

FY24 Budget Review - Town Clerk (161)

Interview with Town Clerk Kelly Darling on 2/8/23
Finance Committee: Nick Athanassiou, Peter O'Meara and Lynn Bruneau

Proposed FY23 Budget

Revenue and Expense Summary for Town Clerk's Office:

-Est. Annual Revenue for FY24: \$17k for a variety of licenses, certificates, permits
-FY24 Expenses: \$201.2k Salaries; \$57.56k for Operating Expenses

Operating Expense History

Town Clerk's Office:

	<u>FY19 Expd</u>	<u>FY20 Expd</u>	<u>FY21 Expd</u>	<u>FY22 Expd</u>	<u>FY23 Voted</u>	<u>FY24 Regst</u>	<u>Avg Incr</u>
Sal	\$144k	\$146k	\$155.3k	\$160.8k	\$187.2k	\$201.2k	\$11.5k
Exp	20k	16k	20.8k	59.6k	86.8k	57.6k	7.6k
Tot	\$166k	\$163k	\$176k	\$220.4k	\$274k	\$258.7k	\$19.1k

Revenue and Expense History

-Since FY19, the average annual increase of the total expenses (Salaries plus Operating Expenses) for the Town Clerk's Office has been \$19.1k (against a total budget request for FY24 of \$258.7k); however, this "average" is impacted in part by the addition of a part-time receptionist in FY22, adding approximately \$30k to the salary total. The other "impactor" is the inclusion of the cost of electronic voting equipment/programming in the FY24 budget. This cost had previously been covered by Special Articles voted at each Town Meeting. Going forward, this cost may vary, depending on the number of Town Meetings each year and the balance in this account. Also, the jump in expenses from year-to-year can reflect the change in the number of elections from year-to-year (eg, 4 elections in FY23 with 2 Town, 1 state and 1 state primary) with more elections requiring more time for poll workers and for ballot preparation and counting.

-Also, the October 2022 Special Town Meeting added another \$2,562 to the Town Clerk salaries for FY23 for Clerical Overtime - upping the base for the FY24 budget.

This addition reflected a change in Town strategy, to begin paying for Clerical Overtime, rather than providing compensatory time off (at time-and-a-half).

Background

Role/Responsibilities - As noted previously, the role of the Town Clerk is defined by MA General Laws and Regulations as well as by the Orleans Town Charter and Bylaws.

-Responsibilities include comprehensive record-keeping requirements as outlined in Schedule A of the Town Clerk budget material in the FY24 budget binder.

-Maintain current and historic census and voter info; run all elections (Town, State, and Federal)

-Also serve as de facto “information center” at Town Hall w/ the Clerk’s Office located just inside the entrance to Town Hall. Despite signage, many patrons stop at the Town Clerk’s desk to ask for directions or information or help (w/ patrons often explaining problems re water bills, tax bills, etc.). The addition of a part-time receptionist to the Town Clerk’s staff has improved the efficiency of operations for this office, as anticipated.

-The Town Clerk’s Office issues many Town licenses, certificates and permits (but not Beach or Transfer Station stickers, and not passports, with the latter now the responsibility of the Assessor’s Office).

-Both full-time Town Clerks are notaries and the part-time Clerk (Jen Higgins) is working toward her certification. The Clerks continue to administer oaths of office for committee and board members. They are also both “Commissioners to Qualify, which allows them to swear in other notaries and other state appointments. They also update most Town Committee and Board web pages with agendas, minutes and committee membership info (however, they rely on Board/Committee chairs to provide current/updated information for updating the websites). With regard to the notary role, as noted previously, during the height of the pandemic, not all near-by towns continued to provide all services in their Town Clerk’s offices. Certain types of certifications require 2 notary signatures and Orleans had become a “go to” place for getting the 2 required signatures. Although this extra activity has substantially returned to pre-pandemic levels w/ the abatement of pandemic peaks, the Orleans Town Clerks are still picking up the slack on this for some of the neighboring towns.

-The Town Clerk has the assigned role as Resource Information Officer for the Town per State Public Records Law; responding to Public Records requests for information (last year, 121 requests 121 in total, up from 63 and 55 in 2021 and

2020 respectively). Previous example: the *Cape Cod Times* asked all Cape towns for detailed information on off-Cape training (who from what Department attended off-Cape training with what money spent) as part of “sunshine week”; “Freedom of Information Act” - “FOIA”.

-The Town Clerks also handle the “operator” phone calls that come into Town Hall unless the caller “dials” an extension. The phone calls and counter visits are not counted but they are numerous and varied. Town Clerk Kelly Darling, who has been with the Town Clerk’s Office for nearly 30 years, noted that she is still occasionally stumped by a question at the counter.

Revenues Drivers

-As noted above, estimated FY24 revenue is \$17k for various certificates, permits and licenses issued by the Office. There is little variation from year-to-year.

