



Amherst Massachusetts

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To: Select Board
Fr: Paul Bockelman
Town Manager
Dt: July 13, 2018
Re: FY18 Town Manager Performance Goals – Annual Report

This memo details the progress and accomplishments we have made to meet the performance goals articulated by the Select Board at its October 16, 2017 meeting.

Please note clearly that every accomplishment in this report is the result of a team of staff members and volunteers who work together toward achieving an agreed upon goal. Many of the accomplishments are the end result of the vision of my predecessors and the fortitude of staff to continue to move the vision forward. I have chosen not to name individual staff members who deserve the bulk of the credit for many of these successes but I know you are aware that any success is the work of many hands.

I. Fiscal Management

1. Address the need for increased revenue:

- CDBG funds: The Town continues to be designated a mini-entitlement recipient of Community Development Block Grant (CDBG) funds and received \$825,000 in FY18. Of this, CDBG allows \$123,750 to be allocated to grant administration. This grant provides crucial funding for projects and activities that serve primarily low- and moderate-income members of the community. CDBG funds will be utilized to fund an ADA self-evaluation and transition plan, a new multi-use path on East Hadley Road, and key social service needs.
- Community Preservation Act (CPA) funds: The CPA raises funds for open space, historic preservation, affordable housing, and recreation facilities through a voter-approved surcharge of 3% of the tax levy. We project that \$1,672,089 will be raised for FY19. The Annual Town Meeting approved the CPA Committee's recommendations for appropriating these funds.
- Potential New Development: After extensive staff work that included the Principal Assessor, Assistant Town Manager, and Town Attorney, we developed the Town's first tax incentive legal document. The Board agreed to the tax-incentive with Beacon Communities and signed the document. Beacon will now develop two new buildings

containing 130 residential units - including 20% affordable units at 50% area median income, 22,000 square feet of non-residential space, approximately 304 parking spaces, and site improvements that include a village square, a play area and a dog park for residents in the North Amherst village area. There was extensive work with legal counsel and counsel for Beacon Communities to develop a written agreement that the Board was able to sign. State funding has been awarded. A building permit has been issued. Construction is expected to occur this year.

- Significant new development continues to move forward including One East Pleasant Street, Spring Street, University Drive, and Hallock Street. Potential projects include the Amherst Motel Site and the East Amherst development.
- Economic development study: The Town received a \$25,000 grant as a Community Compact Cabinet community to research and prepare an economic development plan. Pioneer Valley Planning Commission was selected to prepare the plan. The first public forum on the plan will be held on April 25th. The third and final public forum was held and a final report is being prepared.
- Medical Marijuana: There has been minor activity with those groups seeking to provide medical marijuana in Town. I have signed a host community agreement with GTI, a medical marijuana provider that has received State approval and is open for business.
- Recreational Marijuana: A working group, including two members of the Select Board and several staff members, did extensive research on the new world of recreational marijuana, developing bylaws and positions, and gaining the approval of all of the proposals presented to the Special Town Meeting this Fall. Additional zoning bylaws were presented to and approved by the Annual Town Meeting. I have requested policy guidance from the Board for the development of the content of host community agreements and the allocation of host community agreements in areas where there may be competition.
- Public safety dispatch: There is discussion in collaborating with another community to provide full dispatch services.
- MassWorks grant - downtown: The work on the \$1.5 million MassWorks infrastructure grant to bury 4,000 feet of electrical, cable and telephone wires on East Pleasant, North Pleasant, Triangle, and Pray Streets is now complete. We were not awarded the MassWorks grant for the North Amherst area. We are revising and re-imagining the application for resubmittal this summer.
- Ambulance Fees: With the Board's approval, I am working on extending the relationships with three of our ambulance partners (Leverett, Pelham, and Shutesbury).

