



To: Town Council
Fr: Paul Bockelman
Town Manager
Dt: July 10, 2020
Re: FY20 Town Manager Performance Review

Thank you for the opportunity to present the accomplishments that the Town's staff and I have achieved during the past year. I am very proud of our successes. I look forward to continuing to work on the areas that need improvement.

General Comments

Just about six months ago, the Town Council adopted goals for the Town Manager for FY20 (attached). This ambitious set of goals reflected the priorities and direction of the Town Council at that time. This report summarizes my progress on those goals in the five months since the Council vote.

No one knew, as that vote was taken, that the World Health Organization had concluded that a novel corona virus, then called "2019-nCoV acute respiratory disease", had been confirmed to produce human-to-human transmission in Wuhan, China. With just 7,818 cases confirmed worldwide, no one knew what was to come. Today we stand at over 12.4 million cases confirmed worldwide.

This year has offered an unprecedented series of challenges to the Town and to me as the Town Manager. In addition to the goals you outlined in January, your assessment of my performance will rightfully be focused on how the Town has managed its affairs in the face of this pandemic.

COVID-19 Management

Word of the novel corona virus was working its way into the American media in February. Early on, Town staff, led by our excellent Health Director, were engaged in active discussions about the unknown dangers and threats to Town operations by this novel corona virus. The Health Director was alert to the dangers and, with her urging, I initiated discussions with the senior staff leaders of the Town. In early March, I convened a "Continuity of Operations Team" meeting. The purpose of these meetings was to review all operations to review worst-case scenarios.

At the time, we did not know what was to come. In the coming months, hundreds of decisions affecting thousands of people and their livelihoods would be made by your Town leadership. I believe we made these decisions with care and with public health and public safety at the forefront of each decision.

Three dates stand out to me:

- On March 11th, I held a Department Heads meeting. At that meeting, I announced that this would very likely be the last time we would be together in one room at one time for a very long time. It was a searing moment intended to convey the seriousness of the situation to the departmental leaders. Honestly, I wasn't sure I really believed it because I thought we would weather the storm and be back together in a few months. Walking out of that meeting, however, I realized that it may have been a poor decision to gather those key leaders into one room. Fortunately, there were no ill effects. March 11th was also the day that the World Health Organization declared COVID-19 to be a pandemic.
- On March 13th, the Assistant Town Manager and I held a Cuppa Joe with Paul at Jake's in North Amherst. While we were properly distanced, the intent was to convey to the public that it was still okay to support local businesses by going to them. It wasn't...and, fortunately, there were no transmissions as the result of that meeting.
- On March 16th, I closed Town Hall to the public, symbolizing the serious danger of the virus but also the sad admission that we had no tools to combat this virus. (At that time, we announced that we thought we would reopen on April 3rd...)

How we managed...

The CoRe team included the Health Director, Emergency Management Director/Fire Chief, Police Chief, Superintendent of Public Works, Interim Finance Director, and Assistant Town Manager. This group averaged over 25 years of experience working for the Town of Amherst. I was the newbie with just three years in the Town under my belt, but I brought decades of prior experience in other communities and state-wide organizations.

The Town was extremely fortunate to have this group of people leading it through this most difficult time. They were experienced working in the Town, knowledgeable in their fields of expertise, compatible as a team, yet unafraid to confront each other nor to laugh together.

We all, of course, had extensive experience in managing natural and other disasters, snow storms, tornadoes, train derailments, large parties. These were all relatively intense emergencies of short-duration. A long, energy-depleting emergency like a pandemic was another thing.

By mid-March, this team was meeting every morning, seven days a week. Although the schedule, decision-making, uncertainty, and sheer volume of work was grueling, there was great comfort, comradery, and mutual support amongst the team.

After meeting in the first floor conference room of Town Hall for a several days, we soon realized that, to honor force protection, we had to meet remotely so that we would not spread the disease if one person had been infected.

Our focus in these meetings always started with six major topics:

- *Incident Command*: I also called this vitals...like taking the vitals of a patient in a hospital. Were there any incidents in the prior 24 hours? We reviewed this department by department but mostly it revolved around incidents relating to the Health Department and Public Safety. We checked in on the number of cases and identified if there were any trends that needed to be addressed.
- *Force Protection*: We reviewed each department, individually, as to the physical and mental health of the workforce and their families, steps taken to ensure safety for those on the job,

potential threats that could arise for staff in the coming days/weeks, and discussed employee attendance, availability, and any other issues.

- *Departmental Review:* We reviewed each individual department and received a verbal report on the operations for the past day and operations expected in the future. We focused on supplies on hand, supply lines, and shared policies for work. Early on, there was an emphasis on the supply chain for needed materials.
- *State/Federal Policies:* We spent time reviewing the State's decisions and guidance. We abided, as much as possible, to the guidance being provided by the Centers for Disease Control and the Massachusetts Department of Public Health. But we always relied on the conclusions offered by the Health Director.
- *2-4-6:* We discuss what things would look like 2, 4, and 6 weeks down the road. That's about how far out we felt it was worth looking out.
- *Special Topics:* These are the areas that are urgent at that moment. It could be something to do with the homeless shelter, state issues, communications, resources and supplies, schools with the Superintendent, use of parks and conservation areas, etc.

I want to note that the School Superintendent has been a special partner throughout this period. The challenges faced by the School District are daunting. We talk pretty much every day and it is a pleasure to have such mutual support.

In early March, the Health Director and I spent many hours meeting with Town staff and sharing the information we knew, admitting that there was much that was not known, and fielding questions from concerned employees.

