



To: Town Council
Fr: Paul Bockelman
Town Manager
Dt: October 29, 2021
Re: FY21 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.

This memorandum documents the progress made on the goals the Town Council set for the Town Manager.

I note that this report does not scratch the surface of the many accomplishments of our staff or the professional level of service they provide every day. It does not reflect the immense amount of work that Town staff do every hour of every day. I am incredibly proud of the services provided by the Town staff. We are a 24/7 365 day a year operation. Police, Fire/EMS, Dispatch are on duty at all times. We provide services around the clock with Public Works ensuring our water is clean and available, our wastewater is treated and removed, our roads are clear and navigable, and our parks are clean and available. I.T., Inspections, and Public Works staff are on-call at all times to address any needs that may arise be it a deer struck by a car or the Town's website or communications systems experiencing problems. Town staff work every day for the community providing needed services. This weekend, for example, all staff of the Town Clerk's office will be in Town Hall preparing for the election on Tuesday and extra Police and Fire/EMS officers will be on duty to be available for any public safety needs during Halloween.

General Background and Comments

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 adopted goals for the Town Manager for FY21 (attached) on September 14, 2020 and revised the goals on January 25, 2021 and again on April 5, 2021. 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.

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, your assessment of my performance will rightfully be focused on

how the Town has continued to be managed in the face of this pandemic. I have dedicated most of my focus this year to public health/safety of the community and to ensuring our finances are strong.

I love working for the Town. It is an honor to serve alongside our dedicated staff, who have continued to deliver 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. While this 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.

Policy Goals

I. Climate Action

***Objective:** To prioritize and implement regulatory, fiscal, and other actions to meet the Climate Action Goals adopted by the Council on November 18, 2019 by (1) implementing Community Choice Aggregation and the creation of a Climate Action and Resilience Plan, (2) ensuring that budgeting, purchasing, construction, repair, hiring, and other decisions involve considerations of energy, sustainability, and resilience in order to determine impacts of energy use and move Amherst towards meeting the Climate Action Goals, and (3) educating Town multiple-member bodies and staff on the Climate Action Goals.*

→ We continue to grow a work culture that recognizes how our decisions impact the environment and the steps we, as a Town, can take to move to a carbon neutral world. We do this through the budget process, maintenance decisions, and seeking grants to advance our goal of carbon neutrality.

Community Choice Aggregation and CAARP:

- Completed the Climate Action, Adaptation and Resiliency Plan (CAARP) and presented it to the Town Council for adoption;
 - Hired a special attorney (with the City of Northampton and Town of Pelham) to conduct the legal review of Joint Powers Authority to establish an inter-municipal Community Choice Aggregation;
 - Researched and presented the Property Assessed Clean Energy (PACE) program and presented to the Town Council for adoption;
 - Surmounted several regulatory and permitting hurdles to move the solar on the landfill project forward so that it is now entering the construction phase;
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Budgeting, Purchasing, Construction, Repair, Hiring:

- Completed significant energy projects funded by Green Communities Competitive Grants and Eversource utility incentives) including:
 - Munson Library and Building LED lighting, \$16,663;
 - Police Station LED lighting, \$48,087;
 - Town Hall LED lighting, \$35,748;
 - Idle reduction technology for vehicles, \$25,500;
- Established \$100,000 fund in FY22 capital plan to support sustainability initiatives in capital projects;
- Allocated an additional \$10,000 for sustainability staffing;
- Budgeted and purchased hybrid police vehicles;
- Budgeted and purchased an ambulance with anti-idling technology (paid for by Green Communities Competitive Grant);
- Identified and permitted two additional bikeshare locations at South East Street and West Street with construction underway;
- Installed 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;
- Engaged in ongoing conversations with Eversource about energy efficiency incentives for various projects – including the new elementary school and Jones Library;

Educating Town multiple-member bodies and staff:

- Introduced climate impact information into capital planning process and presentations;
- Established the importance and priority of the Town Council’s goals on climate action to ensure the goals were included in decision-making;
- Departments investigate alternatives to traditionally fueled vehicles and sought alternate sources of heating and cooling for Town buildings with the focus being on Munson Library and the North Amherst Library;
- Included the following statement on every job post:
 - *The Town of Amherst seeks a workforce that reflects the diversity of its community, and strives toward racial equity and environmental sustainability. All are encouraged to apply. AA/EEO.*

II. Community Health and Safety

Objective: *To ensure the health and safety of the residents of Amherst by (1) continuing to take all steps necessary to ensure the health of the community in the presence of the COVID-19 pandemic and (2) in accordance with the Council’s vote on July 27, 2020, and in consultation with the Council and residents of Amherst, fully exploring alternative options of providing services to respond to issues of homelessness, mental health, and other non-criminal calls to emergency dispatch and present the results to the Council no later than May 15, 2021.*

➔ Town staff mobilized quickly, worked together, and showed exemplary leadership amidst a worldwide pandemic. Community members felt safe and protected. The Town can boast of remarkable results for our community, especially in comparison to other college towns that had high rates of community spread. The Town was able to stand-up a robust vaccination campaign with clinics offering needed vaccines during the height of the pandemic. Rates of vaccination is now calculated to be 79%, which is higher than the State average. Significant staff resources were

dedicated to developing alternative responder options in alignment with the policy approaches recommended by the Community Safety Working Group.

Ensure Health of Community During COVID-19:

- Testing:
 - Ran four mobile testing clinics in November/December 2020;
 - Engaged in a partnership with the University of Massachusetts for community testing provided at the Bangs Community Center;
 - Supported testing for individuals experiencing homelessness.
- Contact Tracing:
 - Hire three part-time Contact Tracers providing case management and case investigation.
- Vaccination:
 - Built a large-volume State-approved COVID-19 Vaccination Program;
 - Conducted nearly 150 vaccine clinics at the Bangs Community Center and Amherst Junior-Senior High School;
 - Vaccinated the Town's first responders including Police, Fire, Dispatch, Public Works, and Health Department employees as soon as the vaccine became available;
 - Delivered nearly 13,000 clinic-based vaccines utilizing Town paramedics and volunteer medical professionals;
 - Recruited and trained over 200 volunteers to operate the vaccine clinics alongside experienced paramedics and doctors;
 - Provided 500 school-based vaccines in 5 towns and 7 schools;
 - Visited and delivered 308 homebound patients with 495 vaccines administered in 14 towns (first homebound program in Massachusetts);
 - Held numerous pop-up clinics at various apartment complexes, community events such as Juneteenth, and at the Mobile Markets;
 - Used grant funding to purchase a storage freezer capable of maintaining temperatures for 5 days without power;
 - Activated Medicare/MassHealth provider enrollment procedures and enrolled in Commonwealth Medicine for processing billing.
- Other Services:
 - Organized community support of residents in isolation with reduced resources by notifying first responders, working with the Amherst Survival Center, and Family Outreach of Amherst;
 - Continued the operation of the COVID Concern line, helping people get rental/mortgage support, food delivery during isolation, and transportation to medical appointments;
 - Provided approximately \$4 million in services in response to COVID, utilizing local funds, FEMA, and CARES Act;
 - Added four additional Fire/EMS staff members during the duration of the pandemic and those four positions will continue for the next several years as we move through the recovery phase;

- Continued to maintain an ample supply of Personal Protective Equipment for first responders and cleaning supplies for the facilities department as supply chain issues have remained;
- Established a highly organized multi-generational Covid Ambassadors program to help the public create healthy social norms around social distancing and mask wearing in public spaces;
- Held regular all-staff meetings with the Health Director to provide updates on the status of the Covid-19 virus, reviewed Town policies that changed in response to the status of the pandemic, and educated and offered testing and vaccination opportunities to Town staff;
- Established a “Back to Work” committee of Town employees to work through the protocols and expectations of returning to in-person work safely for those who had been working remotely.