2. Long-term financial health:

- OPEB: We continue to make steady progress to address our "Other Post-Employment Benefits" (OPEB) liability by committing funds within the existing budget, from our enterprise funds, and earmarking Federal Medicare Part D reimbursements into the OPEB trust fund according to the schedules previously established. A contribution of \$500,000 was approved by the FY19 Annual Town Meeting.
- Health insurance: As reported previously, the Town's health insurance trust was in crisis with increasing claims draining the Trust's balance. I detailed the condition and options to the Board at its meetings. The performance of the Trust has had a significant negative impact on the budgets of the Town, Library, and Regional Public Schools and could impact the Town's bond rating. Working with the Employee Insurance Advisory Committee and Town staff, we have developed a plan going forward that will stabilize health insurance costs, fully insure the risk, and provide more predictability for the next 2-

3 years. We have educated employees and retirees with 22 meetings held at nearly every worksite and at different times of days and days of the week. The move to the MIIA Health Benefits Trust will remove the risk for insuring the health of our employees from the Town. Rates have been stabilized with a cap on the increase for FY20. In the third year, any increase will be mitigated by the ending of the surcharge to cover the deficit in the health insurance trust as we run out the claims.

- Regional Assessment Method. I and others have worked with the Towns of Leverett, Pelham, and Shutesbury to come to an agreement on a fair assessment of expenses for our regional school district. This is a short-term agreement and will require significant additional work going forward.
- Bond rating: We continue to monitor the Town's financial positions and policies to ensure our bond rating remains strong or improves. Given our current situation we determined that this was not the year to seek a review of our bond rating.
- Recreational marijuana: The Town approved taxes on the sale of recreational marijuana. It is very difficult to estimate the value of this tax.
- Capital projects: The Town has significant capital needs, specifically new buildings for DPW, Fire, Schools, Library, and Senior Center. In addition, significant capital investment in our recreational areas and field, roads, sidewalks, and existing buildings is needed. Developing a financing plan that is understandable and agreed to by the Town Council is a major task.
- Collective Bargaining Agreements: The Town continues to manage its agreements with its collective bargaining units in a cooperative, financially prudent manner. Cost of Living Adjustments are set to be fair to employees and sustainable to the Town. All collective bargaining agreements have been settled with one agreement being reduced to writing.
- Ambulance billing: We have contracted out the ambulance billing function to a private entity that specializes in this service. We project this will reduce staff dedicated to this function and should increase revenue with more sophisticated billing.

3. Budget Policy Guidelines:

- I delivered the FY19 Annual Budget to you on January 11th. This budget complies with the guidelines you passed. The Finance Committee reviewed the budget and recommended it. The Town Meeting reviewed the budget and approved it with minor additions.

4. Managing FY18 budget:

- The Town continues its prudent management of Town resources by monitoring and managing its FY18 approved budget. Results are reported to the Select Board on a quarterly basis. The increase in health premiums on October 1st and again on February 1st has put additional pressures on the Town's budget. Similar pressures are felt by the Schools, Library and Regional School District.
- Working with a group that included two members of the Select Board I issued an RFQ for food security in the Latino community and the best way to expend the additional funds appropriated at Town Meeting for community services. These funds were awarded to the Survival Center.
- The recent failure of the boiler at the North Amherst Fire Station was covered from existing budgets due to strong management of the Fire Department's discretionary budget.

- An especially snow-laden winter has created a deficit in the snow budget. This is not an unusual situation. This deficit was addressed through a Reserve Fund Transfer approved by the Finance Committee.

II. Relationship with the Select Board

1. Board leadership communication:

- I schedule weekly meetings with the chair and vice chair and staff to set the agendas for the next and future Select Board meetings.
- I meet weekly with the chair to review other, non-agenda topics and as a general “check-in” time for the work I’m doing.

2. Board communication:

- I continue regular communication that does not violate the Open Meeting Law via email with all members of the Board to update members on emergencies, special events, and other updates such as the status of the boiler failure at the North Fire Station, major public safety events such as the March 3rd activities, fires, untimely deaths, and items that may hit the press.
- The Select Board and I dedicated several Saturdays to work on long-range issues in a retreat setting.
- I provide a monthly written report to the Board that captures most of what’s happening in Town. I make regular, verbal reports at Select Board meetings in addition to the monthly written report.
- I make sure I am available to any Board member at any time, any day of the week.

