. – 550-570 Pleasant St.; 24”
 - D. 550-570 Pleasant St. – 555 Pleasant St.; full
 - E. 580 Pleasant St. – 130 Putnam St.; full
14. A. 560-570 Pleasant St. (**“misfiles”!**); 14”
- B.-E. empty
15. A.-B. empty
- C. 1-3 Quincy St. – 24 Rosedale Rd.; 17”
 - D. 27 Rosedale Rd. – 123 Rutland St.; 16 ½”
 - E. empty

16. A. 50 Salisbury Rd. – 417 School St.; 17”
 B. 20 Seyon St. – 66-68 Spring St.; 14”
 C. 74 Spring St. – 119 Spruce St.; 12 ½”
 D. 32 Spruce St. (**“misfile”!**) – 87 Summer St.; 17”
 E. 87 Summer St. – 188 Sycamore St.; 9”
17. A. empty
 B. 10 Tappan Ave. – 40 Upland Rd.; 10”
 C. empty
 D. 21 Walnut St. – 125 Walnut St.; 20 ½”
 E. Lot 4 Waltham St. – 90 Washburn St.; 22”
18. A. Lot 1 Water St. – 20 Watertown St.; 16”
 B. Lot 10A Watertown St. – 145 Waverley Ave.; 24”
 C. 240 Waverley Ave. – 40 Whitney St.; 15 ½”
 D. Williams St. Terraces – 11 Yukon Ave.; 14 ¼”
 E. empty

There is *also* a “pile” of folders on a cart that need to be interfiled; approximately 23”. AND, there are *also* five standard size boxes (*no lids*) arranged on top of the preceding cabinets, which hold *really* “bulky” folders for several major streets that need to be interfiled (Arsenal St., Mt. Auburn St., Nichols, etc.!).

Another cabinet, same as units 1-18, holds “zoning amendments”. Documents are set up in the same assortment of manila/hanging folders as street files and, there is ***no*** “rhyme or reason” to the filing order!

19. A.-E. zoning amendments, ***back to 1980’s***/changes, 1996 (*at least!*); approximately 64”

Next stop, *Ingrid's office*, and she is responsible for the *administrative files*. Most of this documentation is set up in more colored letter size *hanging folders* with assorted colored plastic tabs/*handwritten* inserts, some no tabs. These files are housed in 11 more *standard steel* cabinets, a variety of makes and sizes, with all "capacities" reduced due to *more* of those "awful" *hanging folders*! And, documents often get "caught" in drawers when opened here, too!!

Units 1-9 are located right outside of Ingrid's cubicle.

1. Hon 4-drawer letter size vertical file cabinet, 52"high x 15"wide x 25 ¼"deep/
capacity, 22 ½"
A.-D. mansion vouchers, #1 - #2567, 1999-2017; ***jammed full***
2. same as unit 1
A. same as unit 1: #1868 - #1950, 2012 (***out of order!***)/#2751 - #3125, 2018-
2022; 16"
B. #2051 - #2750, 2013-2018; ***jammed full***
C.-D. planning board assorted files (lots of *folded* plans/minutes/agendas/
meeting notices/petitions/staff reports), 2/11 – 5/15; 42"
3. same as unit 1
A.-D. FY'11 – FY'21 (vouchers/payroll time sheets/invoices/payroll registers); 79"
4. same as unit 1
A.-B. same as unit 2C-D, 10/18 – 3/21; 30"
C.-D. annual reports, 1992-2002/expense ledger, FY'01/computer purchase,
1983/workmens comp/historic inventory, etc., 1980's; 6"
5. same as unit 1
A.-C. same as unit 2C-D, 5/15 – 5/18; 66"

- D. bank statements, etc., for treasurer, **1990's**; legal invoices/insurance info, etc., **back to 1980's**; 12"
- 6. same as unit 1
 - A. *more* vouchers/gl's (trees/open space...), **1992-2019**; 16"
 - B. *more* vouchers/gl's (affordable housing/legal expenses/first home...), **1993-2021**; 18"
 - C. *more* assorted vouchers, **back to 1980's-2021**; "old" purchase orders/calendars/budgets, **1980's-early 1990's**; full
 - D. Watertown Sq. vouchers, **2001-06**/few personnel files, **back to 1980's-1990's**; 11"
- 7. 2-drawer lateral file cabinet, 27"high x 30"wide x 18"deep/capacity, 26 ½"/key lock top right
 - A. WADC (Watertown Arsenal Dev. Corp.), miscellaneous project, etc., master plan for town, **back to 1990's**; 23"
 - B. Arsenal St., bid documents/reconstruction files, back to 2000; full
- 8. 5-drawer lateral file cabinet, 64"high x 36"wide x 18"deep/capacity, 33 ¼"/key lock top center
 - A. WADC meetings, **1997-2002**; full
 - B. Arsenal payroll/bills/vouchers, **1991-98 (at least!)**; **jammed full**
 - C. *more* mansion vouchers/grant info/etc., **1993-2004**; **jammed full**
 - D. personnel files (**no particular order!**), set up in more assorted letter size colored *hanging folders*/assorted colored tabs/*handwritten* name inserts: **jammed full**
 - E. capital projects vouchers, **1993-2004**; full

9. Hon 2-drawer letter size vertical file cabinet, 29"high x 15"wide x 25"deep/capacity, 23 ½"/key lock top right

A.-B. CDBG vouchers, 1999-2009; ***jammed full (plus "pile" of documents on top of cabinet "to be interfiled"!)***

Units 10-11 are located within Ingrid's cubicle.

10. Office Max 2-drawer letter size vertical file cabinet, 28 ½"high x 15"wide x 26 ½" deep/capacity, 24 ½"/key lock top right

A. few daily working files/attendance records, 2015-current; 16"

B. mural/annual report files, ***FY'07-FY'20***/budgets, ***FY'08-FY'22***/"miscellaneous"; full

11. same as unit 10 ("stacked" right on top!)

A.-B. *more* voucher files, assorted "old" vouchers, back to 2012.../current voucher files, FY'22; full

ZONING - The zoning case files are also arranged alphabetically by street name/straight numerical order within, and ***no*** color-coding has been added to the files. Documentation is set up in a *variety* of legal size manila/*some* orange folders with third cut assorted undercut "battered" top tabs/*some* reinforced back flaps. We also noted a few legal size expansion pockets. In any case, a *variety* of standard colored labels is applied to the tabs, and they reference typed/*some* handwritten street address, case number, name(s)/not always inverted properly; however, *many* of the older labels are simply ***"falling off" (unless taped or stapled)!***

Some documents such as hearing notices/timetable sheets are stapled in the #3 position, whereas all other documentation is *loose*ly filed within the fold-

ers/pockets, *sometimes* “batched” together with rubber bands.

A sampling of the documentation within the folders/pockets revealed the following:

- copies of occupancy permits/building permits
- certificates of grant (multiple pages)
- notices of decision (multiple pages)
- memos/correspondence
- petitions for special permits (legal size, some multiple pages)
- “**tons**” of floor plans (legal size)
- checklists & authorizations to file
- reports of planning board (multiple pages)
- staff reports (some multiple pages)
- abutters certifications
- copies of water & sewer bills/tax bills/property valuation cards
- accessory apartment checklists (multiple pages)
- insurance (notices)
- returned mail
- decisions of BOA (multiple pages)
- lots of *folded* drawings!
- petitions for variance (legal size, multiple pages)
- etc.

There are lots of staples/paper clips used throughout the material, as well as some “sticky notes” attached to documents, and some *handwritten* information on the front of the folders. The average number of documents per folder/pocket ranges

from 15 (+ *drawings!*) – 72 (+ *drawings!*), and there are some *really* “bulging” folders/pockets held together with rubber bands! We should *also* point out that according to the staff, there is a “**lot**” of *duplication* between the zoning and planning board files.

As previously noted, Josh has recently begun the task of *interfiling* the zoning documents with the existing planning street files. **AND**, during the process, he is purging any *duplicate* documents! Any legal size zoning documents are just being *folded* as they are added to the planning files. In any case, the process is proceeding **very** slowly!

Files are poorly guided by a 25 division set of letter/legal size green press-board index guides with fifth cut assorted “battered” pre-printed tabs, there is **no** “charge-out” system in place, and files are generally accessed by two people on a regular basis.

All of the zoning files are located within the office, more or less “surrounding” Josh’s desk!

1. Anderson Hickey 4-drawer unit, 52”high x 18 ¼”wide x 26 ¾”deep/capacity, 25 ¼”
 - A. 480 Arsenal St. *only*; 23”
 - B. 570 Arsenal St. (“***misfile*”!**) – 485 Arsenal St.; 19” (***lots of “misfiles” here!***)
 - C. 615 Arsenal St. - 45 Bates Rd. (“***misfile*”!**); 14”
 - D. 41 Beacon Pk. – 626 Belmont St.; 21”
2. same as 1
 - A. 738-740 Belmont St. – 267-269 Boylston St.; 24 ½”

- B. 45-47 Bradford Rd. – 21 Center St.; 25"
 - C. 9 Chandler St. – 30 a/k/a 34 Chestnut St.; full
 - D. Church St. – 63 Commonwealth Rd.; full
3. Stylex 5-drawer unit, 60 $\frac{3}{4}$ "high x 17 $\frac{3}{4}$ "wide x 26 $\frac{3}{4}$ "deep/capacity, 24 $\frac{1}{2}$ "
- A. 10 Conant Rd. – 110 Coolidge Hill; ***jammed full***
 - B. 24-26 Copeland St. – 213-219 Dexter Ave.; full
 - C. 423 Downey St. – 20 Emerson Rd.; ***jammed full***
 - D. 28 Emerson Rd. – 43 Franklin St.; full
 - E. 46-48 Franklin St. – 164 Galen St.; 21"
4. same as unit 3
- A. 19 Garfield St. – 65 Grove St.; full
 - B. 94 Grove St. – 44 Hunt St.; ***jammed full***
 - C. Irma Ave. – 46 Kondazian St.; full
 - D. 25 Langdon Ave. – 43 Loomis Ave.; full
 - E. 32-34 Madison Ave. – 441-445 Main St.; full
5. same as unit 3
- A. 448 Main St. – 39 Marshall St.; full
 - B. 39 Marshall St. – 111 Mt. Auburn St.; full
 - C. 120 Mt. Auburn St. – 443 Mt. Auburn St.; full
 - D. 444 Mt. Auburn St. – 694 Mt. Auburn St.; full
 - E. 705 Mt. Auburn St. – 21 Nichols Ave.; full
6. 5-drawer unit, 60 $\frac{1}{2}$ "high x 18"wide x 26 $\frac{1}{2}$ "deep/capacity, 24 $\frac{3}{4}$ "
- A. 5 Oak Place – 270-274 Palfrey St.; ***jammed full***
 - B. 12-14 Palmer St. – 81-95 Pilgrim St.; full

- C. Pleasant St. – 313 Pleasant St.; ***jammed full***
- D. 380 Pleasant St. – 532-542 Pleasant St.; full
- E. Russo's litigation/550R Pleasant St. – 700 Pleasant St. (***drawer "broken"***);
11"

Filing continues in three Hon legal size 3-drawer vertical file cabinets installed beneath a work counter, 40"high x 18"wide x 26 ½"deep/capacity, 24 ½"/key lock top right.

- 7. A. 700 Pleasant St. – 20 Ralph Piteri Terrace; full
- B. Pepton Circle – 35 Rutland St.; full
- C. 36 Rutland St. – 65 Shattuck Rd.; full
- 8. A. 19 Sparkill St. – 181 Standish Rd.; full
- B. 16-18 Stanley Ave. – 202 Summer St.; 19 ½"
- C. 4-6 Summit Rd. – 67 Walnut St.; 21"
- 9. A. 71-73 Walnut St. – 143 Walnut St.; 14 ½"
- B. 1-3-5 Waltham St. – 20 Watertown St.; 22 ½"
- C. 39 Watertown St. – 286 Waverley Ave.; full

"Oversized" files that do not "fit" in units 1-9 are housed in a Hon 3-drawer standard steel lateral file cabinet, 40 ¾"high x 36"wide x 19 ¼"deep/capacity, 33"/key lock top center.

- 10. A. "miscellaneous" (withdrawn case files, etc.)
- B. 7-9 Ladd Place – 69 Lowell Ave./208 No. Beacon St. – 262-272 No. Beacon St./17 Norseman Ave. & 19-20 Norsemen Ave./2-4-6 No. Park St./3 Nyack St. – 28 Nyack St.; 25"
- C. 86 Wayne Ave. – 11 Yukon Ave.; full

There are *also* three standard size boxes arranged on top of the file cabinets:

- 1 box: *more* Arsenal St. files
- 2 boxes: 6x4 ZBA cross-reference cards, A-Z

Lastly, there are some *old* files that Josh and Tony “inherited”, which are located in Tony’s office. These files are rarely referenced – ***if at all!*** Documentation is set up in a *variety* of letter size manila folders/”battered” tabs, “bulk-filed” in *hanging folders*. “Lead” pressboard index guides/metal top tabs have inserts referencing departments *or* alpha tab inserts are used.

These files are housed in four 32 inch wide lateral drawers of a large bookcase.

11. A. zoning amendments, back to **1980’s-2010 (*at least!*)**/BOH, building inspector, planning department, etc. assorted files (unregistered vehicles, ***back to 1999***/general info...); full
 - B. “**hodgepodge**”; 17”
12. A. “old” complaint files: 20 Arden St. – 128 Maplewood St.; full
 - B. 27-35 Main St. – 18-20 York Ave.; full

RECOMMENDATIONS

IF you loved the color-coded street file system previously outlined for the assessor files, then *you'll simply "love it"* for your planning/zoning street files, too! Therefore, we recommend it to you again!!

As far as your folders are concerned, "cumbersome" *hanging folders* once again need to be replaced, and the same combination of 14-point folders (*only red!*) and expansion pockets makes sense here, too! These folders/pockets will also be letter size versus the *legal size* presently in use for zoning, as the *majority* of documentation is letter size.

Our next topic pertains to equipment, and we have decided to provide you with **two** viable options here. To assist you with your decision-making process, please make reference to the following chart. It shows the physical characteristics of your present planning and zoning systems:

1. floor space used	=	168.4 square feet
2. filing capacity	=	3,218 filing inches
3. filing inches consumed	=	2,046 filing inches
4. available expansion	=	1,172 filing inches

Option 1. **Open shelf *movable*** filing. We would install 12 sections of letter size, 36 inch wide shelving, seven tiers high, which will hold 2,940 filing inches and require *only* 54 square feet. In other words, such a system would provide you with approximately an additional 894 filing inches over the 2,046 inches presently *consumed* for files - about 43% growth! ***AND, at the same time, reduce*** your floor space requirement by approximately 114.3 square feet!! ***MAGIC!!!***

We would install two bi-files: (1) 3x2, with three stationary sections in back, and two *movable* sections/on tracks in front of the three; (1) 4x3, with four stationary sections in back, and three *movable* sections/on tracks in front of the four. Approximately 79 inches in height, 112-148 inches in width, and 30 inches in depth will be needed. Total cost for the equipment is \$22,940.00, including installation *and* shipping.

Option 2. Rotary file installation. We would install nine letter size seven tier units, 82"high x 31"deep. One unit would be 36 ½"wide (starter)/eight units, 30 ¾" wide (add-ons), and each unit would provide a filing capacity of 336 inches. In other words, such an installation would provide you with approximately an additional 978 filing inches over the 2,046 inches presently *consumed* for files - about 47% growth! *AND, at the same time, still a decrease* in square footage required – approximately 107.7 square feet!! *MAGIC AGAIN!!!*

Each of these units comes equipped with a lock, and the total equipment cost is \$39,064.00, including installation *and* shipping.

The following supplies and labor will need to be ordered for conversion:

A.	6 bxs.	#61757 letter size horizontal end tab blank	
		index guides. Cost, \$125.90 per box. Total cost,	\$ 755.40
B.	100	#FST1514TY letter size 1 ¾ inch expansion	
		pockets, <i>right end tab</i> , "cut down" front flap.	\$ 285.00
C.	100	#FST1524TY 3 ½ inch expansion pockets, same	
		as B.	\$ 318.00
D.	100	#FST1534TY 5 ¼ inch expansion pockets, same	
		as B.	\$ 380.00

E.	10,000	#S-1600 letter size 14-point <u>red</u> colored folders, “cut down” front flap, <i>right end tab</i> . Cost, \$433.60 per M. Total cost,	\$4,336.00
F.	30 rls.	#11830 series <i>plain</i> numerical labels, 0-9. Cost per roll, \$7.60. Total cost,	\$ 228.00
G.	7 bxs.	#5366 white labels, pressure-sensitive. Cost, \$235.00 per box. Total cost,	\$1,645.00
H.	104 pkgs.	Alpha Kolor I tabs at \$4.60 per pkg. Total cost,	\$ 478.40
I.	100	#VS-168 letter size red vinyl “OUT” guides, right end tab.	\$ 140.00
J.	500	5x3 requisition slips.	\$ 56.00
K.	Labor to convert. It will be necessary to type (<i>or, laser print</i>) address labels and apply to new folders/pockets – <i>approximately</i> 10,000 labels. Documentation will be converted from old folders/pockets to <i>new</i> folders/pockets, “as is”. Colored alpha tabs and numeric labels will be applied, and all folders/pockets will be rearranged, creating <u>one</u> large alpha-numeric file. Finally, index guides will be installed, folders/pockets re-filed properly onto new equipment, and your staff will be trained in the maintenance and perpetuation of the new system.		

We would assign one of our records management supervisors, who is billed at \$470.00 per day, plus expenses, and two of our staffers, who are each billed at \$418.00 per day, plus expenses, on a “per diem” basis due to all of the variables to com-

plete the conversion for you. However, for budgetary purposes, we recommend that you begin with *at least* 20 days, and then once we are “up and running”, we will be able to provide you with a target date for completion.

The last area to be addressed is the *administrative files* in Ingrid’s office, and once again, we refer you to General Recommendations #1 *through* 7, as they all apply here (a very serious “**purge**” and “**destruction**” to be completed – ***vouchers, back to 1980’s/FY files, back to 2011/bank statements, back to 1990’s/budgets, back to 2008/annual reports, back to 1992/WADC meeting files, back to 1997 – “22” of the 37 drawers holding records fall into this category!***). We saw *many* of these same files ***back in 2008!***

Having said that, our archives supervisor could be scheduled for one day to review and set aside appropriate files for either storage or destruction at a cost of \$675.00 per day, plus expenses. Once the purge step is completed, the amount of and cost of the following supply items, as well as labor, can be determined:

- A. file organizers
- B. expansion pockets (vouchers)/kraft folders
- C. “miscellaneous” folders/**Tell-i-vision subject file** (agendas, annual reports, budgets, staff reports, and so on)
- D. index guides

In terms of equipment, once a proper “purge” is completed, your existing assortment of file cabinets *with* organizers will provide *more than* enough space! In fact, you should *easily* “recapture” at least ***half*** of the file space here!!

HEALTH DEPARTMENT

The central files for the Health Department include **ten** separate A-Z files along with personnel files and a small “miscellaneous” file. However, the staff has been relying on electronic files for the last year, thereby *reducing* the amount of paper being added to these files.

The vast majority of documentation is set up in letter size manila folders with third cut assorted undercut top tabs/*some* reinforced back flaps. Indexing is simply *handwritten* on the folder tabs/*few* “old” white labels, referencing address. Manila folders are then either individually filed *or* “bulk-filed” in colored letter size *hanging folders* with clear/colored plastic tabs added across the back flap in assorted positions. These tab inserts reference neatly typed/*few* handwritten addresses. AND, in some cases, documentation is just “*loosely*” filed within the hanging folders!

Neither index nor "OUT" guides are installed in *any* of these files, which are accessed daily by the entire staff.

Street Files (including hazardous material/nuisance files) – Folders are arranged in one large alphabetical file by street name with no “color-coding” added, and a sampling of the documentation within the folders revealed the following “*loosely*” filed:

- asbestos removal checklists/plan reviews (2 pages)
- asbestos notification forms (multiple pages)
- asbestos removal inspection forms (2-sided)
- correspondence

- project notification revision forms (multiple pages)
- copies of non-hazardous special waste manifests
- tier transmittal forms (multiple pages)
- complaint intake forms (multiple pages)
- submetering of water/sewer certification forms
- complaint/housing checklists (multiple pages)
- hazardous material permits/registration forms/surveys
- general permit applications (multiple pages)
- environmental safety & compliance audit forms
- copies of checks
- public records request forms (multiple pages)
- inspection forms
- *etc.!*

Some of the folders can become quite large – **200 documents or more!** However, the average document count for folders is 44 **AND**, there are lots of staples/paper clips/binder clips used throughout the material, *as well as* lots of attachments to documents (“sticky notes”, mail receipts, photos).

Camps – Presently, there are only “two” camps (though there are “nine” folders in the file!). Material is set up in a few manila folders, and indexing references camp name/*some* address. Folders and “loose” documents are then simply “bulk-filed” in *hanging folders*.

A sampling of the material within the folders revealed the following:

- permits
- applications

- check copies
- disaster plans
- health & safety procedures
- inspections
- health care policies
- correspondence
- etc.

Tobacco (31), Hotel/Inn/Motel (3), Hens & Bees (6), Tanning (1), Body

Art (3), Pools (17) – Individual folders are created within each category, establishing *multiple* separate A-Z files. Documentation is set up in assorted letter size colored *hanging folders* with *some* same colored inner folders also used, and colors denote the following:

- yellow = body art/piercing
- purple = tobacco
- red = tanning
- green = hotels/hens & bees
- blue = pools (maroon inner folders!)

The majority of the hanging folders has clear *or* colored plastic tabs far left/back flap, color of the tab *often* matching the folders, and inserts reference business name/address.

A sampling of the material throughout these folders revealed the following:

- *permits
- *applications
- *inspections

- *certifications
- checklists
- copies of licenses
- correspondence
- compliance check forms
- monthly chemical reports
- etc.

With pools, documents denoted by an asterisk are “*loosely*” filed within the hanging folders, and the maroon inner folder holds hazardous material records/ monthly chemical reports.

Once again, there are lots of staples/paperclips used throughout the material, and there are also some *folded* documents. The average document count throughout the various folders is 22.

