

City Council Budget / Management Analyst Preliminary Screening Committee
Monday, September 14, 2026 at 8:30 a.m.

City Hall, 191 Cabot Street, 3rd Floor, Conference Room

Members Present: Scott Houseman (Chair), Todd Rotondo, Danielle Spang

Members Absent: N/A

Others Present: Gerald Perry, Dawn Hames

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A. Call to Order

Houseman calls the meeting to order at 8:32 a.m.

B. Election of Preliminary Screening Committee Vice Chair

Rotondo nominates Spang to serve as Vice Chair; Houseman seconds; the motion carries 3-0.

C. Election of Preliminary Screening Committee Clerk

Houseman nominates Rotondo to serve as Clerk; Spang seconds; the motion carries 3-0.

D. Establish overall screening process, including the number of candidates for recommendation to the full City Council

Houseman outlines the screening process he used to review all applications that are received; sorting them into three piles (yes / maybe / no), and suggests the Committee use Perry as a resource to help through the screening process. Houseman noted a concern was raised to him that if Perry saw all the resumes and was heavily involved in the process it would be a screening committee of 4 rather than 3 people. Houseman suggests the Committee deliberate without Perry in the room, and bring him into the room when it would be helpful. Rotondo suggested Perry serve as a consultant, which would be helpful to the Committee.

Spang suggests that the Committee recommend at least 3 candidates to the full City Council. Houseman shares discussions he had with City Solicitor, where the screening committee could not recommend only one candidate. Houseman invites Perry to make a presentation to the Committee before any deliberations.

Perry shares materials: "Beverly City Council Budget/Management Analyst Salary History" handout. Years ago, when the City ran into financial trouble, there was a breakdown between the Executive and Legislative Branches. The City Charter was then updated and it included adding this position to assist the City Council, both on finance and management advice. When vetting resumes, Perry stresses that it is not only a financial position but also managerial.

Perry notes that the Department of Revenue is researching these positions at Framingham's request, and that out of the forty-one (41) cities in the Commonwealth of Massachusetts that have City Councils or Boards of Aldermen, eleven (11) have similar positions to Beverly's Budget/Management Analyst, with variations. Methuen had one for years, but now has a Chief Financial Officer instead. Braintree uses an audit firm for their legislative branch that helps draft their Capital Expenditure Report and

Annual Audit Report. Weymouth has a full-time position that pays \$140,000 to advise their legislative branch. Remaining positions are part-time, with Boston and Somerville having combined their positions. Framingham went eight (8) years without filling the position. The Department of Revenue is concerned with a lack of oversight of the position – Perry stresses that there should be an evaluation process in place.

When Perry started 10 years ago there was debate whether the position should be a consultant or an employee. The City's Charter now allows for City Council to hire as a consultant or an employee. Houseman shared that 10 years ago he was on the screening committee, and their concern was how would an employee (all employees work for the Mayor) establish the independence the position requires. Perry has always reported to the City Council, not the Mayor, in his work.

Perry suggests the Committee decide what type of services it would require from the new employee. For example, would the person attend meetings and work in-person with municipal staff throughout the building? Perry's predecessor, Kathy Griffin, worked in the role for 15-20 years, and his understanding is that she did not attend meetings. Perry suggested the guidance from KP Law may have related to hiring Town Managers and not City Council budget analyst positions because when he was hired approximately ten (10) years ago the Screening Committee only recommended one candidate to the full City Council. Griffin billed the City approximately 800-850 hours per year. Flowers did ask, and Perry agreed, for him to stay on in a transition phase after a new person is hired for the position.

Houseman asks how the hours worked may differ throughout the year; Perry estimates that he works 15-20 hours total over the summer. The seasons when he is the busiest are during Financial Forecasting (mid- to late-October to mid-December); in December when the Tax Rate comes in as well as the balance sheet for Free Cash; and then March – June is very busy with the budget season. Perry estimates working 30-35 hours per week sometimes during the budget season. He works approximately 600-650 hours per year outside of special projects.

Rotondo asks whether the City Council should develop the expectations for this position. Spang suggests that expectations of the position should reflect the full City Council's opinions. Houseman thinks this is a great opportunity to do what Rotondo suggests, and Perry's institutional knowledge for continuity. The Committee and full City Council also have a unique opportunity to work with the new hire around job expectations and evaluations.

Perry notes a few potential wrinkles throughout the interview process – 1. Under Mass. General Laws Chapter 268A, Section 23, no municipal employee can be paid by two different communities for working the exact same hours. He urges caution that any candidate working full-time for another community should establish how they can perform both jobs and provide services to the Council. When Perry submits weekly hours to the City Clerk, he does not provide a description of the work performed. However, he retains a calendar / diary of the work he provides in case any questions arise. 2. If the Council expects the candidate to attend meetings, the Committee may wish to ask questions about how the candidate would be able to do so.

Perry shares his sample "*Questions for Consideration*" from the handout, and suggests a candidate also understand MUNIS software (raising a debate whether the person should have read-only access). Perry shares that he also provides advance notice to the Mayor or a Department Head if he was going to

disagree with their recommendation publicly. Perry notes that while it is an advisory position, a candidate should be comfortable providing advice sometimes in the face of political opposition. Perry estimates that he attends about a dozen City Council meetings per year, plus about 7-10 meetings in June for the Budget, and 4 meetings in December for the Financial Forecast. Perry would typically confirm with Council President Flowers on meeting mornings whether she would like him to attend. Perry departed from the meeting at 9:55 a.m.

Members discuss their opinions relating to the number of candidates to recommend to the full Council for review. Rotondo motions to recommend at least 3 and up to 5 candidates to the full Council for review; Spang seconds; the motion carries 3-0.

- E. Consider the establishment of protocols with respect to confidentiality of applicants and applicant materials

Rotondo suggests that members discuss any materials in executive session for review, and those applications stored on the Shared Google Drive should not be shared outside of this Committee (plus the Council President, Human Resources Dept., and IT Department) until recommending a list of candidates to the full Council. Spang notes when recommending candidates to the full Council, we will redact personal identifying information including home address, phone numbers, and email addresses following the Solicitor's "*Guidance to Public Bodies Responsible for Hiring an Employee*".

Houseman moves for a brief up to five (5) minute recess; seconded by Rotondo; the motion carries 3-0. at 10:06 a.m.

- F. Consider the establishment of uniform questions to be asked of applicants

Held for a future meeting.

- G. Proposed Executive Session pursuant to Massachusetts General Laws Chapter 30A, Section 21(8) (open meeting law exemption to consider or interview applicants for the position of City Council Budget / Management Analyst by a preliminary screening committee if the chair declares that an open meeting will have a detrimental effect in obtaining qualified applicants, and particularly for an initial review of those resumes and applications submitted to date).

Ms. Hames exits the meeting room. Houseman calls the Committee back to order at 10:12 a.m. Houseman declares that an open meeting will have a detrimental effect in obtaining qualified applicants, and particularly for an initial review of those resumes and applications submitted to date, and notes that the Committee will not reconvene in an open session but instead adjourn directly from the executive session.

Rotondo moves to enter Executive Session; Spang seconds; Houseman takes a roll-call vote (Rotondo-yes; Spang-yes; Houseman-yes), and the motion carries 3-0 at 10:15 a.m.

- H. **Adjourn Meeting; the Preliminary Screening Committee will not reconvene in an open session but instead adjourn directly from the executive session.**