

TOWN MANAGER EVALUATION FY2018

Select Board Member: Andrew Steinberg

For the purposes of this document, the evaluation terms shall be defined as:

Commendable = Performance surpassing reasonable expectations

Satisfactory = Performance meeting reasonable expectations

Needs improvement = Performance below reasonable expectations; improvement likely

Unsatisfactory = Performance below reasonable expectations; improvement unlikely

Unable to judge = Insufficient information available for evaluation (Please explain)

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
I. FISCAL MANAGEMENT						
1. Address the need for increased revenue by:						
a. Promoting efficiencies in Town structure and service delivery, including regionalization of services where appropriate, and maximizing effective use of CDBG, CPA, and other funds to offset allowed legal and administrative costs;	X					Mr. Bockelman looks for opportunities to reorganize staffing to increase operational efficiency and customer service, such as with the major changes on the first floor of Town Hall. But also see section IV for related discussion. The CDBG priorities and the CPA proposals from staff have advanced the goal to use of the funds to advance overall priorities.
b. Negotiating contracts, including the collective bargaining contracts, that reflect the community's needs and priorities;	X					All agreements settled with one being reduced to writing. Successful in obtaining support for new health insurance plan.
c. Pursuing sustainable and appropriate development to increase the percentage of tax revenue generated from commercial property, and to reduce the burden on residential property owner.		X				Leads staff to work with developers on new projects throughout the town. There is significant public concern about issues of design and parking. Leadership needed for staff and boards to find ways for public to provide comments and then consider them.
2. Develop strategies for the long-term financial health of the Town:						
a. Reviewing and assessing on an on-going basis the Town's current strategies for handling long range post-employment benefit program (OPEB) obligations;	X					Developed a proposed FY 19 budget that continues to fund plan to build the OPEB Trust's balance.
b. Developing strategies to maintain an excellent bond rating;		X				No bond rating in the past year. Continued management practices, including OPEB, which contributed to last two bond ratings.

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c. Working with the legislature to adopt policies in line with our goals and values.		x				It has been difficult with resignation of our Senator and a new Representative without the seniority of his predecessor. Paul uses the resources available to advocate for Amherst.
d. Participate in the Regional Assessment Method process with other towns in the Amherst- Pelham Regional School District to find a resolution that works for Amherst, will be acceptable to the other towns, and will adequately support grade 7-12 education.		x				The preparation and participation in this process, including Four Town meetings and the Working Group, needs to be similar to a contract negotiation. Funding needs for grade 7-12 education and other town supported programs and services make this a priority. Other towns participate with more town-level discussion and strategizing involving all relevant boards and committees.
e. Develop strategy and provide leadership to implement funding for the major capital projects: Fire Station, DPW Facility, Elementary Schools, and Jones Library.		x				This has been a frustrating process with the involvement of multiple boards, committees, and Town Meeting. The incoming Council will offer an opportunity for a reset, but it will need leadership. There could be increased public education about the deficiencies of current buildings and the effect on services provided from them.
3. Prepare the annual budget in conformance with the Select Board Budget Policy Guidelines.	x					The Town Manager's budget was prepared in conformance with Select Board guidance, Finance Committee Guidelines and Mr. Bockelman's priorities based on his work with staff and his knowledge of the needs of departments to achieve goals.
4. Affectively administer the adopted budget.	x					The long-standing practice to spend within the limits of the budget and achieve or exceed revenue goals continued in FY 18.
II. RELATIONSHIP WITH THE SELECT BOARD						
Maintain a professional and collaborative relationship with the Select Board by:						
1. Providing regular communications to the Select Board about matters relevant to their responsibilities and concerns, including changes and additions to Town programs and initiatives;	x					The Board is well-informed with regular written and oral reports. One public comment praised the written reports, found in SB packets, and recommended wider distribution.
2. Responding to communications from members of the Select Board in a timely manner;	x					Paul responds promptly to email and phone messages, schedules meetings as necessary. This will be more difficult with a Council more than twice the size of current Select Board.