Food Service Establishments – There are 529 licensed food establishments, and an individual folder is created for each one. Folders are arranged in one big A-Z file with documentation set up in orange letter size *hanging folders* with orange/green plastic top tabs far left **but**, the color of the tabs *no* longer has any significance. Indexing is neatly typed on inserts and references establishment name/address. Material within the folders may be set up in several colored inner folders/”battered” tabs *or*, just “loosely” filed in the hanging folder:

- green = certifications
- manila **or** filed behind inner folders = important information/specifications/ plans
- orange **or** filed in front of inner folders = permits/applications/inspections

Indexing on the inner folders references establishment name/address *or*, name/document title/year *or*, name/year *or*, ***nothing at all!*** Some folders have a red adhesive "dot" affixed to the top tab, but they are *a/so* not used any more.

A sampling of the documentation within these folders revealed the following:

- permits (lots of attachments)
- workers comp insurance affidavits
- applications (multiple pages)
- copies of employee notices/checks/receipts
- correspondence
- inspection reports (multiple pages, ***back to 2009, at least!***)
- checklists
- returned mail receipts
- surcharge/violation notices
- plan review applications (multiple pages)
- folded plans
- literature/specs
- complaint forms
- certificates of training
- *etc.!*

Inspections can be purged after five years, but they presently remain in the files for the life of the establishment. Document counts, which vary *greatly*, can reach as high as ***300 or more!*** Once again, there are “**tons**” of binder clips/staples used throughout the material, as well as some attachments to documents (“sticky” notes/mail receipts/photos...), as well as large *folded* plans.

Except for food establishment, all of the preceding files are located right in Larry's office, and they are housed in a battery of eight Hon 4-drawer standard steel letter size vertical file cabinets, 52"high x 15"wide x 26 ½"deep/capacity, 24"/key lock top right.

Street files are housed in units 1-7.

1. A. 25 Acton St. – 379 Arlington St.; 20"
 - B. Arsenal Court Dr. – 475 Arsenal St./490 Arsenal Way (***"misfile"!***); 20"
 - C. 480 Arsenal St. – 88 Arsenal Yards; 20 ½"
 - D. Arthur Terrace – 1070-1080 Belmont St.; 18 ¼"
2. A. Bemis St – 108 California St.; 23"
 - B. 91 Carroll St. – 316 Common St.; 21"
 - C. 16 Commonwealth Ave. – 148 Cypress St.; 23 ½"
 - D. 1 Dana Terrace – 13 Ellen Terrace; 21"
3. A. 23 Elm St. – 47 Fuller Rd.; 21"
 - B. 2 Galen St. – 49 Grenville Rd.; 19"
 - C. 1 Grove St. – 147-149 Hillside Rd.; 22 ½"
 - D. 12-14 Hillcrest Circle (***"misfile"!***) – 168 Langdon Ave.; 23 ¼"
4. A. 61 Laurel St. – 275 Main St.; 20 ½"
 - B. 309 Main St. – 202 Maplewood St.; 14 ½"
 - C. 27 Marcia Rd. – 20 Morton St.; 13"
 - D. 2 Mt. Auburn St. – 495 Mt. Auburn St.; 17 ½"
5. A. 500 Mt. Auburn St. – 73 Myrtle St.; 15"
 - B. 14 Nash St. – 4/6 No. Park St.; 19 ½"
 - C. 1 Oak Place – 38 Phillip Darch Rd.; 23 ½"

- D. 115 Pierce Rd. – 414 Pleasant St.; 20 ½”
- 6. A. 457 Pleasant St. – 35 Purvis St.; full
 - B. 12 Putnam St. – 98-100 Rutland St.; 17 ½”
 - C. 8-10 St. Mary’s St. – Super 8 Motel; 17 ¼”
 - D. 20 Seyon St. – 198 Summer St.; 13”
- 7. A. 6 Summit Rd. – Vivien Dr.; 12”
 - B. 8-19 Walcott Rd. – 247 Warren St.; 16”
 - C. 28 Warwick Rd. – 225 Watertown St.; 13”
 - D. 1 Waverley Ave. – 11 Yukon Ave.; 21 ¼” (*plus approximately 5” to be interfiled!*)

The nine remaining A-Z files are all housed in unit 8.

- 8. A. tobacco: AAA Auto – Yogi’s General Market; full
- B. funeral director (1 folder)/hotels/inns/motels (4 folders)/pony rides (1 folder)/hens & bees (12 folders)/tanning (1 folder)/body art (11 folders)/camp (9 folders + “miscellaneous”; full
- C. pools: Bell Watertown – Marriott Residence Inn; 20”
- D. Newtown @ The Gateway – Whitney Plaza; 22” (*plus approximately 6” to be interfiled!*)

We *also* noted 13 three-ring binders stored in a glass bookcase in Larry’s office: meeting minutes, 2008-2020; approximately 47”.

Food service establishment files along with some “miscellaneous” records are located right outside of Larry’s office, housed in four assorted 4-drawer letter size standard steel vertical file cabinets.

- 9. 52”high x 15”wide x 25 ¼”deep/capacity, 20 ½” (*reduced due to hanging racks!*)

- A. residential/retail: Alex's Kitchen – Brigham House; 20"
 - B. Bus Stop Market - Coolidge Liquors; 20"
 - C. Corporate Chef – Domino's Pizza; 16"
 - D. Donohue's – Flaming Pit LLC; 19"
10. Hon, 52"high x 15"wide x 25 ¼"deep/capacity, 23 ½"
- A. FoMu – Home Taste; full
 - B. Independent Z, Inc. – Masis Bakery; full
 - C. Matildas – Num 1 Taste; 19 ½"
 - D. Nzuko Restaurant – Porcini's; 15 ¼"
11. same as unit 2
- A. Ravello Italian Kitchen – Watertown High School; 20"
 - B. Sebastian's LMP Holding Co. – Stop & Shop; full
 - C. Stop & Shop – Uncommon Ground; ***jammed full***
 - D. Victoria Spa – Yummi Sushi; 16 ½"
12. same as unit 10
- A. mobile food: 2018-current, The Bacon Truck – Zinneken's/2017, A-Z/2016, A-Z/2015, A-Z; full
 - B. temporary food events, arranged by year, 2019-2022; 14 ½"
 - C. 1 3-ring binder: Biotech permits, 2021
 - D. "piles" of folders/documents re: temporary food permits (Commanders Mansion, Wedding Showcase, Farmers Market, *etc.*), 2017-19; full
- Personnel Records, Funeral Directors/Burial Agents, Minutes** – Documentation is "*loosely*" set up in more letter size *hanging folders*, majority with inner manila folders. Plastic tabs are used with hanging folders/white labels on manila

folders. These files are housed in one 3-drawer letter size standard steel vertical file cabinet, 41"high x 14 ¾"wide x 28"deep/capacity, 26"/center rod projections, which is located directly opposite the food establishment files.

13. A. personnel: Arnold – VanDinter, 5"/terminated files, 6 ½"
- B. burial agent (1 folder)/funeral directors: Bedrosian – Urquhart; 10"
- C. "stack" of minutes (*loose documents*/1 bound book), 1963-2001

General Files – Documentation is simply "*loosely*" filed within letter size *hanging folders* with clear plastic tabs, printed title inserts/some inner manila folders with third cut "battered" assorted top tabs and white index labels. These files are also housed in one 3-drawer file cabinet, same as unit 13, located right next to that unit.

14. A. "**hodgepodge**" of files: abrasive blasting application/permits – well permits, back to 2007 (***at least!***)/21E notifications, 2020-21/Stericycle (medical waste tracking forms), 2010-2021, etc.; 10"
- B. "**hodgepodge**" of letter/legal size supplies: assorted dog case files, Havoc Boyd – R. Hall; 13"
- C. rabies vaccine clinics/results files (red folders), 2007-2020/animal quarantines (blue folders), 2003-2021/rabies control reporting forms (manila folders), 2003-07, 15"; "stacks" of dog violation notice/quarantine order books, back to 2007 (***at least!***), approximately 12"

Lastly, closed permit files are housed in one 2-drawer 42"wide lateral file cabinet located opposite the food establishment files – ***access "blocked"!***

RECOMMENDATIONS

Once again, the *color-coded* street file system previously outlined for *both* the assessor department and planning/zoning department files *is* the “way to go” for existing street files housed in units 1-7 in Larry’s office. And, the same combination of letter size 14-point folders (*only yellow!*) and expansion pockets makes sense here, too! Colored Tabbies can also be used to signal hazardous material/nuisance files, or whatever you choose.

As far as food establishment files and the small file categories including tobacco/pools/camps/hens and bees, *and so on* are concerned (units 8-11), the *color-coded* alphabetical filing system known as **KromaCode** is definitely the answer for the sake of accuracy *and* efficiency *and* for growth accommodation!

Because color is the key, it is an extremely difficult system to teach in writing, *but here goes!* In brief, with the KromaCode system the primary breakdown is based on the *first* letter of a *surname* in a file. Each letter, A through W and XYZ as a single letter, is assigned an identifying combination of two colors. These colored labels *also* have the letter of the alphabet printed in black ink above the color bar. Ten colors are used to create 24 two-color combinations. For example, the letter A is printed with green and red bands, letter B with green and gray bands, and so on.

Secondary coding of the title (the *second* letter of the *last name*) is achieved with “**Abgor**” labels. These labels create *five* color divisions within each primary letter, and color stripes are based on the letters A,B,G,O,R. Labels are printed with color edges and sides with color assignments as follows:

A = azure blue

B-F = brown

G-N = green

O-Q = orange

R-Z = red

A combination of letter size 17-point kraft folders and expansion pockets will be used here, and Tabbies will be added to signal the multiple *small* categories noted previously.

Our next topic pertains to equipment, which will be used to house all of the preceding files. Once again, to assist you with your decision-making process, please make reference to the following chart. It shows the physical characteristics of your present system:

1. floor space used	=	60.1 square feet
2. filing capacity	=	1,058 filing inches
3. filing inches consumed	=	871 filing inches
4. available expansion	=	187 filing inches

AND, the **open shelf movable** filing system is the *only* “way to go” here due to your *extremely* limited space! In Larry’s office, we would install five sections of letter size, 36 inch wide shelving, seven tiers high, which will hold 1,225 filing inches and require *only* 23.3 square feet. In other words, such a system would provide you with approximately an additional 354 filing inches over the 871 inches presently *consumed* for files - about 40% growth! *AND*, at the same time, *reduce* your floor space requirement by approximately 36.8 square feet!! *MAGIC!!!*

We would install one 3x2 **bi-file** with three stationary sections in back, and two *movable* sections/on tracks in front of the three. Approximately 79 inches in

height, 112 inches in width, and 30 inches in depth will be needed. Total cost for the equipment is \$9,600.00, including installation *and* shipping.

The following supplies and labor will need to be ordered for *both* the street file and the KromaKkode conversions:

- | | | | |
|----|----------|---|------------|
| A. | 5 bxs. | #61757 letter size horizontal end tab blank index guides. Cost, \$125.90 per box. Total cost, | \$ 629.50 |
| B. | 1 set | #Z-A1243 letter size alphabetical index guides, 100 division, end tab/extra depth. | \$ 260.00 |
| C. | 25 | #FST1514TY letter size 1 ¾ inch expansion pockets, <i>right end tab</i> , “cut down” front flap. | \$ 71.25 |
| D. | 25 | #FST1524TY letter size 3 ½ inch expansion pockets, same as C. | \$ 79.50 |
| E. | 3,500 | #S-1600 letter size 14-point <i>yellow</i> colored folders, “cut down” front flap, <i>right end tab</i> . Cost, \$433.60 per M. Total cost, | \$1,517.60 |
| F. | 700 | #CCK-17 letter size 17-point kraft folders, “cut down” front flap, <i>left end tab</i> . Cost, \$49.94 per C. Total cost, | \$ 349.58 |
| G. | 15 rls. | #11830 series <i>plain</i> numerical labels, 0-9. Cost per roll, \$7.60. Total cost, | \$ 114.00 |
| H. | 3 bxs. | #5366 white pressure-sensitive labels. Cost, \$235.00 per box. Total cost, | \$ 705.00 |
| I. | 78 pkgs. | Alpha Kolor I tabs at \$4.60 per pkg. Total cost, | \$ 358.80 |
| J. | 8 pkgs. | #KKL150VAPS alpha labels at \$22.05 per pkg. | |

		Total cost,	\$ 154.35
K.	5 pkgs.	Abgor color-coded labels at \$16.50 per pkg.	
		Total cost,	\$ 82.50
L.	1,000	Mylar protectors.	\$ 180.00
M.	100	#VS-168 letter size red vinyl "OUT" guides, 50 right end tab/50 left end tab.	\$ 140.00
N.	500	5x3 requisition slips.	\$ 56.00
O.	8 bxs.	#1600 series Tabbies to signal categories at \$24.50 per box. Total cost,	\$ 196.00
P.	Labor to convert. It will be necessary to laser print (<i>or, type!</i>) address/name labels and apply to new folders/pockets – about 3,000 labels street file, 610 labels KromaCode file. Documenta- tion will be converted from old folders to <i>new</i> folders/pockets, "as is". Colored alpha tabs/numeric labels/mylar protectors will be applied, and all folders/pockets will be re-arranged, creating <u>one</u> large alpha-numeric street file/ <u>one</u> large A-Z KromaCode file.		

Finally, index guides will be installed, folders/pockets re-filed properly onto new equipment, and your staff will be trained in the maintenance and perpetuation of the new systems.

We would assign one of our records management supervisors, who is billed at \$470.00 per day, plus expenses, and one of our staffers, who is billed at \$418.00 per day, plus expenses, for an estimated 20-25 days to complete the conversions.

Lastly, it's time to address all of the "general/miscellaneous" files currently

housed in units 12-14 (pages 109-110). AND, another “**purge**” is on the agenda *before* files are converted to a *proper* **subject file (Tell-i-vision)**, which is *once again* the answer! Once the purge step is completed, the amount and costs of the following supply items, as well as labor, can be determined:

- A. file organizers
- B. “miscellaneous” folders
- C. kraft folders/labels
- D. index guides

**CONSERVATION COMMISSION/HISTORICAL COMMISSION/
HISTORIC DISTRICT COMMISSION**

These three departments are combined in one area on the third floor, with a staff of three presiding over all. Some of the documentation is set up in manila letter size folders with third cut assorted undercut top tabs, which are “bulk-filed” in letter size *hanging folders*/clear top tabs affixed in assorted positions along the back edge with handwritten/typed inserts. In many cases, documents/plans are simply “loosely” filed within hanging folders. Indexing on the folders is either *hand-written* or typed on standard red/white labels, and material within the folders is just “loosely” filed in no particular order. Once again, there are “**tons**” of staples/paper clips used throughout the files, and neither index nor “OUT” guides are installed.

Conservation Files – These files generally include wetlands filings, but any conservation related issues may be added to the folders, too. Indexing on the folders references address/DEP number/WWO number/some business names, some project titles. Frequently referenced DEP numbers are assigned by the DEP and consist of seven digits. WWO or “Watertown Wetlands Ordinance” numbers consist of these three letters, followed by a two digit year, then a two digit file number issued in straight numerical order. For example, the third wetlands filing for 2008 would be WWO-08-03. Large sites, as well as some individual addresses, may have multiple DEP and WWO numbers.

A sampling of the material within these folders revealed the following:

- “**tons**” of folded plans/drawings
- plot plans

- applications
- studies/reports
- hearing results/actions/notices
- orders of condition
- wetlands determinations
- permits
- correspondence
- copies of payments
- abutters' certifications/lists
- letters of transmittal
- lots of wire bound reports/3-ring binders
- NOI's (multiple pages)
- orders-of-condition
- scope of work (multiple pages)
- WPA enforcement orders
- etc.

Folders are *often* two inches thick, *many* documents consist of *multiple* pages, and there are some attachments to documents *as well as* to inside folder flaps ("sticky notes"). There is really no "average" document count here, as files vary greatly based on severity of issues, size of property, scope of projects, etc. In fact, a few files are so large that they take up *more than* one drawer! **AND**, lots of *folded/"bulky"* plans "stick up" out of the drawers!!

Folders are generally arranged in alphabetical order by street name, but some folders are referenced by title (for example: Mt. Auburn Cemetery, Sawins

Pond, DCR...). Purging is simply **not** done, since even "dead" issues are used as reference material.

A few administrative files along with conservation street files are located right by Susan's desk, and they are housed in four Envoy 4-drawer letter size vertical file cabinets, 52"high x 15" wide x 26"deep/capacity, 24" (*reduced due to hanging racks!*).

1. A. *administrative files*: Charles River; correspondence; environmental reviews; wetlands filing logs, 1980's-1990's; minutes to meetings, 1993-2002; stormwater management, 1999; stormwater IDDE reports, 2004-2012, etc.; full
 - B. 74 Acton St. – 93 California St.; 22 ½"
 - C. Charles River Rd. – Greenough Blvd.; full
 - D. Dept. of Conservation & Recreation assorted files; 15 ½"
2. A. 23 Elm St. – 580 Mt. Auburn St.; ***jammed full***
 - B. Nonantum Rd. – 64 Pleasant St.; full
 - C. 106 Pleasant St. – 270 Pleasant St.; 22"
 - D. 290 Pleasant St. – 430 Pleasant St.; 22 ½"
3. A. 480 Pleasant St. – 680 Pleasant St.; 21 ½"
 - B. 680-700 Pleasant St. – 57 Stanley Ave.; 22 ½"
 - C. Waltham St. Apts. – 4 Wheeler Lane; ***jammed full***
 - D. "miscellaneous": archaeological survey, **1978** – Fillipellon Pk.; 22 ½"
4. A. Fillipellon Pk. (contracts) – Sawins Pond, **1966-1995**; full
 - B. *more* Sawins Pond, **1980's-2002 (majority!)**, Walker Pond – Whitney Hill; 21 ½"

C. Metromedia Fiber Network, 1999-2000, approximately 2 1/5 inch 3-ring binder (site assessment)=*more* Sawins Pond files, 2008

D. *more* Sawins Pond files, just “stacked” in drawer; 8”

There are *also* additional files just “piled” on the floor (***blocking access to drawers!***), which need to be interfiled: 1 24 inch box/”pile” of *loose* folders (approximately 16”)!

Historical Commission – This is essentially a “demolition file”, which was established about 2002. When application for total demolition of a structure is made to the building department, a copy of the application is automatically sent to the Historical Commission. Only structures over 50 years old need be reviewed by the board before demolition can be done. However, since this application may become the *only* record of a building’s existence, an individual folder is created for each and every application received *regardless of need for board review!*

Folders are arranged alphabetically by street name, they are considered “permanent” files, and ***no*** purging has been done.

These files are located in the *former* bathroom located directly opposite the vault by Susan’s desk.

5. Hon 4-drawer letter size vertical cabinet, 52”high x 15”wide x 26 1/2”deep/capacity, 25” (***lots of papers just “sticking up” out of the folders!***)

A. general files: bylaws/minutes to meetings, 1995-2001/artifacts survey, **1999**/demo detail, **1997**/historical presentation awards, 1998-2012/barn inventory, 2010/condemned properties, 2009-2012/historic property inventory/historic home info letters, 2008-2011/Arsenal reuse committee, ***back to 1990’s***/commander’s mansion (proposals, etc.), **1990’s**/60 Main St. – 562

Main St./134 Mt. Auburn St./344 Mt. Auburn St./Mt. Auburn Cemetery/
library, etc.; full

B. demo files: 74 Acton St. – 30 Grandview Ave.; ***jammed full***

C. 28 Green St. – 350 Pleasant St.; ***jammed full***

D. 77 Riverside St. – 59 Wilson Ave.; 15"

There is *also* a "stack" of folders "to be interfiled", *right on the floor* (approximately 5")!

In Gideon's office, the following archival records can be found;

- approximately 25 assorted 3-ring binders: US Army Corp. of Engineers superfund (Arsenal Mall) files (assessments, soil removal/testing, real estate transfers, inspection reports, etc.), ***back to 1990's***; approximately 75"

- 1 odd box, approximately 25 "*loose*": *more* assorted plans!

Historic District Commission – There are 60 properties in the historic district, and an individual folder has been created for each one. Indexing references address and HDO number. "Historic District Ordinance" or HDO numbers are assigned in the same manner as previously described for WWO numbers.

Very little documentation is being added to these files, as documents have been stored electronically for the last several years. A sampling of the material within the folders revealed the following:

- work certificates for exterior projects
- property information
- commission findings
- correspondence
- etc.

The average number of documents per folder is 12, and **no** purging is done due to the "permanent" nature of the files.

These files are arranged alphabetically by street name in one A-Z file, which is located right in Laurel's office, housed in one 2-drawer *standard steel* lateral file cabinet.

6. 27"high x 36"wide x 18"deep/capacity, 33"/key lock top right

A. correspondence/general information

historic properties: Marshall St. – Palfrey St.; 12"

Oakley Neighborhood Historic District

Brigham District

20"

B. supplies

RECOMMENDATIONS

Once again, the *color-coded street file* is the “way to go” with regard to existing street files presently housed in ten drawers (units 1B-D, 2A-D, 3A-C on page 118)! **AND**, our recommendation is that you consolidate these files with the central file previously outlined for the *planning/zoning files*, thereby “freeing up” much needed space within this office. In this case, *green* folders will be used along with expansion pockets, as previously specified.

We *also* recommend consolidating the demo street files here (unit 5B-D on page 120)! Green folders would still be used **but**, a colored Tabbie would be added to each of these folders to signal “demo”.

In terms of equipment, **no** additional purchase should be needed **IF** the “purge” that Josh has already begun with regard to the planning/zoning files is completed properly. The two street files in this department consume approximately 288 filing inches. Even if the purge task was not completed, there would *still* be some growth within the new equipment; however, the 43% growth factor specified on page 98 would be *reduced* to approximately 26%.