Explore Alternative Options for Providing Services:

- Established and appointed the BIPOC-majority Community Safety Working Group (CSWG) with staff support and direct Town Manager participation in a large number of its meetings;
- Provided funding for multiple consultant contracts to support development of the community responder program and other recommendations of the CSWG;
- Included \$170,000 in funding (plus pensions and benefits estimated at \$40-50,000) for a community responder (CRESS) program in the FY22 Town budget;
- Sought and received a \$90,000 earmark for community responder program in the State budget courtesy of our State Representative;
- Provided Part A of the CSWG report to the Town Council on May 15, 2021;
- Established an Implementation Team to develop the CRESS program that includes the Director of Senior Services (since departed), co-chairs of the CSWG, Police Chief, Fire Chief, Ms. Moyston, and other staff and members as needed such as the Police Operations Captain and Dispatch Supervisor.
- While not selected to be one of the initial cohort group – the Town was one of the smaller communities to apply – we were invited to participate Harvard University Kennedy School of Government Performance Lab Alternative 911 Emergency Response Community of Practice;
- Provided Part B of the CSWG report to the Town Council on October 25, 2021;
- Allocated \$250,000 in ARPA funds for community responder program;
- Established the BIPOC-majority Community Safety and Social Justice Committee to serve as a successor group to the CSWG;
- Secured \$449,949 in funding from the Massachusetts Department of Public Health’s (DPH) Bureau of Community Health and Prevention under the Equitable Approaches to Public Safety (EAPS) grant program. Worked with Town staff to write a lengthy grant application that was selected as part of a highly competitive grant process, one of five communities in the State to be awarded this major grant to develop equitable approaches to public safety with the possibility of additional years of funding.

III. Economic Vitality

Objective: *To ensure the present and future economic health and well-being of the Town by (1) working closely with local institutions and business entities, including the BID and Chamber of Commerce, to provide support and assistance to the local business community in the face of the economic challenges encountered as a result of the COVID-19 pandemic, (2) facilitating the review and revision of the Zoning bylaws to promote diverse neighborhoods, affordable housing, and new growth in downtown and village centers, and (3) continuing to develop a plan to implement actions proposed by the Downtown Parking Working Group as modified by CRC and adopted by the Town Council.*

➔ Town staff worked closely with the Business Improvement District and the Chamber on numerous initiatives, bringing the Town’s “Destination: Amherst” initiatives to the agenda for decisions by the Town Council, securing funding for various initiatives, offering grant support for struggling businesses, and dedicating significant high-level staff and legal time to developing and reviewing zoning bylaws/

Provide support and assistance to the local business community...:

- Was awarded a \$1.5 million MassWorks grant for the Pomeroy Village Roundabout and, working with the residents, property owners, and business community, presented a proposal to the Town Council for its adoption <https://engageamherst.org/pomeroy> ;
- Was awarded a \$129,472 Shared Streets grant to fund outdoor dining equipment, streetscape improvements downtown, and new bus shelters;
- Was awarded a \$192,600 Shared Streets grant to construct a new ramp from the Boltwood Parking Lot to the Musante Health Center, Clark House, and Ann Whalen along with new outdoor furniture for the Boltwood Plaza to activate the area;
- Was awarded a \$184,728 Shared Streets grant for crosswalk improvements on North Pleasant Street and pedestrian safety improvements along Boltwood Walk;
- Proposed allocation of \$575,000 in ARPA funds for small business startup/emergency relief programs, downtown improvements, an accessible downtown bathroom, and to promote opportunities for art and cultural organizations;
- Modified billing for liquor licenses (prorated amounts) to encourage new applications during the course of the year;
- Initiated “Dinner Delights” meals program that supported businesses and offered needed meals to those most in need by providing seed money for the program along with staff support;
- Proposed Temporary Zoning to support outdoor dining to the Town Council for its adoption;
- Supported the work of the Amherst Business Improvement District (BID) by serving on its Board of Directors;
- Supported the work of the BID and the Amherst Area Chamber of Commerce by meeting regularly with both executive directors along with the Assistant Town Manager and Town Council President;
- Installed Writers Walk plaques at various locations to create a sense of place and an added cultural attraction;

- Moved forward on the Town’s “Destination: Amherst” <https://www.amherstma.gov/3521/Destination-Amherst> initiative including:
 - Construction and opening of the Kendrick Park playground with the support of a \$400,000 PARC grant and Community Preservation funds;
 - Supported the BID’s presentation of the Performing Arts Shell which is in the process of being reviewed by the Town Council;
 - Secured approval of the improvements to the North Common with capital funding approved by the Town Council <https://engageamherst.org/northcommon> ;
 - Explored a Parking Structure on the Town-owned North Pleasant Street (CVS) parking lot;
 - Completed construction of new crosswalks, walkways, and roadway improvements in the downtown area utilizing grants whenever possible;
- Initiated an intense community engagement process on Hickory Ridge in anticipation of closing on the purchase after approval from the Town Council providing funding for the purchase <https://engageamherst.org/hickory> .

Facilitate the review and revision of the Zoning bylaws...:

- Town staff worked with Town Councilors and the Planning Board on a priority list of Zoning amendments and provided background and analysis to the decision-making boards <https://www.amherstma.gov/3603/2021-Zoning-Amendments> including some, but not all, of the following:
 - Adding B-L District to footnote b;
 - Adding footnote a to maximum lot coverage and maximum building coverage;
 - Proposed a revised SDU bylaw, similar to the 2018 Town Meeting proposal;
 - Demolition Delay bylaw revisions;
 - Move apartments to SPR in more zoning districts;
 - Remove Footnote m;
 - Revise the Apartments definition;
 - Regulations in the R-G and R-VC;
 - Lowering barriers to development of duplexes and triplexes;
 - Frontage regulations for Residential zones;
 - Look at appropriateness of Use Table for V-C: What kinds of businesses are allowed or encouraged in V-C districts - food, entertainment, services - things that make community and meet basic needs, within walking distance;
 - Parking overlay district;
 - Extension of Article 14.

Develop a plan to implement actions proposed by the Downtown Parking Working Group...:

- Town staff are finalizing parking permit program recommendations and changes for the Council along with other parking related improvements with a presentation expected in December, 2021.

IV. Four Major Capital Investments

Objective: To provide the Council with a plan for the funding of the renovation/expansion or replacement of an elementary school in accordance with Fort River MSBA Grant application, the repair or renovation/expansion of the Jones Library, the replacement of the Central Fire Station, and the replacement of the Department of Public Works headquarters, consistent with the

October 21, 2019 Council vote that it is the sense of the Council that the Council is committed to a plan that will address all four buildings in some fashion.