Town staff – including public works, fire, police, general government, library, and schools – have been absolutely outstanding every step of the way during this emergency. People have stepped up, volunteered to take on whatever was needed, came up with creative new ways to deliver Town services and to deliver services – like masks – that we never thought we would have to provide.

- The Director of Senior Services serenaded seniors in the courtyard outside of the Clark House.
- Parking enforcement officers were delivering meals to seniors.
- Facilities staff quickly reconfigured Town buildings to accommodate as many staff safely as possible with new plexi-glass and creative use of meeting rooms.
- Inspections introduced an innovative zoning bylaw to expedite permitting for local businesses and ensured that all required permits and inspections for alcohol and food service were processed in days...sometimes hours.
- I.T. scavenged every piece of electronics they could and quickly developed protocols for the continuity of government online.
- DPW reconfigured downtown streets to provide a lifeline for local restaurants.
- Finance produced and FY21 budget...then started over and produced a one-month budget and a new FY21 budget reframed in an entirely different reality...all while making sure the Town's bills were paid, employees got their checks, and purchases were processed expeditiously to meet the needs.
- The Town Clerk ensured that those who still wanted to get married during a pandemic were able to do so.
- The Library staff produced incredibly creative programming and resources that restored a semblance of normalcy to our daily lives.

- Multiple staff, including conservation, LSSE, Finance, parking enforcement, and the senior center pivoted and took on “other duties as assigned” to fill gaps to open Cherry Hill and Puffers Pond.
- A torrent of communications were developed and pumped out at an incredible rate by the Communications Manager including a new website dedicated to updating the public on COVID-19, a twice-weekly online community chat with the Health Director and Town Manager, a slew of web and social media postings and, just this week, a 24-hour Ask Me Anything on Reddit featuring the Finance Director.

These are just a sampling...there are so many others that I have not mentioned.

I love working for the Town. I especially love working with the people who I get to work with every day. It is a special group who have delivered when it would have been easy to step back.

I deeply appreciate the opportunity to serve you and the people of Amherst. I love living and working and being a part of this special community. It is a challenging job. It is a job that aligns with my values and skillset. And I appreciate the progressive intelligent leadership provided by the Town Council. You continue to challenge us, as staff.

I work to be accessible, patient, collaborative, and inclusive in everything I do. These are values I try to embody every day. 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 – both staff and volunteers. It goes without saying that when we fall short, I bear responsibility.

Management during the COVID-19 pandemic has dominated all management activity since February when Town officials started to be alerted to the potential danger of this disease. I ask that you review the attached goals in light of this unusual situation.

Background on Process and Goals

Section 3.9 of the Amherst Home Rule Charter requires that the Town Council “conduct an annual review for the purpose of assessing the Town Manager’s performance.”

The Town Council voted unanimously to approve the Town Manager’s performance goals for FY20 at its meeting on January 27, 2020. The Town Manager’s FY20 Goals expand on duties of the Town Manager as specified in the Amherst Home Rule Charter, Section 3.2 and other relevant sections.

I. Fiscal Management

A. Multi-year budgets:

- Operating budget: The FY21 budget presented to the Town Council on June 29th includes a budget for FY21 plus projected budgets for FY22 and FY23. See page xxiv of the FY21 Town Manager Budget [here](https://www.amherstma.gov/DocumentCenter/View/51936/FY21-Budget-Book-Final-):
<https://www.amherstma.gov/DocumentCenter/View/51936/FY21-Budget-Book-Final->
- Capital budget: The Capital Improvement Program was delayed until the Fall due to the COVID-19 pandemic. We will present a realistic five-year Capital Improvement Program at that time.

B. State advocacy:

- a. I have been engaged in extensive advocacy for additional resources at the State.
- b. I serve on the MMA's Local Government Reopening Advisory Committee,
- c. I have advocated for additional funds for Chapter 90 road repairs and general government support.
- d. Schools have successfully advocated to increase circuit-breaker funding for special education.
- e. I have continued to participate in weekly Tuesday calls organized by the MMA with the Lt. Governor.
- f. I participate in weekly municipal CEO Sunday afternoon calls organized by the Metropolitan Area Planning Council.

C. Additional sources of revenue:

- a. Support from higher education institutions: The University of Massachusetts at Amherst committed \$185,000 in support for the Amherst schools. These funds were paid in FY20. Negotiations for a comprehensive strategic partnership agreement with the University were cut short due to the COVID-19 pandemic.
- b. Potential New Development: Numerous projects are under development in the Town. These projects will increase the tax base, providing needed additional funds to address the challenges facing the Town. Developments include Spring Street, South East Street, University Drive Extension, and the Amherst Motel site. Several others are still in the pre-permitting phase.
- c. Marijuana/Short-term Rental Revenue: All receipts for these new revenue sources are provided to the Finance Committee and published on the Town's website quarterly. The quarterly reports can be found here:
<https://www.amherstma.gov/DocumentCenter/View/51181/FY2020-Third-Quarter-YTD-Budget-Report>. We do not recommend spending new revenues until there is a proven track record of receipt.
- d. Grants:
 - i. Received \$3,482,889 in CARES Act funding has been allocated to support the Town's response to the COVID-19 pandemic. \$314,794 has been received to date.
 - ii. The Town secured nearly 40 other grants during the course of the fiscal year. For a list, see pages 172-173 of the FY21 Town Manager Budget here:
<https://www.amherstma.gov/DocumentCenter/View/51936/FY21-Budget-Book-Final->
- e. CDBG and CPA funds:
 - i. CDBG funds: The Town continues to be designated a mini-entitlement recipient of Community Development Block Grant (CDBG) funds, a portion of which is 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 extension of the new multi-use path on East Hadley Road, pre-development work for the studio apartments at 132 Northampton Road, and key social service needs.
 - ii. 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. \$10,000 of these funds are allocated for the Town's administration expenses. The Town Council approved the CPA Committee's recommendations for appropriating these funds.