If you adopt our recommendation to consolidate the various street files as outlined above, then there would only be “two” supply items to be ordered at this time, as there will be enough expansion pockets and assorted labels previously specified to accommodate these files, too:

- | | | | |
|----|--------------------|---|----------|
| A. | 500 | #S-1600 letter size 14-point <i>green</i> colored folders,
“cut down” front flap, <i>right end tab</i> . Cost, \$43.36 | |
| | per C. Total cost, | | \$216.80 |

- B. 1 box #1600 series Tabbies to signal "demo". \$ 24.50

As far as the labor to include these files as part of the conversion is concerned, it would also be addressed as part of the "per diem" project.

The last areas to be addressed are the *administrative files* and the *archival records* currently "spread out" between units 1A/3D/4A-D/5A (7 drawers), along with "stacks" of folders/boxes/binders "*here and there*"! Once again, our archives supervisor could be scheduled for one day to review and set aside appropriate files for either storage or destruction at a cost of \$675.00 per day, plus expenses. When the purge step is completed, a proper "subject file" could then be established, and the amount and costs of the following supply items for the **subject file (Tell-i-vision)**, as well as labor, determined:

- A. file organizers
- B. kraft folders
- C. expansion pockets
- D. "miscellaneous" folders
- E. index guides

PROJECT COST SUMMARY
ASSESSOR – PLANNING/ZONING – HEALTH DEPARTMENTS –
CONSERVATION COMMISSION

1, EQUIPMENT (INCLUDING INSTALLATION & SHIPPING)

- ASSESSOR: \$26,680.00
- PLANNING/ZONING: \$22,940.00 (OPTION 1)
\$39,064.00 (OPTION 2)
- HEALTH: \$9,600.00

SUBTOTAL = \$59,220.00 - \$75,344.00

2. SUPPLIES (EXCLUDING SHIPPING)

- ASSESSOR: \$10,329.00
- PLANNING/ZONING: \$8,622.00
- HEALTH: \$4,894.00
- CONSERVATION COMMISSION: \$241.00

SUBTOTAL = \$24,086.00

3. LABOR (INCLUDING EXPENSES)

- ASSESSOR: \$19,430.00
- PLANNING/ZONING/CONSERVATION COMMISSION: \$19,430.00
- HEALTH: \$19,430.00 - \$24,288.00

SUBTOTAL = 63,148.00

GRAND TOTAL = \$146,454.00 - \$162,578.00

BUILDING DEPARTMENT

There are five categories of records in this area: building permits, certificates of inspection, certificates of occupancy, gas/plumbing permits, and permit index cards.

Building permits are arranged in numerical order by permit number, and all of the permits through 2016 have been bound in hard cover books. Since 2017, permits have simply been stored in *boxes*, as the company who provided the book binding service is no longer in business.

Material for *pending* building permits is arranged in “recycled” manila letter size folders with third cut assorted undercut top tabs. Indexing is *handwritten* right on the tabs and references address only. These folders are then “bulk-filed” in letter size *hanging folders* with clear plastic top tabs affixed in assorted positions along the back edge but, quite a few of the *handwritten* alpha inserts are “missing”!

A 6x4 index or cross-reference card is created for each permit, which references permit #, date of permit, work done, owner, builder, architect, costs, plans, and so on. Cards are arranged alphabetically by street name in one large A-Z file, and they are guided by a set of green pressboard 6x4 index guides with second/few third cut assorted metal top tabs with typed inserts referencing street names. These cards provide a complete history through 2009, with information regarding permits/certificates/ZBA cases, etc.. AND, they are referenced on a daily basis. From 2009 on, information is stored electronically.

Certificates of inspection – documentation for each address is set up in letter size *hanging folders* with clear plastic tabs added along the edge in assorted

positions/inserts referencing typed address or name. Certificates/correspondence, etc. go back to the 1970's (*at least!*), sometimes with only one-two documents per folder.

Certificates of occupancy – documentation here is simply “bulk-filed” in letter size *hanging folders* with more assorted plastic tabs/handwritten inserts (*or “sticky notes”!*) referencing “CO/year and or month”. Either an individual folder is created for each year *or* multiple folders grouped by months.

Gas/plumbing permits – documentation is also “bulk-filed” here in *hanging folders* with clear plastic tabs/assorted positions along the edge, inserts referencing handwritten alpha captions. With the exception of large streets, an individual folder is created for each letter.

Building permits, current certificate files, and gas/plumbing permits are all located in the department. Building permit books are actually located in two areas. The oldest books are stored in the health department office, directly across the hall. Books here are stored in three glass front bookcases: 195 books, 1899-2012; approximately 434”. In the department, the most recent books are stored in two glass bookcases arranged right on top of units 1 and 2: 47 books, 1986/2013-2016; approximately 96”.

Certificates and permits are housed in two 4-drawer standard steel lateral file cabinets, 53”high x 36”wide x 18”deep/capacity, 32 ¼”/key lock top center, which are located along the wall to the right as you enter the room.

1. A. certificates of inspection/general: AAA Driving School/places of public assembly/24 Acton St. – 25 Whites Ave.; full
- B. schools/daycare/multi-family apartment buildings/group homes,etc.: 92 Mt.

Auburn St. – 100 Parker St./daycare centers: 36 Arlington St. – 25 Whites Ave./schools: Alberico – Marshall Spring School; 30”

C. certificates of occupancy: 2016 – 2021; full

D. “old” reference files; full

2. gas/plumbing permits

A. A – Commonwealth Rd.; 28 ½”

B. D – K; 30 ½”

C. L – Pleasant St.; 30”

D. Q – Z; 27 ½”

The balance of the records is housed in a vault along with a few archival records. The entrance to the vault is 78”high x 28”wide, and overall inner dimensions are approximately 127”wide x 159”deep/ceiling height, about 133”.

The pending permit files are housed in one 4-drawer lateral file cabinet, 53”high x 36”wide x 18”deep/capacity, 33”/retractable fronts/key lock top center.

3. A. pending permits: 1 Arden Rd. – 50 Watertown St./demo files: 570

Arsenal St. – 44 York Ave.; 20”

B. **“hodgepodge”!**

C.-D. “inherited” property files from previous administration: 25 Acton St. –

36 John Whooley Way; 59”

Older permit files/lists/etc. are simply “bulk-filed” in more *hanging folders* by year. AND, due to the smaller size of these occupancy permits (8 ½x5 ½), all attachments to the permits are *folded* for filing with material arranged in two rows per folder – each row bound with a rubber band! These files are housed in one Security Steel Equipment 4-drawer standard steel letter size vertical file cabinet,

52"high x 15"wide x 28 ½"deep/capacity, 25"/center rod projections.

4. A. permit lists, 2009/2011; trench permits, 2010-13; payments to treasurer, **2008-2011**; E. Jr. high school inspections, **1975-1989**; decision cross-reference list re: permits granted, **back to 1950's (at least!) – 1991**; 14"
- B. occupancy permits, 1990-2015, 46"/2 folders=lists of permits issued, **1950's-1992**
- C. 1 folder=master sign permit list, **1979-1983**/more occupancy permits, **1985-1988**/sign permits, **1978-1994**; 26"
- D. 1 folder=*more* occupancy permits, **1950-1968**/1 folder=*more* lists of building permits issued, **1951-1982**/1 folder=Arsenal Mall occupancy permits, **1983 - 1985**/several folders=*more* occupancy permits ("**hodgepodge**!"), **1970-1989**/correspondence, **1980's-1990's**/orders & correspondence, **1981-86**/complaints, **1971-1983**, etc.; full

Permit index cards are housed in one Art Steel 8-drawer card file, 52"high x 15"wide x 28 ½"deep/2 rows per drawer/capacity per row, 27 ½".

5. A. Acton St. – Boylston St.; 51 ½"
- B. Bradford Rd. - Edenfield Ave.; 52"
- C. Edenfield Ave – Hilltop Rd.; 52"
- D. Holt St. – Marion Rd.; 51"
- E. Marlboro Terrace – Palfrey St.; 49 ½"
- F. Panteline Terrace - School St.; 48 ¼"
- G. School St. – Watertown St.; 47"
- H. Waverley Ave. - Yukon Ave.; 19 ¼"

A few boxed archival records are also stored in the vault:

- 3 24 inch boxes: building permits, 2017-2019
- 1 24 inch box: payments to treasurer, **2001-07/2012**
- approximately 218 rolled maps/plans (1 large box, *wastebasket*, 1 odd box, lots “loose”!)
- 1 3 cube box: “dead” application files, **back to 1990’s** (1 Arsenal St. – Winsor Ave.)
- 1 3 cube box: trench permits, 2009/2011; permit lists, 2004-08/2010/2012; building permits, 1992-2013; end of month/annual reports, **1980’s (at least!)**

There are *also* “**tons**” *more* maps/plans stored at the old police station, which were previously referenced in the Archives section.

Lastly, there are several small boxes holding CD’s/flash drives of all maps/plans, A-Z, with additional ones for larger properties (Arsenal St./Pleasant St....).

RECOMMENDATIONS

The most important recommendation in this area pertains to the *building permits*, which are permanent records for which you have **no** “back-up”! As noted previously in the inventory section, permits through 2016 have been *beautifully* bound in books; however, documentation should have been microfilmed *before* binding. *Going forward*, permits for 2017 - current should be filmed, and all permits “relocated” to that *great* vault located right in the department.

In the preceding Archives section, we have already recommended three sections of shelving, which will accommodate 144 standard size boxes. Permit books consume approximately 530 filing inches, thereby requiring 36 boxes – *still* leaving room for additional storage of records *as well as* maps/plans. **AND**, almost all of the records presently stored in unit 4 (“old” permits/lists...) should *also* be boxed and that “ancient” file cabinet simply *eliminated* making better use of the floor space!

Another candidate for filming here are the “historical” 6x4 *permit index cards*. As previously noted, such information has been electronically stored since 2009 **but**, there are no “back-ups” for these old cards. Microfilming and related costs were previously specified on pages 56-58.

General Recommendations #1 and #2 (page 3) *definitely* apply here with regard to *certificate and permit files* (units 1A-C, 2A-D). A combination of *sturdy* kraft folders and expansion pockets are the answer! And, certificates of inspection in unit 1A-B should *also* be “re-arranged”, creating **one** small A-Z file versus *multiple* separate files that exist now!

The following supply items will need to be ordered:

A.	50	#75520 manila pockets, “cut down” front flap, straight edge, 1 inch expansion.	\$ 55.00
B.	50	#75560 manila pockets, “cut down” front flap, straight edge, 2 inch expansion.	\$ 55.00
C.	200	#10710 kraft letter size folders, “cut down” front flap, straight edge. Cost, \$49.50 per	
		C. Total cost,	\$ 99.00
D.	1 box	#5366 white pressure-sensitive labels.	\$235.00
E.	7	Drawer organizers (32 ¼” capacity) at \$51.25 each. Total cost,	\$358.75

The last **very familiar** step to be taken here – “**purging**”! When this step is completed, costs of the following supply items, as well as labor, can be determined for a proper subject file (**Tell-i-vision**):

- file organizers
- kraft folders
- “miscellaneous” folders
- index guides

PERSONNEL

There is a total of 364 employees, including both full and part-time. This figure does not include either school department, which maintains their own files, or temporary employees. An individual folder is created for each full and part-time employee, and the folders are arranged alphabetically *by department* in “18” separate A-Z files with **no** color-coding added! A separate medical folder is created only if necessary, and separate benefits folders along with payroll records, are maintained in the town auditor's office, and will be covered in that section of our report. Temporary employee material is simply “bulk-filed” in one “bulging” folder per department!

Excluding medical, documentation is set up in letter size manila folders/straight edge (*many* “battered”!), “cut down” *pre-printed* front flap with employee history. Indexing is neatly typed on either standard clear or white labels applied upper right/back flap, and they reference employee name, most properly inverted/*often* employee number/*often* date of hire, too. A second label *sometimes* affixed to the folder front includes name/address/phone #/employee #. Employee history, social security #, date of birth, etc. is *handwritten* in the appropriate spaces on the front flap. The individual folders are then “bulk-filed” in letter size *hanging folders*/no tabs.

Material within the folders is “loosely” filed with attendance records on top followed by everything else in date order, and a sampling of the documentation revealed the following:

- attendance records

- emergency contact information
- appointment/hire letters
- payroll set-up sheets
- personnel action forms (PAF's)
- group activity forms
- applications
- civil service certifications
- correspondence
- etc.

There are lots of staples/paperclips used throughout the material, emergency contact sheets are stapled to the inner front flap, and there really is no "average" document count here.

Administrative/general documentation is set up in a "**hodgepodge**" of manila/~~few~~ colored letter size folders with third cut assorted undercut "battered" top tabs. Indexing is typed/*handwritten* on standard labels, and folders are *once again* often "bulk-filed" in letter size *hanging folders*/no tabs.

Neither index *nor* "OUT" guides are installed in *any* of these files, which are generally accessed by two-three people on a regular basis.

Active employee files are located in the outer office along with "lots" of *general administrative files*. The various files are housed in a battery of five Hon 4-drawer lateral *standard steel* file cabinets, 53"high x 30"wide x 19 ¼"deep/capacity, 27"/key lock top left.

1. A. payroll warrants, FY'20-21; check register warrants, 2017-18; warrants/
copies of checks/purchase orders/paid bills, **2013-19**; carryover requests,

- 2006-07**; sick leave buy-back, **2006-2022**; UPMC contract, 2018-19; Fred Pryor seminars, **2012**; ***jammed full***
- B. blank forms/benefits information/personnel action forms, 2004-2021, 7";
full/part time library: Arcese – Young, 13"/"temps" library, "bulk-filed" A-Z/
 project literacy, "bulk-filed" A-Z, 7"
- C. Mt. Auburn Hospital purchase orders, *more* warrants, **2008-2014**/attend-
 ance sheets "bulk-filed" by department, letter size manila folders/3rd cut as-
 sorted undercut top tabs/white labels referencing department & year: *audi-
 tor's*, 2004-09/*DPW*, 2004-09/*recreation*, 2004-2010/*skating rink*, 2003 &
 2006/*town manager's office*, 2004-09/*treasurer-collector*, 2004-05/*library*,
 2003 & 2005/*town clerk*, 2004-2010; full
- D. active employees: *town manager*, Driscoll-Osmond/*public buildings*, Hop-
 kins-Pena/*purchasing*, McGoldrick/*skating rink/town clerk/treasurer & col-
 lector*, Casey-Sharkey; full
2. A. fire department: PAF's, "bulk-filed", **2005-2020**/Allen – McManus, Jr.; full
- B. McNamara – Wood, 18 ½"/*fire temporary & permanent position certifica-
 tions (no order!)* – exams, **back to 2007-2013 (at least!)**; ***jammed full
 (plus folders along the back of drawer!)***
- C. *more* PAF's, "bulk-filed", **2005-08**/*assessor*, DelRose-Smith/*town auditor*,
 DeAngelus-Tracy/*community development & preservation*, Farrar-Wilson/
 COA, Cunningham-Kruglyansky/*IT/health*, Bonilla-Venizelos/*HR*, Aquilano-
 Shattuck/*town council*, Airasian-Sideris; full
- D. *DPW*, PAF's/Aiello – Watkins; 23"
3. A. *police*, PAF's/Collin-Martino; 26"

- B. McManus-Wojtowicz, 12"/*civil service recruitment files (no particular order!)*, **2003-07 (at least!)**; 24"
 - C. Patterson legal files, **back to 1980's**, approximately 9"; Rice legal file, **back to 2011-12**, approximately 3"; *recreation*, PAF's/Aftandilian-Woodland, 23"
 - D. *EEO reports*, **2000-03**, 4"/*MEO (motor equipment operators)*, "bulk-filed" employee documentation, "clipped/stapled" together in *batches* by date for each employee, **1995-2001**; 14"
4. A.-C. civil service postings, 1991-2006; full (**plus 3" of folders along back of drawer!**)
- D. civil service postings, **1987-1990**/police & fire workers comp & correspondence, 1996-2002; full
5. worker's compensation, documentation set up in *another "hodgepodge"* of manila folders/*some* white labels on tabs, lots of *handwritten* indexing referencing names/date of incident/date of claim
- A. assorted reports/claims, 1980's-2017, approximately 10"/Aiello – Connelly, 17"
 - B. Connors – Lawn; full
 - C. Lessard – Paglierani; 23 ½"
 - D. Papazian – Vittoria/**few more along back of drawer**; 32"
- More "general files" are arranged in a variety of standard steel cabinets along the opposite wall, or in the conference room.*
6. Hon 3-drawer lateral cabinet, 40 ¾"high x 36"wide x 19 ¼" deep/capacity, 33"/key lock top center
- A. recruitment files, ongoing/closed, 2019-2022; full

- B. *more* recruitment files, 19"/sexual harassment training files & acknowledgements, 2005-2022, 12"
 - C. drug testing, **1990's-2015**/worker's comp payments, 1998-03; full (***plus few assorted files along back of drawer – bylaws/ordinances/discrimination, 1970-1991...!***)
7. Hon 4-drawer letter size vertical cabinet, 52"high x 15"wide x 26 ½"deep/capacity, 25 ½"/key lock top right
- A. library terminated employees, "bulk-filed"; 11"
 - B. MOA's, ***back to 1990's-current***/fire negotiations, 2007 & 2010-11/fire arbitration, 2001-03/fire bargaining, **1990's-2003**/fire arbitration "comps", 2013, *etc.*; 21"
 - C. WPSA negotiations, 2005-2019; police MOA's, 2002-03/2013-19; WPA arbitrations, 2003-04, *etc.*; 22"
 - D. Teamster bargaining notes/contracts, 2010-2021; DPW bargaining files, **1990's-2003**; DPW reclassification study, **1988**; library bargaining files-contracts, *etc.*, **1997-2005**/2013-2020; 13"
8. same as unit 7
- A. general information files/studies/projects/policies/"old" blank forms, ***back to 1980's ("hodgepodge")***: agreements, ***back to 1980's***/Affirmative Action Policy, **1985**/COI, **1992**/DPW sick leave bank, **1999**/Hep B assorted files, ***back to 1990's***/travel policy, 2018, *etc.*!; full
 - B. COVID/unemployment information, *etc.*; Affirmative Action Plan & reports, **1989-1990**; EEO reports, **1988-89/FY'04-05**; 12"
 - C. *recreation*: terminated employee files/inactive files/PAF's, 2017-2021

(*at least!*); 20 ½"

D. fire department PAF files, 6"/"pile" of veteran's *miscellaneous* files, approximately 6"

Units 9 – 14 are located in the small conference room.

9. Hon 4-drawer letter size vertical cabinet, 52"high x 15"wide x 26 ½"deep/capacity, 25" ("missing" key lock top right)

A.–D. terminated employee files: A-Mart; ***jammed full***

10. Steelcase 4-drawer letter size vertical cabinet, 52 ¼"high x 14 ¾"wide x 28 ½" deep/capacity, 26 ½"

A.–C. terminated employee files: Lacerra-Lyman (***"misfiles"!***)/Mahoney-Vrock; 79 ½"

D. DPW PAF's, 2008/continuation of C: Walsh-Zulueta, Ward-Winston

(***more "misfiles"!***), 12"; *more* EEO filings, 1993/1995/1997-99/2001, 4"

11. 4-drawer legal size vertical cabinet, 52 ½"high x 18 ¼"wide x 28 ¼"deep/capacity, 25"

A. *few* more closed position files, 2019/assorted attendance sheets, **2013-14/** parking attendance sheets, 2017/fire department sick leave, 2004/fire department attendance sheets, **2005-07/**health attendance sheets, 2005-2020/health sick leave, 2004/police dispatcher attendance sheets, 2009/police attendance sheets, **2004-08/**police, DPW, town clerk, town manager sick leave, **2003/**purchasing attendance sheets, **2006-10/**town manager attendance sheets, **2005/**parking attendance, **2006-08;** full

B.-D. *more* closed purchase orders, 2018-2021, 68"/"piles" of *more* terminated employee files, approximately 15"/"piles" of *new* employee files, approxi-

mately 5"

12. Hon 4-drawer letter size vertical cabinet, 49"high x 15"wide x 22"deep/capacity, 19 ¼"/key lock top right

A. *more* civil service applications (***some folders, 4" of paper!***), 2002-03/2005-2006/2011-13; 15"

B. 2009-2014; full

C. 2015-16/*few* appeals files, 2007-08; full

D. 2017-20; full

13. same as unit 12

A. DPW PAF's, 2016-2021

B. DPW MEO candidates & applications, 2006-2016/DPW recruitment files, ***2004-05***/CDL list, ***2006; jammed full***

C. police promotion exam files (*blue folders*)/*more* certification files, 2010-18; full

D. ***jammed!?***

14. Hon 2-door/2-drawer lateral cabinet, 66 ¾"high x 42"wide x 19 ¼"deep/capacity, 39"/key locks right door & above B

A. supplies

B. grievance files (***no particular order!***), ***1994-2021; 36"***

C. Watertown Commission on Disabilities, ***1991-2015 (at least!); jammed full***

We *also* noted six 24 inch boxes here, too (***some "crushed"!***): recruitment files, ***1993/2003/2008-2012/2014-2016.***

As far as purging outdated information from the administrative files is concerned, records are ***not*** routinely reviewed for destruction *or* transferred to the

archives! As noted, terminated employee files are arranged separately from the active files in one large A-Z file (***“lots” of misfiles!***). An *indefinite* retention period is being followed, and ***no*** microfilming of either active *or* terminated records has ever been done.

RECOMMENDATIONS

With 364 employees, it is definitely time for you to “upgrade” to a *color-coded* filing system **AND**, once again, the KromaKode A-Z system previously outlined for the Health Department files on pages 111-112, “fits the bill” here, too!

All active employee files should be ***interfiled***, creating **one** large A-Z file versus **“18”** separate files that exist now! AND, you can even take the color-coding one step further by adding “colored signals” to the folder edge to indicate department *or*, exempt *or*, part-time *or*, whatever you wish. The largest category should simply remain “unflagged”, a signal all by itself. The application of colored Tabbies serves the same purpose as keeping folders in separate places, except that the Tabbies are 100% ***more effective*** and ***more efficient***. This system of signaling files is being used by many of our clients, *and they all swear by it!*

Our next recommendation pertains to the folders, and simply put, it’s time for you to “upgrade” from the combination of *“flimsy”* manila and hanging folders to *sturdy* 25-point letter size blue pressboard folders to accommodate the amount of documentation generally found in such files. New folders will have third cut top tabs in the #1 position, factory-installed fasteners #1/#3 positions, and a one inch reinforced expansion.