➔Progress is being made on the major capital projects. First, a strong, fiscally sound financing plan has been developed, vetted, and adopted by the Town Council. Second, outside funding has been secured for the elementary school and library. Third, the elementary school is moving forward through the arduous, time-consuming Massachusetts School Building Authority (MSBA) process. Fourth, the legal challenges to the Jones Library project has delayed further development until the voters decide on Election Day. Fifth, locating the public works building has been particularly vexing after an RFP process produced no suitable responses. Work continues on identifying a site that can be presented to the Town Council.

- Overview:
 - Finance Director developed sophisticated financial tool to enable members of the public and produced an interactive website on EngageAmherst <https://engageamherst.org/financing-the-future> ;
 - Refined the capital investment plan to fund all four major capital building projects and updated assumptions;
 - Received support of the Town Council and Finance Committee for the plan;
 - Continued to educate the public about the financial feasibility of being able to move forward with all four projects in accordance with the plan;
 - Secured a new bond rating from Standard and Poors confirming the Town's superb AA+ rating during difficult economic times and a worldwide pandemic;
 - Worked with Eversource to identify funding opportunities for energy efficiency initiatives in each of the buildings, a process that is important to begin prior to the design of any buildings;
 - Increased reserves as we work to ensure the Town is in the strongest financial position to take on multiple major investments of four major capital expenditures, and help offset impact on taxpayers with reserves increasing from \$10,030,686 in FY16 to \$23,132,159 in FY22 which equates to a percentage of the budget of 13.9% in FY16 to 27% in FY22.
- School:
 - Established and appointed the Elementary School Building Committee <https://www.amherstma.gov/3539/Elementary-School-Building-Committee> ;
 - Serve as a member of the Elementary School Building Committee
 - Met major deadlines to continue through the Massachusetts School Building Authority process;
 - Hired an Owner's Project Manager;
 - Scheduled to meet with the MSBA on November 2nd to select a design team.
- Jones Library:
 - Successful Town Council vote to authorize borrowing for the Jones Library building project;
 - Managed multiple legal challenges to the petition to overturn or delay the Town Council vote;
 - Managed legal challenges to the quantum of vote for the passage of the measure on November 2nd ;

- Established the Jones Library Building Committee
<https://www.amherstma.gov/3634/Jones-Library-Building-Committee> ;
- Serve as a member of the Jones Library Building Committee.
- Public Works Headquarters:
 - Prepared and completed Request for Proposals for to site a Public Works Headquarters – subsequently rejected all proposals as not in the best interests of the Town;
 - Explored numerous locations for a suitable a site for the new facility;
 - Continue to evaluate sites to locate the facility.
- Fire Department Headquarters:
 - Progress dependent on successful identification of a location for the Public Works Headquarters.

V. Housing Affordability

***Objective:** To provide access to safe, affordable housing for low- and moderate-income residents by (1) implementing the Resolution Adopting an Interim Affordable Housing Policy vote by Town Council on April 4, 2020 that called for identifying and aggressively exploring opportunities to preserve and increase affordable housing at all income levels, (2) assisting the Council in developing a Comprehensive Housing Policy, (3) ensuring the operation of a seasonal shelter, and (4) exploring the possibility of creating a permanent seasonal or year round shelter in Amherst either through the repurposing of surplus Town buildings or land and/or through working in partnership with concerned community groups or individuals to realize this goal.*

Identify and explore opportunities to preserve and increase affordable housing at all income levels:

- Identified, evaluated, financed, gained approval, and purchased Belchertown Road site for development of affordable housing;
- Issued a Request for Proposals for development of both the Belchertown Road and the East Street School sites with the understanding that a joint RFP would produce more competitive quotes for the projects;
- Funded a rental assistance program through the CARES Act;
- Sought Community Preservation Act funds to create an Affordable Housing Coordinator position;
- Supported continued development of supportive studio apartments at 132 Northampton Road as it progressed through the permitting phase including legal support;
- Explored a differentiated tax rate structure to provide a residential discount for owner-occupants as requested by the Town Council with more work to be conducted in 2022 prior to the setting of the tax rate.

Assist the Council in developing a Comprehensive Housing Policy:

- Staff supported the Councilors in the development of the Comprehensive Housing Policy;
- The Town Council passed the Comprehensive Housing Policy on September 27, 2021.

Ensure the operation of a seasonal shelter:

- Worked with Craig’s Doors to secure a new shelter location for 2020-2021 and to permit the site for occupancy;

- Funded accessible bathroom and shower access through CARES Act to enable the shelter to occupy the space at the Unitarian Church during 2021;
- Worked to support Craig’s Doors to secure a new shelter location for 2021-2022 and to permit the site for occupancy;
- Provided rented shower/warming/meeting space during the major winter months;
- Provided medical support with special vaccination outreach to Shelter staff and guests throughout the Covid-19 pandemic;
- Provided a cooling shelter that was staffed and stocked with water and food during heat waves.

Explore creating a permanent seasonal or year-round shelter:

- Worked with a coalition of Western Massachusetts municipal leaders and advocates to secure State funding to address the broad range of needs for the homeless communities in Western Massachusetts;
- Supported Craig’s Doors in securing the University Motor Lodge for additional housing;
- Allocated ARPA funds to seek a more stable solution to sheltering and support services.

VI. Racial Equity and Social Justice

Objective: To explore, recommend, and implement policies and procedures that address racial equity and social justice consistent with the Town Council Resolution in the Aftermath of the Death of Mr. George Floyd adopted on June 1, 2020, and the Town Council Resolution Affirming the Town of Amherst’s Commitment to End Structural Racism and Achieve Racial Equity for Black Residents adopted on December 7, 2020, and the Town Council Resolution Condemning the January 6, 2021 Insurrection and Violence at the U.S. Capitol adopted on January 25, 2021 that (1) ensure all community members feel and are a part of Amherst and feel and are protected, listened to, and served by their public servants, (2) foster a community free of fear, intimidation, and violence, and (3) incorporate significant involvement of BIPOC residents in shaping these policies and procedures.

➔Our community – including elected officials, committee members, staff, and members of the public – have invested significant time and effort into making tangible change to our community and how we as a Town do business to bring our actions more into alignment with our values. This is a slow process that requires daily attention, ongoing conversations, and a shared commitment to do better.

Ensure all community members feel and are a part of Amherst and feel and are protected, listened to, and served by their public servants:

- Reallocated funds to establish a Diversity, Equity, and Inclusion (DEI) Department with both a Director and DEI Coordinator with additional funding identified in ARPA;
- Added \$80,000 to the operating budget to fund development and programming for racial equity;
- Recommended to the Town Council the creation of a Reparation Stabilization Fund which was voted by the Town Council;
- Recommended a funding mechanism of allocating a percentage of funds from Free Cash that would go to the Reparation Stabilization Fund;

- Appointed members to the BIPOC-majority African Heritage Reparation Assembly (AHRA);
- Worked with the AHRA to organize and advance its mission by providing staff support, information, and advice;
- Worked with the Town Attorney to review the goals of the AHRA and look into the legal aspects of its mission to allocate funds for reparations;
- Included the following statement on each job post:
 - *The Town of Amherst seeks a workforce that reflects the diversity of its community, and strives toward racial equity and environmental sustainability. All are encouraged to apply. AA/EEO.*

Foster a community free of fear, intimidation, and violence:

- Supported the work of the staff-led Core Equity Team whose goal is to create an inclusive government that empowers our employees, elected officials, and board and committee members to help residents, businesses, students, and guests feel safe, welcomed, and included in Amherst (www.amherstma.gov/dei);
- Maintained membership in the Government Alliance on Race and Equity (GARE) www.racialequityalliance.org, a national network of government working to achieve racial equity and advance opportunities for all;
- Offered implicit bias training to Town staff, led by Town staff;
- Continued implicit and other trainings for all members of the Amherst Police Department;
- Attended and participated in various forums, workshops, and events focused on moving toward racial equity;
- Actively participated in the Town Council-sponsored 2 ½ day anti-racism workshops.