- f. Fees:
 - i. Water and sewer fees are reviewed and updated annually. The Town Council voted new fees on June 29, 2020.
 - ii. Updated ambulance fees to bring them in line with other local communities.
 - iii. Other fees were updated slightly to take into account the additional costs incurred in processing certain permits.
 - iv. Going forward we are looking at fees off cycle of budgets in order to be able to devote the time needed. This is occurring at the present time.
 - g. Shared Services:
 - i. The Town continues to seek out partners for a regional dispatch operation.
 - ii. The Town is partnering with the City of Northampton and the Town of Pelham to offer a new, greener way to purchase electricity that is based locally.
 - h. Regional Assessment Method: Participated in multiple meetings of the four communities and successfully obtained a result that was positive for the Town (relative to the other options under consideration).
- D. Core Service Needs:
- a. Fire/EMS staff: The loss of revenue due to the losing the Town of Hadley contract plus the early move by the colleges and university to go to remote learning has significantly reduced demand, for EMS services. The Town hired five additional temporary firefighters for two months to support COVID-19 response.
- E. Departmental reviews:
- a. Conducting a wage and classification study and analysis of part-time positions in the Town to bring rationality to the classifications and wage scale.
 - b. Funds to conduct strategic review of departments had been included in the original capital plan but was delayed due to funding.
- F. Collective bargaining agreements: We continue to manage the agreements with our collective bargaining partners in a cooperative, financially prudent manner. Cost of Living Adjustments are set to be fair and consistent to employees and sustainable to the Town. All collective bargaining agreements are signed and in force.
- G. Budgets:
- a. I delivered a one-month budget for July, 2020 to recognize the disruption in planning caused by COVID-19.
 - b. I delivered the FY20 Annual Budget to the Town Council balanced, on time, and in compliance with the budget guidelines presented by Town Council.
 - c. The budget was balanced and delivered without a request for an override, reserves, or layoffs, even after accounting for the significant loss of revenue due to COVID-19.
 - d. The FY20 budget had a lot of surprises, first with COVID-19 and then with the college students leaving. Despite significant reduction in revenues, staff were able to offset with prudent planning and efficient spending.

II. Climate Action

- A. Educate staff:
- a. Established the importance and priority of the Town Council's goals on climate action to ensure the goals were included in decision-making.
 - b. Departments have investigated alternatives to traditionally fueled vehicles, alternate sources of heating and cooling for Town buildings with the focus being on Munson Library and the North Amherst School.

- c. Invited Department Heads to engage in the Energy and Climate Action Committee's sector specific task groups in the development of the town's Climate Action, Adaptation and Resiliency Plan.
- B. Assess options:
 - a. Hired a Building Facilities Manager tasked with conducting energy and efficiency assessments of all municipal buildings to identify carbon reduction options.
 - b. Investigated the purchase of vehicles (ambulance, police cruisers, etc.) that are hybrid or utilize batteries instead of fossil fuels in their operations.
 - c. Planning for retrofitting of lighting at Town Hall, Police Department, and Munson Library
 - d. Investigating alternative heating and cooling systems for the Munson Building and North Amherst Schools
 - e. Assessment of Police Department to accommodate solar on the roof
- C. Track energy savings: No progress
- D. Climate Action plans.
 - a. Amherst College: <https://www.amherst.edu/amherst-story/today/green-amherst/climate-action-plan>
 - b. Hampshire College: <https://www.hampshire.edu/sustainable/climate-action-plan>
 - c. University of Massachusetts: <https://www.umass.edu/sustainability/about/planning-taskforces-and-initiatives>
- E. Implement Projects
 - a. Inter-municipal Community Choice Aggregation with Northampton and Pelham
 - b. MVP Action Grant (\$100,000)
 - c. Green Communities Competitive Grant (pending)
 - d. In addition to the three Valley BikeShare locations in Town, added stations on West Street and Southeast Street near intersection with College Street
 - e. Contracted to install three additional EV charging stations at no cost to the Town at Pray Street Lot, Boltwood Garage (upper and lower levels), and Ann Whalen parking lot
 - f. The Town continues its effort to green the environment by working toward planting 2000 trees over three years.

III. Long-term Planning

- A. Master Plan and Zoning Bylaws:
 - a. The Planning Department, Planning Board, and Building Commissioner are working with the Town Council Community Resources Committee to revise the Zoning Bylaw.
 - b. An update of the Master Plan has begun, but may take a step back in terms of priorities in favor to revising the Zoning Bylaw.
 - c. There have been two zoning amendments reviewed in FY20
 - d. Temporary Zoning to assist downtown businesses to recover from COVID-19 was passed by the Town Council.
 - e. Voting Requirements for Site Plan Review will come before the Town Council on July 20th.
- B. 5-Year Capital Improvement Program:
 - a. Investment in Town Buildings
 - i. MSBA process moved forward with the appointment of the Elementary School Building Committee
 - ii. DPW and Fire Station locations were delayed due to the COVID-19 pandemic.