3. Emerging issues:

- Sanctuary Communities: The possibility that the Town will be refused grant funds for our police department is a very real possibility. We have received no word on whether the funds that were awarded will actually be delivered and at this point we are not planning on this grant. Adjustments to the police department budget have been implemented.
- PEG Access Contract: With the assistance of a negotiating team that included two members of the Board, we reached a successful resolution of the PEG access contract with Amherst Media. The Annual Town Meeting approved the appropriation of funds and borrowing in accordance with the contract.
- Homeless Shelter: Craig’s Doors has received State funding for its shelter operations. We held a post-season group meeting that includes staff and board members of Craig’s Doors along with Town staff from inspections, police, and fire.
- Health Insurance: We have devoted an enormous amount of time to managing health insurance for our employees. We successfully addressed the issue by consolidating the risk pool by eliminating one of the two providers, transferring the risk from the Town and Schools to another entity by moving to a fully insured plan, and adjusted benefits in an attempt to manage costs. The transition was completed successfully and, as of July 1st, the Town is completely insured with a fixed cost per subscriber for its health costs. Eliminating this risk has reduced the Town’s liability significantly and has had a positive impact on the Town’s OPEB liability.

4. Policy

- Ample discussion is afforded members of the Board, both in one-on-one communication with the Manager and in public settings, before public policy is set. An example of this is the Marijuana Host Community Agreement discussion. Even though this is an item that is firmly within the responsibility of the Town Manager, I have engaged the Select Board because decisions have significant public policy implications.

5. Collective Bargaining

- FY18 contracts are settled with all unions within the budget and guidance of the Select Board.
- We have a tentative agreement with the Firefighters Union for a successor collective bargaining agreement that expires on June 30, 2018, subject to ratification and final wording.
- I have heard and ruled on numerous grievances, most being resolved by mutual agreement.

6. Litigation

- Litigation updates are delivered to the Board when there are significant changes.

7. Media

- Standard practice is that anything of consequence from the Town Manager's office gets copied to the Board in advance.
- Since I conduct weekly meetings with members of the media, it is difficult to determine which issues they may choose to address in writing. But most of the issues are heard first at a Select Board meeting.
- We have become more proactive in communicating the good work of the Town through use of the Town's and the Town Manager's social media.

III. Long Range Planning

1. Town property and facilities profiles:

- The Board has approved a property disposition policy. I anticipate that the first property to flow through this process will be the Summit Academy school building in South Amherst.
- The Town's new facilities manager has been assessing the condition of all Town buildings, including schools, and developing a list of the capital and maintenance needs of each building.

2. Sustainability and Green Initiatives:

- A public meeting was held to discuss the placing solar panels on the landfill. A developer has been selected and this firm is working toward obtaining the necessary permits. A key issue is the changing subsidies provided by the State programs. This will be the Town's second attempt at this project.
- At least two additional solar installations are under consideration on private land. The Town would seek a PILOT payment as used in previous projects.
- A \$50,000 grant to hire a staff person for solid waste has been received. I have hired a person who is reviewing recycling practices by individual homeowners and apartment building residents.