Incorporate significant involvement of BIPOC residents in shaping these policies and procedures:

- Supported the work of the BIPOC-majority Community Safety Working Group as it worked through its charge;
- Supporting the work of the BIPOC-majority African Heritage Reparation Assembly as it works through its charge;
- Facilitated the recovery, cleaning, and relocation of the historic Civil War tablets with a display at the Bangs Community Center and allocated a staff-docent to monitor the display;
- Appointed member to the African Heritage Reparation Assembly <https://www.amherstma.gov/3625/African-Heritage-Reparation-Assembly> with a majority BIPOC membership.

Management Goals

I. *Administration, Leadership and Personnel*

Objective: *To effectively and appropriately administer the operations of Town affairs pursuant to the Home Rule Charter, specifically, but not exclusively, the duties outlined in Section 3.2 (Executive and Administrative Powers and Duties), 3.3 (Powers of Appointment), 5.3 (Public Forum), and 5.4 (Submission of Budget; Budget Message). Further, to provide leadership by (1) anticipating future needs and positioning the Town to meet those needs, (2) devising appropriate courses of action to achieve the policy goals of the Town Council, (3) improving the delivery of services to residents and businesses, and (4) developing and*

implementing decision making and plans regarding road and sidewalk repairs that are transparent to the residents. Further, to effectively supervise and manage the Town's workforce through (1) retaining, recruiting, and developing a highly qualified, diverse, and effective staff, (2) improving cooperation and coordination of services across departments, and (3) inspiring attitudes of respect, helpfulness, courtesy, and sensitivity toward and among all employees, residents, and visitors in Amherst.

➔ Town leadership has worked relentlessly to (a) align our work with the priorities established by the Town Council and (b) to continue to provide superior service across the organization. Hiring and retaining highly qualified and committed employees has been a particular challenge, and we are not alone in that experience.

- Anticipating Future Needs:
 - Careful attention to the Town's budget and bond rating over the past five years has ensured that the Town is in a fiscally sound position to take on the significant new building projects;
 - It should be noted that many carefully laid plans fall by the wayside when a world-wide pandemic demands all staff resources, when important new priorities emerge such as the need for immediate climate action and progress on racial justice.
- Aligned with Town Council Priorities:
 - Town Council priorities are outlined above and my responses to how Town staff have aligned our work is documented accordingly;
 - We have re-tooled our budget development and internal decision-making to see things through the lenses of climate change and racial equity;
- Service Delivery:
 - Our employees work to improve what we do and how we do it. We continue to provide services to the public through traditional means and offering more robust engagement electronically. We recognize that there is still much work to do, projects to take on, and services to improve.
 - We continue offering more digital services online including:
 - Refreshed the Town website with home page redesign that is more conducive for one-stop shopping of all the most important features;
 - Developing all new online interfaces with a "mobile-first" design;
 - Installed ADA assistive technology and compliance monitoring software (Audio-eye) to automatically monitor all web content for accessibility on all main Town websites (Town, Police, Recreation) which places the Town's websites at the head of accessible municipal sites;
 - Offered more and enhance online bill payment options for the public;
 - Enhanced the interface of the human resources portal for job applicants;
 - Transitioned from a legacy online permitting system to new, state-of-the-art permitting portal that is currently used by Inspections but will be expanded to nearly all permits;
 - Introduced search engine optimization (SEO) and keywords best practices to allow for better web search experience;
 - Expanded use of social media to highlight Town events and work;

- Offered short “explainer videos” to share how-to instructions and information on key projects;
 - Branded custom mobile app through our See-Click-Fix tool with buttons and tiles to all the Town’s important services and current Covid-19 information;
 - Increased viewership by 400% from prior year on Town’s YouTube Channel with videos from events and public meetings;
 - Developed and maintained stand-alone Covid-19 website with newly enhanced daily data counts and regular updates;
 - Produced new and expanded opportunities for the public to connect online including:
 - EngageAmherst public discourse website dedicated to important topical areas;
 - Developed and offered a Resident Capital Request form that permits residents to submit ideas and proposals for municipal expenditures on capital projects;
 - Developed and presented an enhance budget presentation utilizing a new, easier to understand budget format, more understandable budget story map, and use of EngageAmherst website for feedback;
 - Installed Soofa information kiosks throughout the downtown;
 - Staff supported Zoom meeting platform for all meetings of public bodies;
 - Staffed Covid Concern hotline via telephone and email;
- Road and Sidewalk Repair:
 - The Town Council has allocated significant funds for road (\$1,500,000 in FY22) and sidewalks (\$200,000 in FY22) work;
 - These funds have helped address the backlog of work that was in the queue;
 - Sharing updated information and making the decision-making process clear to the Town Council and transparent to the public is a priority for this winter.
- Human Resources:
 - The Town has done a good job of recruiting applicants for positions. I was concerned with the departure of several recently-hired department heads. I reviewed the situation with the Human Resources Department (HR) and met with the Personnel Board. We determined that we needed to pay more attention to retention and a better understanding of why people left – and stay. The job market is quite fluid as we emerge from the pandemic. There are a lot of job opportunities that provide growth. HR conducts exit interviews for all departing employees. In addition, we conducted additional exit interviews with selected positions six-months after they left the employ of the Town. We also instituted a new team-mentoring program that has been put into place for the new Recreation Director and will be put into place for all future new department heads. We are also looking into our workplace culture and other factors that may lead to turnover.
 - The staff-driven Core Equity Team continues its work in addressing racial and other inequities in the workplace;
 - HR has arranged for numerous internal trainings available to all staff such as customer service training, remote work training, health and workout competitions provided by the Town’s health insurance provider;

- Recruiting: Change in an organization of this size is normal. Prior to advertising, vacancies are examined to determine need and responsibilities of the position.
 - Principal Assessor: I replaced the previous Principal Assessor with a qualified replacement;
 - Recreation Director: I hired a new Recreation to take the place of the previous director who retired;
 - Health Director: We are in the final stages of interviewing for this important position.
 - Senior Services Director: We are in the interview stage for this important position.
- 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 also continues to accept paper applications, a key feature for many people who do not have access to computers.
- 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.
- I serve as the International City/County Management Association's UMass Chapter Professional Advisor, encouraging careers in local government to students at the University.
- Maintaining positive staff morale has been a challenge during the Covid-19 pandemic with fewer in-person interactions and opportunities to work side-by-side. I believe it is important that I am accessible to all staff. In addition to normal, everyday 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, and recognizing the important role our Dispatch team plays in our emergency response system.
 - I have worked with our department heads and leadership team to develop more effective relationships with all staff in the Town.
 - My monthly meetings with small groups of employees has had to be curtailed due to the Covid-19 pandemic, I continue to meet with employees virtually in large and small settings such as quarterly all Town staff meetings open to all Town employees which are always very well attended, numerous social settings, and regular day-to-day contact. These meetings have helped to quell the rumor mill and encourage people to understand new standard operating procedures during pandemic times and as we emerged from self-isolation, the proper course back to the workplace, and how to share space again.
 - I hold regular monthly and quarterly meetings with my leadership team and department heads.