- iii. I have hired a new Facilities Maintenance Manager who started just as the COVID-19 pandemic was beginning. He will be working on the facilities profiles in the Building Assessment Report and reviewing energy reduction opportunities in all facilities.
 - b. Balanced Plan
 - i. The Capital Improvement Program was delayed until the Fall due to the COVID-19 pandemic. We will present a realistic five-year Capital Improvement Program at that time.
 - ii. Staff secured a \$40,000 grant to complete an ADA Transition Plan for town buildings and properties. Work is underway; it will be completed by the end of the calendar year. This plan will provide useful information about changes that need to be made to town buildings and properties to bring them into conformance with ADA requirements.
 - c. Public Infrastructure:
 - i. Staff secured a \$44,000 grant to improve crosswalks and a sidewalk downtown which have barriers to people with disabilities. Construction work will proceed in the fall of 2020 or spring of 2021.
 - ii. Groff Park improvements created a new playground and spray park that has created an incredible new amenity for South Amherst.
 - iii. The Dog Park design has been permitted and finalized and all funding has been secured including a major grant and ongoing support from the Stanton Foundation.
 - iv. Plans for renovations to the North Amherst Library have moved to the next phase and the Town is prepared to move to design, permitting and a public process, pending obtaining funds from the anonymous donor.
 - v. A new high-speed, fiber-optic internet to municipal buildings including police, fire, library, schools, and DPW has been designed, bid, and will be constructed in FY21.
 - vi. Kendrick Park - We have \$660,000 in CPAC and PARC grant money to design and construct a playground at Kendrick Park. The design is finished and the project is about to be put out to bid, for construction to begin in the fall of 2020.
- C. Hickory Ridge: Hickory Ridge is under a purchase and sale agreement. Once the sale is completed, the Town will embark on a collaborative process with the community to assess this asset. I anticipate the Master Plan of property will take 6-9 months and will involve input from Town staff, departments, committees/boards/Council, and community.
- D. Safe Travel:
 - a. The Town obtained a Solomon Foundation Grant in the amount of \$10,000 grant to provide furnishings to improve downtown sidewalks and parking areas to provide spaces for outdoor dining during the COVID-19 crisis. Much of the work that is being done can be viewed as a pilot program for widening sidewalks and providing more outdoor pedestrian and sitting spaces for subsequent summer outdoor dining and entertainment.
 - b. The Town is seeking a MassDOT Grant in the amount of \$270,000 to provide traffic calming, site furnishings and plantings to improve the downtown streetscape to promote outdoor dining and entertainment for this summer. The furnishings acquired can be reused next year and in subsequent summers.
 - c. The Town continued its commitment to roads and sidewalks by investing significant funds through the Town's capital improvement program and Chapter 90 state funding.

- d. The new parking and traffic patterns on State Street has created a safer, more rational traffic and parking area near Puffers Pond which has proven especially useful as we manage traffic during the COVID-19 pandemic.
- E. Affordable Housing:
 - a. Amherst's State Subsidized Housing Inventory (SHI) is consistently above the State's 10% threshold. However, the Town continues to encourage a variety of affordable housing types to meet community need and also be included on the SHI. The SHI has recently increased to 12.59 % because of the inclusion of North Square (130 total units and 26 affordable units) and 2 affordable homeownership units on North Pleasant Street that were developed by Habitat for Humanity.
 - b. The SHI serves as an inventory of State-recognized affordable housing and captures many of the affordable units in Town. In addition the SHI, there are 'local' affordable units for low and moderate income households that have a deed rider or resale provision. For instance, units that were developed with different zoning regulations or first time homebuyer units.
 - c. Seasonal Shelter:
 - i. The seasonal shelter had a successful shelter season with few issues.
 - ii. The shelter staff successfully navigated the alarming COVID-19 pandemic and, after comprehensive testing, we found that no shelter guests, staff, or volunteers were positive for COVID-19.
 - iii. The Town was successful in obtaining temporary isolation and quarantine shelters at Hampshire College for any guests who would have tested positive. Extensive staff work was required to obtain the location, negotiate an agreement, obtain staffing, security, bedding, cleaning, food, and all the amenities that go along with opening a staffed shelter. This was all completed in a matter of weeks.
 - d. The Principal Assessor is exploring the differentiated residential tax rate structure.
 - e. A review of policies for rental housing has been short-circuited due to the impact of the COVID-19 pandemic.
 - f. Housing affordability:
 - i. The Affordable Housing Trust has focused its efforts on exploring affordable housing development at the East Street School site.
 - ii. Extensive staff time was devoted to the public process for CPA funds for the studio apartments at 132 Northampton Road. The Town Council ultimately approved the appropriation of \$500,000 for this project. Now the project is moving through the permitting phase.
 - iii. I have provided special legal support for the Zoning Board of Appeals as it moves through permitting.

IV. Personnel Management

- A. Retain and recruit highly qualified, diverse staff.
 - a. Recruiting: Change in an organization of this size is normal. Prior to advertising, vacancies are examined to determine need and responsibilities of the position.
 - b. Town Clerk: I hired a very qualified Town Clerk who brings extensive election experience to the Town at a time when that experience is most needed.
 - c. Director of Senior Services: I hired a creative and energizing Director of Senior Services who has transformed the nature of senior services in the Town.