For the *medical* documentation, our recommendation is an 11-point letter size “kraft” folder, which will also come with third cut top tabs in the #1 position, and a factory-installed fastener in the #1 position within the folder.

In either case, pressure-sensitive labels will also be typed (*or laser printed!*) with employee name/properly inverted and applied in the upper left hand corner of

the back flap of each folder.

In terms of equipment, it is strongly recommended that your active employee files be housed in **fireproof** cabinets; therefore, our recommendation is the purchase of three Phoenix letter size 4-drawer vertical cabinets in order to accommodate some growth. Each unit will be 54"high x 17"wide x 31"deep, and the cost is \$3,502.00 per unit, plus shipping. A "file organizer" should then be installed in each drawer to properly support the new folders (#15034 at \$51.25 each).

The following supplies and labor will need to be ordered for the **KromaKode** conversion:

- | | | | |
|----|---|--|------------------|
| A. | 500 | #SP letter size blue pressboard folders, straight edge,
"cut down" front flap, fasteners #1/3 positions, one
inch expansion. Cost, \$350.00 per C. Total cost, | \$1,750.00 |
| B. | 100 | #10710 kraft letter size folders, straight edge, "cut
down" front flap, fastener #1 position (medical). | \$ 100.00 |
| C. | 5 bxs. | Abgor colored labels, pressure-sensitive. Cost,
\$16.50 per pkg. Total cost, | \$ 82.50 |
| D. | 1 set | Alphabetical top tab index guides, letter size,
50 division. | \$ 130.00 |
| E. | 25 | #OG-24 letter size, top tab, "OUT" cards. | \$ 22.50 |
| F. | ----- | #1600 series Tabbies to signal categories.

Cost, \$24.50 per box (optional). |

\$ ----- |
| G. | Labor to convert. It will be necessary to type (<i>or laser print!</i>) approximately 364 labels, convert material from old folders to new folders, "as is", affix labels and colored tabs. Finally, index guides | | |

will be installed, Tabbies applied, folders re-filed, and your staff will be trained in the maintenance and perpetuation of the new system.

We would assign one of our records supervisors, who is billed at \$470.00 per day, plus expenses, for an estimated three-four days to complete the conversion.

Time now to address the “**12**” assorted file cabinets located throughout the department that are simply housing “**TONS**” of outdated, and in *many* cases, unnecessary files – approximately “**36**” drawers fall into one *or* both categories with *lots* of information going back to the **1980’s!** This very necessary “**purge**” step can either be completed by your staff or ours with our archives supervisor billed at \$675.00 per day, plus expenses.

Once the purge task is completed, the amount and cost of the following supply items, as well as labor, to establish a proper **subject file (Tell-i-vision)** can be determined (General Recommendation #3):

- A. file organizers
- B. kraft folders
- C. “miscellaneous” folders
- D. index guides

The last item on the agenda is all of those *terminated* employee files, and with a required retention period of 20 years, they should be microfilmed versus *wasting* valuable space that could be better utilized for *active* files (approximately 230 filing inches!). Please refer to our costs for filming, which were previously specified in the Archives section on pages 56-58.

TOWN AUDITOR

The central files in the town auditor's office include *employee benefits files* for both active *and* terminated employees, as well as *AP invoice files*. Once again, neither index nor "OUT" guides are installed in *any* of these files, which are generally accessed by three-four people on a regular basis.

Benefits – As previously noted in the Personnel section, benefits are administered through the town auditor's office. There is a total of 364 employees, and an individual benefit folder is created for each employee *or* retiree receiving benefits. Documentation is set up in manila/few colored letter size folders with third cut assorted "battered" undercut top tabs/*some* reinforced back flaps. Indexing is either typed or just *handwritten* on standard red labels or, simply *handwritten* right on the folder tab, and it includes name, *most* properly inverted/date of hire/depart-ment. More recent folders also reference employee number. Folders are then "bulk-filed" in letter size *hanging folders/no* tabs.

Material within the folders is not arranged in any particular order, and a sampling of the documentation revealed the following:

- payroll histories
- benefit enrollment/change forms
- benefit histories
- disputes/benefit issues
- personnel action forms related to benefits/payroll
- payroll maintenance input forms
- payroll adjustments

- correspondence
- etc.

There are lots of staples/*some* paperclips and rubber bands used throughout the material, and the average number of documents per folder is 45.

Terminated/inactive files *are* purged from the active files in a timely fashion. An *indefinite* retention period is being followed, and no microfilming of either active *or* terminated benefit information has ever been done.

The benefit files are arranged alphabetically in two separate A-Z files with **no** color-coding added: (A) active employees, (B) retirees/terminated/deceased. The *active* files are housed in three 4-drawer lateral *standard steel* file cabinets, which are located in *various* spaces around the office.

Unit 1 is located behind Lisa's desk.

1. 52 ¼"high x 36"wide x 18"deep/capacity, 33"/key lock top center

- A. active employees: Abbas – Cahill; 30 ½"
- B. Callaghan – Coughlin; full
- C. Courtney – Dudley; 30 ½"
- D. Duffy – Gonzalez; 24 ½"

Units 2 and 3 are located along the wall on the other side of the office but, they are *not* next to one another!

2. Hon unit, 53"high x 30"wide x 19 ¼"deep/capacity, 27"/key lock top left

- A. Gonzalez – Hoiseth; 22 ½"
- B. Homan – Laracy; 22 ¼"
- C. Latanowich – Manion; 23 ½"
- D. Mannix - Meehan; 22 ½"

3. same as unit 1

- A. Meier – Paggioca, Palmero (*“misfile”!*); 26"
- B. Palmer - Salvucci; 30"
- C. Samios – Szende; 29"
- D. Taintor – Zywochinski; 27"

Retiree files are housed in two *standard steel* lateral file cabinets and, a “**ton**” of boxes! Oftentimes, the retirement date (or date of death) is *handwritten* right on the front of these folders.

4. 4-drawer unit, 53 ¼”high x 36”wide x 18”deep/capacity, 33”/key lock top center/
retractable fronts

- A. Aberuzzi – Carlson; full
- B. Carolan – Duest; full
- C. Dunn – Gildea; full
- E. Gildea – Jones-Yankowski; full

5. Hon 3-drawer unit, 40 ¾”high x 36”wide x 19 ¼”deep/capacity, 32 ¾”/key lock
top center

- A. Jones – Loprete; 28 ¼”
- B. Lund – Miceli; 29 ½”
- C. Miele – Oviatt; 28 ½”

Now, filing continues in **35** standard size boxes, which are just “stacked” on top of a table, on the floor *beneath* the table, and on top of file cabinets! These boxes hold terminated files for 2020-current:

- 35 boxes (no lids): A, B (2 boxes), C (3 boxes), D, E (2 boxes), F (2 boxes), G, Gra-Pal, H, I-J, K, L, M (2 boxes), M-N, O, Pa-Po, P-Q, Po-Ro, R (2 box-

es), Ro-Sc, S (2 boxes), Se-St, T, St-Tu, U-Z, W, X-Z

AP Invoices – Documentation is “bulk-filed” in letter size *hanging folders* with clear plastic top tabs affixed in assorted positions along the back edge of the folder/*older* years, red label inserts reference neatly typed beginning-ending warrant numbers/“school or town”. Some of the recent folders simply have *hand-written* white tab inserts, and now, tabs are no longer used on *any* of the folders, which are arranged numerically by warrant number.

The warrant number consists of a one-two letter type code (special=SP, town=T, school=S, Medicare reimbursement=MR, and so on), followed by one-two digit fiscal year designation (FY2008=8), then three digits for week of fiscal year that the voucher was issued (first week of FY2008=001, last week=052). For example, special warrant for fiscal year 2008 (FY runs from July 1 to June 30) issued during the first week of the fiscal year = SP8001.

Material within the folders is arranged with the AP journal on top, followed by warrant documents, then the invoice. AND, there are **tons** of staples/binder clips/rubber bands used throughout the material, as well as lots of attachments to documents!

The most recent AP files are stored in the department, housed in eight assorted standard steel lateral file cabinets, various makes and sizes, arranged “wherever possible” along the walls of the department!

1.-2. Hon 4-drawer units, 53”high x 42”wide x 19 ¼”deep/capacity, 38 ¾”/key

lock top center

A.-D. FY’18; full (approximately 310”)

3. 54 ¼”high x 36”wide x 18 ¼”deep/capacity, 32 ¾”/key lock top center

- A.-D. FY'19; 131"
- 4. same as units 1-2
 - A.-D. FY'21-22; 155"
- 5. Hon 3-drawer unit, 40 ½"high x 36"wide x 19 ¼"deep/capacity, 33"/key lock top center
 - A.-B. FY'22; 66"
 - C. empty
- 6. same as units 1-2
 - A.-B. empty
 - C. FY'18; 38 ¾"
 - D. FY'21; 38 ¾"
- 7. same as units 1-2
 - A.-D. FY'21; 155"
- 8. Hon 3-drawer unit, 40 ¾"high x 42"wide x 19 ¼"deep/capacity, 39"/key lock top center
 - A.-C. FY'21; full

Now, we travel to the 3rd floor, the hallway where the planning department street file cabinets are located. AND, *older* AP invoices are housed in eight Hon 5-drawer vertical file cabinets, same as units 1-18 referenced on page 86. There is a total of 40 drawers: AP invoices, 2014 – 2017; approximately 980".

AP files are *seldom* referenced, and a seven year retention period is being followed here, after which AP files are simply "shredded".

RECOMMENDATIONS

The first order of business pertains to the “benefit files” AND, *once again*, the color-coded alphabetical filing system known as **KromaKode** is the “way to go”. This system was previously specified for *both* the health and personnel department files (see pages 111-112), and it is *definitely* the answer here, too!

Having said that, ALL of the folders should be *interfiled*, creating “**one**” large A-Z file versus two separate files that exist now. AND, colored Tabbies can again be added to the folder edge to indicate the *smaller* categories, “retirees”/ “deceased”.

A 17-point letter size kraft folder is all that’s needed based on the documentation counts; however, optional fasteners could be added to categorize the material, one for *payroll documentation*/one for *benefits documentation*. In any case, all folders will have a “cut down” front flap, and a *left end tab* so that labels can be appropriately applied in the upper left hand corner of the back flap with names typed (*or laser printed!*) and inverted.

In terms of equipment, we have outlined two options for you.

Option 1. **Open shelf** filing. We would install three sections of letter size, 36 inch wide shelving, seven tiers high, which will hold 735 filing inches and require *only* 10.5 square feet. In other words, such a system would provide you with approximately an additional 195 filing inches over the 540 inches presently *consumed* for files - about 35% growth! AND, at the same time, *reduce* your floor space requirement by approximately 34 square feet!!

Approximately 73 inches in height, 108 inches in width, and 14 inches in

depth will be needed. Total cost for the equipment is \$4,934.00, including installation *and* shipping.

Option 2. **Rotary file** installation. We would install three letter size six tier units, 72"high x 31"deep. One unit would be 36 ½"wide (starter)/two units, 30 ¾" wide (add-ons), and each unit would provide a filing capacity of 336 inches. In other words, such an installation would provide you with approximately an additional 324 filing inches over the 540 inches presently *consumed* for files - about 60% growth! *AND, at the same time, still a decrease* in square footage required – approximately 23.5 square feet!!

Each of these units comes equipped with a lock, and the total equipment cost is \$12,500.00, including installation *and* shipping.

The following supplies and labor will need to be ordered for the KromaKkode conversion:

A.	1 set	#Z-A1243 letter size alphabetical index guides, 100 division, end tab/extra depth.	\$ 260.00
B.	1,500	#CCK-17 letter size 17-point kraft folders, "cut down" front flap, <i>left end tab</i> . Cost, \$499.40 per	
		M. Total cost,	\$ 749.10
C.	1 box	#5366 white pressure-sensitive labels.	\$ 235.00
D.	15 pkgs.	#KKL150VAPS alpha labels at \$22.05 per pkg.	
		Total cost,	\$ 330.75
E.	5 pkgs.	Abgor color-coded labels at \$16.50 per pkg.	
		Total cost,	\$ 82.50
F.	100	#VS-168 letter size red vinyl "OUT" guides, left	

		end tab.	\$ 140.00
G.	500	5x3 requisition slips.	\$ 56.00
H.	2 bxs.	#1600 series Tabbies to signal categories at \$24.50 per box. Total cost,	\$ 49.00
I.	Labor to convert. It will be necessary to laser print (<i>or, type!</i>) approximately 1,500 name labels and apply to new folders. Documentation will be converted from old folders to <i>new</i> , “as is”, colored alpha tabs will be applied, and all folders will be re-arranged, creating <u>one</u> large A-Z KromaKode file.		

Finally, index guides will be installed, folders re-filed properly onto new equipment, and your staff will be trained in the maintenance and perpetuation of the new system.

We would assign one of our records management supervisors, who is billed at \$470.00 per day, plus expenses, and one of our staffers, who is billed at \$418.00 per day, plus expenses, for an estimated 10 days (based on 1,500 files) to complete the conversion.

Time now to address *all* of those AP files consuming *so much* of your valuable floor space! Simply put, files such as these are truly “archival” – they should ***not*** be consuming so much floor space within the department (***and on the 3rd floor!***), nor should they be housed in *space-consuming* file cabinets!!

Our recommendation is that AP files for FY’18-FY’21, presently consuming “22” file drawers (***824 filing inches!***) within the department, be transferred to standard archives boxes (approximately 55), thereby “freeing up” *at least* five

lateral file cabinets *and* much needed floor space! It should only be necessary to keep the current year and one year prior in the department, and an option here would be to install one or two sections of standard archives shelving, 72"high x 42"wide x 15"deep, either in place of file cabinets or in your vault. AND, the eight file cabinets (**"40" drawers, 980 filing inches!**) located on the third floor, presently housing AP files back to 2014-2017, should ALL be *boxed* and incorporated with your "new" archives system ASAP (equivalent of 65 standard boxes).

You could handle the boxing and indexing of these files yourself, or we could assign one of our archives staffers at \$535.00 per day/plus expenses, for two days to properly box AP records from 2014-2021 as outlined above.

TOWN CLERK

The major categories of records included in this area are voter registration files, licensing files, contracts, underground storage tank files, claims files, *as well as* meeting minutes, and all of the various vital records (birth, marriage, death); however, there are a ***lot*** of “miscellaneous” files here, too **AND**, *many* archival records stored alongside more current files!

As far as the vital records are concerned, *some* microfilming was done “way back when”, and as previously noted in the Archives section, *most* of this film is stored at the library – approximately 143 rolls (at least that was the case back in 2008!). A couple of additional rolls are stored in the vault within the department.

The various current files are generally accessed on a daily basis by three-four people, there is no “charge-out” system in place, index guides are not installed unless otherwise noted, and entire folders, etc., are normally removed when accessing the files. As far as “purging” is concerned, ***it simply isn’t done!*** AND, lack of “space” is a *big* problem here!

The most current vital records along with a *variety* of other records are filed in 39 three-ring binders either arranged on top of file cabinets *or* in assorted bookcases (approximately 158’): marriage/birth/death certificates, 2021-22; marriage intentions, 2022; business certificates, 2013-14/2017-21; BOH regs, 1996-2014; historic district study, 2000; commission on disability minutes, 1995-2020; ZBA minutes, 2008-2017; town/city council minutes, 2015-21; planning board minutes, 2011-17; zoning/planning board minutes, 2018-20; Mass Business Trust.

Voter registration cards/forms, 8 ¼x5 ½ and 8x5, are housed in six assorted

standard steel vertical file cabinets of various makes and sizes. Cards are poorly guided by 25 division sets of 8x5 pressboard/manila/salmon index guides, *some* tabs with *handwritten* or typed alpha captions on inserts – *most*, no captions at all!

Units 1 and 2 hold *inactive* voter registration cards, **1920's (at least!)-1988**.

1. 7-drawer unit, 51 $\frac{3}{4}$ "high x 19"wide x 28 $\frac{1}{4}$ "deep/2 rows per drawer/capacity per row, 26"/key lock top right

A.-G. A – Kh; 321"

2. same as unit 1

A.-G. Ki – Z; 296"

Units 3-6 hold *current/deceased* voter registration cards/forms.

3. Steelmaster 7-drawer unit, 52"high x 19 $\frac{1}{4}$ "wide x 28 $\frac{3}{4}$ "deep/2 rows per drawer/capacity per row, 26"

A. "batches" of daily deposit receipts, 2018-20

B.-E. current: A – Ci; 208"

F. *deceased*: A – S; 52"

G. T – Z; 6"

4. same as unit 1

A. – F. continuation of 3E: Ci – Hap; 308"

G. supplies

5. 8-drawer unit, 52"high x 19 $\frac{1}{4}$ "wide x 28 $\frac{3}{4}$ "deep/2 rows per drawer/capacity per row, 26"

A.-G. continuation of 4F: Har – O'Neil; 364"

H. supplies

6. same as unit 5

A.-H. continuation of 5G: O'Neil - Z; 416"

There are *also* two small boxes on top of these cabinets holding *more* current forms "to be filed".

The various *license files* are arranged A-Z by year with some of the documentation "bulk-filed" in assorted colored letter size *hanging folders* with clear/colored plastic tabs added in assorted positions/taped inserts referencing category and year *or* dates. *Some* documentation is filed in assorted letter size manila folders with third cut assorted undercut top tabs, which are then "bulk-filed" in *hanging folders*. AND, sometimes expansion pockets are used. In any case, standard red labels are *usually* applied to the manila folders, and they reference title and month/year.

The preceding files are housed in one All Steel 4-drawer standard steel lateral file cabinet, 52 ¾"high x 36"wide x 18"deep/capacity, 32 ½"/key lock top center/retractable fronts.

7. A. 2021: ALCV (all kinds alcoholic beverages) – W&M (wine/malt); full
- B. 2020: ABCC renewals (1 folder)/ALCV – W&M; full
- C. *violation files, **back to 1990's***: A-1 Auto – B, 9"/licensing board minutes, 2/84 only/1986-2016, 15"
- D. same as C: C&N Gas – Villa Cantina; full

Additional licensing files are housed in two Hon 2-drawer standard steel lateral file cabinets, 28 ¼"high x 30"wide x 19 ¼"deep/capacity, 27"/key lock top left.

8. A.-B. 2018: ABCC renewals/All Alcohol – W&M; 36"
9. A.-B. 2019: ABCC renewals/All Alcohol – W&M; 35"

Documentation for *contracts* is set up in letter size manila folders with third

cut assorted undercut top tabs (some “battered”!)/blue labels referencing CON/#/ title. These folders are then “bulk-filed” in letter size *hanging folders*/no tabs, which are housed in drawers A-B/“miscellaneous” files drawers C-D.

10. Hon 4-drawer standard steel lateral cabinet, 53”high x 36”wide x 19 ¼”deep/ capacity, 33”/key lock top center

A. CON2006-001 – CON2006-077/Earmark/CON2007-001 – CON2007-063/ Coolidge School/CON2008-001 - CON2008-054/CON2009-001 – CON-2009-096/CON2110-001 – CON2010-106/CON2011-001 – CON2011-125/CON2012-001 – CON2012-101; full

B. same as A but, contracts “bulk-filed” in 1 hanging folder per year: 2013 – 2020; 24”

C. *copies* of vitals, 2007-2012, “bulk-filed” in date order within letter size *hanging folders* (few tabs); burial permits/agents, 1996-97; Chapter 151 filings, 1997-2001; Department of Revenue, 1999-2006; tax liens, back to 1992-2000 (*at least!*); *released* liens, A-Z, early 1990’s-2007; 33”

D. *orders & resolutions*, set up in the same manner as contracts/blue & white labels reference year: 1982-1995, 12”; *insurance claim files*, set up in the same manner as contracts/red & blue labels referencing name/case #: C-97-1 – C-00-106; 21”; *also*, 2 “batches” of documents *on the side*: assorted meeting notices, 2014-2016, approximately 10”

11. same as unit 10

A. *more orders & resolutions*, 1996-2016; 21”

B. *more insurance claims*, C07-001 – C10-094; 26 ½”

C. *more copies of vitals*, 2002-06; full

- D. **“hodgepodge”**: “stacks” of meeting notices/agendas, 2013-14 (*at least!*), 15”/vitals monthly reports births, 1995-2002/home births, 1989-2002/ap-
pointment letters, 1990-2017/COI disclosures, 1990’s-2020/housing au-
thority appointments, 1999-2011/*some* resignations, 2004/going out of
business sales, back to 1990’s, *etc.*; 23”

Additional contract files, claims, etc., are housed in two more lateral file cab-
inets, same as unit 10.

12. A. raffle/bazaar permit files, **back to 1960’s**, set up in the same manner as
contracts/*few* red labels *or* handwritten indexing right on the tabs refer-
encing name/number with the issue dates also handwritten right on the
front of the folder: #1 – 253; full (**+ 5”!**)

- B. FY2001 contracts (*few “misfiles”!*): CON2001-001 – CON2001-080/FY
2002 contracts: CON2002-001 – CON2002-111/FY2003 contracts:
CON2003-001 – CON2003-118/FY2004 contracts: CON2004-001 –
CON2004-095/FY2005 contracts: CON2005-000 – CON2005-076;
jammed full

- C. FY1998 contracts: CON1998-001 – CON1998-132/FY1999 contracts:
CON1999-001 – CON1999-130/FY2000 contracts: CON2000-001 –
CON2000-123; full

- D. *few* miscellaneous files/FY1996 contracts (*usually*, standard white labels
here): CON1996-001 – CON1996-131/FY1997 contracts: CON1997-
001 – CON1997-138; full

13. 53 ¼”high x 30”wide x 19 ¼”deep/capacity, 26 ¾”/key lock top center

- A. meeting notice folders, 2022, 8”

B.-D. same as 10D: claims, 2011-2021; 68"

Underground storage tank documentation is set up in *more* assorted manila folders/red labels referencing address. Manila folders are again "bulk-filed" in letter size *hanging folders* (no tabs).