II. Finance

Objective: *To ensure the Town's strong financial and fiscal health by (1) effectively administering the adopted FY21 Budget, (2) preparing and proposing a balanced FY22 Budget in accordance with the Town Council Budget Policy Guidelines and Charter Section 5.4, (3) increasing, utilizing, and maximizing revenue and shared regional resources to meet the Town Council's Policy Goals and Budget Policy Guidelines, (4) implementing Town Financial Management Policies and Objectives and other sound financial management policies and practices, and (5) studying, recommending, and implementing structures for user fees, water fees, sewer fees, and permit fees that consider the cost of providing services.*

→ The Town of Amherst has excellent finances with strong finance officers. If the Town's finances are strong, we have the ability to address many of the goals of the Town Council and concerns of the public. Our management focus has been to be wise stewards of the public's money so that the Town has the ability to address its many needs and the demands of the public.

- Budgets:

- Effectively managed the FY21 operating budget and closed the year with a surplus due to careful budget management, conservative filling of positions, and strategic use of Federal funds for unanticipated costs leaving a positive balance in both expenditures and revenues resulting in certified free cash at \$8,881,421 or 10.4% of the General Fund, as compared to \$4,322,441 in free cash in FY16 which was 6% of the General Fund;
- The FY22 budget included modest increases with minimal impact on Town services;
- For the fifth year in a row as Town Manager, we increased reserves as part of the financial strategy to meet the financial demands of multiple capital projects;
- Prepared and proposed a balance FY22 budget in accordance with the Town Council's Budget Policy Guidelines which was adopted by the Town Council;
- As in the previous four years, the budget did not rely on use of reserves (other than the capital reserve which was used intentionally);
- Developed a plan to allocate a significant allocation of American Rescue Plan Act (ARPA) funds;
- Finance Committee and Town Council approve the process for allocating funds that included outreach to the community <https://engageamherst.org/arpa>;
- Will be presenting a revised plan to the Town Council in the near future taking into account public feedback.

- Revenue:

- Cultivated and secured a significant private donation from an anonymous donor to make needed additions to the North Amherst Library including a new community room, rest rooms, and making the library accessible <https://engageamherst.org/north-amherst-library-project> ;
- Developed a spending plan for ARPA funds following guidance from the Finance Committee and with input from the public and the Town Council;
- Worked with our State delegation to advocate and win additional resources from the State including Chapter 90, general government support, capital

- support, and targeted funds designated by our State Senator and State Representative;
- Reviewed and permitted numerous new development projects that will increase the tax base, providing needed additional funds to address the challenges facing the Town including South East Street, University Drive Extension, and the Amherst Motel site.
- Received \$3,482,889 in CARES Act funding has been allocated to support the Town's response to the COVID-19 pandemic;
- Secured 29 grants during the course of the fiscal year including:
 - \$1.5 million MassWorks grant for Pomeroy Village Center roundabout;
 - \$129,472 Shared Streets grant for outdoor dining/streetscape improvement downtown/bus shelters;
 - \$192,600 Shared Streets grant for Bangs Center ramp and Boltwood plaza furniture;
 - \$184,728 Shared Streets grant for crosswalk improvements/pedestrian safety downtown;
 - \$276,549 for Fearing Brook Floodplain Creation project;
 - \$44,100 in ADA grants to replace two existing crosswalks and one sidewalk downtown;
 - \$400,207 grant to the Police Department – with other entities – to provide community-defined solutions to Violence Against Women;
 - For a list, see page 237 of the FY22 Town Manager Budget here: <https://www.amherstma.gov/DocumentCenter/View/55853/FY22-Complete-Budget>
- CDBG funds: The Town continued 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 of \$825,000 provides crucial funding for projects and activities that serve primarily low- and moderate-income members of the community.
- Town staff worked with the Community Preservation Act (CPA) Committee to make recommendations to the Town Council for funding 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.
- Policies:
 - Completed an initial study of residential exemption with a presentation to the Town Council and will work with Town Council to investigate further and engage the public;
 - Introduced a new, more accessible budget format that makes more information more readily available to the public online;
 - Working with the Town Council Finance Committee to update financial policies previously adopted in 2012;
 - Met with and made a presentation to Standard and Poors that resulted in reaffirming the Town's strong bond rating;
 - Continued to implement annual inventory process and streamlined process with sustainability coordinator;

- Supported the Town Council in completing the Audit Request for Proposals, review, and selection of an auditor;
- Continued service on the MMA's Local Government Reopening Advisory Committee; to participate in weekly Tuesday calls organized by the MMA with the Lt. Governor, and weekly municipal CEO Sunday afternoon calls organized by the Metropolitan Area Planning Council.
- Continued to work with regional partners and communities to provide shared services including:
 - Sealer of Weights and Measures with the City of Northampton;
 - Municipal Hearing Officer with the City of Northampton;
 - Veterans' Services with multiple communities;
 - Pioneer Valley Bike Share with multiple communities;
 - Provision of Ambulance Services to the Towns of Leverett, Pelham, and Shutesbury;
 - Agreement for dog kennel services with City of Northampton;
 - DART Case Management Memorandum of Understanding;;
 - Provision of transit services by the University of Massachusetts;
 - Paramedic Intercept Services with the City of Northampton and Towns of Hadley and Turners Falls;
 - Agreement for fire and emergency medical services mutual aid with multiple communities
- 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).
- Fees:
 - Established a staff/Council/Finance Committee working group to explore revisions to water/sewer rate structure;
 - Water and sewer fees are reviewed and updated annually by the Town Council based on staff recommendations;
 - Reduced alcoholic beverage license fees to provide needed support to local businesses;
- Core Service Needs:
 - Fire/EMS staff: The Town hired four additional temporary firefighters to support COVID-19 response in 2020 and will maintain these firefighter/paramedics with the support of ARPA funds;
 - 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. Most collective bargaining agreements will expire on June 30, 2022 except for the firefighters union which expired June 30, 2021.
 - Health Insurance: The transition to a fully funded health insurance plan has stabilized the Town's largest non-salary employment cost and the MIIA Health Benefits Trust is providing a one-month relief from the Town and employees contributing premiums due to the reduced use of health insurance during the pandemic.

III. Long-Term Vision

Objective: *To maintain and manage the Town's capital and public assets consistent with the Council's long-term vision by (1) ensuring that the Town's facilities and infrastructure are well-maintained, attractive, and safe, (2) developing a 5-Year Capital Improvement Program in accordance with Charter Sec. 5.7(b) that is logical, transparent, balances competing capital needs, and able to be implemented, and (3) planning for long-term improvements to public infrastructure, parks, conservation land, recreation land, and public ways that ensure public accessibility, safe use, and sustainability.*

➔ The Town has made significant strides on capital planning with the arrival of our Finance Director. The 5-Year Capital Plan has developed into a true planning document with realistic projections and an inventory of needs. Planning for capital needs has been formalized and centered with staff working with the Town Council Finance Committee and Joint Capital Planning Committee.