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3. Recognizing issues or changes with a direct or significant impact on the community, and that falls within the Select Board's authority to provide feedback;	x					The best example for FY 18 is policies regarding medical and adult use marijuana. The use of an internal working group including two members of the Select Board and their reports at regular meetings allowed appropriate participation and feedback from the entire board.
4. Allowing the Select Board opportunity to provide feedback on changes to policy and practice or new initiatives before implementation;	x					The decision to terminate the Health Insurance Trust Fund was a significant policy change. The Board received regular reports and had opportunities to ask questions and provide feedback
5. Involving the Select Board in the determination of collective bargaining strategies for the current contract process, and keeping the Select Board updated on such progress;		x				The Select Board cannot and should not be directly involved in collective bargaining. Within appropriate limits, the board is updated on progress and consulted on strategies.
6. Informing the Select Board regarding litigation strategies and proposed settlements of litigation, and keeping the Select Board updated on the progress of litigation;		x				Paul continued the practice of providing an annual litigation update in February and reported on specific ongoing matters as appropriate.
7. Ensuring that all members of the Select Board are aware of anything significant before it appears in the media.	x					The board regularly receives emails regarding any matter that might appear in the media, often incidents that required police or fire intervention. Given the 24/7 nature of these incidents, this requires significant effort and discipline.
8. Beginning the process of cataloging Select Board policies for review by the Board with the intent to assemble them in a coherent and publically available format.					x	Matter apparently postponed.
III. LONG RANGE PLANNING						
1. Continuing to revise and update the 07-16-16 Facilities Profiles (former goal known as "Building Assessment Report"). Provide at least a semi-annual review of the document with the Select Board to make them aware of changes or proposed changes in the buildings' use, benefit or liability to the Town, and recommendations for retaining ownership.					x	There was no update on the specific document referenced in the standard, but good work was done to adopt a policy for property disposition. The Previous Facilities Profile was largely an effort of the former facilities manager. It took some time to fill that position. We did not have staff to address this need for a significant period.
2. Developing a policy for the disposition, reuse or disposal of surplus Town property (e.g., East Street School).		x				As Noted in Section III.1, this policy was developed and adopted.

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3. Initiating and advocating for "green" efforts and programs, including progress on the installation of solar energy generating equipment on the landfill.		X				Progress includes adopting a workable Zero Energy Building policy, the Bike Share program, and initial work to create a Sustainability Committee.
4. Supporting the preservation, maintenance and creation of housing that is safe, decent, and affordable for low- and moderate-income individuals and families, including:						
a. Reviewing and assessing on an on-going basis the Town's status on the State's Subsidized Housing Inventory (SHI) and anticipating factors impacting our SHI percentage in the short- and long-term;	X					Excellent work with Beacon Communities and other partners on the North Square project. This was the first use of the tax incentive program and that required significant work.
b. Reporting periodically on the operation of the seasonal shelter and recommending changes to any written agreements, as needed.		X				The shelter had a successful season. The Select Board and the community were regularly informed about the Town's role in making it a success.
5. Preparing materials and information as needed in advance of the March 2018 Charter Vote. Creating and implementing a transition plan based on the outcome of the Charter Vote	X					Excellent work to provide useful, objective information and respond to advocates for and against the proposed Charter, consistent with the requirement to refrain from political activities. (See ICMA Code of Ethics.) The post-election transition is a significant challenge without precedent in Amherst.
6. Ensure coordinated planning and resource allocation in the Fort River School Feasibility Study					X	
7. Periodically review and update a staffing plan that suggests the optimal number and types of positions in each department to best address current service levels and key needs, and serves as a framework for prioritizing recommendations for future hiring. Recommendations for new positions should include the full cost of each position, including post-employment and other benefits.		X				Addressed thoroughly in the proposed FY 19 budget and accompanying budget message/
8. Improving public infrastructure and spaces:						