14. Hon 2-drawer lateral unit, 28 ½"high x 30"wide x 19 ¼"deep/capacity, 26 ¾"/key lock top center

A. assorted application files ("**hodgepodge**" of **supplies!**): shuttle, 2010-2017/livery & limo vehicles, 2009-2017/taxi change of ownership, 2018/assorted taxes owed, 2009-16/hackney, 2015-2020/required medallion, 2007 - 2014 (*at least!*)/taxi license, 1997-2004/rate increases, 2005-2011/workers comp, 2016; 22"

B. underground storage tanks/assorted files ("**mess**!"): certificates/hazardous material regs, 2000/tanks removed & inactive/underground storage lists, back to 1990's/storage of inflammables, 2003-2021/15 Arlington St. - 257 Sycamore St./"**hodgepodge**" along sides & back of drawer; 35"

A few assorted current files are housed in a Hon 3-drawer standard steel lateral cabinet, 40 ½"high x 36"wide x 19 ¼"deep/capacity, 33"/key lock top center.

15. A. 1 odd box: COI forms, 2009-2020

B. *more* licenses for 2022 ("bulk-filed" hanging folders/no tabs; 15"

C. "batch" of *more* COI forms, 2021, 6"/paid & unpaid parking tickets, 2017-2020 (*at least!*)

There are *also* 5x3 cross-reference cards for all of the vital records through 1995, which are housed in five 8-drawer vertical file cabinets installed beneath a work counter, 41"high x 12 ½"wide x 28"deep/2 rows per drawer/capacity per row,

26"/key lock top right.

16. A. "missing" drawer

B.-H. *marriages*, poorly guided by Y&E 5x3 manila index guides with 3rd cut
assorted tabs/typed alpha captions: A–Z; 308 ½"

17. A.-D. *births*, poorly guided by Shaw Walker 5x3 black pressboard/salmon
index guides with 5th cut assorted tabs/typed alpha captions *or* name
inserts: A-Do; 172"

E.-G. *deaths*, well-guided by salmon 5x3 index guides with 5th cut assorted
tabs/pre-printed alpha captions: A–Z; 130 ½"

H. empty

18. A.-E. continuation of 14D: Don – L; 188"

F. supplies

G.-H. empty

19. A.-D. continuation of 15E: M – Ra; 149 ½"

E. supplies

F.-G. cassette tapes: licensing board, 1997-2008/2012-14

H. empty

20. A.-D. continuation of 16D: Rat – Z; 145 ½"

E.-F. supplies

G. empty

H. - "pencils"!

- continuation of 21H: T–Z, 13 ½"/A–Z "miscellaneous" subject file,
guided by 5x3 blue pressboard index guides with 5th cut assorted pre-
printed tabs/A-Z cities & towns, guided by 5x3 salmon index guides

with 5th cut assorted pre-printed tabs, 11"

21. A. - supplies

- *births*, 2003: A-Z/*births*, 2002: A-Z, both files guided by 25 division set of 5x3 manila index guides with 5th cut assorted colored tabs/pre-printed captions; 5 ½"

B. "old" certificate of business 5x3 cards (**"TOSS"!**)

C. empty

D. cross-reference to ledger books/by category (**back to early 1900's!**), well-guided by assorted manila/salmon index guides with 2nd/3rd cut assorted tabs/handwritten & typed captions; 40"

E. empty

F. same as D: A-Z street construction, guided by 5x3 manila index guides with 5th cut assorted pre-printed tabs; 46"

G.-H. same as D, only A-Z, guided by 5x3 manila index guides with 5th cut assorted pre-printed tabs: A-O; 46"

RECOMMENDATIONS

Obviously, the vital records are at the “top of the list” in this area, and simply put, they should be **microfilmed** for disaster recovery. **AND**, you do earn a “**GOLD STAR**” here, as at least *some* filming *has* been done over the years, and as far as we know, this processed film “should” still be stored in the library reference area (approximately 110 rolls of vital records/along with lots of additional rolls!).

We also want to point out that there is *another* option for your vitals, as well as all of those vitals *cross-reference cards* (approximately 1,000 filing inches) – conversion to a digital format *with* a microfilm back-up! **AND**, *all* of the “voter registration cards (*back to early 1900’s!*) should simply be filmed versus consuming **1,971 filing inches/six assorted file cabinets!!**

The second step in this area is to *clearly* define the archival records, which should **not** be “co-mingled” or stored alongside the active files! In addition to all of the archival records stored in the vault here, there are many more records stored throughout the department in assorted file cabinets – extremely “inefficient” **AND**, *another* “huge” waste of space!! Once again, our recommendation is that you have our archives supervisor, who is billed at \$675.00 per day, plus expenses, scheduled for two days to review the various records stored in assorted file cabinets and determine either “storage or destruction” – violations/tax liens/insurance claims/meeting notices/raffle permits/contracts, *just to name a few*.

Once the vault in the department is reorganized as part of the labor in the preceding Archives section, there should be room to store *additional* vital and archival

records here versus “cluttering up” office space *outside* of the vault.

When the purge task is completed, all of the remaining files in approximately “14” drawers are *truly* candidates for a proper *color-coded* “**subject file**” (**Tell-i-vision**), as previously outlined on page 5 - *a perfect “match” for licensing, contracts, insurance claims, copies of vitals, underground storage tank files, and so on!*

Obviously, it only makes sense here to have our archives supervisor conduct a review and purge, setting aside candidates for destruction, boxing dated records to be incorporated into your “new” archives system, and assigning proper retention periods so that “dated” records will **no** longer simply *build up* within the department files. We recommend assigning our supervisor for three days to complete the task at \$675.00 per day, plus expenses.

Once the review/purge task is completed, the costs for the following supply items, as well as labor, can be determined:

- A. file organizers
- B. kraft/manila folders
- C. “miscellaneous” folders
- D. index guides

Lastly, in terms of equipment, no purchases will be necessary *provided* you adopt our previous recommendations with regard to purging/destruction/archives storage! In some cases, entire cabinets will be “freed up”, in other cases, lots of space *within* the drawers will be “freed up”. **AND**, since reference is generally made by either removing individual pieces of paper, *or* entire folders, *or* drop filing, your *existing* vertical and lateral file cabinets are “ideal”!

TREASURER/COLLECTOR

The major files maintained in this area include tax titles, parking tickets, day work reports, along with lots of assorted general/"miscellaneous" files. Records such as tax bills, cash books, etc. are generally stored in the vaults and will be dealt with in the preceding Archive section.

Documentation is either *loose*ly filed in manila/some colored letter size folders with third cut assorted undercut top tabs, which are then "bulk-filed" in more hanging folders with typed or *handwritten* indexing on both tab inserts and folder tabs **AND**, sometimes **no** indexing at all! Or, documents are just "*loose*ly" filed within the hanging folders!! However, MLC documents are "bulk-filed" in manila expansion pockets. In any case, all files are devoid of index guides, files are generally accessed by four-five people on a regular basis and, "OUT" guides are *not* used.

The various files are housed in 13 assorted standard steel file cabinets with units 1-7 located throughout the department, and units 8-13 located right in Kathy's office.

Units 1-3 are located beneath the customer counter.

1. Hon 2-drawer lateral unit, 28 ¼"high x 30"wide x 19 ¼"deep/capacity, 27"/key lock top center
 - A. MVE turn-in cover sheets, 2019-20/Munis assorted reports (payments/deposits/abatements), 2020-21, 13"; *few* MVE commitment books, 2021, 5"
 - B. paid bills/bank statements/refunds, etc., FY'16-19; full
2. same as unit 1

- A.-B. paid/dismissed parking tickets, FY'20-21; 45"
- 3. same as unit 1
 - A. empty
 - B. *more* MVE turn-in sheets/refunds, etc., FY'17-21; 23"
- 4. Hon combination 2-door storage cabinet/2 lateral drawers below, 66 $\frac{3}{4}$ "high x 36"wide x 19 $\frac{1}{2}$ "deep/capacity, 33"/key lock top right on door
 - A. checks issued/*more* parking tickets issued & paid, 2019-20; 17"
 - B. "bundles" of bank deposit slips, 2021-22
- 5. same as unit 4
 - A. MLC's, FY'21-22; full
 - B. supplies
- 6. Hon 4-drawer lateral unit, 53"high x 30"wide x 19 $\frac{1}{4}$ "deep/capacity, 27"/key lock top center
 - A.-C. day work reports, 2021-22; full
 - D. empty
- 7. Hon 2-drawer lateral unit, 28 $\frac{1}{2}$ "high x 36"wide x 19 $\frac{1}{4}$ "deep/capacity, 33"/key lock top center
 - A. *more* day work reports, 2018; 30"
 - B. supplies

Units 8-10 are located against one wall in Kathy's office.

- 8. Hon 4-drawer lateral unit, 53"high x 42"wide x 19 $\frac{1}{4}$ "deep/capacity, 38 $\frac{3}{4}$ "/key lock top center
 - A. assorted leases, back to 2000/2017; Pilot agreements/payments, **2010**; invoices, **FY'11-13**; town hall "working group", **1990**; assessor, FY'11-13;

- budgets, **FY'11-15**; obligation bonds, **back to 1980's-1990's**; deputy collector bonds, **1980's-2000**; deferred compensation assorted files, back to 1990's; payroll control sheets, 2009-10; time sheets, **2011-13, etc.**; full
- B. DOR indebtedness letters, **1980-2013**; articles, back to 1970's; street/sidewalk bonds, 1997-2015; tax possessions/sale of tax property, 1990's; vehicle insurance, **1990's-2000 (at least!)**; red flag policy, 2010-11; assorted banking agreements, **2010-13 (at least!)**; debt service invoices, 2005-2014; Obra, 1990; CIP, FY'10-12; MIIA renewals, **FY'08-12**; loss control audit, 2006; *more* payroll time sheets, **2010-12**; *more* payroll control sheets, 2013-16, *etc.*; ***jammed full (+ files along back of drawer!)***
- C. payroll time sheets, **2010-16**/control sheets, 2012-15; full
- D. child support files, **back to 1990's**/payroll savings bonds, 2007-10/*more* payroll control sheets, 2014-15
9. 4-drawer legal size vertical unit, 52"high x 18"wide x 27 1/4"deep/capacity, 25"
- A. tax titles/abatements/foreclosures/takings/advertising, *etc.*, back to 1970's-2014; 16"
- B. assorted bank bond files (statements/correspondence/transfers/etc.), back to 1990's-2015; full
- C.-D. assorted bank statements (retirement/ambulance fund/trust funds/commissioner fundraising/schools/mansion), 2009 -2016 (*at least!*), *etc.*; full
10. same as unit 9, only letter size/15"wide
- A. assorted scholarship fund files, **back to 1990's**; trust fund files, back to 1980's-2016; portfolio reviews, 2002-03 (*at least!*); MWRA assistance program, **2001**/invoices, **FY'10-14**; audits/financial statements, back to 1990-

2014; full

B. MVE tax, **2001-02**; certificates of insurance, **2004-09**; insurance claims, **back to 1990's-2003**; debt service, FY'10-11; *more* CIP, FY'04/FY'09-11; vehicle titles, **back to 1990's**; *more* street/sidewalk bonds, FY'06-11, etc.; 23"

C. *more* tax titles – certificates of redemption, back to 2012-19 (*at least!*); 12"

D. *more* redeemed tax titles, back to 1970's (*at least!*): Arlington St. – Irma Ave.; full

Units 11-13 are arranged along the opposite wall.

11. Hon 4-drawer lateral unit, 53"high x 36"wide x 19 ¼"deep/capacity, 32 ¾"/key lock top center

A. schedule of payments to treasurer, FY'20; full

B. *more* banking files (statements, etc.), **back to 1990's-2013 (at least!)**; budgets, FY'14/FY'17-18; trash RFP; *few* bids, 2016; payments/correspondence, **back to 2013, etc.**; full

C. Munis postings/corrections, 2015-19; water/sewer liens (tax levy reports), 2014-16; 26"

D. "old" bond redemption files/payments made in lieu of taxes, **back to 1990's**; copies of deeds, back to early 1900's; Commonwealth of MA statements, 1952-59; *more* bank recons, **2013-15**; real estate tax payment transaction history reports, **back to 2004 (at least!)**; full

12. same as unit 11

A. 1099's, 2014-18; Mellon report, 2014; retirement fund bank statements, 2012-13; retirement state tax, 2013-15; signed recons, FY'18, etc.; 14"

- B. *more* bank statements/*more* payroll control sheets, 2020-21; 28"
 - C. *more* bank statements, FY'22; 15"
 - D. *more* debt issue files, back to 2010-17 (*at least!*); full
13. same as unit 11, only 30"wide/capacity, 27"/key lock top center
- A. debt payments, as of 12/21; abatements, FY'21; commitments, FY'19-20;
retirement payroll, 2020-21; 10"
 - B. *more* debt issue files, 2017-21; full
 - C.-D. empty

RECOMMENDATIONS

Please refer to General Recommendations #1 *through* 3 (*another huge* “*purge*” to be done here – *particularly* in Kathy’s office (see pages 65-66)!

There are “**34**” drawers of records to be reviewed, which will result in a combination of storage and destruction; therefore, we would assign our archives supervisor for at least three days at \$675.00 per day, plus expenses, to complete the task. Once the review is completed, the *remaining* documentation should be “re-organized” based on the **Tell-i-vision/subject file** system, as previously outlined for *several* other areas. The amount and costs of the following supply items, as well as labor, will be determined once the purge task is completed:

- A. file organizers
- B. manila folders/pockets
- C. “miscellaneous” folders
- D. index guides

TOWN MANAGER

There is a *variety* of records maintained in this area, but they are truly “general” in nature, and the various records are reflected in the detailed inventory that follows. Folders are *usually* indexed by subject ***but – not always!***

The majority of the documentation is set up in a *variety* of letter size manila and colored folders with third cut assorted “battered” undercut top tabs, which are then “bulk-filed” in letter size green *hanging folders*. But, much of the documentation is *also* just “loosely” filed within the hanging folders – no inner folders, *and* there are “lots” of rubber bands holding documents together! *Sometimes* indexing is simply handwritten right on the folder tabs, *sometimes* it is typed on standard white labels applied to the tabs, and clear plastic tabs are *sometimes* applied along the back flap of the hanging folders/inserts referencing typed, *some* handwritten, title/*often* year(s), too. **AND**, there are lots of folders with ***no*** indexing at all!

There are lots of binder clips/paper clips/rubber bands used throughout the files, as well as “**tons**” of “sticky notes”. **AND**, in many cases, individual folders have been created for only ***one-four pieces of paper*** – we even noted *some* “empty” folders throughout the drawers! There are also no index guides installed *and*, we couldn’t help but notice *several* “misfiles” – these files are ***really*** “challenging” to reference!!

These files are housed in two Hon 5-drawer *standard steel* lateral file cabinets, 67”high x 42”wide x 19 ¼”deep/capacity, 39”/key lock top center/retractable fronts A-B, fixed fronts C-E.

1. A. supplies

- B. collective bargaining assorted files (arbitration MOA's, negotiations, correspondence, contracts, etc.), **back to 2003-2017 (at least!); jammed full**
 - C. *more* negotiation files, school/assessor collective bargaining, 2015-19; management letters/financing summaries, 2010-18; attendance reports, **2008; 28"**
 - D. general/"miscellaneous": attendance reports, **2008 (again!)/cherry streets, 1998-2002...executive session minutes, 2016-18 (at least!); 37 ½"**
 - E. **"hodgepodge"** of bills/budgets...drug taskforce reimbursements, 2018-2021...assorted reimbursements, **FY'11-FY'21; full**
2. A.-B. supplies
- C. continuation of 1D: fire department case file, 2020-21/"gic" agreement, **2008/CMA, 2016-2020/staff meeting, 2014/manager evaluations, 2008... police department, 2021; jammed full**
 - D. police department, 2016-2022/appointments/correspondence/police traffic, 1999-current/public safety study, 2011/staff meeting, 2014/school budget, 2014/assorted school files, **back to 2011-2021/assorted senior center files, 2016-2021/skating arena, 2007/assorted town clerk...veterans Belmont; jammed full**
 - E. Victory Field, 2014/library building, 2002-06, *at least*/workers comp, 2007-2012/tax rate assorted files, 2002-2021/tax classification, FY'11/retirement board, **2001-07 (at least!)/town attorney appointment/RFP's legal services, back to 1990's...Wayside Multi-Service, 2010; jammed full (plus 9" along side!)**

TOWN COUNCIL

Within the small office, *meeting agendas and documents* files along with a few “miscellaneous” files are set up in letter size manila folders with third cut assorted undercut top tabs and reinforced back flap (no hanging folders!). Indexing is simply *handwritten* right on the tab, referencing title/date. And, *once again*, there are “**tons**” of binder and paper clips used throughout the material.

Files are housed in one Quantum 4-drawer standard steel lateral file cabinet, 50”high x 36”wide x 18”deep/capacity, 32 ½”/retractable fronts/*missing* key lock right of A. Index guides are not installed, and folders simply “fall over” within the drawers, as there are no follower blocks installed!

1. A. abutters’ letters, 2018 -19

legal ads, 2018-19

town meeting notices, 2018-19

town council meeting documents, 2/13/18 – 1/18/19

executive session minutes, 2019

correspondence, 2018

27”

B. correspondence, 2021

legal ads, 2020-21

town meeting agendas, 2021

town council meeting documents, 6/29/20 - 10/12/21

executive session minutes, 2021

abutters’ letters, 2020

town council meeting notices, 2020

26”

C. town council meeting documents, 7/9/19 – 6/23/20

executive session minutes, 2004 – 2009/2011-2014

full

D. executive session minutes, 1982 – 1998/2000 - 2004

Coolidge School

Coolidge School lease, 2004

legal ads, 2012 – 2015

committee assignments, 2011/2014

K&P memoranda, 1997 – 2008

K&P billings, 1997 – 2008

few legal files

town manager evaluations, 1990's – 2016

town manager contracts, 1990's/2005

town auditor evaluations, 2005

town auditor resumes, **2004**

petition files (Arsenal St./Oakley Country Club, 2012; Citizens United, 2014)

charter review committee minutes, 1990/2000 – 2001/2010 – 2011

recreation center surveys, **2006-07**

etc.

full

Remaining files are located in the meeting room, and the *majority* of documentation here is simply “loosely” filed with some documents set up in a “hodge-

podge” of letter size *hanging folders*/some blue folders with inner pockets/*few* as-sorted colored folders, and so on. In any case, the date is usually just *handwritten* on the folder tabs with another label referencing “town council meeting” – indexing *really* “inconsistent”!

These files are housed in three Hon 4-drawer standard steel lateral file cabinets, 53”high x 30”wide x 19 ¼”deep/capacity, 27 ¼”/key lock top left.

2. A. correspondence, **2003 - 2016**; Brown School – police, 2005; Coolidge School usage, **2001/2005-06**; petitions, 2001/2004

B. town council meeting documents, 1/12/16 – 12/13/16 & 7/11/17

executive session minutes, 2016

legal ads, 2016

meeting notices, 2016

full

C. town council meeting documents, 8/8/17 – 1/23/18

abutters’ lists, 2017

correspondence, 2017

town auditor evaluation

legal ads, 2017

meeting notices, 2017

“stack” of folders...*more* correspondence, **1999/2008-09**

13”

D. town council meetings, 8/10/10 – 1/13/09; 21”

3. A.-D. town council meetings, 7/13/04 – 11/25/08; 78”

4. A.-D. town council agendas (meetings), 2/24/87- 10/23/01 & 1/8/02 – 6/22/04;

109”

Lastly, there are 48 assorted 3-ring binders arranged right on top of units 2-4:

- 19 binders: ordinances, 1982-84/resolutions, 10/27/81 – 2021; 61”
- 29 binders: meeting minutes, 9/24/84 – 2021; 104”

We *also* noted “stacks” of assorted wire bound reports/documents on the ledge opposite the file cabinets: school project manuals, 2019/library appraisals, 2015/high school design, 2020/agenda item documents, 2013-15 (*at least!*); approximately 50”.

RECREATION DEPARTMENT

A variety of files is stored in this department, which include lots of “general/miscellaneous” files, vendor/invoice files, deposits, payroll, and employee files. **AND**, the documentation within the vendor/invoice, payroll, and employee files is all “*duplicated*” elsewhere!

“Old” *inherited* files are set up in a “**hodgepodge**” of letter size supplies – manila/blue/red folders either individually *or* “bulk-filed” in *hanging folders* with colored plastic tabs/handwritten *or* typed inserts in assorted positions. Files for vendors are set up A-Z by year, sometimes using a different color folder for each year, with corresponding colored labels referencing neatly printed vendor name/year/number. These files are then “bulk-filed” in more *hanging folders*.

Payroll and deposit documentation is just “bulk-filed” by month in manila folders, which are then “bulk-filed” in more *hanging folders*. Month/year are noted right on the tabs.

Active employee files are set up in letter size manila folders with third cut assorted undercut top tabs. Red labels reference neatly printed name/properly inverted, and folders are then “bulk-filed” in more *hanging folders/no* tabs.

The various files are housed in seven assorted standard steel vertical file cabinets arranged in two areas of the office.

Units 1-4 are located along one wall facing you upon entry to the office.

1. Steelcase 4-drawer unit, 52 ¼”high x 15”wide x 27”deep/capacity, 26”/key lock top right

A. “general/miscellaneous” files, A-Z, ***back to 1990’s-2003 (at least!)***;

jammed full

- B. budgets, FY'13-FY'17/"old" assorted park files (plans/contracts/improvements/safety...), ***back to 1980's-1990's***; full
 - C. *more* park/skate park assorted files, ***back to 1980's-2001 (at least!)***; full
 - D. approximately 25-30 rolled maps/plans; full
2. same as unit 1
- A. Victory Field assorted files/turf project/funding, *etc.*, ***2011-12***; 18"
 - B. "archive files": job applications, ***1990's***/employee contact info, ***1978-1990's***/Filipello Park correspondence, ***1990's***/outdoor areas recommendations, ***1960's***, *etc.*; 25 ½"
 - C. payroll (time sheets/weekly payrolls/total sheets), FY'15-16; full
 - D. budgets, FY'16/attendance, 2015-16/payroll, FY'17-18; full
3. Steelmaster 4-drawer unit, 52"high x 15"wide x 28"deep/capacity, 25"/key lock top right
- A. payroll, FY'19/picnic permits (1 folder), 2019/revolving account documents, FY'16/attendance (1 folder), FY'14; 22"
 - B. vendors (red folders): A-Z, FY'17; 21"
 - C. vendors (blue folders): A-Z, FY'18; 14"
 - D. newsclippings, ***2011-2016***
4. same as unit 3
- A. vendors (green folders): A-Z, FY'19; 23"
 - B. deposits, FY'19; 12"
 - C.-D. terminated employees: *multiple* A-Z files; approximately 48"

The most current files are located right behind Kelly's desk.