- Town Facilities and Infrastructure:
 - See reports above on four major capital projects;
 - Our new Facilities Maintenance Manager is working on the facilities profiles in the Building Assessment Report and reviewing energy reduction opportunities in all facilities;
 - Budgeted for a Capital Projects Manager to oversee the numerous capital projects moving forward;
 - Refurbished the front doors of Town Hall during the Covid shut-down;
 - Close to completing the installation of a new high-speed, fiber-optic internet to municipal buildings including police, fire, library, schools, and DPW.
- 5-Year Capital Improvement Program:
 - Developed and presented a revised 5-year capital improvement program which can be found here:
<https://www.amherstma.gov/DocumentCenter/View/55851/FY22-Capital-Improvement-Program> ;
 - Continued to implement annual inventory process;
 - Incorporated the ADA Transition Plan for Town buildings and properties into the overall Capital Improvement Program;
 - Incorporated sustainability lens for all capital projects;
 - Developing methods to introduce viewing capital projects through a racial equity lens.
- Planning for Long-Term Improvements:
 - Much of this work is happening around the Capital Improvement Plan process;
 - Significant public engagement is happening around the anticipated purchase of Hickory Ridge and the decisions about the utilization and disposition of the property;
 - Once the location for the new elementary school is decided by the Elementary School Building Committee, there is likely to be a site available to the Town for a decision on future use or disposition.

IV. Community Engagement

Objective: *To maintain, develop, and increase positive relationships and communication with residents, institutions of higher education, and local and state governmental entities by (1) facilitating the flow of information to and between the various constituencies, (2) encouraging and supporting new ideas and methods for expanding resident involvement in Town government and awareness of Town matters, (3) developing and implementing strategies and agreements to mitigate the financial and social impacts of the higher education institutions on the Town and neighborhoods, demand for public safety resources, parking and traffic, and other municipal services, and (4) maximizing the contributions of Town multiple-member bodies to the municipality.*

→ Amherst has high engagement from many members of the public. But the Town is often missing voices from other parts of the population who are less likely to participate in local government. Our mission is to serve those who are already fully engaged and reach out with new tools for connection to those who may not feel able or entitled to participate.

- Flow of Information:
 - Built out and launched the EngageAmherst website that includes important topical areas;
 - Issue regular press releases and public notices on topics of interest to the public;
 - Expanded use of social media to highlight Town events and work;
 - Developed and presented enhance budget presentation utilizing a new, easier to understand budget format, more understandable budget story map, and use of EngageAmherst website for feedback;
 - Posted all Town Manager Reports and offered a notification subscription by text or email and online archive and ability to subscribe to receive notice of posting;
 - Developed and maintained stand-alone Covid-19 website with newly enhanced daily data counts and regular updates;
 - Staffed Covid Concern hotline via telephone and email;
 - Installed Soofa information kiosks throughout the downtown;
 - Refreshed the Town website with home page redesign that is more conducive for one-stop shopping of all the most important features;
 - Installed ADA assistive technology and compliance monitoring to all main Town websites (Town, Police, Recreation) which places the Town's websites at the head of accessible municipal sites;
 - Branded custom mobile app through our See-Click-Fix tool with buttons and tiles to all the Town's important services and current Covid-19 information;
 - Expanded the content on the Town's YouTube Channel with videos from events and public meetings, expanding viewership by 400% from the prior year;
 - Working with the University of Massachusetts on a collaborative research project to expand community engagement and broaden our outreach to those communities less likely to connect with Town government;

- The Communications Manager and Town Manager hold weekly press briefings with members of the media and provide them with information on upcoming issues;
- The Town Council President and I hold bi-weekly meetings with our State Senator and State Representative to facilitate communication;
- Increased the Twitter feed for the Amherst Town Manager to 977 regular followers, a 31% increase from a year ago;
- Continued outreach events like Community Chats and Cuppa Joe with Paul organized around important Town issues and milestones to encourage awareness and participation.
- New Ideas:
 - The EngageAmherst site is an outstanding vehicle for the public to engage directly with Town staff working on specific projects;
 - Posted the Residents Capital Request on the Town's website prior to the start of the budget process;
 - Advertised the availability of Community Preservation Act funds to the general public and made applying easier;
 - Advertised the availability of Community Development Block Grant funds to the general public;
 - Developing a method for Town staff to suggest and promote new ideas directly to the Town Manager.
- Higher Education:
 - Town staff are in discussion with representatives of Amherst College on its public way requests and additional areas of mutual interest;
 - Town staff are in discussion with representatives of the University of Massachusetts on various matters;
 - Town staff are in discussion with representatives of Hampshire College regarding campus developments.
 - Weekly on-call meetings review activities and areas of concerns identified by Town Police, Fire, and Inspections with University officials;
 - Regular Community Campus Coalition meetings share strategies and initiatives around student behavior;
 - Staff continue to work to mitigate the impacts of significant student populations on neighborhoods through the Ambassador program and the Town's community liaison officer and comfort dog;
 - Staff are engaged with the University concerning the impacts of major construction projects on campus.
- Multiple-member bodies:
 - Town 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;
 - The Town Council has worked with Planning Board staff and the Planning Board to develop processes to develop, review, and approve Zoning Bylaws;
 - All Town boards and committees have a staff member assigned to serve as their support and liaison;

- 45 boards and committees with approximately 200 appointed members with multiple applicants interviewed by the Town Manager, a member of the Residents Advisory Committee, and committee chair and/or staff.

V. **Relationship with the Town Council**

Objective: *To maintain, develop, and increase positive relationships and communication with the Town Council to ensure the Council's effectiveness by (1) effectively assisting and supporting the Council in providing policy leadership and establishing and implementing long-range goals, (2) providing support for Council Committees, (3) responding to communications from the Councilors in a timely manner, (4) resolving issues at the administrative level to avoid unnecessary action at the Council level, and (5) providing regular communications to the Council to ensure the Council receives relevant information, including analysis and supporting documents as appropriate, in advance of meetings or media coverage.*

➔ I work hard to support the work of the Town Council, the Town's legislative body and chief elected officials. The Town Council is very active on numerous fronts and its heavy agendas – at both the Council and Committee levels – places big demands on staff to support its work. We have established strong communication protocols and the Council President and Committee Chairs have taken on large responsibilities of managing the Council's work. The Council's work is expertly facilitated by the Clerk to the Council who has established – and enforced – high standards and expectations for the Council's operations.