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
a. Prioritizing and implementing repairs to sidewalks, multi-use paths, roadways, parking areas and intersections;		x				Consistent with Mr. Bockelman’s recommendation, JCPC put close to \$1 million in the FY 19 capital budget. Implementation requires concerted staff follow-through. There are problems at times with public dissatisfaction and understanding about these projects, which may be in execution or may be in communication with the public.
b. Reviewing and following up on actions recommended by the Transportation Advisory Committee (TAC);		x				Addressed proposed crosswalk standards and complete streets policy. Followed up on parking changes approved by Select Board on recommendation of Downtown Parking Working Group and TAC.
c. Planning and implementing improvements to public areas, including parks, commons, and greenways so that they are safe, attractive, and contribute to our quality of life;		x				Great planning processes for Groff Park and North Common.
d. Planning and implementing maintenance and improvements in the downtown and village centers, including working with Town staff and the Business Improvement District (BID) to assess capital needs, to implement improvements, and to complete current projects (e.g., downtown way finding system).		x				Good efforts in downtown (e.g., Wayfinding signs) and North Amherst (continued pursuit of a MassWorks grant).
9. Report on the review of LSSE program options and the associated fee structures to ensure that there are appropriate affordable recreation opportunities.					x	LSSE had to adjust to new director after retirement of long-time director. Needs work with LSSE staff and Commission to methodically review program options and fees.
10. Planning for I-Net replacement in conformance with October 2016 Comcast contract.		x				Was a priority in contract discussion with Amherst Media to meet its capital needs and the Town’s I-Net replacement.
11. Explore whether the replacement of the I-Net with a wholly Town owned communication network provides an opportunity to create an enterprise fund for the purpose of providing high-speed internet access to the whole community.					x	
IV. STAFF AND PERSONNEL RELATIONS						
Manage Town staff and improve their effectiveness in delivering the services our community relies on:						

AREAS OF RESPONSIBILITY	Commendable	Satisfactory	Needs Improvement	Unsatisfactory	Unable to Judge	COMMENTS
1. Maintaining high staff morale by working toward a positive work place culture that includes diversity, civility, mentoring and receptivity to new ideas and innovations;		x				Paul's efforts to reach out to all employees, including those who work at locations outside of Town Hall such as DPW, are noteworthy and appreciated. That includes meetings and email communications.
2. Increasing communication with staff at all levels, to inform, engage and solicit feedback, in particular developing a strategy and protocols for accepting and responding to communications from staff;		x				See comment to Section I.1. It seems that some staff may not understand goals for reorganization and feel involved in it. The process then creates frustration at what is perceived as slowness at filling positions and the burden on them because of vacancies. The regular meetings with staff are a good practice and a challenge due to the multiple locations, shifts, and number of employees
3. Encourage a similar framework of communication be implemented by all directors and department heads so that a consistent process is developed at all levels of Town government;		x				This goal and the next (Section IV.4) are more difficult to assess. Communication between department heads and employees they supervise seem to be strong.
4. Encouraging communication between departments to improve cooperation and coordination of services, and to foster pride in accomplishments across all areas of Town government		x				Employees across departments generally seem aware of issues and needs of colleagues in other departments. Very evident within functional areas (e.g., Public Safety), but also apparent across functional areas.
5. Recruiting, retaining, and assigning the best qualified personnel;	x					There are examples in all positions that Amherst continues to be an employer of choice and then hires highly qualified employees.
6. Modeling and fostering attitudes of helpfulness and courtesy toward the public;		x				Town employees in all departments work hard and know their purpose is to serve the public. But there are public perception and communications problems, particularly with Public Works. This is an area with substantial public awareness and expectations. See comment on Section I.2.e and consider the connection between staff morale and public understanding regarding the need for a new facility.
7. Encouraging a workplace culture of improved service delivery;		x				See previous section for comment.
8. Providing adequate resources, including time, equipment, and professional development, for staff to be effective and successful;	x					There are many examples but will note two: the training on responding to a threat to workplace violence and encouraging staff to attend special programs geared for professional growth and development.

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9. Providing periodic updates on progress of action steps identified in the July 2015 Human Resources Audit.					x	
V. COMMUNITY, INTERGOVERNMENTAL RELATIONS, AND VOLUNTEER COMMITTEES, BOARDS, AND COMMISSIONS.						
1. Strengthening relationships with UMass, Amherst and Hampshire Colleges and engage them in:						
a. Mitigating the impacts of a significant student population on neighborhoods, on demand for public safety resources, on parking and traffic, and other municipal services;		x				The APD and AFD, Public Health Department, Inspections and UMass have worked together to address this goal. Staff participates in the Campus and Community Coalition, along with two members of the Select Board.
b. Developing our partnership and strategies, through regular meetings, with Amherst College that reflect shared interests and concerns;		x				Mr. Bockelman has developed valuable relationships with the Chancellor of UMass, the Presidents of the colleges and senior staff at all 3 institutions.
c. Developing our partnership and strategies, through regular meetings, with Hampshire College that reflect shared interests and concerns;		x				See comment on Section V.1.b, above.
d. Pursuing actions of mutual benefit to the Town and the academic institutions including cooperative approaches that encourage “spin off” business development, the creative and innovation economies, and the arts and culture in Amherst;		x				The UTAC partnership led to the issuance of an RFI for targeted development on University property. We are all disappointed that UTAC and the Town have not been more involved since the RFI was issued.
e. Working with the institutions to facilitate the development of new student housing off- campus and on-campus;		x				See comment on Section V.1.d, above.
f. Reporting periodically on the ongoing efforts and plans of the University for improving the campus and campus life to encourage a constructive relationship between the students and the Town, including the plans and projects of the University Town of Amherst Collaborative (UTAC);		x				As noted in the comment on Section V.1.d, UTAC seems to have been less active in recent months. The creation of UTAC was an important effort and needs to be a priority in our work with UMass.