- d. Principal Assessor: I hired a highly qualified Principal Assessor who is fully certified and brings a broad range of commercial and residential experience to the position.
 - e. Finance Director: I hired the single, absolute best and most qualified person to fill this vital function.
 - f. We continue to work to diversify our workforce. This is an ongoing challenge. We have instituted a new Career Portal that makes applying for jobs with the Town easier, more accessible, and mobile-friendly. The Town continues to accept paper applications, a key feature for many people who do not have access to computers. I am working with the School Department to learn new ways of reviewing and interviewing applicants to remove bias brought to the process by most staff.
 - g. Retaining high performing members of the organization requires the supervisor to provide guidance, mentoring, and ample professional development opportunities. I continue to work to cement these values in our supervisors. I have encouraged department heads to review the professional development opportunities available to their staff.
- B. Customer Service
- a. We are examining all aspects of our permit processes to make obtaining permits from the Town more understandable, consistent, predictable and to process permits in a timely manner.
 - b. We continue to work to improve customer service in all outward-facing departments. This includes friendlier face-to-face interactions, improving the information and accessibility of our website, and expanding our language capabilities. 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 courteously, expeditiously, thoroughly, and professionally.
 - c. Good customer service and service delivery is a theme that I review regularly with staff during staff meetings. I also try to model excellent customer service in my interactions with the public.
 - d. All requests for public records are processed through the Town Clerk's office which records the request, responds to the requester, and monitors the deadline for a response.
- C. Professional Development:
- a. We have offered 16 training sessions for Town staff on topics such as: Customer Service, Effectively Managing Challenging Situations, Difficult People, Management 101, Performance Evaluations, Reasonable Suspicion Training, Management Education, and Communicating with Tact.
 - b. We leverage existing resources, including the Town's EAP which provides trainings for free through our health insurance plan with MIIA>
 - c. I serve as the International City/County Management Association's UMass Chapter Professional Advisor, encouraging careers in local government to students at the University.
 - d. I was elected to the Massachusetts Municipal Management Association Executive Committee entitling me to attend Massachusetts Municipal Association Board of Director meetings and meetings of the Local Government Advisory Committee.
- D. Communication:
- a. I continue 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 about twenty-five of these Meet-ups so far and met with about 120 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.

- b. I hold quarterly meetings with all department heads.
 - c. I hold monthly meetings with the leadership team.
 - d. I meet regularly with the Police Chief, Fire Chief, Superintendent of Schools, Library Director, Town Clerk, Superintendent of Public Works, Assistant Town Manager, Director of Senior Services, LSSE Director, Human Resources Director, Communications Manager, and Assistant to the Town Manager.
 - e. We hold monthly meetings to discuss economic development issues in the Town that brings together planning, building, assessing, and economic development staff.
 - f. I participate in biweekly economic development meetings of business, higher education, and non-profit sector organized by the State Representative.
 - g. I continue to serve on the Business Improvement District Board of Directors and attend monthly meetings.
 - h. We now hold CoRe Team meetings multiple times a week.
- E. Finance Director: The position has been filled.

V. Community Engagement

A. Communication

- a. I hold weekly press briefings with members of the media and provide them with information on upcoming issues.
- b. My Twitter feed for the Amherst Town Manager has 744 regular followers, a 40% increase from a year ago.
- c. We continue to expand our aggressive social media policy utilizing the skills and knowledge of our Communications Manager.
- d. I continue the popular 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. These have migrated to online monthly coffees since April
- e. I have issued press releases on important topics to promote coverage of an issue and to articulate clearly the Town’s position.
- f. Working with the Communications Manager, we have instituted an online “Community Chat” that started twice-a-week and is now weekly for the foreseeable future.

B. Higher Education:

- a. Continued changes at Hampshire College required engagement with the College.
- b. The University commissioned the Donohue Institute to conduct a study of the cost of providing elementary and secondary education to residents in University-owned housing, which was completed and presented to the Town and School District. This study informed a decision by the University to offer funding for the Amherst public schools. Negotiations on the Strategic Partnership Agreement have been sidelined during the pandemic and the economic uncertainty both parties are in.
- c. We continue to work to mitigate the impacts of significant student populations on neighborhoods. The pandemic has caused.
- d. No progress on new agreements with Amherst or Hampshire Colleges

C. Town Committees:

- a. Ensure that staff responds to committees, boards, and commissions that offer recommendations by reporting on follow-up with actions or reasons why a recommendation may not be feasible.
- b. The Town Council has worked with Planning Board staff and the Planning Board to develop processes to develop, review, and approve Zoning Bylaws.
- c. Diversifying membership on committees continues to be a challenge. I have strived to appoint a wider range of community members but much work remains. This will be a continuing effort.
- d. I have not requested annual reports from Town Manager appointed committees.

VI. Economic Development

- A. The departure of the Economic Development Director did not allow progress on this goal.
- B. No progress on exploring the need for an Economic Development Committee.
- C. The COVID-19 pandemic has presented new challenges to moving forward on economic development. However, it points to the need and importance of developing a shared vision moving forward. We are fortunate to have collaborative, dynamic partners at the Amherst Business Improvement District and Chamber of Commerce.
- D. No progress in exploring with UMass and other stakeholders potential barriers and opportunities for encouraging spin-offs and start-ups in Amherst.
- E. Delay the development of a plan to implement the three actions proposed by the Downtown Parking Work Group as modified by CRC, as adopted by the Town Council.
- F. One silver lining of the COVID-19 pandemic is the rapid reformation of the downtown business area with outdoor dining expanded exponentially, new lighting, and new street furniture all being introduced. This movement provides a model for achievable change in the future.