- Assisting and supporting the Council and Council committees:
 - I work with the President and Clerk of the Council to systematize processes and make materials available to the Town Council in a timely manner;
 - Materials are made available to the Town Council and the public in advance of Council meetings in an organized, well-documented manner;
 - The Clerk of the Council, Assistant Town Manager, Executive Assistant and I meet on a regular schedule prior to each Council meeting with the 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;
 - 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;
 - Staff initiated material on the Town Council agenda includes a cover memo from the Town Manager with clear recommendations, an analysis of the issue, and areas for the Town Council to consider with appropriate back-up material;
 - I ensure staff are available during meetings for Council discussion & questions;
 - Detailed written Town Manager Reports are provided prior to every Town Council meeting and posted on the Town's website and are supplemented by verbal highlights and updates at the meetings;
 - I provide a detailed memo summarizing all Town Council actions and action or follow-up items to all department heads and staff immediately after the Council's meeting.
- Councilor Communication and Relations:
 - I make myself available to address any concerns of any Town Council member at every Town Council meeting;

- I continue to respond to communications and inquiries from the Council in a timely manner;
- 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;
- I make sure I am available to any member of the Town Council at any time, any day of the week and regularly have conversations with Councilors in the evening and on weekends;
- I met with individual Town Councilors to listen to any budget concerns they had prior to the development of the FY22 budget and will do the same for the FY23 budget;
- Working through the Clerk of the Council, we have ensure that minutes of all meetings of the Town Council and Town Council committees are prepared by staff and are submitted to the Council for approval on a timely basis;
- Every Town Council committee has a Senior staff member assigned to it for guidance and support;
- I continue to provide regular communication with all members of the Town Council via email to inform Councilors of emergencies, legal developments, special events, and other updates such as the status of major public safety events, projects, activities, fires, sudden deaths, and other events;
- I continue to provide information to the Council on emerging events and matters before they appear in the media;
- After every Town Council meeting, I write a detailed memo summarizing all Town Council actions and identify future agenda items (example at the end of this memo).
- Next Town Council:
 - For the first time, we will have a transition from one Town Council to another. I have taken the following steps to ensure that all Council candidates have a common understanding of Town operations:
 - Provided a public forum to introduce Town departments and finances to all Council candidates with time for questions and answers;
 - Offered to meet with all candidates one-on-one prior to the election to address any questions or concerns;
 - After the election, I will reach out to those who have been elected to provide any support they need as they transition into their new roles;
 - I.T. staff will also provide the tools necessary to all Town Councilors to update technology and ensure the elected officials have the technology tools available to conduct the business of the Town.

VIII. Conclusion

I reference 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 Council Performance Goals for the Town Manager

July 1, 2020 – June 30, 2021

Adopted by the Town Council on September 14, 2020; amended January 25, 2021 and April 5, 2021

Charter Section 3.9 requires the Town Council to conduct an annual review to assess the Town Manager's performance. These Performance Objectives are adopted to provide guidance to the Council in fulfilling its Charter obligation and to assist the Town Manager in carrying out his duties.

The core purpose of municipal government is to provide quality services to the Town's residents and ensure the health, welfare, and safety of its residents. Under Charter Section 2.6(a), the Town Council provides the policy leadership for the Town. The Policy Goals set out below reflect the Council's priorities for FY21, a year which will pose serious fiscal and operational challenges and uncertainties. These Policy Goals are deeply interrelated and overarching and should guide decision-making at all levels of Town government and its provision of core, municipal services and are meant to be used by the Town Manager to set priorities, direct work activities, and allocate staffing and financial resources. The Management Goals reflect the requirement to assess the day-to-day performance of the Manager's duties as set forth in the Charter, as well as his ability to supervise a significant work force.

Policy Goals

I. Climate Action

Objective: To prioritize and implement regulatory, fiscal, and other actions to meet the Climate Action Goals adopted by the Council on November 18, 2019 by (1) implementing Community Choice Aggregation and the creation of a Climate Action and Resilience Plan, (2) ensuring that budgeting, purchasing, construction, repair, hiring, and other decisions involve considerations of energy, sustainability, and resilience in order to determine impacts of energy use and move Amherst towards meeting the Climate Action Goals, and (3) educating Town multiple-member bodies and staff on the Climate Action Goals.

II. Community Health and Safety

Objective: To ensure the health and safety of the residents of Amherst by (1) continuing to take all steps necessary to ensure the health of the community in the presence of the COVID-19 pandemic and (2) in accordance with the Council's vote on July 27, 2020, and in consultation with the Council and residents of Amherst, fully exploring alternative options of providing services to respond to issues of homelessness, mental health, and other non-criminal calls to emergency dispatch and present the results to the Council no later than May 15, 2021.

III. Economic Vitality

Objective: To ensure the present and future economic health and well-being of the Town by (1) working closely with local institutions and business entities, including the BID and Chamber of Commerce, to provide support and assistance to the local business community in the face of the economic challenges encountered as a result of the COVID-19 pandemic, (2) facilitating the review and revision of the Zoning bylaws to promote diverse neighborhoods, affordable housing, and new growth in downtown and village centers, and (3) continuing to develop a

plan to implement actions proposed by the Downtown Parking Working Group as modified by CRC and adopted by the Town Council.

IV. Four Major Capital Investments

Objective: To provide the Council with a plan for the funding of the renovation/expansion or replacement of an elementary school in accordance with Fort River MSBA Grant application, the repair or renovation/expansion of the Jones Library, the replacement of the Central Fire Station, and the replacement of the Department of Public Works headquarters, consistent with the October 21, 2019 Council vote that it is the sense of the Council that the Council is committed to a plan that will address all four buildings in some fashion.

V. Housing Affordability

Objective: To provide access to safe, affordable housing for low- and moderate-income residents by (1) implementing the Resolution Adopting an Interim Affordable Housing Policy vote by Town Council on April 4, 2020 that called for identifying and aggressively exploring opportunities to preserve and increase affordable housing at all income levels, (2) assisting the Council in developing a Comprehensive Housing Policy, (3) ensuring the operation of a seasonal shelter, and (4) exploring the possibility of creating a permanent seasonal or year round shelter in Amherst either through the repurposing of surplus Town buildings or land and/or through working in partnership with concerned community groups or individuals to realize this goal .

VI. Racial Equity and Social Justice

Objective: To explore, recommend, and implement policies and procedures that address racial equity and social justice consistent with the Town Council Resolution in the Aftermath of the Death of Mr. George Floyd adopted on June 1, 2020, and the Town Council Resolution Affirming the Town of Amherst's Commitment to End Structural Racism and Achieve Racial Equity for Black Residents adopted on December 7, 2020, and the Town Council Resolution Condemning the January 6, 2021 Insurrection and Violence at the U.S. Capitol adopted on January 25, 2021 that (1) ensure all community members feel and are a part of Amherst and feel and are protected, listened to, and served by their public servants, (2) foster a community free of fear, intimidation, and violence, and (3) incorporate significant involvement of BIPOC residents in shaping these policies and procedures.

Management Goals

I. Administration, Leadership, and Personnel

Objective: To effectively and appropriately administer the operations of Town affairs pursuant to the Home Rule Charter, specifically, but not exclusively, the duties outlined in Section 3.2 (Executive and Administrative Powers and Duties), 3.3 (Powers of Appointment), 5.3 (Public Forum), and 5.4 (Submission of Budget; Budget Message). Further, to provide leadership by (1) anticipating future needs and positioning the Town to meet those needs, (2) devising appropriate courses of action to achieve the policy goals of the Town Council, (3) improving

the delivery of services to residents and businesses, and (4) developing and implementing decision making and plans regarding road and sidewalk repairs that are transparent to the residents. Further, to effectively supervise and manage the Town's workforce through (1) retaining, recruiting, and developing a highly qualified, diverse, and effective staff, (2) improving cooperation and coordination of services across departments, and (3) inspiring attitudes of respect, helpfulness, courtesy, and sensitivity toward and among all employees, residents, and visitors in Amherst.

II. Finance

Objective: To ensure the Town's strong financial and fiscal health by (1) effectively administering the adopted FY21 Budget, (2) preparing and proposing a balanced FY22 Budget in accordance with the Town Council Budget Policy Guidelines and Charter Section 5.4, (3) increasing, utilizing, and maximizing revenue and shared regional resources to meet the Town Council's Policy Goals and Budget Policy Guidelines, (4) implementing Town Financial Management Policies and Objectives and other sound financial management policies and practices, and (5) studying, recommending, and implementing structures for user fees, water fees, sewer fees, and permit fees that consider the cost of providing services.