Expenses Drivers

-As noted above, most expenses and year-to-year variations in expenses are related to elections and the different number of elections from year-to-year (eg, additional elections in presidential election years). An increase in the number of elections creates an up-tick in part-time help (election workers), the consulting support for coding voting machines, and printing local ballots. State and federal election ballots are funded by the state and federal government, respectively.

The increased interest in mail-in ballots has also caused an up-tick in related costs. The broad “permission” for “no excuse” mail-in ballots has been formalized (after a brief interruption a year ago), providing more flexibility for Orleans voters.

-The process for mailing ballots begins w/ entering the data for each request for each election. The state sends postcards notifying voters of the opportunity for mail-in ballots for state elections and the Town sends the postcards for local elections. In 2024, the state will also send the postcards ahead of the presidential primary in March 2024.

-Once the data is entered, the Town Clerk’s Office prints the bar code labels and address labels, places name and address stickers on envelopes, and then stuffs the envelopes with the instructions, ballots and signature envelopes and return envelopes. The envelopes are separated into “Orleans Streets”, Orleans P.O. Boxes, East Orleans P.O. Boxes, South Orleans P.O. Boxes and out of town - and then are run through the postal machine (stamped). The stamped envelopes are then delivered to the appropriate Post Office in Town.

- Ballots mailed in 2022: 1548 mailed in August for the September State Primary; 2296 mailed in October for the November State Election; 1800 mailed in November for the December Special (Town) Election; 1450 mailed in December for the January Special (School District) Election (which included 2 ballots and 2 signature envelopes for each voter).
- Early voting for state/federal elections is permitted by state/federal guidelines. For local elections (eg, the post-Town Meeting election in May), approval must be asked of/granted by the local Board of Registrars. Ms. Darling noted that for local elections, there seems to be greater participation with mail-in ballots than there had been with just in-person voting (at the polls).
- As noted above, the cost for electronic voting at Town Meeting is now included in the Town Clerk's budget. Previously, the cost for each Town Meeting had been approximately \$25k; however, the cost for the May 2023 Town Meeting is expected to be just \$15-16k (which does not include "wiring" the second gym).
- Three elections anticipated for calendar 2023 - local elections in January (school district) and May and local election in October/November (after the Fall Special Town Meeting). At least 4 in calendar 2024 - presidential primary in March; local election in May (following Town Meeting); state primary in September; presidential election in November. The post-Town Meeting election in the Fall of 2024 could be combined w/ the presidential election; however, the ballot information w/ have to be provided in August - which could be a challenge.

5-Year Look-Ahead Worksheet

- Town Clerk Kelly Darling again documented the need for future growth plans for the Town Clerk's office as part of her FY24 Budget. For FY24, the recommendation is to increase the hours of the part-time receptionist (Jen Higgins) from 24 hours/week to 28 hours/week with an anticipated salary uptick of \$3883. This would include support for the Zoning Board of Appeals as well as receptionist duties and taking a lead role in the "Laserfiche" program, scanning Town Clerk documents for electronic archiving.
- The memo supporting these additional hours also notes that "this position also plays into the succession planning (for) the Town Clerk's office". Ms. Darling has been with the Town for nearly 30 years. In addition to her "day job", she is also very involved in the Town Clerk "industry" at the County, State and Regional level, currently serving on the Executive Board of the MA Town Clerks' Association, on the Executive Board of the New England City and Town Clerks' Association, and as the Vice President of the Cape & Islands Town Clerks' Association. She has noted

that it is “crucial to the position to be involved with these organizations for the education and networking”.

-In the 5-Year Look-Ahead Worksheet, Ms. Darling also noted the on-going need for additional public meeting space, in or near Town Hall. The Town Clerks help to schedule Board/Committee meetings but Town Hall space is very tight, and even more limited for Zoom or hybrid or broadcast meetings.

-Ms. Darling noted that there has been no word yet re the potential continuation of “hybrid” meetings for official Town business meetings. The current extension for Zoom meetings expires in March.

-Fin Comm noted that a separate 5-year Look-Ahead Worksheet had been included with the Town Clerk’s budget material - one provided by MIS Director Peter Van Dyck related to a new phone system, scheduled for FY25. Fin Comm will be meeting with Mr. Van Dyck on 2/15/23 and will find out more about the proposed phone system update - and the financial implications for the Town Clerk’s department (and other departments).

-Town Hall physical security was also discussed. Fin Comm was aware of a recent meeting related to the topic that included Building & Facilities Manager Ron Collins, Police Chief Scott MacDonald and others. Ms. Darling confirmed that there is a “panic button” within the department and that there are security cameras in/around the building (eg, one focused on the drop box on the porch outside the main doors) - but no one is actively monitoring those cameras. The sizable vault in the department - visible to all from the Clerk’s counter - looks like Fort Knox but contains only paper records - no cash or other valuables.

Findings and Recommendations

-As noted previously, most of what the Town Clerks do is required by MA General Law. They monitor compliance, focus on efficiency and expediting results - and provide personal (not automated) response for information requests. They are the primary “first impression” for anyone entering Town Hall.

-Providing sufficient funding to ensure effective, well-trained resources for this Department is common sense.