

TOWN OF WESTFORD  
Budget Task Force - Benchmarking and Efficiency Working Group  
MEETING MINUTES

Date: Wednesday July 5, 2023

Location: Virtual Meeting

Members Present: Kristen Las, Kristina Greene, Amy Lundquist, Vibhu Jain, Jenny Lin, Valery Young

Las called the meeting to order at 12:31pm.

VOTE: Young MOVED and Greene SECONDED to approve 26-June and 28-June meeting minutes. Approved by unanimous vote.

Las informed the group that she has organized the shared drive and created a subfolder for documents pertaining to this particular group's work. Las also began a list of data sources, pulled 2020 US Census data for all of the comparable communities and is capturing each town's health insurance structure.

School Benchmarking: Jain created a visualization of MA Dept of Ed's Per Pupil Expenses from FY18-22 for the school benchmark communities. Filters allow viewer to show in-district, out-of-district and total expenditures. Young raised a concern that the Concord-Carlisle line item was only showing the regional high school, not the entire district; Jain updated the dataset in real-time to correctly capture the district.

The group discussed if analysis would be useful to separate by funding source (general fund or grant/revolving funds); Greene shared her experience from the finance committee that trends can be hard to see if analysis is only the general fund since some expenses change to/from grants year-to-year. Young wondered if there might be learnings by comparing expenses between Westford's school-level data, perhaps between PK-2 schools, 3-5 schools, etc.

The group revisited how to build trust in using the DESE dataset if there are differences in how districts manage certain expenses like health insurance and benefits, transportation, and capital expenses like student chromebooks. Young offered to begin a detailed comparison between Westford and one or two other districts; members discussed and suggested Acton-Boxborough with Chelmsford as second. Lundquist questioned whether the deep dive comparison should be a random sampling to provide an objective analysis. Members discussed the need to provide objective explanations for which districts were chosen for comparisons. Jain suggested using the visualization tool to methodically review expenses by category and looking for differences in the cluster analysis which can provide which areas to dig into.

Action: Jain to add a filter showing General Fund expenses versus Grant/Revolving Fund expenses.

Action: Young to investigate Acton-Boxborough's district budget and look for parallels with DESE's data.

Municipal Benchmarking: Greene shared that she has new municipal data from the town's finance director that she is sorting through. She suggested an iterative process for the internal interviews with Westford's department heads – perhaps individuals could perform an initial self-evaluation on how Westford's services compare with other towns.

Action: Las to add this as a discussion topic to the next full committee meeting agenda.

Community Discussion Forum: Group discussed the upcoming forum scheduled for Monday July 24. Members expressed an interest in keeping any introductory presentation brief to maximize the listening and discussion portion. Emphasis was placed on widely advertising and communicating the event.

Action: Young offered to create an event flyer to physically hang around town and to use in any online advertisements.

Online Feedback Form: Group reviewed Young's initial draft of an online form to capture feedback, suggestions and questions from different stakeholders.

Action: Young to share finished form to be published on the town website.

VOTE: Young MOVED and Greene SECONDED to adjourn at 1:50pm. Approved by unanimous vote.



Town Manager

Date: 7/18/23