VII. Relationship to the Town Council

- A. Timely Meeting Materials:
 - a. I continue to work with the President and Clerk of the Council to systematize processes and make materials available to the Town Council in a timely manner:
 - b. We continue to work to be consistent in making materials available to the Town Council and the public in advance of Council meetings. Our systems are getting better. The Clerk of the Council is excellent at collecting upcoming agenda items and tracking material needed for each meeting. COVID-19 and remote working arrangements have disrupted this progress, but we continue to work toward this goal and communicate to staff and others that materials be sent by Wednesday before a Council meeting.
 - c. The Clerk of the Council, Assistant Town Manager and I meet on a regular schedule prior to each Council meeting with Council President, Vice President, and sometimes a member of the Town Council to set agendas for Council meetings and plan for items on future agendas.
 - d. The Clerk of the Council and I meet with the Chair of the Town Services and Operations Committee to assist in setting that committee's agendas.
 - e. I continue to provide memos as needed regarding matters on the agenda that include as much relevant information as possible.
 - f. I continue to provide written Town Manager Reports prior to every Town Council meeting which are supplemented by verbal highlights and additions at the meetings.
 - g. I make myself available to address any concerns of any Town Council member at every Town Council meeting.

B. Regular Communication:

- a. I continue to provide regular communication with all members of the Town Council via email to inform Councilors of emergencies, special events, and other updates such as the status of major public safety events, projects, activities, fires, sudden deaths, and other events.
- b. I continue to provide information to the Council on emerging events and matters before they appear in the media.

C. Responsiveness to Town Councilor Requests:

- a. I continue to respond to communications and inquiries from the Council in a timely manner.
- b. Ample discussion is afforded members of the Town Council, both in one-on-one communication with me and in public settings, to discuss issues of concern. Even if an item is firmly within the responsibility of the Town Manager, I have engaged members of the Town Council and others because decisions often have significant public policy implications.
- c. I make sure I am available to any member of the Town Council at any time, any day of the week.
- d. I met with individual Town Councilors to listen to any budget concerns they had prior to the development of the FY21 budget.
- e. Working through the Clerk of the Council, we have arranged to ensure that minutes of all meetings of the Town Council and Town Council committees are prepared by staff.
- f. Senior staff have been assigned to each Town Council committee.

VIII. Conclusion

I have attached the Town Manager Reports that were submitted during the past year to the Town Council. These reports should be considered a part of this self-evaluation. They provide a broader assessment of the work completed this year.

Town Manager's Performance Goals FY2020 as of 1/22/2020 From Amherst Town Council

The Town Council voted unanimously to approve the Town Manager's performance goals for FY2020 at our meeting on January 27, 2020. The Town Manager's FY2020 Goals, expanding on duties of the Town Manager as specified in the Amherst Home Rule Charter, Section 3.2 and other relevant sections. As required by the Amherst Home Rule Charter, Section 3.9: requires that "The Town Council ... conduct an annual review for the purpose of assessing the Town Manager's performance. The Town Council revised and compressed previous years' goals to reflect current community priorities; and rearranged and added to the categories.

I. Strong Fiscal Management: Ensure the Town budget allocates resources responsibly and responsively.

Maintain and strengthen strategies for long-term fiscal health.

1. Create multi-year operating and capital budgets (See III.C) projections.
2. Work with the State legislature to adopt policies to maximize state support for Amherst.
3. Identify additional sources of revenue.
 - a. Increase revenue from higher education institutions.
 - b. Facilitate development with an emphasis on economic and environmental sustainability.
 - c. Report the quarterly and annual revenues from medical and adult use Marijuana and Airbnb/short term rentals (if able to be differentiate) and the recommended application of those funds to costs and to short term or long term goals.
 - d. Seek grants to support Town goals and report grant conditions.
 - e. Maximize effective use of CDBG, CPA, and other funds to meet Town needs and offset allowed Town legal and administrative costs.
 - f. Evaluate service fees to assure they are in line with costs
4. Explore opportunities for regional shared services (e.g., personnel, energy, etc.) and equipment (e.g., ladder truck, etc.).
5. Participate in the Regional Assessment Method process in the Amherst-Pelham Regional School District to find a resolution that works for Amherst, other three towns accept, and supports grade 7-12 education.

Determine financially sustainable strategies to meet core service needs in all departments:

1. Assess need, develop a plan, and take steps to address Fire/EMS staffing, as needed.
2. Conduct strategic departmental review(s), focused on staffing and systems.
3. Negotiate contracts, including collective bargaining contracts that take into account the overall fiscal health of the town.

C. Prepare and Administer Annual budget.

1. Prepare proposed annual budget for FY 21 in conformance with the Town Council Budget Policy Guidelines.
2. Effectively administer the adopted FY20 budget.

II. Climate Action: Using a lens of Climate Action, prioritize and begin to implement regulatory, fiscal, and other actions to meet energy, sustainability, and resilience goals.

A. Educate staff on goals and opportunities within each department.

- B. Assess options for energy efficient buildings, vehicles, and other purchases in operating and capital budgets.
- C. Explore internal systems to track energy savings based upon investments (e.g., investments in energy efficient buildings, vehicles, etc.).
- D. Gather Climate Action plans from three higher education institutions to inform future areas for possible cooperation.
- E. Start to implement projects or initiatives that the Town Council identifies as actionable in the short term, including building regional alliances and securing grants.

