

Town of Needham
Special Joint Meeting of the Select Board with the
School Committee & Finance Committee
Minutes for Tuesday, December 5, 2023
Powers Hall
and
Via ZOOM
<https://us02web.zoom.us/j/87212942887>

5:04 p.m. Call to Order:
A joint meeting of the Select Board, School Committee, and Finance Committee was convened by Select Board Chair Marianne Cooley. The Select Board members present were Vice Chair Kevin Keane, Cathy Dowd, Heidi Frail, and Town Manager Kate Fitzpatrick. Marcus Nelson joined shortly after the meeting began. David Davison, DTM/Finance, Katie King, DTM/Operations, and Susan Metropol, Recording Secretary, were also in attendance.

Andrea Longo Carter called to order the meeting of the School Committee. School Committee members present were Andrea Longo Carter, Chair, Elizabeth Lee, Vice Chair, Alisa Skatrud, Connie Barr, Michael O'Brien, Dr. Dan Gutekanst, NPS Superintendent and Anne Gulati, NPS Assistant Superintendent.

Finance Committee members present were Carol Smith-Fachetti, Vice Chair, and Joshua Levy.

5:05 p.m. IT Organizational Assessment Discussion:

Ms. Cooley introduced the topic of the IT organizational assessment and exploring the possibility of merging the Town and School IT departments. Ms. Fitzpatrick thanked the School Department for their support over the past year. Ms. Cooley then introduced Mr. Marvin Sawyer from Plante Moran who has been working over the summer with members of the School Department on an IT organizational assessment. Mr. Sawyer gave a brief description of the work of Plante Moran, highlighting the firm's work with public sector clients. Mr. Sawyer then outlined the firm's findings and assessment of the Town and School's technology needs and potential solutions, responding primarily to the following questions:

- Given the existing town-wide IT responsibilities, what is the optimal organizational structure for the Town's IT services? Should some (or all) of the Town's IT services be combined? If changes are proposed, what is an implementation plan and budget?
- What should each proposed unit be responsible for and how should it be staffed? Include any critical responsibilities that are currently not being completed.
- Through answering these above questions, the consultant should identify and share any additional strengths, weaknesses, and recommendations with the Town.

Mr. Sawyer introduced his findings by first outlining his data collection process, which included 19 meetings with over 90 stakeholders representing both the Town and School, 11 meetings with 18 IT staff, over 300 end-user satisfaction survey responses, and 18 IT staff survey responses. Common themes across end-user surveys and stakeholder interviews included lack of technology training, cybersecurity concerns, unclear responsibilities within IT, and unavailability of technology support. There were also concerns that integration specialists spend too much of their time on IT support.

Mr. Sawyer also reviewed the technology trends in other settings of local government, specifically:

- Cybersecurity
- Modernizing outdated IT systems, applications, etc.
- Innovation/applying technology in new ways to help solve problems
- IT workforce retention/attraction
- Launching or updating digital services for citizens (e.g. mobile apps, web services, etc.)
- Migrating systems/applications to the cloud
- Addressing interoperability/integrating disparate systems, applications, etc.
- Addressing data silos/making data more real-time and actionable
- Streamlining procurement processes for the purchase/implementation of technology

Mr. Sawyer made several key observations about the organizational structure of the Town and School IT staff. He noted that currently, Needham has IT staff divided between the Town and School. The School side has thirteen IT FTEs servicing 1,200 employees, which is below industry benchmarks. The Town has six full IT FTEs to serve 350 users, which is below industry benchmarks. Of particular note is the time/effort allocation analysis conducted that shows that IT staff spend 12% of their time on non-IT functions. This will become a priority as multiple IT staff are expected to retire in the near term, and there are no training plans for IT staff currently.

Based on findings from his investigation, as well as based on the organizational structure of both Town and School IT departments, Mr. Sawyer made recommendations according to urgency, impact, resources, complexity, timing, and budget. Mr. Sawyer recommended combining IT support for Town and School and adding the following new positions: Chief Technology Officer, Project Manager, Applications & Data Manager, and Cybersecurity Specialist. He also outlined People and Process recommendations for the Town and School, highlighting a strategic leverage of external vendors, succession and transition plan, technology professional development program, formal technology training programs for Town staff, and a formal communications plan.

Ms. Cooley asked what the deficit of IT staff is relative to the industry benchmarks. Mr. Sawyer explained that benchmarks are based on much larger corporations, therefore is difficult to assess efficiencies and inefficiencies. Ms. Cooley also noted

for attendees that Town and School employees are under different union structures, and this may play a role in new collaborations.

Discussion ensued with members of both the School Committee and Finance Committee on the benefits to both Town and School of combining IT departments, opportunities for collaboration and increasing efficiencies, as well as potential recruiting challenges for the position of Chief Technology Officer. Dr. Gutekanst noted that merging workforces can take a significant amount of time to work well, however there are clear opportunities for collaboration with regard to efficiencies and upgrades in cybersecurity. Dr. Gutekanst also emphasized that a key component to this vision and strategy being successful is the new Chief Technology Officer position.

Another significant topic that was raised was the level of specialization with regard to the technological needs of the Town and School Department and ensuring that specialized departmental needs are addressed with the appropriate level of expertise. Ms. Fitzpatrick explained that specialized work, such as public safety, has been contracted out, and the intent is to maintain that being outsourced. Members of the Finance Committee raised a similar concern, asking whether an integrated system would help or hinder the work of IT staff given the differences in levels of services and expectations for both the Town and School. Mr. Sawyer explained that additional needs in the classroom or in the Town would potentially benefit from a dedicated integration specialist role. Joshua Levy also asked about where the integrated IT department would be housed. Dr. Gutekanst explained that the current idea is for the Chief Technology Officer to report to the Superintendent. Dr. Gutekanst noted it is preferred for this role to report to an individual rather than to a Board.

Ms. Cooley concluded the discussion, noting that the Town and School will continue on the current path with the Town Manager and Superintendent evaluating the plan for the upcoming year. Dr. Gutekanst added that in current discussions for FY 25 budget there are not any additional costs of consulting, security, and staffing, however, the Boards can anticipate Warrant Articles proposed to the School Committee and the Select Board in the near term. Ms. Cooley thanked Mr. Sawyer for his work.

6:06 p.m.

Adjourn:

Motion by Ms. Lee that the School Committee vote to adjourn the Special Joint Meeting with Select Board & Finance Committee of Tuesday, December 5, 2023.

Second: Ms. Barr. Unanimously approved 5-0.

Motion by Ms. Frail that the Select Board vote to adjourn the Special Joint Meeting with School Committee & Finance Committee of Tuesday, December 5, 2023.

Second: Mr. Nelson. Unanimously approved 5-0.