- The Town passed Zero Energy for Municipal Buildings bylaw at the Special Town Meeting. This bylaw presented distinct challenges to constructing municipal buildings. I worked with an internal working group to make adjustments in the bylaw and it was approved by the Annual Town Meeting.
 - The Town continues its effort to green the environment by working toward planting 2000 trees over three years. We still have several hundred to plant but it is an initiative that continues to be pursued.
 - With the support of the Board, I have developed a charge for a new Sustainability Committee, which would provide the overriding guidance for all sustainability and resilience efforts in Town government. I believe this initiative will need to wait for the Town Council to take office.
 - We are participating in a community energy consortium with the Town of Pelham and the City of Northampton. The project is in its early stages but has promise.
 - The Town installed five bikeshare stations as our contribution to the ValleyBikeshare initiative.
3. Affordable housing:
- The aforementioned Beacon Communities development in North Amherst will contribute significantly to the Town's stock of housing that is permanently affordable. Most important, it will contribute to the Town's Subsidized Housing Inventory and help us to continue to meet the 10% threshold.
 - I will continue to work with Craigs Doors to see that the organization has the funds it needs to carry out its mission.
 - The Town has taken an active role in ensuring that the promised affordable housing units in the Presidential development are rented to people who qualify for the units. Fines were levied and legal counsel was sought to ensure compliance with making the units available.
 - The Affordable Housing Trust has been active in securing staff support for its efforts and has focused on exploring affordable housing development at the East Street School site.
4. Staffing:
- Turnover in an organization of this size is normal. Vacancies are examined to determine need and responsibilities of the position.
 - LSSE: I appointed a new LSSE director based on excellent performance in the interim role. The assistant director's position will not be filled.
 - Planning: With the appointment of one new planner, this department was brought to its full staffing level.
 - Health and Community Services: At her request, the Director has gone to a reduced work schedule and reduced responsibilities and, consequently, reduced pay.
 - Fire: I have assembled a small, internal working group to begin the assessment of fire operations utilizing information identified by the Fire Staffing study. The Fire Staffing Study identified the need for additional staffing during peak periods and this language has been negotiated into the Fire collective bargaining agreement. With the elimination of emergency medical services calls to the Town of Hadley, there should be a reduction of about 20% of our calls, which should relieve the pressure on staffing in the Fire Department.

- Finance: The Treasurer/Collector has resigned and I have appointed the assistant treasurer and assistant collector to fill those roles. The Comptroller will continue to provide Finance Director leadership. The addition of the shared procurement officer has been a godsend.
- Town Clerk: I have hired a stellar replacement to our long-term Town Clerk who retired on June 30th.
- Executive Assistant to the Town Manager: I have hired a highly talented individual to fill this role and enhances our services by being bilingual.

5. Improving public infrastructure and spaces:

- With the support of the Joint Capital Planning Committee, I recommended and the Annual Town Meeting approved a large commitment of funds for roads, crosswalks and sidewalks.
- Funds have been appropriated to rehabilitate the North Common. This project has been combined with the Main Street parking lot reconstruction to create one, coordinated project. Design will take place in the summer of 2018 with construction to occur in June/July 2019.
- The Downtown Parking Working Group recommended and the Select Board adopted significant changes to the parking policies. This, together with the introduction of a new “pay by app” and new parking machines, has created a more logical, coherent parking program for the downtown area. We continue to receive letters from people frustrated with the increased parking fee and extended length of enforcement hours.
- The Transportation Advisory Committee continues its efforts to address crosswalk standards, complete streets policies, and addressing traffic calming requests.
- The appropriation of funds for a specific schedule of work at the North Amherst Library has resulted in the selection of a local designer to conduct the work. Work on a design will be initiated later in the summer.
- The Town has settled on a design for wayfinding signs to be placed throughout the community. The Business Improvement District will be funding the first sign in the new roundabout and I have requested funds to phase in the installation of the rest of the signs. The first set of signs will be installed within the next month. Town Meeting approved funding for purchasing additional funds and we will move forward with that project after we understand the lessons from the BID’s sign installation.

6. Fee subsidies for LSSE:

- Funds for subsidies as approved by Town Meeting in 2015 are in the FY17 and FY18 budgets and were again included in the FY19 budget.

7. I-Net replacement:

- Planning continues for this project and a funding schedule is prepared and included in the capital arrangement in the PEG agreement with Amherst Media and in the Town’s capital plan.

IV. Staff and Personnel Relations

1. Staff morale. Maintaining positive staff morale is critical to the success of the Town of Amherst government operations. In addition to normal, everyday staff interactions with members of the staff throughout the organization, I have reached out in the following ways:

- I have redefined the understanding of “Emergency Services” to not only include Police and Fire, but to include our dedicated DPW crews, as well. This is manifested in our messaging during emergencies and ensure that the DPW was invited to the First Responders picnic sponsored by the Chamber of Commerce.
- I have worked with our department heads and leadership team to develop better effective relationships with all staff in the Town.
- I am encouraging a safe working environment and fully supporting interdepartmental staff safety working groups in all municipal buildings. The Town Hall Safety Committee is very active and is recommending tangible improvements to Town Hall safety for employees and visitors.
- I have met with groups of employees in large and small settings including employees in:
 - Town Hall including regular all Town employee meetings which are always very well attended, numerous social settings, and regular day-to-day contact;
 - Public Works including tours of DPW facilities, attending the annual holiday party, visiting the DPW during snow storms, on Thanksgiving and Labor day at water main breaks and chance encounters;
 - I have initiated a bi-monthly “Meet-up with the Manager” where a group of five employees from different departments meet with me to discuss anything that’s on their minds. I have conducted eleven of these Meet-ups so far meeting with 55 employees. It is an opportunity for me to hear directly from people working in the field and for other employees hear about the challenges and joys they experience in their jobs.
 - I have supported the Town employees’ initiative of a winter holiday party and a summer picnic to encourage employees to socialize informally.

2. Staff communication:

- I have initiated open all-staff meetings for Town staff that have always been very well attended.
- I write an email to all department heads and other interested party reporting on the results of every Select Board meeting.
- I have begun a regular news notes email newsletter to all staff to update staff on comings and goings of staff and significant issues facing the Town. This is also sent out to former staff, who really appreciate being remembered.
- We held 22 information meetings to explain the impending changes to the Town’s health insurance plan.

3. Departmental communication:

- I hold quarterly meetings with all department heads.
- I hold monthly meetings with the leadership team.
- I hold weekly or bi-weekly meetings with the Police Chief, Fire Chief, Superintendent of Schools, Library Director, Economic Development Director, Superintendent of Public Works, Assistant Town Manager, Director of Senior Services, Interim LSSE Director, Human Resources Director, Facilities Director, and Executive Assistant to the Town Manager.
- We hold monthly meetings to discuss economic development issues in the Town which brings together planning, building, and economic development staff.

- We hold quarterly economic development meetings with representatives from the Town, BID, Chamber, University and Amherst and Hampshire Colleges.
 - I continue to serve on the Business Improvement District Board of Directors and attend monthly meetings.
4. Recruiting staff:
- I continue to work with our Human Resources department to ensure that the Town is seen as an “employer of choice” in western Massachusetts. We have seen numerous wins in our successful recruitment of talented staff such as a new sports director, DPW employees, Town Hall employees, and police officers.
 - We have discussed additional ways to diversify our workforce. This is an ongoing challenge.
 - I have hired strong candidates for all of our positions. I have appointed a new Director of LSSE. With the passage of the Town Charter, I initiated the recruitment of two major positions, Town Clerk and Executive Assistant to the Town Manager, were key appointments with exceptionally strong candidates.
 - The vacant Finance Director and Treasurer/Collector positions are targeted for recruitment next.
5. Customer service:
- The Town has established a high bar for excellent customer service and I continue to work with staff to ensure that all requests and visits from the public are handled expeditiously and thoroughly and professionally.
6. Service delivery:
- Good customer service and service delivery is a theme that I review regularly with staff during staff meetings. Special focus has been placed in my conversations with DPW employees whose work is highly visible and subject to critique, simply due to the high visibility of their jobs.
7. Staff support:
- Retaining excellent staff is also a high priority which I continue to emphasize throughout the organization. Retaining high performing members of the organization requires the supervisor to provide guidance, mentoring, and ample professional development opportunities. I have worked to cement these values in our supervisors.
 - Individually, I have worked directly with the Economic Development Director, a significant new post for the Town, to refine his role with the business community and neighborhoods; he has taken the lead on both medical and adult-use marijuana and on the gas moratorium where he was certified as an expert witness, and with his appointment to the Policy Committee on Municipal and Regional Administration at the Massachusetts Municipal Association.
 - Working with experienced, long-tenured staff is really built on relationships and I have worked hard at building those relationships.
 - I am pleased that the Superintendent of Public Works was appointed to the Massachusetts Municipal Association’s Policy Committee on Energy and the Environment.
 - I have been encouraging department heads to review the professional development opportunities available to their staff. One such opportunity is the MMA-Suffolk

University Certificate in Leadership and Management program. Our Treasurer-Collector was admitted to this program.