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g. Reporting regularly on the UMass December 2015 Strategic Partnership Agreement (SPA).			x			Hadley seems to have successfully renegotiated its SPA, and Amherst needs to do so too.
2. Maintaining an awareness of developments and planning in nearby institutions and municipalities, and reporting on their activities that impact Amherst.		x				Included in Town Manager reports as issues warrant.
3. Actively engage the community by providing information about Town successes and challenges.	x					Mr. Bockelman has made outstanding efforts to communicate with the community, such as “Cuppa’ Joe with Paul”. He uses the many vehicles of communication to inform the public and hear their concerns and priorities.
4. Developing a strategy for a clear and manageable process for responding to public inquiries and requests. Encouraging effective and responsive communication by all directors and department heads so that a consistent process is provided at all levels of Town government.		x				Generally, this is achieved but with a few exceptions.
5. Ensuring that staff responds to committees, boards, and commissions that offer recommendations on plans or projects. In addition to acknowledging that input, follow up with action to be taken in response, or an explanation about why a recommendation may not be feasible.		x				Staff generally works well with committees and boards relevant to their work.
6. Improving overall modernization and management of the volunteer committees, boards, and commissions system.	x					Mr. Bockelman has attended meetings of most boards and committees, possibly with all of them. He has used appointments to achieve this goal and is developing a plan for a Sustainability committee to replace the Recycling and Refuse Management Comm.
7. Helping to ensure that Amherst adheres to the principle of being a diverse community by.						
a. Increasing diversity among staff, boards, and committees;		x				As opportunities arise, diversity is apparently considered in appointments. Consideration might be given to outreach to encourage a more diverse applicant pool.

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b. Reviewing our policies and procedures to promote hiring and retention practices that ensure a workforce which reflects the diversity of our community;					x	
c. Engage and inform those parts of our community not currently participating in Town government activities, e.g., forums, public hearings, committee participation;		x				Mr. Bockelman included “recruiting strong leaders for critical positions as a future goal in his July 13, 2018 memorandum to the Board. As noted in comment on Section V.7.a, an effort can be made to use outreach to achieve more diversity.
d. Promote efforts which seek to foster respect toward and among all employees, residents, and visitors in Amherst.		x				Mr. Bockelman supports the work of the Human Rights Commission and the schools.
GENERAL EXPECTATIONS						
Feel free to comment on strengths or weaknesses in any of the following areas: Professionalism Community spirit Leadership Defends conviction under pressure Enthusiasm Openness to differing views/new information Accessibility Resourcefulness Setting priorities Advocacy with State and Federal Government Communication style Crisis management Listening skills Responsiveness Public speaking Facilities management	Comments					
OTHER COMMENTS						

If you are willing to share any additional information, insight, or experience relevant to this evaluation, please do so here.

Throughout this evaluation, I have provided examples of Mr. Bockelman’s professionalism, community spirit, leadership, enthusiasm, accessibility, resourcefulness, advocacy for Amherst, public accessibility, and skills at communications. Amherst is fortunate to have him as our Town Manager. This next year will be challenging as we move from a long-standing Town Meeting and Select Board to a Council. Paul has already started to inform the new Council with a program for candidates and made other plans to assure a smooth transition. The goals we propose for the next year will undoubtedly emphasize the need to maintain and, where needed, improve current services. Paul’s success in this last year will be a guide to what must be accomplished in the next year as the Council forms and assumes its responsibilities.