

Dear Commissioners:

First, I want to express my sincerest thanks for the considerable time and thoughtful effort each of you have put into this process. I understand the commitment required and appreciate all of you.

I write today mainly in response to the discussion on Wednesday evening regarding the proposed revisions relating to the Town's budget process. The Commission's objective in considering the proposed revisions is, as I understand it, to make the budget process a) more efficient, and b) more transparent for the public and easier to follow. My concern is that some of the proposed changes, while well intended, will accomplish neither; in fact, some have the potential to be counterproductive on both fronts. I am most concerned about the proposal to conduct the budget hearings through joint meetings of all the voting bodies. I have outlined some thoughts below in more detail.

Joint Meetings

To begin on a positive note, I do believe the Town would be well served in some respects with a joint meeting structure – specifically, a budget kickoff process whereby the Town Administration and FPS present a budget overview to all the voting bodies, with a forum for Q&A. This contrasts with the current process -- a Town-focused presentation delivered by the First Selectwoman separately to each body at the start of that body's hearing schedule. A joint kickoff can help:

- Provide an earlier overview to each of the elected bodies. This will enable elected officials to better understand budget drivers earlier in the hearing process, be better prepared for budget hearings, and be more responsive to constituents throughout.
- Provide a more appropriate and inclusive level of focus on the FPS budget as part of the overview. The current process treats FPS as a department in terms of the hearing schedule, even though it is roughly 2/3 of the budget.
- Reduce redundant presentations by both the Town and FPS. Unlike departmental or budget object discussions (which are more Q&A driven and receive different levels of focus by each Town body), the overview presentations are repetitive – currently delivered to multiple bodies, at different times, in a near-identical fashion. This takes up valuable hearing time and is not necessary.

Board of Selectmen

I believe the Commission should reconsider the utility of the Board of Selectmen's voting role in the budget process. I know you have previously considered revisions that prescribe joint budget meetings between the BOS and the BOF, followed by separate processes for each body to deliberate and vote. I urge the Commission to consider the suggestion from Mr. Mitola to send the First Selectperson's proposed budget directly to the BOF for its deliberation. I do not believe this is a controversial viewpoint, or an uncommon practice among other Towns. The

First Selectperson already has an existing role presenting and advocating for their budget in the BOF meetings. Selectmen can participate in the BOF meetings with all associated privileges of ex officio members, and caucus together with their colleagues. This approach would substantially streamline the process, preserve the value and perspective the Selectmen bring forth, and eliminate the concerns I heard from numerous current and past BOF members about the previous joint BOS/BOF process – namely, related to the concurrent deliberations by the two separate bodies and the resulting compressed timeframe for the BOF to consider the revised budget after the BOS vote.

BOF / RTM Meetings

My most significant concern with the proposed changes is the notion of joint budget meetings that include the RTM. I understand the intent of this proposal in achieving efficiencies. There are indeed plenty of pain points in the current BOF process that result in too many and too lengthy meetings. This process is followed by RTM meetings which can be repetitive in certain respects. However, the proposed solution was conceived without seeking balanced input from participants on all sides of the process, and without evaluating the root causes that drive the inefficiencies. Expanding the size of the meetings is likely to amplify the issues rather than resolve them. Some relevant considerations:

- The BOF process includes 7-8 budget hearings including a hearing devoted to public comment. The RTM process includes 2 budget hearings. The difference in the number of meetings is by design and appropriately considers the different roles of each body. Combining the meetings could result in a number of different scenarios: larger, lengthier meetings that are unnecessary for the RTM to meet its responsibilities, a layer of joint meetings followed by a BOF schedule that is still necessary for the BOF to meet its responsibilities, or a combination of both. It's difficult to imagine a scenario where this type of process reduces the number of meetings or makes meetings more productive rather than the opposite.
- Efficiencies in the BOF process can and should be targeted – outside of the Charter process, through a collaborative effort. For example, it is clear to me that the current process is impacted by the quality and nature of budget materials provided to the elected bodies for review. This is in no way a criticism of the current Administration; the format of the “budget book” has been consistent for many years. What comes to the bodies for review is a document that provides basic comparisons of departmental budget accounts to prior years, and a listing of headcount and salaries for each department. It provides little to no insightful information about true budget drivers. Supplemental materials that address basic analysis and questions about departmental revenue/expenses or changes to department structures need to be requested by Board members, and routinely arrive at the last minute before a meeting. This is one reason why meetings are long and inefficient (many lasting near and past midnight), and why we devote additional hearings entirely to follow up questions. None of these issues are particularly difficult to address, and there are plenty of models from other Towns that

could be used to improve our budget information in a short and medium-term timeframe. There are also other process improvement opportunities that are too detailed to list here. The Town and elected Board members should work on these issues together rather than attempt to solve them by layering larger meeting groups on top of an already unwieldy process.

- There are multiple ways that efficiencies and effectiveness might be gained in the RTM process. It is important to solicit feedback from their leadership, but one obvious approach is to establish an RTM budget committee structure that includes liaisons to the BOF.

Finally, I want to address the concern raised by one Commissioner regarding the confusing nature of the process from the perspective of the public. There are some aspects of this that are inevitable – even if the notion of joint meetings were pursued, we would still have bodies deliberating and voting separately, with resulting changes in the numbers. We would also still have changes to budget assumptions when new information arises (e.g. health insurance and pension costs, state aid). In short, some of these issues are a feature of the process and not a bug. We should always strive for improved communication, but joint meetings will not alleviate these issues so long as we have a multi-step process with more than one body deliberating and voting on the budget.

Thank you for your consideration. I would be happy to discuss any of these matters in more depth should any of you wish to do so.

Sincerely,

Lori Charlton
Chair, Board of Finance

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