

ARTICLE #8

RE: Amend Administrative and Professional  
Classification Plan  
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## TOWN OF BURLINGTON

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## MEMORANDUM

To: Paul Sagarino, Town Administrator  
From: John Danizio, Town Accountant  
Re: Article 8-Amend A&P Classification Plan  
Date: January 9, 2020

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The purpose of this article is to request an amendment to the Administrative and Professional Plan as described below. Over the course of the past year, the Administration has undertaken an in depth review of the financial structure of the Town. To aid in that analysis, the Town engaged the services of the Department of Local Services (DLS) of the Massachusetts Department of Revenue which offers such assistance to municipalities for no cost. The Town's analysis and DLS review resulted in similar conclusions, and the requested amendment to the plan outlined below. This amendment is intended to be cost-neutral.

### **Request:**

In September of 2019 the position of Purchasing Analyst became vacant, presenting an ideal opportunity to review the position and implement any necessary changes. Since September, the current Budget Analyst has performed the functions of both the Budget Analyst and Purchasing Analyst. During that time it has become clear that our ideal structure, is to create the position Budget Director, described in more detail below, who is also the Chief Procurement Officer overseeing the purchasing functions of the Town. In conjunction with the Budget Director we would then create the position of Financial/Purchasing Analyst. The role of the Financial/Purchasing Analyst would be a combination of certain responsibilities of the former Budget Analyst position and Purchasing Analyst positions, as well as providing other support to the Accounting Department and Finance team as a whole. The Budget Director and Financial/Purchasing Analyst will fall under the general supervision of the Assistant Town Administrator/Town Accountant.

Functionally, the changes would be as follows:

- *Eliminate the position of Budget Analyst in Group 12*
- + *Add the position of Budget Director in Group 14*
  
- *Eliminate the position of Purchasing Analyst in Group 12*
- + *Add the position of Financial/Purchasing Analyst in Group 10*

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**Background:**

Starting last summer with the appointment of a new Town Administrator and Town Accountant, and the anticipated retirement of the Treasurer/Collector it became clear that it was time to conduct a review of the current financial structure and the positions contained within those departments. In addition to our own analysis, the Administration engaged the services of the DLS. Representatives met with department heads and staff, analyzed documents such as budgets, bylaws, job descriptions, organizational charts, and made a series of recommendations.

Two of the recommendations resulting from that review were as follows:

*We further recommend changing the budget analyst to a budget director. As budget director, this individual would be formally recognized as having responsibility for budget development, year-round budget monitoring, and long-term planning, while the assistant town administrator for finance [Assistant Town Administrator/Town Accountant] would continue to oversee and coordinate the town's finance-related departments and activities. In an expanded role, the budget director would also become more involved in a broader range of financial issues including the recommendation of budget, debt and reserve policies, reviewing and conducting analysis for collective bargaining, and spearheading capital planning.*

*Lastly, in establishing a consolidated finance department, we recommend folding the purchasing department under the town accountant. Today, the purchasing analyst is a member of the town administrator's staff. Modifying the reporting structure would consolidate the review of accounts payable under one umbrella, bolster oversight, and streamline coordination between the two departments.*

**Conclusion:**

These two position adjustments will be vital in improving the Town's financial structure and ensure that we are operating as effectively and efficiently as possible. This solution takes into account the recommendations of DLS and the experience of Town staff and accomplishes both in a cost-neutral manner.