5. same as unit 3
 - A. payroll, FY'20-21; 18"
 - B. vendors (manila folders): A-Z, FY'21; 17"
 - C. deposits, FY'20-21; 22"
 - D. *few* more "inherited" files; 3"
6. same as unit 3
 - A. vendors (manila folders): A-Z, FY'22; 5"
 - B. vendors (manila folders): A-Z, FY'20; 12"
 - C. active employees: Anderson – Lynch; 15"
 - D. MacDonald – Yusman, 8"/vendor W-9 files, A-Z, 6"
7. Steelmaster 3-drawer unit, 40"high x 15"wide x 28 ½"deep/capacity, 26 ½"
 - A. deposits, FY'22; 5"
 - B. payroll, FY'22, 3"/financial reports (1 folder per year), 2019-2021/budget prep (2 folders), FY'21-22; 7"
 - C. supplies

PURCHASING DEPARTMENT

The files in this department are comprised of two types of contracts: yearly, and “ground up”. *Yearly* contracts include snow plow, electrical maintenance, road work, for example, and could cover from one-three years. Documentation for yearly construction contracts is simply “loosely” filed within letter size *hanging folders* with clear plastic assorted tabs/*handwritten* indexing on inserts referencing year-#, title. Yearly files are also saved electronically.

“Ground up” construction contracts (for example, schools) are considered *permanent records*, and documentation is set up in orange wire bound report binders with *several* colored inner pockets: 1=signed contracts, 1=bonds/insurance, 1=advertisement/bid evidence, 1=plan holder list/bid tabulation, 1=specs, 1=contract document tracking/communications, 1=miscellaneous. Large white labels applied to the front of these binders reference name/contract #/vendor name/term.

There are lots of rubber bands used to hold “bulky” binders together, some large folded plans throughout the files, and index guides are not installed. AND, document counts vary *greatly* depending on the length of contract/project size, and so on.

Contract files are arranged by year/contract number, and they are housed in three Hon 4-drawer standard steel lateral file cabinets, 53”high x 42”wide x 19” deep/capacity side-to-side=39”, front-to-back=15”/key lock top center.

1. A. 2016: 2016-001 – 2016-097; full
- B. 2016-098 – 2016-103/2015: 2015-005 – 2015-091; full
- C. 2014: 2014-000 – 2014-092; full

- D. **“hodgepodge”** of pre-qualifications/”ground up” school project files “piled”
in drawer; full
- 2. 3 rows per drawer A&B only
 - A. 2020: 2020-001 – 2020-047; full
 - B. 2018: 2018-084 – 2018-090/2019: 2019-002 – 2019-082; full
 - C. *more* 2018: 2018-001 – 2018-079; full
 - D. 2017: 2017-001 – 2017-085; full
- 3. 3 rows drawer B only
 - A. 2022: 2022-002 – 2022-041; 20”
 - B. 2021: 2021-001 – 2021-060; full
 - C. empty
 - D. “old” certified payrolls, 2018-19 (*at least!*)/assorted project files, **back to 2003**

At the time of our visit, there were *also* two 24 inch boxes “stacked” on the floor, which hold “ground up” construction contract files regarding school projects.

RETIREMENT DEPARTMENT

The retirement department gets a “**gold star**” for having recently completed scanning all of the active and retiree member files – a total of approximately 1,000 files, a “two year” project!

Documentation for *active* employees is set up in letter size blue vinyl folders with third cut assorted undercut top tabs, which are *loosely* filed in the drawers (no hanging folders!). White labels applied to the tabs reference printed employee name/properly inverted and *usually* the department name, too. Material within these folders is simply *loosely* filed in chronological order, and folders are arranged in two A-Z files, active/retiree.

Files are housed in four Hon letter size standard steel vertical file cabinets arranged along one wall, and index guides are not installed.

1. 3-drawer unit, 40”high x 15”wide x 26 $\frac{3}{4}$ ”deep/capacity, 25”/”missing” key lock top right
 - A. active: Abbas – Hallal-Dixon; 23”
 - B. Donahue – Latanowich; 19 $\frac{1}{2}$ ”
 - C. Lawn – Parent; 19 $\frac{1}{2}$ ”
2. same as unit 1 (with key lock!)
 - A. Patenaude – Zirolla; 21 $\frac{1}{2}$ ”
 - B. retiree (“old” manila folders): Adams – Beninati; 22”
 - C. Bernier – Colleran; 21”
3. 5-drawer unit, 60”high x 15”wide x 26 $\frac{1}{2}$ ”deep/capacity, 24 $\frac{1}{2}$ ”
 - A. Collins – Devaney; 17 $\frac{1}{2}$ ”

- B. Deveau – Forte; 23”
 - C. Fox – Gullotti; 23”
 - D. Haggerty – Kelland; 22 ½”
 - E. Kelly – Malay; 23”
4. same as unit 3
- A. Mahoney – Miele; 22 ½”
 - B. Monahan – Papandrea; full
 - C. Papas – Reilly; 22 ½”
 - D. Reyes – Thibaut; full
 - E. Tocci – Zuccala; 17 ½”

We noticed the following archival records either “stacked” right on *top* of units 3-4, or stored in four 24 inch *plastic drawers* “stacked” right next to unit 1:

- “stacks” (approximately 16”) of folders: “died” (purged from retiree files)
- “stacks” (approximately 10”) of folders: retiree affidavits
- 1 drawer: board meeting attachments (approximately 8”), 2011
- 1 drawer: 38C reimbursements/payments, 2014-2022 (*at least!*); audits, 2005-08/2014/2017
- 1 drawer: appropriation info, back to 1995 (at least!)-2022; actuarial valuations, 2017/2019; Melanson health audits, 1998-2004/2010-2012/ 2018-19; PERAC audits, 2005-2012
- 1 drawer: 38C reimbursements, 1992-2014; 38C decreased reimbursements, 1975-1988; actuarial valuations, 1999-2002/2004/2006-2013

Additional archival records are *a/so* stored in an adjoining room, and they are reflected in the separate Archives section on pages 24-27.

RECOMMENDATIONS

To avoid repetition, we have consolidated the recommendations for the preceding five departments (**Town Manager, Town Council, Recreation, Purchasing, Retirement**), as the problem *throughout ALL* of these areas is the same – it's just a matter of volume or degree!

Having said that, we refer you to General Recommendations #1 *through 7* outlined on pages 3-6, as all of these apply here! AND, as far as “**purging**” goes, you simply “can’t do enough” here – there are *many* candidates (***town manager evaluations, 1990’s/collective bargaining files, 2003/RFP’s, 1990’s/Coolidge School usage, 2001/legal billings, 1990’s/budgets, 2013/job applications, 1990’s/correspondence, 1980’s, etc.)!***

Due to the volume of records to be reviewed throughout the town manager/town council/recreation department files, we recommend assigning our archives supervisor at \$675.00 per day, plus expenses, for an estimated five days. Destruction candidates will be set aside, records that must be retained will be boxed/indexed and then incorporated into the “new” archives system.

Once the purge task is completed throughout these three departments, the amount of the following supply items, as well as labor, can be determined:

- A. file organizers
- B. kraft/manila folders
- C. manila pockets (town council)
- D. “miscellaneous” folders
- E. index guides

We want to point out that the minutes and orders/resolutions files here are *also* candidates for microfilming, as previously specified on pages 57-58.

As far as the *purchasing department* is concerned, a small amount of purging is the only necessary step here, and the *retirement department* gets a “hearty” **CONGRATULATIONS** for having recently completed scanning all of the employee files! AND, the employee files are *also* “neat and orderly” – there is **no** need for any changes here!! The only problem in the retirement department is the archives, and these recommendations were previously addressed in the separate Archives section.

FIRE DEPARTMENT

The major categories of records included in this area are personnel, AP, permits/inspections, terminated employee/retiree records, grievance files, and ambulance/EMS/EMT, along with lots more general or "miscellaneous" files.

Almost all of the documentation is set up in either letter size *hanging folders*, most with clear plastic top tabs in assorted positions *or*, in manila letter size folders with third/some fifth cut assorted undercut top tabs, which are either individually *or* "bulk-filed" in the *hanging folders*. Indexing is *handwritten*/some typed on top tabs or tab inserts.

There is ***no*** particular arrangement to any of the general files, but reports and invoices are generally arranged in date order, some material is "grouped" together by type (permits, testing, inspections, etc.), and personnel/retiree files are arranged alphabetically. Neither index nor "OUT" guides are utilized in *any* of these files.

Some material, such as ambulance run reports, permits and correspondence *used to be* purged from the files on a regular basis and sent to storage ***but***, *many* records are simply never reviewed!

There are currently 89 employees in the fire department, and an individual hanging folder is created for each one/*few* inner manila folders are used. The majority of the material in these files is *copies* but, we did notice some **original** documentation, too. A sampling of the material within the folders revealed the following, which is ***not*** arranged in any particular order:

- personnel action forms

- appointments
- critical information changes
- military service
- injury reports/medical information
- training certifications
- payroll information
- requests for verification of employment
- worker's compensation
- correspondence
- W-4 forms
- resumes/copies of transcripts
- copies of ID's
- etc.

There are lots of staples/paper clips/*some* rubber bands used throughout this material.

Personnel and AP files are located in Madeline's office, housed in a Hon 4-drawer lateral *standard steel* cabinet, 53 ¼"high x 42"wide x 19 ¼"/capacity, 39"/key lock top center.

1. A. personnel: Allen – Maietta, Jr.; 37"
 - B. Maloney – Wood; full
 - C. MIIA accidents, 2019-22 (1 folder)/AP, 2019-22; 23"
 - D. "miscellaneous" files: capital accounts carry-over, 2017-19; overpayment refunds (schedule of bills), 2015-2021; pay rates, 2005-2021; assorted AP, 2014-18; grants/refunds, etc.; 26"

Permits, inspection reports, and “lots” of miscellaneous files are located in the Fire Prevention Office on the first floor. Gas station and quarterly inspection folders are set up for each address inspected, and files are arranged alphabetically by street name and number/business name within. Individual folders may *also* be created for other inspections or issues, but these folders are simply interspersed among other general material in the files. Indexing on these folders references either address *or* business name.

2. Steelmaster 4-drawer vertical unit, 52”high x 15”wide x 26 ½”deep/capacity, 25”
 - A. permit files, 2021 (blasting, propane, candle, welding, tank...)/food truck inspections/street address changes/oil burner inspections/records of system completion/fire detail invoices/exhaust hood reports/treasurer reports/master boxes/Captain Allen “miscellaneous”, *etc.*; 22”
 - B. smoke inspections/tank truck inspections/school fines/insurance notifications/fire & fire watch details/master box payments/treasurer reports/street address changes/candles/food truck inspections/welding-propane-tank permits/paid invoices, *etc.*, 2018-19; 21”
 - C. same as A & B, 2019-20; 19”
 - D. same as A & B, 2020/fire details (invoices/payments), 2020; 18”
3. Hirsch 2-drawer letter size vertical unit, 28 ½”high x 15”wide x 26 ¾”deep/capacity, 25”/key lock top right
 - A. smoke detector certificates of compliance, A-Z by year, 2015/2020-22; 14”
 - B. receipt books, 2020-22; 9”
4. Hon 4-drawer lateral unit, 53”high x 42”wide x 19 ¼”deep/capacity, 39”/key

lock top center

- A. assorted permits/boiler & tank installations/daily invoices/treasurer reports/
master box invoices, 2022; boiler inspections, 2021; Safe applications,
2017-2021; system record of completion, 2020, *etc.*; 21"
- B. *permit application file/flammable storage (excludes stations)*, back to
1980's: 60 Acton St. – 89 Webster St.; full
- C. *permit application file/gas & auto repair stations*: 74 Acton St. – 250
Orchard St.; full
- D. 106 R. Pleasant St. – 39 Watertown St.; 10"

A variety of general/"miscellaneous" files along with grievance files are located in the Chief's office. Records are housed in two Hon 2-drawer standard steel lateral cabinets, 28 ¼"high x 36"wide x 19 ¼"deep/capacity, 33"/key lock top center.

- 5. A. vehicle registration files, **back to 1970's-2017**; flow tests, 2010/2012/2014-
2016/2018-2022; certifications of air quality, 2010-18; assorted test files
(pump/ladder), 2006-2022; boat registration files, 1997-2022; FCC li-
censes, expire 2024; ambulance license/registration, 2016-2021; radio
equipment, **back to 1990's**; accident, **2003**; turn-out gear orders, **1996-
1997**; fire marshall emails, **2004-05**; ride along releases, **2000-01**; fire
training council minutes, 2012-15 (*at least!*); blizzard, 2005; vehicle acci-
dents, **2004/2006**; town manager correspondence, **1990's**; traffic com-
mission, 2004, *etc.*; 29"
- B. *more* fire marshall memos, **2004-09**; ambulance billing/call centers, **2004-
2021**; AMR memo of agreement, 2003; RFP ambulance billings, **FY'00-02**;

10"

6. A. town manager/council correspondence, **2007-09**; contracts/awards, 2002-2003; grievance bypass, 2004; CIP, FY'98; equipment grant, **FY'03**; assorted training programs, **2007**; "old" paid invoices, **back to 1990's**; ladder testing, **back to 1990's-FY'02 (at least!)**; annual hydrant inspections, **1987 - 1996**; sexual harassment training, 2004-16; Safe grant applications, **1995 - FY'00**; assorted grant files, **2007-2010**; military pay issue, **2006-08**; layoffs, **2009-10, etc.**; 27"
- B. grievance files, **back to 1990's-2015 (at least!)**; incidents, 2006; *more* town manager correspondence, **1993-94**; public safety subcommittee, **1994**; air quality tests, 2005, *etc.*; full

Next stop, Ryan's office. Simply put, file cabinets in this office are just *full* of "inherited" files from *previous* occupants – terminated/retiree files, attendance card files, along with lots of *general/"miscellaneous" files*!

7. Hon 4-drawer lateral standard steel unit, 53"high x 42"wide x 19 ¼"deep/capacity, 39"/key lock top center
 - A. *few* certificate & training files (*no particular order!*); couple of apprentice agreements, **1962**; IMC incident files, **2010-14**; equipment purchase orders/invoices, **2011**; station reports, **2007-08**; week calendars/schedules, **2000-03**; Scott's flow testing, 2004-2022; deferred compensation, **1997**; jury duty, **1985**; disciplinary actions, **back to 1980's**; 30,000 capacity, **1995**; department history, **1970's**; seniority lists, **1950's-1980's**; manpower/union info, **1980's-1990's**; salary schedules, **1960's-1980's**; accidents, **1970's-1980's**; "old" attendance files, **1930's-1940's**; 33"

- B. terminated/retired employees: Alberico – Guzzetti, 24 ½”; followed by “**hodgepodge**” of folders: employment verifications, **2013-2021**/job bidding, **2012-2020**/few candidate package files/sick leave, **1980’s-1990’s**/retired sick leave, **1960’s-1970’s**/deputy chief exam, **2001**/lieutenant exam, **2003**, *etc.*; 13”
- C. continuation of B: Haggerty – Paglierani; full
- D. Papalia – Visco; 31”
8. 54”high x 36”wide x 33”deep/capacity, 33”/key lock top center
- A. shift reports, 1/15 – 6/21, 25”/few “miscellaneous” files, 5”
- B. **2 “piles” of folders**: union dues retro, **FY’12-16**; budgets, **FY’14-15/** FY’17-19; contract worksheets, **1998-2000/2005-07/2010-16**; ISO grading, **1994**; hydrant flow tests, **1998**; ISO survey forms, **back to 1990’s**; retro contract sheets, **2001-09**; contract/bylaws, **2003-05**; union contracts, **2000-05**; bargaining agreement/engine 2 equipment, **2008**, *etc.*; 23”
- C. deceased members: Alexson – Messina; 30 ½”
- D. Milmore – Yeradi; 27”

There are *also* two bookcases holding 219 *more* bound books: call books, 1926-2003; treasurer account/rosters/engineering expenditures/department expenditures, **back to 1800’s**; approximately 249”.

Lastly, there are nine assorted size card files, 6”highx8 ¼-8 ½”widex11 ¼-12 ¼”deep, and 1 check size metal file/23”deep, holding the following records:

- leave of absence/sick/absentee cards, A-Z by year(s), **1980’s – 2021**
- vacation, 2015 – 2021 (*at least!*)

- injury, A-Z by year, 2007-2021

approximately 145”

RECOMMENDATIONS

We begin with the *fire prevention* office files, as there is very little purging to be done here! Files in units 2,3, and 4 (pages 185-186) should be *consolidated*, creating a proper **subject file (Tell-i-vision!)**, as previously outlined.

The following supplies and labor will need to be ordered:

- | | | | |
|----|---|--|----------|
| A. | 2 boxes | #50534 letter size blank index guides, 3rd cut
black metal top tabs #1 position. Cost, \$89.30
per box/50. Total cost, | \$178.60 |
| B. | 1 box | Same as A, only #2 position. | \$ 89.30 |
| C. | 1 set | #SPEC 25 division set "miscellaneous" folders,
letter size, 5 th cut top tabs/center position. | \$ 29.50 |
| D. | 1,000 | #10786 kraft 11-point letter size folders, 2/5
cut right tabs, reinforced back flap. | \$449.60 |
| E. | 1 bag | #67671 color-coded name labels. | \$ 21.54 |
| F. | 25 | #51910 letter size "OUT" cards, top tab. | \$ 27.60 |
| G. | 10 | Drawer organizers: 6 (25") at \$51.25 each/
4 (39") at \$75.00 each. Total cost, | \$607.50 |
| H. | Labor to convert. It will be necessary to create folder labels,
convert material from old folders to new, properly establish
Tell-i-vision/subject files <i>and</i> "miscellaneous folders", and
affix labels. Finally, captions for index guides will be estab-
lished, guides and organizers installed, all folders will be re-
filed, and your staff will be trained in the maintenance and | | |

perpetuation of the new system.

We would assign one of our records supervisors, who is billed at \$470.00 per day, plus expenses, for an estimated 10 days to complete the task for you.

“Subject files” are *also* the answer for both the Chief’s office (units 5-6, pages 187-188), and Ryan’s office (units 7-8, pages 188-189). However, a “**TON**” of *purging* is on the agenda for *both* of these areas, as the various files are simply “cluttered” with *many* old inherited files from previous administrations! Therefore, our recommendation is that *both* of these office files be reviewed by our archives supervisor, who is billed at \$675.00 per day, plus expenses, and three days will be required to complete the task.

Once the purge is completed, the amount and costs of the following supply items, as well as labor, can be determined:

- A. file organizers
- B. kraft/manila folders
- C. “miscellaneous” folders
- D. index guides

In Madeline’s office, we would normally recommend a fireproof cabinet for *personnel files*; however, since the vast majority of this documentation consists of “copies”, drawer organizers and proper supplies are once again all that’s needed:

- A. 100 #SP blue pressboard letter size folders, straight
edge, “cut down” front flap. \$ 35.00
- B. 1 pkg. #Abgor standard blue labels. \$ 16.50
- C. 4 Drawer organizers at \$51.25 each.

Total cost, \$205.00

Lastly, microfilming is *definitely* on the agenda here with regard to *terminated employee files* (20 year retention!), and *call books* (permanent retention!). As previously noted, all of these files are presently stored right in Ryan's office **AND**, consuming *much* needed file space! Please refer to our costs for filming previously outlined on pages 57-58.

DEPARTMENT OF PUBLIC WORKS

There are seven main categories of files here located between the first and second floors. Cemetery records, water department administration, contractor bonds, accounts payable, as well as personnel files, and a few general/"miscellaneous" files are all located in the administrative office on the first floor. The remaining water department records are located in various areas of the second floor.

Cemetery Records – Many old burial records and certificates are arranged in bound books stored in the basement but, there are *also* index card systems for lot purchase, plot plans, and internment, which have been in use here for *many* years. Information is either recorded on 5x3 or 6x4 index cards, which are arranged both alphabetically and numerically as follows:

- 5x3 lot purchase cards: filed numerically by lot #/by location
- 5x3 internment cards: filed alphabetically by name of deceased/by location
- 6x4 plot cards: filed alphabetically by owner name

Cemetery cards have been created and stored electronically since *at least* 2008 ***and***, all of the old cards were also ***scanned*** "way back when" to facilitate access and referral!

Cards are *poorly* guided by a variety of 25 division sets of manila, press-board, and "homemade" index guides – ***lots of "broken"/"missing" tabs!*** The various cards are arranged in 25 metal trays: 3 ¾"high x 5 ¼"wide x 15"deep/capacity, 14 ¾" for 5x3 cards; 4 ½"high x 6 ¾"wide x 15"deep/capacity, 14 ¾" for 6x4 cards.

Cemetery records are located near the front windows of the administrative office area, housed in one standard steel cabinet, with a two-door storage cabinet "stacked" right on top for supply storage.

1. Steelcase 4-drawer lateral unit, 52 ¾"high x 42"wide x 18"deep/retractable drawer fronts/drawer-within-a-drawer feature/key lock top center

A. - lot purchase, 5 trays: #1 - #3425; 59"

- internment, 7 trays: Ridgefield Cemetery, A-O; 75 ¼"

B. - internment, 3 trays: Ridgefield Cemetery, P-Z; 30"

- plot cards, 5 trays: A-Z; 56"

C. - internment, 5 trays: Common St. Cemetery, A-Z, 32 ¼"/Arlington St. Cemetery, A-Z, 7"/"miscellaneous" cards, 9 ¼"

D. supplies

Water Department Administration – Water billing registers, cycle read files, final reads, and "miscellaneous" records are "bulk-filed" in letter size *hanging folders* (with/without tabs!)/*some* inner manila folders. *Handwritten* indexing on tabs/inserts reference titles and dates or, cycle #/date/CMT code. Some of these files are arranged "more or less" in date order, while others are not arranged in *any* particular order at all!