III. Long-term Planning: Develop Plans Consistent with Town’s Long-Term Vision.

- A. Facilitate the review and revision of the Master Plan and Zoning bylaws, as needed.
- B. Develop a 5-Year Capital Improvement Program
 - 1. Develop plans for major Capital investments in Town Buildings.
 - a. Develop multi-year plan to Construct, Renovate and/or Repair 4 Major Buildings.
 - b. Update the 07-16-16 Facilities Profiles (known as “Building Assessment Report”).
 - c. Include requirements of Zero Energy Building Bylaw where applicable
 - 2. Develop a Plan that balances competing needs for Investments – Roads, Sidewalks, Building Maintenance, Technology, Equipment, Vehicles, Municipal Facilities (e.g., parks, athletic fields, etc.) etc.
 - 3. Begin to develop a plan to improve Downtown public infrastructure, parks, and public spaces.
- C. Develop a plan and report on 6- month progress for the use of Hickory Ridge land.
- D. Identify short and longer-term actions to make it easier and safer to walk, bike, or travel around in Amherst, especially sustainable modes of transportation.
- E. Assess efforts and potential actions to provide access to safe, affordable housing for low- and moderate-income residents.
 - 2. Report on Amherst’s status on the State’s Subsidized Housing Inventory.
 - 3. Develop a plan to conduct a town-wide inventory of low- and moderate-income housing.
 - 4. Report on the operation of the seasonal shelter.
 - 5. Study impact of differentiated residential tax rates.
 - 6. Assess rental housing permit pricing and inspection policy to reduce repeat violations. Potentially revise permit pricing for repeat violations.
 - 7. Continue to take steps to encourage and increase housing affordability

IV. Personnel Management: Manage staff, emphasizing the responsiveness and effectiveness in delivering services to our community.

- A. Retain and recruit highly qualified, diverse staff.
- B. Improve customer services to residents and businesses.
 - 1. Develop and implement a clear and manageable process to respond to public inquiries or requests and communicate the disposition and status.
 - 2. Promote efforts to foster respect toward and among all employees, residents, and visitors in Amherst.

3. Continue to streamline permitting and inspection processes.
4. Create transparency regarding decisions and plans about roads and sidewalks.

C. Provide opportunities for professional development.

D. Encourage communication and create cross-departmental teams to improve cooperation and coordination of services.

E. Report a plan to address the role of permanent Finance Director.

V. Expand Community Engagement and Strengthen Intergovernmental Relations, Volunteer Committees, Boards, and Commissions.

A. Continue to improve and report on communication and outreach efforts to engage residents regarding Town activities (e.g., town activities, CPOs, Census, etc.).

B. Continue to Develop Relationships with Higher Education Institutions.

1. Maintain an awareness of developments at UMass, Amherst, and Hampshire College and report on activities that affect the Town.
2. Negotiate the next Strategic Partnership Agreement with UMass and continue to assess UMass's impact on the Town's resources.
3. Develop and implement strategies to mitigate the impacts of a significant student population on neighborhoods, on demand for public safety resources, on parking and traffic, and other municipal services.
4. Secure Amherst College and Hampshire College agreement that they will negotiate strategic partnership agreements and assess their impact on the Town's resources.

C. Maximize Contributions of Town Committees.

1. Ensure that staff responds to committees, boards, and commissions that offer recommendations by reporting on follow-up with actions or reasons why a recommendation may not be feasible.
2. Identify areas for potential cross-committee collaboration, including Town Council Committees.
3. Report on improved diversity in committee membership.
4. Provide annual report from all Town Manager appointed committees.

VI. Economic Development: Identify opportunities to improve the cultural and economic vitality of Amherst

A. Explore strategies that build on the Pioneer Valley Planning Commission's Economic Development 2018 report, including opportunities to collaborate with higher education institutions.

B. Explore the need for an Economic Development Committee.

C. Begin to develop a vision of Amherst assets and unique attributes that could guide branding and a marketing plans.

- D. Explore with UMass and other stakeholders potential barriers and opportunities for encouraging spin-offs and start-ups in Amherst.
- E. Propose a plan to implement the three actions proposed by the Downtown Parking Work Group as modified by CRC, as adopted by the Town Council: dedicated (designated?) staff person regarding all transportation policy, (including sustainability?); improved and consistent signage, including update of the parking webpage to be more user friendly; and earmark a percentage of the Transportation Enterprise Fund revenues for downtown parking.
- F. Work with BID and others on efforts to enliven Downtown and village centers.

VII. Relationship to the Town Council

- A. Ensure that the Council and/or Council Committees receive relevant information in advance of their meetings to inform their decisions.
- B. Provide regular communications to the Council about matters relevant to its responsibilities, including significant issues before they appear in the media.
- C. Respond to communications from Councilors in a timely manner.

Commentary (/Commentary/)

Guest columnists J. Lynn Griesemer and Paul Bockelman: Local government matters now, more than ever

By J. Lynn Griesemer and Paul Bockelman

Thursday, March 26, 2020

The world has changed. Everything we say and do is occurring in a context that changes by the hour and takes local government into territory we've never seen before. We want you to know how we are approaching all this and what to look for as events unfold.

First, Amherst has some incredible things going for us that should give us confidence:

- The town staff is highly professional, experienced and qualified to help us deal with whatever comes along. Our frontline staff — from first responders to support staff in every area — bring the highest level of skill and dedication to their work. The town has invested in quality, professional staff and it shows.

- Second, like every community, Amherst has its financial challenges. However, the town has a strong legacy of prudent financial planning and strong fiscal management. We enter this period of uncertainty with strong financial reserves, a solid bond rating and deep experience in getting value for our dollar. All of that will make a tremendous difference going forward.

- Finally, quite apart from the formal mechanisms of government and a fully engaged and talented Town Council, we have a community that shares values of compassion, generosity, and concern for our common good. We are inescapably all in this together, and we can rely on each other to meet each challenge with intelligence, good will and respect.