III. Long-Term Vision

Objective: To maintain and manage the Town's capital and public assets consistent with the Council's long-term vision by (1) ensuring that the Town's facilities and infrastructure are well-maintained, attractive, and safe, (2) developing a 5-Year Capital Improvement Program in accordance with Charter Sec. 5.7(b) that is logical, transparent, balances competing capital needs, and able to be implemented, and (3) planning for long-term improvements to public infrastructure, parks, conservation land, recreation land, and public ways that ensure public accessibility, safe use, and sustainability.

IV. Community Engagement

Objective: To maintain, develop, and increase positive relationships and communication with residents, institutions of higher education, and local and state governmental entities by (1) facilitating the flow of information to and between the various constituencies, (2) encouraging and supporting new ideas and methods for expanding resident involvement in Town government and awareness of Town matters, (3) developing and implementing strategies and agreements to mitigate the financial and social impacts of the higher education institutions on the Town and neighborhoods, demand for public safety resources, parking and traffic, and other municipal services, and (4) maximizing the contributions of Town multiple-member bodies to the municipality.

V. Relationship with the Town Council

Objective: To maintain, develop, and increase positive relationships and communication with the Town Council to ensure the Council's effectiveness by (1) effectively assisting and supporting the Council in providing policy leadership and establishing and implementing long-range goals, (2) providing support for Council Committees, (3) responding to communications from the Councilors in a timely manner, (4) resolving issues at the administrative level to avoid unnecessary action at the Council level, and (5) providing regular communications to the

Council to ensure the Council receives relevant information, including analysis and supporting documents as appropriate, in advance of meetings or media coverage.

Example of Follow-up Email Sent After Every Town Council Meeting

Bockelman, Paul

| | |
|--|---|
| From: Sent: To: | Bockelman, Paul Tuesday, June 22, 2021 6:42 AM Aldrich, Sonia; Audette, Susan; Bockelman, Paul; Boucher, Cheryl; Brestrup, Christine; Connor, Steven; Dragon, Emma; Duffy, Elizabeth; Hannon, Sean; Kenneally, Donna-Rae; LaFountain, Jennifer; Laplante, Jeremiah; Livingstone, Scott; Mangano, Sean; Mills, Angela; Misiaszek, Joanne; Mooring, Guilford; Morra, Robert; Nelson, Tim; Ogulewicz, Mary Beth; Rusiecki, Amy; Sharry, Sharon; Ziomek, David; Moyston, Jennifer; Sunryd, Brianna; Morris, M |
| Subject: Attachments: | Town Council Follow-up: June 21, 2021 Town Manager Report 06-21-2021.pdf |

Below is a follow-up from the June 21st Town Council meeting.

Please feel free to share with your staff.

The Town Council will be meeting entirely on Zoom for the rest of the summer and will reevaluate how they meet around Labor Day.

I've attached the Town Manager Report for June 21st.

Here is the link to the unofficial votes: <https://www.amherstma.gov/Archive.aspx?AMID=223>

Actions taken at the June 21st Town Council meeting:

Town Manager Reappointments:

- Cultural Council:
 - o Nicolas Graber-Mitchell for a term expiring June 30, 2024
 - o Nandi Chivende for a term expiring June 30, 2022
 - o Sydney Mager for a term expiring June 30, 2022
 - o Leah Neuburger for a term expiring June 30, 2022
- Board of Assessors:
 - o Ken Hargreaves for a term expiring June 30, 2024
- CDBG Advisory Committee:
 - o Rika Clement for a term expiring June 30, 2024
- Energy and Climate Action Committee:
 - o Steve Roof for a term expiring June 30, 2023
 - o Dwayne Breger for a term expiring June 30, 2024
- Munson Memorial Building Trustees:
 - o Alexander Neifer for a term expiring June 30, 2024

Town Manager Appointments:

- Human Rights Commission:

- o Philip Avila for a term expiring June 30, 2024
- Recreation Commission:
 - o Sanjay Arwade for a term expiring June 30, 2024
 - o Matt Cain for a term expiring June 30, 2024

Town Council Appointments:

- Finance Committee (non-voting member):
 - o Robert Hegner for a term expiring June 30, 2023
- Planning Board:
 - o Douglas Marshall for a term expiring June 30, 2024
 - o Janet McGowan for a term expiring June 30, 2024

Town Council Referrals:

- Referred the Town Manager’s proposed process to allocate American Rescue Plan Act funds with a report back to the Town Council by July 12, 2021.
- Referred proposed zoning bylaw amendment to section 5.011 ADU to Planning Board & CRC

Actions:

- To continue the Town Council meetings in remote meeting format until September 1, 2021.
- Adopted a resolution in support of the CRESS program.
- Adopted a resolution to provide for multi-year funds to fill eight community responders by February 1, 2022 and report back to the Town Council by January 31, 2022.
- Adopted an order appropriating funds for the FY22 operating budget.
- Adopted an order approving and authorizing borrowing to fund capital projects.
- Adopted an order appropriating funds for the FY22 capital improvement program.
- Adopted an order approving the acceptance of optional tax exemptions for FY22.
- Adopted an order creating a special purpose stabilization fund for reparations.
- Accepted and authorized the expenditure of American Rescue Act Funds.
- Approved locations for two new ValleyBike locations on West Street and South East Street.
- Designated the Districting Advisory Board for Special Municipal Employee status
- Approved Town Council minutes for: May 27, 2021 Special Town Council meeting; June 7, 2021 Special Town Council meeting; June 7, 2021 Town Council Public Forum; June 7, 2021 Town Council meeting.

Follow-up/Monitor:

- Referred proposed zoning bylaw amendment to section 5.011 ADU to Planning Board & CRC
- Referred the proposed rezoning of parcel 14A-33 from RG to BG to the Planning Board and the Community Resources Committee for hearings held no later than July 28, 2021.
- Referred “Unlawful Noise Bylaw 3.24” and the “2020-05-18 GOL Report to Town Council” for a proposed revision to the General Bylaws to the Community Resources Committee, with a report back to the Town Council in 90

days.

- Voter Petition for a zoning change implementing a building moratorium on residential development of 3 or more units in certain areas of Town to the Planning Board, CRC Committee, and GOL Committee.
- Referred the Town Manager's (Planning Department) proposed zoning bylaw, Article 15: Inclusionary Zoning, to the Planning Board and Community Resources Committee for a joint hearing by July 7th.

Future Agenda Items:

- June 28, 2021, 6:30 p.m.
 - o Zoning, zoning, zoning!
- July 12, 2021, 6:30 p.m.
 - o ARPA funding process
 - o PACE program
- Role of Transportation Advisory Committee
- Surveillance Technology Bylaw

Upcoming Meetings and Events:

- June 28th – Town Council meeting
- July 5th – Independence Day
- July 12th – Town Council meeting
- August 2nd – Town Council meeting
- August 23rd – Town Council meeting

Meeting adjourned at 12:52 a.m. TUESDAY!

Paul Bockelman
Town Manager
Town of Amherst
4 Boltwood Avenue
Amherst, Massachusetts 01002
413-259-3002