Water final reads/transfer of ownership records are arranged alphabetically by street name, and an individual blue letter size *hanging folder* has been created for each and every street. Assorted blue plastic top tabs with typed street name inserts are used.

Neither index nor "OUT" guides are installed in *any* of these files, which are accessed by four-five people on a regular basis.

The various files are housed in two standard steel cabinets.

2. 4-drawer lateral unit, 51 $\frac{3}{4}$ "high x 36"wide x 18"deep/capacity, 32 $\frac{3}{4}$ "key lock top center
 - A.-B. cycle reads, #1/#2/#4/#5; 59"
 - C. billing registers, "bulk-filed" in blue *hanging expansion pockets*; 24"
 - D. "problem files": 23 Acton St. – J.A. Wood Mgt.; 17"
3. 3-drawer vertical unit, 38"high x 15"wide x 27 $\frac{1}{2}$ "deep/capacity, 25 $\frac{3}{4}$ "key lock top right
 - A. A-Z "miscellaneous" file: collection calendar/consumption reports – trenching info; 15 $\frac{1}{2}$ "
 - B. continuation of 2A-B: cycle reads, #6/#7; 20"
 - C. cycle reads, #3; 18"

Address cards and transfer of ownership files are located by the cemetery clerk's desk, housed in a 4-drawer lateral standard steel cabinet, 52 $\frac{3}{4}$ "high x 36" wide x 18"deep/capacity, 33"/one retractable drawer front/drawer-in-a-drawer feature in A/key lock top center. Within drawers B–D, records are arranged in two front-to-back rows, *as well as* from side-to-side in the "left-over" spaces. Address cards are arranged in more 5x3 metal trays, same as previously described for cemetery cards. And, cards are well-guided by 5x3 manila index guides/"battered" third cut assorted tabs.

The staff is in the process of **scanning** these card files into Munis, after which these card files will simply be stored!

4. A. - address cards, 6 trays: Acton St. – Otis St.; 77"
 - address cards, 3 trays: Palfrey St. – Yukon Ave; 36"

- B. water finals/transfer of ownership: Acton St. - Fitchburg St., 26"; "bulk-filed" hydrant applications, FY'04-05/FY'07; 3"
 - C. Flint Rd. – Oakland St., 21 ½"; "bulk-filed" hydrant applications, FY'09-16/ general service applications, FY'00-03/FY'06-08; 5"
 - D. Oakley Rd. – Yukon Ave.; 21"
5. Hon 3-drawer lateral unit, 41 ¾"high x 30"wide x 19 ¼"deep/capacity, 26 ¾"/key lock top center
- A. daily deposits: backflow – white goods, FY'22; 7 ½"
 - B. **"hodgepodge"** of assorted files: NPDES/IDDE program/outfall monitoring/ DEP sanitary survey, 2016/Filipello Park, 2018/DEP notice of response action, 2017-18/municipal discharge permit applications, 2012-15/EPA quarterly reports, 2016-20, *etc.*; full
 - C. supplies

Additional index card files are maintained for the water department: (A) 5x3 water service cards, A-Z by street; (B) 5 ½x3 ¼ water meter "take-out" cards, filed numerically by "old" computer system service number; (C) 5x3 water drawing cards, filed same as take-out cards. Both service index and water drawing cards are **duplicate** files of records maintained in the water department office. **AND**, the water drawing cards were all **scanned** "way back when" for ease of access! As far as the "take-out" cards are concerned, this information has been stored electronically for a long time.

Water service and drawing card files are *well-guided* by a variety of 5x3 manila/green pressboard index guides with third/fourth cut assorted metal/plastic top tabs with typed/*handwritten* inserts; however, some of these guides have also

seen better days!

These three groups of cards are located just outside the copy room, housed in one Tennesco 8-drawer standard steel vertical file cabinet, 52 ¾"high x 15"wide x 28 ¼"deep/two rows per drawer/capacity per row, 26 ¼"/key lock right of A.

6. A. - water service: Acton St. – Dexter Ave; 25 ½"
 - Downey St. – Langdon Ave; 23 ½"
- B. - Ladd St. – Pleasant St; ***jammed full***
 - Pond St. – Yukon Ave; ***jammed full***
- C. - "take out cards" (*no guides*): 2379 – 4922; 25 ½"
 - 1 – 2379; 25 ½"
- D. - 7410 – 9563, 18 ½"/"loose" cards, 7 ½"
 - 4923 – 7409; 25 ½"
- E. - water drawings: 1 – 1699; 23"
 - 1700 – 3399" 23 ½"
- F. - 3400 – 5099; 23"
 - 5100 – 6799; 21 ½"
- G. - 6800 – 8944; 22" (no index guides!)
 - empty
- H. empty

Contractor Bonds – Material for each contractor is set up in letter size green pressboard *hanging folders*, as well as some "old" yellow and manila letter size folders, both with third cut assorted/*some* undercut top tabs. Indexing on both inner and hanging folders is simply *handwritten* and references contractor name.

Various permits are arranged alphabetically by street in letter size manila

folders/third cut assorted undercut top tabs, which are then inserted into *more* letter size *hanging folders*. Yellow plastic top tabs with pre-printed alpha inserts are applied in assorted positions along the folder back flap.

7. 4-drawer lateral unit, 52"high x 36"wide x 18"deep/capacity, 33"

- A. contractor violations (1 folder)/bonds: A Yard & A Half Landscape Coop. – Muzzioli; 28"
- B. NPA Masonry LLC – Zanelli Excavation; 22 ½"
- C. permits (by street): block party permits (1 folder)/A – Z streets, 2022; 6"
- D. "pile" of rules & regs

Accounts Payable Invoices – Original invoices (or copies) are forwarded to the town auditor's office, but the department maintains a file of copies (or originals) for reference purposes. Invoices for FY'20-22 are set up in *more* letter size *hanging folders* with clear plastic top tabs/*handwritten* A-Z inserts. Inner letter size manila folders with third cut assorted undercut top tabs/white labels reference alpha caption/year. An individual folder is created for entities with four or more pieces of paper, while those with fewer than four documents are "bulk-filed" in the "miscellaneous" A-Z folders, one for each letter of the alphabet. Files are arranged alphabetically in two A-Z files per year: (1) vendors, (2) utilities.

AP files are housed in two standard steel lateral cabinets right near Cindy's desk.

8. Hon 3-drawer unit, 41 ¾"high x 30"wide x 19 ¼"deep/capacity, 27 ½"/key lock top center

- A.-B. FY'22: A – Z; 52"
- C. utilities (folder each month): Allied Waste, FY'20-22/Eversource, FY'21-22;

12 ½"

9. 4-drawer lateral unit, 51 ¾"high x 36"wide x 18"deep/capacity, 32 ½"/key lock top center

A.-D. FY'20-21: A – Z; 102"

Personnel Records – There are approximately 54 employees here. An individual folder has been created for each employee, and *most* of the folders are arranged alphabetically in one A-Z file with *no* color-coding added. The *majority* of material within these folders should be ***duplicates*** of records stored in either the personnel department or town auditor's office.

Material is set up in Smead manila letter size expansion pockets/straight cut/"cut down" front flap/center thumb notch/one inch expansion *or*, a few manila/colored letter size folders with third cut assorted undercut top tabs. Indexing is neatly typed/some *handwritten* on standard labels, and it references employee name/properly inverted. Pockets/folders, as well as *loose* material, are inserted into letter size *hanging folders* with clear plastic top tabs, and typed inserts reference name/properly inverted.

Material within the folders is *loosely* filed in no particular order, and a sampling of the documentation revealed the following:

- personnel action forms
- promotions/payroll changes
- jury duty notices
- copies of ID
- training certificates
- letters of appreciation

- medical information/doctor's notes
- W-4's
- job postings
- warnings
- correspondence

Terminated employee files are **not** purged from the active file on a regular basis, but older files are stored in the basement archives, retained "indefinitely".

Personnel files are also located right next to Cindy's desk, housed in a Sentry 2-drawer letter size vertical **fireproof** cabinet, 27 ¾"high x 17"wide x 23 ½" deep/capacity, 18"/key lock right of B.

10. A. Aiello – Leonardi; 14"

B. Leone – Tuson; 11"

At the time of our visit, there were 11" of *new* employee files to be *interfiled*!

General/"Miscellaneous" Files – Material for the majority of these files is set up in a "**hodgepodge**" of supplies! *More* manila/colored letter size folders with third cut assorted undercut top tabs/indexing either *handwritten* or typed right on the folder tab, or on standard white labels. Files are then "bulk-filed" in *more* green/colored letter size *hanging folders*.

Some of the material within the drawers is arranged alphabetically in one A-Z file but, there is really **no** "rhyme or reason" to the arrangement of the majority of files within these drawers! AND, purging is **not** done on a regular basis!!

These files are housed in two more *standard steel* lateral cabinets, next to units 8-9.

11. Hon 3-drawer unit, 40 ¾"high x 30"wide x 19 ¼"deep/capacity, 26 ¾"/key lock

top center

- A. address change requests: “bulk-filed” A-Z, **back to 2004 (at least!)**; 23 ½”
- B. completed work orders: “bulk-filed” A-Z; 12”
- C. grant of location files (**no particular order!**); 19”

12. same as unit 9

- A. supplies
- B. “project folders”/construction phase, **back to 2008 (no particular order!)**; 29”
- C. snowstorm files: 12/08 – 2/22; 30”

Water Department (2nd floor) - The central files for the water department include backflow records, cross-connection files, street permits, site plan review files, general/“miscellaneous” files, original card files for water drawings, and **“tons”** of water/sewer plans! Back in 2008, water drawings had all been **scanned**, along with sewer drawings and some plans. AND, water drawing and service index cards were *also* reproduced on microfiche about 28 years ago!

A *variety* of records is located in the “copy room” – backflow files/high water bills, cross-connection/survey files, *just to name a few!* And, once again, no index guides are installed/“OUT” cards are not used.

Backflow files – An individual folder is created for each street/per year with documentation “bulk-filed” in letter size manila folders/third cut assorted undercut top tabs. White labels applied to the tab simply reference neatly printed street name/year. The manila folders for each street are then “bulk-filed” in legal size hanging folders, which *also* have third cut assorted top tabs/neatly printed street name only. Within the folders, documentation “should be” arranged alphabetically

by owner. However, there are *many* folders that hold only *one-two* documents or, ***“they’re empty”!***

High water bills – Documentation is set up in the same manner as backflow, except that only the legal size hanging folders are used – no “inner” folders.

Cross-connection files – Documentation is set up in letter size yellow folders with third cut assorted undercut top tabs (no indexing!), which are then individually filed within *more* letter size *hanging folders*. Clear plastic tabs have neatly typed inserts referencing street name.

The preceding files are housed in three Hon 4-drawer standard steel lateral cabinets, 53”high x 36”wide x 19 ¼”deep/capacity, 33”/key lock top center.

13. A. high water bills: Adams Ave. – Myrtle St.; 31 ½”
 B. Nash St. – Yukon Ave., 18”/cycle #1-#7 files (one folder per cycle), 2016-2019 (*at least!*), 9”
 C. cross-connection/surveys: Adams Ave. – Main St.; ***jammed full***
 D. Mangano Ct. – Village Condo, 26”; *few* chain of custody files, 2015-2022/initial testing files, ***2011-12***/violation letters, ***2012/etc.***, 6”
14. backflow files, 2015-17
 A.-D. Acton St. – Victory Field House; 88”
15. backflow files, 2019-20
 A.-D. Acton St. – Yukon Ave./Park & Field & School; 21”

Unit 16 holds a *variety* of assorted files set up in a **“hodgepodge”** of supplies with subject indexing just *handwritten* right on the tabs.

16. A. 15 *more* books/diaries, ***1989-1990/2001-2012***, 22”; weekly sample results (1 folder per year), ***2010-16***; contamination reports, ***1998-2009***; roll call

files, **2010-16**, 16”; large kraft envelope along back=MWRA quarterly updates, **1998-2007**, 3”

- B. “yearly folders” created for each of the following categories: appendix A (water leakage) files, **1994-2002**; customer service files, **1994-2005**; municipal discharge permits, **2000-05**; water test results, **1992-2004**; general service, **1992-2014**, *etc.*; 26”
- C. “yearly folders” created for each of the following categories: lead/copper samplings, **1997-2011**; EPA quarterly reports, **2006-11**; dye testing, **2016**; ASR (annual statistical reports), **1991-2016**, *etc.*; 28 ½”
- D. “yearly folders” created for each of the following categories: water problems, **2007-2013**; meter info daily reports, **2007-08**; purchase orders, **2014-15**; faxes sent, **2009-2013**; contractor references, **1999-2005**, *etc.*; 29”

Right outside the copy room, there are five *more* lateral file cabinets lined up in the hallway holding *more* backflow files, as well as street permit files, and so on. Backflow files here are set up in a *real* “**hodgepodge**” of supplies and order – *some* “bulk-filed” in hanging folders/*some* expansion folders/*some* manila or yellow folders only, *and so on!*

17. same as units 13-16

- A. backflow: 2007-2010/2013, Acton St. – Yukon Ave./park & department files; full
- B. A-Z/by year (“**mess**!”), 2004 – 2006/2011-12; 27”
- C. 1 standard box/6 expansion folders, 1999-2003; 11”
- D. “pile”; approximately 3”

18. 3-drawer lateral unit, 39"high x 36"wide x 18"deep/capacity, 32 ½"/key lock top center

- A. backflow: 2014, Acton St. – Victory Field House; 13"
- B. Acton St. – Yukon Ave./few schools, etc.; 21"
- C. empty

Street permit applications – "bulk-filed" A-Z/by year in letter size *hanging folders*/some clear plastic tabs, inserts referencing alpha caption corresponding to street name/year ("lots", no tabs!). In some cases, *handwritten* alpha captions/year are just noted right on the folder tabs! These files are housed in units 19-20.

19. same as units 13-16

- A. 2003-04 ("**mess**!"); 23"
- B. 2011-13; full
- C. 2008-10; full
- D. empty

20. Haskell 4-drawer unit, 42"high x 36"wide x 18 ¼"deep/capacity, 38 ½"/key lock top center

- A. - "pile" (approximately 10") of "loose" permits, 2005/A-Z, 2006-07; 20"
- 2 folders: driveway permit cards/construction cards, 2007; 3"
- B. **1999-2002**; full
- C. **1993-1998**; full
- D. construction permits/driveway permits, *both* "bulk-filed" in manila expansion pockets/*hanging folders*: A-Z by street, **2001-06**; 19"

Additional street permit files are stored in several boxes either arranged on *top* of the preceding cabinets, *or* just "stacked" right next to cabinets:

- 3 standard boxes, 2 odd, 2 3 cube: 2014 - 2020

Site plan review files – Documentation and folded maps/plans are set up in letter size *hanging folders*/clear assorted tabs with inserts referencing *handwritten* street names.

21. 4-drawer lateral unit, 51 $\frac{3}{4}$ "high x 36"wide x 18 $\frac{1}{4}$ "deep/capacity, 32 $\frac{1}{2}$ "key lock top center

- A. 36 Arlington St. – Home Depot; full
- B. Hosmer School – Pleasant St.; 28"
- C. 555 Pleasant St. – 31-33 Wilson St.; 29"
- D. Arsenal St., Edenfield, Harrington St., Mt. Auburn St., *etc.*; full

Water and sewer maps/plans are located in the second floor "archive" room, and the overall inner dimensions are approximately 469"wide x 158"deep/ceiling height, about 95". Plans are housed in 29 steel plan cabinets, as well as on some "old" wooden shelving, and all drawers are indexed with A-Z captions, or section numbers, utilities, street names, easements, *and so on*:

- 1 "stacked" unit: 5 Safco 5-drawer sections, 16 $\frac{1}{2}$ "high x 46 $\frac{1}{2}$ "wide x 35 $\frac{1}{2}$ "deep/6"base
- 3 "stacked" units: 12 Safco 5-drawer sections, 16 $\frac{1}{2}$ "high x 53 $\frac{1}{2}$ "wide x 41 $\frac{1}{2}$ "deep/6"base
- 1 "stacked" unit = 4 Safco 5-drawer sections, 16 $\frac{1}{2}$ "high x 40 $\frac{1}{2}$ "wide x 29 $\frac{1}{2}$ "deep/6" base
- 1 "stacked" unit = 4 5-drawer sections, 18 $\frac{3}{4}$ "high x 45"wide x 28 $\frac{1}{2}$ "deep/ 2 $\frac{1}{2}$ " base/1 $\frac{1}{2}$ "cap
- 2 "stacked" units: 4 Safco 5-drawer sections, 16 $\frac{1}{2}$ "high x 53 $\frac{1}{2}$ "wide x

41 ½"deep/6"base

In addition to the plans stored in the various cabinets, plans are arranged in one "homemade" *wooden* unit = 84"high x 96"wide x 38"deep/31 cubes!

Lastly, as far as the water drawing and service card files are concerned, these are **"THE"** files! Whereas the cards previously noted in the administrative area are for the most part "back up" files, these cards are the original working files, which are updated and referenced on a regular basis. These 5x3 cards are filed and guided in a similar fashion to their counterparts on the first floor and, *once again*, some of these guides have seen better days!

In addition to the water drawing and service cards, 6x4 sewer and 8x5 hydrant drawing cards are *also* maintained in this area. Cards are filed alphabetically by street name in two A-Z files, and they are guided by 25 division sets of 6x4/8x5 manila index guides with second cut assorted top tabs/typed captions.

Cards are housed in a variety of small card files, which are just "stacked" on top of a bank of vertical file cabinets in the water department office:

- 2 3-drawer 8x6 metal card files, 7"high x 27 ¾"wide x 16 ⅛"deep/2 rows per drawer/capacity per row, 15": water drawing cards; 156 ½"

- 4 3-drawer 5x3 metal card files, 5 ¼"high x 18 ¾"wide x 16 ¼"deep/capacity, 15": water service index cards, A-Z; 152"

- 2 2-drawer 6x4 metal card files, 6 ¼"high x 15 ½"wide x 19"deep/capacity, 17"; 1-drawer 6x4 metal card file, 6 ¼"high x 7 ⅞"wide x 18"deep/capacity, 16 ½": sewer drawings, A-Z; 76"

- 2 8x6 wooden card files, 7"high x 10"wide x 17"deep/capacity, 15": hydrants, A-Z; 27"

RECOMMENDATIONS

A hearty “**CONGRATULATIONS**” here for having scanned the cemetery/ water drawing/water meter “take out” cards, *as well as* water and sewer drawings cards and plans! However, since you’re *still* maintaining the various card files, you should really invest in some proper “index guides”. Following is a breakdown of sizes/costs:

- internment cards: #SPEC 150 division set of 5x3 A-Z guides, \$298.00
- lot purchase/“take out” cards: #SPEC 50 division sets of 5x3 blank guides, \$98.00 per set
- plot cards: #SPEC 50 division set of 6x4 A-Z guides, \$125.00
- water drawing/water service cards: #SPEC 150 division sets of 5x3 blank guides, \$298.00 per set
- sewer drawing cards: #SPEC 75 division set of 6x4 blank guides, \$185.00
- hydrant cards: #SPEC 25 division set of 8x5 blank guides, \$82.50

Having said that, there is another option: simply microfilm all of the various card files, and then all of the original cards can be *destroyed!* Rely on the scanned images, and if there is ever a problem, “microfilm to the rescue”!! Just think of all of the various file cabinets and assorted card files that will be eliminated!!!

The next step is going to sound ***very familiar*** to you by now – “**PURGING**”! Active file space is simply being consumed by records that go back to the **1990’s (at least!)** – particularly throughout the second floor!! Examples include the following records: backflow files/contractor references/lead & copper samplings/permits, **1990’s**; general service applications, **2000**; hydrant applications, **2009**, *just to*

name a few. At least “26” file drawers, equivalent of “seven” file cabinets, hold records that should either be destroyed or incorporated with your “new” archives system. And, as far as the *accounts payable* files are concerned, there is no need for any changes here, as these files are simply **duplicates** – retention of this record is the responsibility of the auditing department.

Due to the amount of “active files” to be reviewed here, we would assign our archive supervisor at \$675.00 per day, plus expenses, for an estimated five days to complete the necessary review of records throughout the two floors, identify records for destruction, and box/inventory any records that need to be retained and added to your “new” archives system.

Once the review is completed, *remaining* files should then be “reorganized” based on the **Tell-i-vision subject file**, a file created for each floor. Costs for the following supplies, as well as labor, will be determined upon completion of the preceding “purge” step:

- A. file organizers
- B. kraft/manila folders & pockets
- C. “miscellaneous” folders
- D. index guides



Thomas J. Tracy
Acting City Manager

CITY OF
WATERTOWN
Office of the City Manager

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6465
www.watertown-ma.gov
citymgr@watertown-ma.gov

To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: June 23, 2022
RE: Agenda Item – Transfer of Funds Request

Attached please find a March 3, 2022 Agenda Item cover memorandum regarding the Three Elementary Schools Project. As stated during the Public Hearing and Vote at the March 22nd City Council meeting, an upcoming transfer request for funds of \$1,128,109 would finalize resources to the Three Elementary Schools Project totaling \$170,000,000, which has been the overall project budget amount.

Given the above, I respectfully request the attached transfer be placed on the June 23, 2022, City Council Agenda.

Thank you for your consideration in this matter.

cc: School Building Committee
Honorable School Committee
Dr. Deanne Galdston, Superintendent of Schools
Heidi Perkins, Director of Finance & Operations
Steven Magoon, Acting Deputy City Manager/CD&P Director
Brian Wyncoop, Purchasing Agent
James Kane, Director of Public Buildings
Melissa A. Morrissey, City Treasurer/Collector
Mark R. Reich, Esquire, KP Law

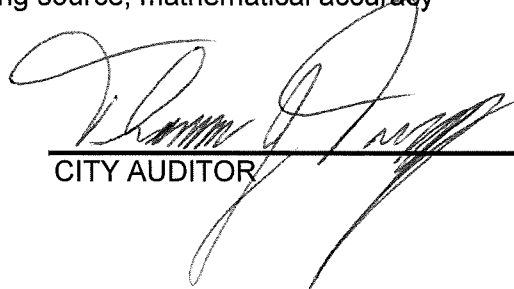
TRANSFER AMOUNT \$1,128,109

FROM: FY 22 DEBT RETIREMENT- PLANNED DEBT \$ 1,128,109
0171000-590927

TO: FY 22 TRANSFER TO CAP. PROJECTS - 3 ELEM. SCHOOLS PROJ. \$ 1,128,109
0193059-596505

I hereby certify to the availability, authority of funding source, mathematical accuracy
and appropriate fiscal year.