So we approach a bad situation with many reasons to feel (relatively) good. But it remains a bad situation nonetheless, and in the coming weeks we will need to rethink many of our existing assumptions and plans. Here are some of the main issues you can expect to see us working on:

The town budget. We must make many decisions over the next few months about spending, taxes and use of reserves, even as uncertainty is our constant companion. No one can predict what the national and state economies will look like by July 1. Critical to our planning are federal and state actions.

Because so many residents and local businesses are struggling financially, we assume that local tax revenues may decline. How we deal with all that remains to be seen, but this is clearly not business as usual. We will need to approach budgeting with a clean slate and clear priorities.

The Town Council and town manager and his staff, along with their counterparts at the schools and library, must exercise a high degree of flexibility and innovation as we remake our budget. These difficult decisions come with the job, and we feel confident that we will work together to reach the best solution for our community.

The town staff. We rely on our town staff more than ever in these most difficult of situations. In the past few weeks, we've made major adjustments to how we deliver town services, drastic changes like closing town offices and buildings. But our commitment to excellence and responsiveness is unchanged, and we ask for your patience and forbearance as we take the steps necessary to provide services while keeping our service providers as safe as we can.

The future. Much of the council's efforts has focused on the future: Preparing for discussion of the master plan and zoning bylaws, looking for opportunities to broaden the tax base, dealing with decades of backlog in investment in town, school and library facilities.

The present challenges may seem overwhelming, but one hallmark of a strong community is that it never takes its eye off the future. So the Town Council will continue to look forward, but we will clearly need to revisit some of our assumptions. Long-term commitments will be considered in the context of current needs and the prospect of uncertainty. We ask for your understanding as we find the best path forward in unfamiliar terrain.

Local government. In the coming weeks and months, local government will play a vital role in restoring normalcy to our daily lives. Libraries will reopen. Children will return to class. Our businesses will open their doors.

In crisis is opportunity and we intend to reject complacency and seize this moment.

So, many questions and regrettably few answers at this time. But we emphasize that Amherst is as well prepared to tackle these challenges as any community in the state. We are in uncharted waters. But we have a good ship and crew. Thank you for your continued support.

Lynn Griesemer is Amherst Town Council president and Paul Bockelman is Amherst town manager.



Joint Statement by Town of Amherst

Town Manager Chief of Police Superintendent of Schools
Chair of Human Rights Commission
Amherst Police Supervisors Union Amherst Police Patrol Officers Union

May 31, 2020

We are haunted by the searing vision of a Minneapolis police officer kneeling on a subdued man's neck, as other officers watched the man die. We witnessed Mr. George Floyd's pleas for help be ignored by the very people who are trained to help and assist. We are haunted, too, by the knowledge that this was not an isolated incident in our country. The number of names and similar experiences is unconscionably long, and an undeniable part of the history of this nation.

First, we extend our collective condolences to Mr. Floyd's family and friends and to all who grieve his death. We offer our thoughts to the countless members of our community who have been personally impacted as well.

Second, we condemn the actions of the police officers involved. The Amherst Town Manager, Police Chief, and School Superintendent have joined with the chair of the Human Rights Commission and the leadership of the Town's two police unions – the Amherst Police Patrol Officers Union and Amherst Police Supervisors Union - to denounce in the strongest possible terms the actions and inactions by these police officers that resulted in Mr. Floyd's death.

Third, we feel compelled to say affirmatively and with real compassion that violence like this is yet another blow to black and brown people—particularly African-American men—who too often are told by our culture that they do not matter. It confirms the lived experience of black men – nationwide and, yes, in our own community. This is a wrong that needs to be righted, and white Americans need to join those who have been carrying this burden, and do the heaviest lifting to right it.

As public officials, this tragedy makes us reflect on our own practices, behavior, and attitudes. We question whether we are doing enough, are we vigilant enough, have we fostered a true culture of respect and honesty? We strive to remain ever thoughtful in our work – as public officials and police officers – to ensure that all members of our community feel part of Amherst and feel protected, listened to, and served by their public servants. We try to do this through training, listening, and learning, and by maintaining an attitude of humility and service.

As public officials, it is our duty to use our legal and moral authority to protect all members of our community no matter their race or color or where they fall on the power spectrum. It is our duty to foster a community free of fear, intimidation and violence – a community in which people are not targeted or hurt unnecessarily by law enforcement – and provide equal protection under the law.

We know we can do better as a country to confront the systemic racism that has brought us to this place of fear and distrust. We can advocate for the criminal justice system to take a firm stand against officers who use excessive force. Those of us who are white can demonstrate that protecting and promoting the rights of black and brown people in our community is integral to securing the well-being of our entire community.

We know many of the young people in our community have seen this video and other similar news, and are trying to process these traumatizing events with their families. However, the current public health situation makes it that much more difficult as they are unable to connect with friends, extended family, or school staff in-person. As such, Amherst Regional Public School counselors and Family Center staff will be available to support students in the coming days and weeks.

In the aftermath of this tragedy, we reaffirm our commitment to the larger goals of social justice and will focus on how we can deliver on the promise of good and fair public safety protection. Police and Town leadership will be meeting with community groups during the week. We welcome your thoughts and suggestions and are prepared to listen. We will work with our community leaders to determine the best ways for us to engage on this important mission as we continue to move forward.

Paul Bockelman
Town Manager

Scott Livingstone
Chief of Police

Dr. Michael Morris
Superintendent of Schools

Matthew Charity
Chair, Human Rights Commission

Amherst Police Patrol Officers Union

Amherst Police Supervisors Union