- The Assistant Town Manager and I have focused attention on the Information Technology department. There are an incredible number of demands placed on this department and prioritizing these demands and communicating with other department heads is a high priority.

V. Community, Intergovernmental Relations, and Volunteer Committees, Boards, & Commissions

1. Institutional partners:

- I meet regularly with the Chancellor of UMass, most recently two weeks ago, to discuss issues of mutual concern and will continue to meet with him on a regular basis. The Town works well with senior staff at the University, working hard to maintain good communication and articulating the needs and expectations of the Town.
- I have established a good working relationship with both Amherst College President Martin and we have been working with Amherst College to address some of the core needs of the Town.
- I also developed a good working rapport with Hampshire College President Lash. I recently met with Hampshire College's new president, Miram Nelson, on her second day of work. I look forward to building a strong relationship with her.
- UTAC has been reorganized and we have had ongoing discussions about the mission and direction of the group. This is a work in progress and we will continue seeking the right mission and venue for the next phase of this initiative.
- The University has commissioned the Donohue Institute to conduct a study of cost of providing elementary and secondary education to residents in University owned housing. We have seen a draft of the study and anticipate this will be discussed in the near future at both the School Committee and Select Board meeting

2. Campus and neighboring communities developments:

- Improved communication among our institutional partners has enabled the Town to not be surprised by developments such as the University's RFI. However, since the RFI was issued, we have not heard much of substance about the responses to the RFI. This has proved disappointing.

3. Public Relations:

- I hold weekly press briefings with members of the media and provide them with information on ongoing or upcoming issues.
- I have established a Twitter feed for the Amherst Town Manager that has 343 regular followers, up from 253 six months ago.
- I have initiated a more aggressive social media policy and have a plan in place to develop and provide content that can be delivered to our constituents and the press. The Town of Amherst Twitter account has 1,148 followers. Over 1,000 people follow the Town's Facebook account.
- I held two "Town Hall Roadshow" whose purpose to engage with the public on general or specific issues, describe important issues facing the Town, and answer any questions. Most important, I believe these events will allow the public to meet and talk with our impressive staff.

- I held a Councilor Candidate Information Session on July 11th for candidates for the new Town Council. 31 of 34 candidates said they were planning to attend. A dozen Town staff made a two-hour presentation on Town operations to the candidates.
- I recently held my 15th monthly “Cuppa Joe with Paul” series at area coffee places to have an open invitation to members of the community to come in and talk. I am joined each time by a different department head.
- I have issued press releases on important topics to promote coverage of an issue and to articulate clearly the Town’s position.

4. Customer service:

- We continue to seek ways to provide better public service and have begun investigating licensing management options as envisioned by the Town Charter.

5. Committee support:

- In the next months, I will be reaching out to the chairs and members of committees as we work toward implementation of the new Town Charter.

6. Committee management:

- One of the continuing challenges that we have not addressed adequately is ensuring that minutes, especially for the Select Board, are prepared in a timely fashion. There are two challenges that must be addressed at the same time. One is to put in place a system so that minutes for Board meetings can be presented to the Board for review in a timely manner. The other addressing the backlog of minutes from over a year ago. For the first, the new Executive Assistant to the Town Manager is maintaining minutes on an ongoing basis. For the second, the former Assistant is working on the backlog.

VI. Going Forward

In the coming months, I will be reporting to you on the following projects:

- Water system study follow-up and steps the Town will need to take to ensure supply, reliability and resiliency and further discussion about rates;
- A review of municipal property following the proposed new policy for the Board’s consideration;
- Proposals for a new dog park initiated by a large group of motivated residents;
- Paving and management of the Town’s roads and sidewalks is a high priority with additional funds devoted to this important need, including pursuing Complete Streets certification;
- Sustainability initiatives that will lead to overall sustainability goals for the Town;
- Conducting searches and recruiting strong leaders for critical positions;
- Identifying changes – physical and organizational – that will need to take place with the adoption of a new Charter.