6/22/22
DATE


CITY AUDITOR



Thomas J. Tracy
Acting City Manager

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149 Main Street
Watertown, MA 02472
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To: Honorable City Council
From: Thomas J. Tracy, Acting City Manager
Date: March 3, 2022
RE: Agenda Item – Proposed Loan Order

As the City Council is aware, Watertown has nearly completed the construction of the new Hosmer and Cuniff Elementary Schools. Punch list items for both the Hosmer and Cuniff remain to be completed, as well as the demolition of the former Hosmer building and completing the related sitework.

Please be advised, the School Building Committee will most likely be awarding a contract during March of 2022 for the renovation and expansion of the Lowell Elementary School. In order to award a contract for the last stage of the Three Elementary Schools Project, I am respectfully requesting the Honorable City Council authorize a loan order in the amount of \$48,895,000. The loan order amount of \$48,895,000 along with an upcoming transfer request for funds of \$1,128,109 would provide resources to the Three Elementary Schools Project totaling \$170,000,000, which has been the overall project budget amount.

As a reminder to the Honorable City Council, Conceptual Items Number 21 of the FY2022-2026 CIP, adopted by the Council on 3/23/21, stated:

For the “Building for the Future” Three Elementary Schools Project: endorse the revised borrowing plan, within the confines of Proposition 2 ½, to reflect the accelerated schedule as voted by the School Building committee on February 16, 2021, will change from this:

- Planned FY22 loan order of \$46,000,000
- Planned FY23 loan order of \$43,478,109

To this:

- Second proposed FY21 loan order of \$239,455,000
- Proposed FY22 loan order of \$50,023,109

The requested loan order amount of \$48,895,000 and future transfer request of funds \$1,128,109 totals \$50,023,109.

The \$50,023,109 of additional resources will result in total resources of the Three Elementary Schools Project totaling \$170,000,000. If all the resources are not needed to complete the Three Elementary Schools Project, the amount that will actually be borrowed will be less than what the Honorable City Council has authorized in project loan orders. Thus, reducing the overall related debt service.

For your information and review, attached are copies of related correspondence from former City Manager Michael J. Driscoll.

Given all of the attachments and all of the above, I respectfully request the proposed loan order be placed on the March 8, 2022 City Council Agenda as a first reading so that Watertown can finalize the Hosmer and Cunniff Schools remaining items as well as award the contract for the Lowell School renovation and expansion.

Thank you for your consideration in this matter.

cc: School Building Committee
Honorable School Committee
Dr. Deanne Galdston, Superintendent of Schools
Heidi Perkins, Director of Finance & Operations
Steven Magoon, Acting Deputy City Manager
Peter J. McLaughlin, Inspector of Buildings
James Kane, Director of Public Buildings
Melissa A. Morrissey, City Treasurer/Collector
Mark R. Reich, Esquire, KP Law



Watertown City Council

Administration Building
149 Main Street
Watertown, MA 02472
Phone: 617-972-6470

ELECTED OFFICIALS:

Mark S. Sideris,
Council President

Vincent J. Piccirilli, Jr.,
Vice President &
District C Councilor

John M. Airasian,
Councilor At Large

Caroline Bays,
Councilor At Large

John G. Gannon,
Councilor At Large

Anthony Palomba,
Councilor At Large

Nicole Gardner,
District A Councilor

Lisa J. Feltner,
District B Councilor

Emily Izzo,
District D Councilor

Report of the Committee on Economic Development & Planning Meeting Dates: June 9 and 14, 2022

The Committee convened on Thursday June 9, 2022 at 5:30 pm in the City Council Office. Present were Lisa Feltner, chair; John Gannon, vice chair; and Vincent Piccirilli, secretary. The purpose of the meeting was to conduct a Planning Board interview.

Janet Buck is an architect seeking re-appointment to the Planning Board, where she served since 2016. She thinks Watertown is going in the right direction, with new commercial development bringing in jobs, and housing being built for new employees. A common theme in meetings is that people don't want change, but change is inevitable, and old tired buildings are being replaced with better, newer buildings with green space. She believes it would be helpful to have a tree warden on call to assist in reviewing the landscape designs. Regarding the Comprehensive Plan update and the pending Climate and Energy Plan, she thinks the real challenge will be how to translate goals into actual language in the zoning ordinance that can be enforced.

➔ **Action Item:** Councilor Piccirilli made a motion, seconded by Councilor Gannon, to recommend that the City Council confirm Janet Buck for reappointment to the Planning for a term to expire February 15, 2025. Voted 3-0.

The meeting adjourned at 6:02 pm.

The Committee convened on Tuesday June 14, 2022 at 5:30 pm in the City Council Office. Present were Lisa Feltner, chair; John Gannon, vice chair; and Vincent Piccirilli, secretary. The purpose of the meeting was to conduct a Planning Board interview.

Abigail Hammett is an architect who was appointed to the Planning Board in 2021 to fill a vacancy. Having grown up in Watertown, she moved to California, and has now moved back to Watertown, and is opening a Boston office for her San Francisco based firm. In her first year, the Board has not had many big projects yet, but several will be coming soon, such as the Watertown Mall project, and she noted big projects have big architects who are able to present plans that achieve the city's goals. She is also excited about participating in the update of the Comprehensive Plan, to help provide guidance for Watertown's future.

➔ **Action Item:** Councilor Piccirilli made a motion, seconded by Councilor Gannon, to recommend that the City Council confirm Abigail Hammett for reappointment to the Planning for a term to expire February 15, 2025. Voted 3-0.

The meeting adjourned at 6:01 pm.

Report prepared by Vincent Piccirilli

**Watertown City Council
Committee on Human Services
Thursday, May 26, 2022**

Members Present: Councilor Tony Palomba, Chair; Councilor Caroline Bays, Vice Chair; and Councilor John Gannon, Secretary

The Committee on Human Services held a public meeting on May 26, 2022, at 5:30pm to consider nominations of trustees to the Watertown Affordable Housing Trust.

1. Call to Order

Committee Chair Palomba called the meeting to order at 5:35pm and introduced the other committee members present: Caroline Bays, Vice Chair; and John Gannon, Secretary. Also present during the course of the meeting were Senior Planner Larry Field, Jill Hyde, Leo Patterson, David Leon, Zoe Weinrobe, Cliff Cook and Helen Oliver.

The Committee considered questions to be posed to each nominee. The two questions chosen were:

- i. What do you hope the Trust achieves? and
- ii. What special skills do you bring to the Trust?

2. Interview of Cliff Cook on His Confirmation to the Housing Trust for a Term to Expire on June 30, 2024:

The first Trust nominee interviewed was Cliff Cook. He has served on the Watertown Housing Partnership since 2014. He would like more affordable housing to be built in Watertown. He was successful in pushing for the inclusionary zoning threshold to be raised to 15% for properties developed in Watertown. He sees affordable housing opportunities for the Methodist Church property up for sale, as well as for the former Rosary Academy property. He recognized the difficulties of building affordable housing in that land costs are so much higher. He thinks the City Council should consider Community Preservation Act affordable housing funding opportunities and the use of ARPA funding. He brings strategic thinking on affordable housing as one of his skills. Tony made a motion to approve the nomination, seconded by John Gannon. The vote to approve of the nomination was 3-0.

3. Interview of Helen Oliver for Her Confirmation to the Housing Trust for a Term to Expire on June 30, 2024

Helen Oliver has an extensive background in affordable housing finance, which she thinks will assist her in serving as a Trustee. She hopes that monies from ARPA, the CPA and linkage fees can be used toward developing more affordable housing in Watertown. She provided information on the use of affordable housing tax credits. Councilor Palomba moved that the Committee recommend that Helen Oliver be appointed to the Trust, seconded by Councilor Gannon. The vote to approve the nomination was 3-0.

4. Interview of Leo Patterson on His Confirmation to the Housing Trust for a Term to Expire on June 30, 2023

Leo Patterson has a background in the design and construction of affordable housing. Going back over a period of twenty years, he has worked on the development of numerous affordable housing developments, including in Jersey City, NJ; Cambridge, Lowell and Edgartown on Martha's Vineyard. His firm is also proficient in quality design and in developing elderly housing, including inter-generational housing opportunities. He has also served on the Watertown School Building Committee. Councilor Palomba moved that the Committee recommend that Leo Patterson be appointed to the Trust, seconded by Councilor Gannon. The vote to approve the nomination was 3-0.

5. Interview of David Leon on His Confirmation to the Housing Trust for a Term to Expire on June 30, 2023

David Leon has an extensive background in real estate finance and development, specializing in the development of affordable housing. He brings a broad range of expertise. He has served on the Watertown Housing Partnership for over twenty-three years. He believes that the Watertown Affordable Housing Trust will allow the town to be both a funder of affordable housing projects, as well as a developer of such projects. Councilor Palomba asked David where he envisions the funding sources for affordable housing to come from. David replied that such funding could come from the Community Preservation Fund, inclusionary zoning monies, ARPA and linkage monies. Councilor Palomba moved that the Committee recommend that David Leon be appointed to the Trust, seconded by Councilor Bays. The vote to approve the nomination was 3-0.

6. Interview of Zoe Weinrobe on Her Confirmation to the Housing Trust for a Term to Expire on June 30, 2024

Zoe Weinrobe has a background in affordable housing finance and development. She has worked on the development of affordable housing, including a complex comprising 1,400 apartments. She looks forward to serving on the Trust. Councilor Palomba moved that the Committee recommend that Zoe Weinrobe be appointed to the Trust, seconded by Councilor Bays. The vote to approve the nomination was 3-0.

Caroline Bays departed the meeting at 7:45pm.

7. Interview of Jill Hyde on Her Confirmation to the Housing Trust for a Term to Expire on June 30, 2023

Jill Hyde serves as a lawyer and has an extensive background in real estate development, servicing, management, finance, and title issues. She has worked on numerous affordable housing development projects and has been involved in all aspects of real estate transactions. She has focused on the development of transit-oriented housing projects. She looks forward to working on the developing, creating and preserving affordable housing projects in Watertown. Councilor Palomba moved that the Committee recommend that Jill Hyde be appointed to the Trust, seconded by Councilor Gannon. The vote to approve the nomination was 2-0.

Councilor Gannon made a motion to adjourn the meeting, seconded by Councilor Palomba. The vote was 2-0. The meeting adjourned at 8:20pm

Respectfully submitted,
John Gannon, Secretary

Watertown Town Council

Committee on Public Works

Councilor Piccirilli, Chair, Councilor Feltner, Vice Chair, Councilor Palomba, Secretary

Committee Report

Tuesday, June 28, 2022

The Committee on Public Works met on June 6, 2022 at 5:00 PM in the City Council office to discuss the questions that would be asked to the candidates for appointment and reappointment to the Watertown Environment and Energy Efficiency (WE3C) and the Solid Waste and Recycling Advisory Committee (SWRAC). All the members of the Committee were present. The questions created by the Committee were: "Why do you want to be a member of the committee?" and "What would you like to achieve?". The Committee recognized that the questions are prompts and that Committee members can ask additional questions.

The first candidate interviewed was **Mr. Ed Lewis**, our Energy Manager, who has been recommended for reappointment to the WE3C for a term ending November 15, 2024. Ed believes that the City Climate and Energy Action Plan is a huge step forward and is very pleased with the outcome of the year and a half of work by City staff, residents, scientists and the consultant. He sees WE3C playing a big role in the implementation of the Plan. It will be a very big challenge, but he feels, the administration, the WE3C members, and residents are up to the challenge. He welcomes the ongoing changes in the effectiveness and efficiencies of evolving technologies that can decrease greenhouse gas emissions and increase the use of renewable energy, such as the change in wattage from solar panels. Mr. Lewis also is pleased to see government stepping up to the challenge by offering incentives to residents for purchasing and installing energy alternatives, such as heat pumps.

The second candidate interviewed was **Judy Fallows**, the Garden Coordinator for the Watertown Public Schools, who has been recommended for appointment to the SWRAC for a term ending May 15, 2024. Ms. Fallows sees recycling and composting as very important and key to addressing climate change. She has been studying this issue for some time and believes we need a major education campaign to build awareness about the direct link between solid waste management and recycling and green house gas emissions. Ms. Fallows is excited about the new composting program and the \$485,000 the City Council approved when it passes the FY '23 budget. She places a lot of faith in the value of educating school aged children who, through recycling and composting efforts in school and their involvement with the community gardens, can serve as models to their parents. She would like to see the SWRAC develop a multi-prong outreach and education program.

The third candidate interviewed was **Alexandra Lahr**, a teacher at a private school, who has been recommended for appointment to the SWRAC for a term ending May 15, 2024. Ms. Lahr is anxious to engage as a volunteer in Watertown and the SWRAC is the ideal avenue to do given her passion about recycling and reducing our solid waste stream. She has played a major role in developing policies and procedures on the issue at her school and as a teacher understands the needs of diverse learners which will be helpful in crafting messages to Watertown residents. She describes herself as well organized, familiar with leading groups, and patient. These attributes will be very helpful as the SWRAC begins to work with residents and businesses to advertise and encourage participation in the new composting program and to build awareness about the need to reduce solid waste.

The fourth candidate interviewed was **Russ Arico**, a long time resident of Watertown, who is being recommended to the SWRAC for a term ending May 15, 2023. Mr. Arico is a student of history and can remember when there were swivel buckets and does not want to go back to that situation. He believes any composting program must in an “opt in” and not an “opt out” program and that there must be a published list of the benefits and drawbacks of the program. He sees himself as being the voice of reason on the SWRAC. Mr. Arico is in favor of reducing waste and believes strongly in recycling but not because it will “save the planet”. He believes goal setting, as in the Commonwealth’s stated solid waste reduction goals, are not realistic and should not be considered. He looks forward to serving.

The fifth candidate interviewed was **Eileen Zubrowski**, the Recycling Coordinator for the City of Waltham for twenty-two years, who is being recommended to the SWRAC for a term ending May 15, 2025. Ms. Zubrowski will bring a wealth of experience to the SWRAC as well as a deep passion for addressing climate change through the collection of food waste and its proper disposal such that it can capture carbon. She is also a big supporter of the City’s recycling program and hopes she can contribute to improving the program. She is eager for the SWRAC to begin meeting and creating an education and outreach program. Based on her experience in Waltham she understands that persuading residents to properly recycle and begin to compost is difficult work, but that the only way to succeed is to keep at it for the long term. Ms. Zubrowski believes residents are more likely to do something new when they see their neighbors have successfully done it.

The final candidate interviewed was **Shi Nagpal**, an electrical engineer, who is being recommended to the WE3C for a term ending November 15, 2022. Mr. Nagpal has lived in Watertown for six years and thinks it is a vibrant community. He has convinced his brother’s family to move here and would like to see his parents move to Watertown also. He is eager to get involved in the community, believing community participation is a responsibility. Joining the WE3C seemed like the logical place for him given its mission and his engineering background. He has been following WE3C by reading the minutes of its meetings and is impressed with its work. In addition to helping with the analysis of energy use and conservation, he would bring his newly acquired program management skills to the group. Mr. Nagpal believes these skills can be employed to help members reach agreement as well as create and monitor an action plan.

ACTION ITEM: Councilor Palomba made a motion that the Committee recommends to the full City Council that Ms. Fallows be appointed to the Solid Waste and Recycling Advisory Committee for a period ending May 15, 2024, that Ms. Lahr be appointed to the SWRAC for a term ending May 15, 2025, and that Ms. Zubrowski be appointed to the SWRAC for a term ending May 15, 2025. The motion was seconded by Councilor Feltner and passed 3-0.

ACTION ITEM: Councilor Palomba made a motion that the Committee recommends to the full City Council that Mr. Arico be appointed to the Solid Waste and Recycling Advisory Committee for a period ending May 15, 2023. The motion was seconded by Councilor Piccirilli and it passed 2-0. Councilor Feltner absented.

ACTION ITEM: Councilor Feltner made a motion that the Committee recommends to the full City Council that Ed Lewis be reappointed to the Watertown Environment and Energy Efficiency Committee for a term ending November 15, 2024 and that Shin Nagpal be appointed to the WE3C for a term ending November 15, 2022. The motion was seconded by Councilor Palomba and passed 3-0.

Councilor Palomba made a motion to adjourn which was seconded by Councilor Feltner and passed 3-0. The meeting adjourned at approximately 7:40 PM. Minutes were prepared by Councilor Palomba.

The Committee on Public Works met again on June 13, 2022 at 5:30 PM to interview candidates for appointment or reappointment to the Watertown Environment for Energy Efficiency (WE3C), the Solid Waste and Recycling Advisory Committee (SWRAC) and the Conservation Commission. The Committee met in the City Council Room and all members of the Committee were present. The Councilor Piccirilli called to meeting to order at 5:35 PM.

The first candidate was **Eileen Ryan**, a longtime community and environment advocate, who is being recommended to the SWRAC for a term ending May 14, 2023. Ms. Ryan sees solid waste as a major environmental issue and one that, if addressed effectively, could result in saving the City money. She is not a fan of single stream recycling and has some ideas on how to improve our recycling efforts. She is a big proponent of our Recycling Center and appreciates that residents can recycle large pieces of metal and clothing as well as traditional items like yard waste, glass, and plastics. Ms. Ryan is well versed in the environmental problems posed by the use of plastics and has advocated for reducing the consumption of plastics. She also recognizes the need to increase the recycling of glass, and to improve how it is recycled and for what purpose. She supports the passage of an expanded Bottle Bill.

The second candidate interviewed was **Carina Wallack**, a Senior Policy Analysis at E4The Future in Framingham, who is being recommended to the WE3C for a term ending November 15, 2024. Ms. Wallack has extensive experience in energy policy, particularly finding effective ways to reduce energy usage. She also works with states and municipalities helping them to take advantage of federal funds available for programs that reduce energy consumption and increase energy efficiency in municipal buildings. Her particular areas of expertise include managing energy policy campaigns, researching and analyzing climate and energy policies, facilitating diverse stakeholder meetings, and creating social media and blog posts about clean energy and job creation. Ms. Wallack hopes to learned from the current members of WE3C as well as contribute to its work by sharing her expertise and experience.

The next candidate interviewed was **Rachel Danford**, a consultant on Environmental Education and Design, who is being recommended to the Conservation Commission for a term ending February 15, 2025. Ms. Danford was eager to become more involved in the community and attended various meetings of our committees and commissions. Relaying on her expertise in outdoor and environmental education she volunteered with Judy Fallows on the school garden at the Lowell School and with Laurel Schwab on the Municipal Vulnerability Program grants. Ms. Schwab suggested she look into joining the Conservation Commission. Ms. Danford is passionate about the importance of urban greening, access to nature, and open space. She appreciates the Conservation Commissions commitment to conservation and green space and its protection of both along the Charles River. While acknowledging that there will be a learning curve to become familiar with the state statutes that guide the Commission, she believes she can make a positive contribution to its mission.

The next candidate to be interviewed was **Charles Bering** who is being recommended for reappointment to the Conservation Commission for a term ending February 15, 2025. Mr. Bering was unable to attend in person so the interviewed was conducted by phone. Mr. Bering has served on the Commission for 25 years and provides expert legal advice regarding interpretation of federal and state regulations. While he will miss the contributions of Patrick Fairbairn, another long term members who is resigning, he is

pleased that the Commission includes a number of younger residents with expertise in specific areas and that there are residents interested in joining the Commission. He is very happy with the redevelopment of Arsenal Park and is hopeful that the City will take the steps to acquire more open space. He finds that having the Commission represented on the Community Preservation Committee and the Planning Advisory Committee has been particularly helpful to the members of the Commission. The members of the Committee on Public Works thanked Mr. Bering for his years of service.

The final candidate was **Leslie Evans**, a well-known Watertown illustrator, who is being recommended for appointment to the SWRAC for a term ending May 14, 2024. Before beginning the interview, the Committee thanked Ms. Evans for coming ahead of her 7:10 scheduled time. Ms. Evans was a member of the original Recycling Committee. She has been an active recycler for many years and is eager to be part of the new SWRAC. Ms. Evans questions the value of single stream recycling and believes that the percentage of what actually gets recycled is much smaller than what the public understands it to be. This gives our residents a false sense of pride that they are recycling. She believes we need to reduce plastic consumption and is familiar with plastic and Styrofoam bans in other states. Ms. Evans is excited about the new composting program and hopes it will allow households living in the same building to merge their compostable items. She is a strong advocate for public education about the value of recycling and its impact on climate change. Mr. Evans provided numerous examples of the public educational materials she has illustrated and written. Her artistic skills will be a valuable contribution to the SWRAC.

ACTION ITEM: Councilor Palomba made a motion that the Committee recommends to the full City Council that Rachel Danford be appointed to the Conservation Commission for term ending February 15, 2025 and that Charles Bering be reappointed to the Commission for a term ending February 15, 2025. The motion was seconded by Councilor Feltner and passed 3-0.

ACTION ITEM: Councilor Feltner made a motion that the Committee recommends to the full City Council that Eileen Ryan be appointed to the Solid Waste and Recycling Advisory Committee for a term ending May 15, 2023 and that Leslie Evans be appointed to the SWRAC for a term ending May 15, 2024. The motion was seconded by Councilor Piccirilli and passed 3-0.

ACTION ITEM: Councilor Palomba made a motion that the Committee recommends to the full City Council that Carina Wallack be appointed to the Watertown Environment and Energy Efficiency Committee for a term ending November 15, 2024. The motion was seconded by Councilor Feltner and passed 3-0.

Councilor Feltner made a motion to adjourn which was seconded by Councilor Piccirilli and passed 3-0. The meeting adjourned at approximately 7:15 PM. Minutes were prepared by Councilor Palomba.