

Question 1:

It would be an honor to become the next Westford Town Manager and an opportunity to bring enthusiasm and current local government expertise to a municipality rooted in excellence, history and diversity. Preparing an onboarding plan for the Town Manager position is a unique challenge as there is an immense responsibility to the Select Board (the Board), the town residents and the team of staff. I expect there may be requests for change from those within or external to the organization who express their opinions on current operations or may otherwise aim to influence a new Town Manager. It is upon me to stay focused and have a steady hand when evaluating the organization and systematically implementing strategies and goals from the Board's strategic vision as well as local government management best practices. I plan to review and develop comments on the Strategic Goals that were established in September 2022 before I engage with the Board members. I intend to engage with the Board members as a primary step to gauge their expectations for the new manager. I endeavor to gain a better understanding of the extent and situations where guidance and direction comes from either the Chair of the Board or from all five board members. Once the Board's expectations have been communicated, I will begin to engage in conversation with the Board on a weekly basis to understand their various goals and determine how the goals are being implemented by departments, boards and commissions and staff.

I previously read the book "The First 90 Days: Proven Strategies for Getting Up to Speed Faster and Smarter" by Michael Watkins when I transitioned from the role of Shrewsbury's Assistant Town Manager to Assistant Town Manager for Community Development and Health and Human Services. I am revisiting the strategies presented in this and similar books in preparation for the position of Town Manager.

In the first 30 days, I plan to establish a management presence with the Board in several ways. First, I will ensure they have my personal contact information and can reach me at any time. It will be important for me to get to know each member and for us to set boundaries on how we prefer to communicate, our general preferences to receive information, and any other matters that may be important. During this initial period, I will also be observing and meeting with various department heads, staff members and local board and commission members to learn as much about the organization as possible. The timing of the new Town Manager position is also important as it will be close to the start of the Annual Town Meeting. It will be imperative for me to be up to speed and thoroughly prepared for the Annual Town Meeting.

I recognize that building trust and confidence with stakeholders does not happen overnight, and will take a combination of time and meaningful engagement.. Accordingly, the first two months in the position will be critical to beginning the process. I plan to use the first 60 days to meet with as many department heads, staff and community members as possible to introduce myself and to begin to engage with them. I expect our conversations will likely become more in depth as my understanding of their goals and/or concerns become more clear. Since the Annual Town Meeting will occur during this initial timeframe, I recognize that the “new Town Manager” will be in the spotlight during this time. It will be important for me to make connections with the key presenters, town moderator and key town meeting members before Town Meeting commences, and to have the necessary resources readily available to answer questions that may arise during Town Meeting.

Through the first 90 days, I will track my connections and conversations, the various documents and reports I have reviewed, and will then begin to analyze and compare this information to my personal expectations for a high performing local government operation. In consultation with key leadership, The Board and other board and committee members, I will identify three priority action items. I will also identify a secondary list of action items that are important but may be of less urgency at the time. Generally there are several factors necessary when taking action on existing or new priorities that include readily available and adequate financial resources, staff or consulting capacity and community feedback.

I will personally evaluate my success in the first year as Town Manager using several tools. The first of which being how I manage and undertake the goals I have set for myself. The second being the evaluation that is given by the Select Board during the annual evaluation. The third being the extent of engagement and relationship-building and management of staff and stakeholder expectations. Throughout the year, I will document notable concerns and accomplishments for both myself and the Town as a whole.

Question 2:

I have extensive public sector and private sector project management experience and also use various tools to manage various projects and action items. I have used tracking tools ranging from basic excel spreadsheets to more complex Microsoft Project features. Specifically related to capital building projects, I currently serve as the Town Manager's appointment to the Shrewsbury Police Station Building Committee. We utilize the services of an owner's project manager to track the project timeline and budget. I am in constant contact with the project Architect and the Construction Manager to understand what potential change orders may be coming up and evaluating the merits of each.

I have also managed multiple grant projects, with some that are planning and others that are capital. Most notably, I manage a \$3.5-million MassWorks Grant with other associated funds from MassDOT and the Town of Shrewsbury to install new sewer mains and service laterals along the Route 20 Corridor and completely upgrade the roadway travel corridor. My responsibilities also include the review of invoices and payment to multiple vendors. This project is now substantially complete and we are in the final phases of paying the vendors.

With regard to human management, I have extensive public and private experience in performance appraisal systems, routinely evaluating staff and maintaining an open and honest dialog. I have learned that it is also important to give managers the tools they need to properly guide their employees through sometimes complex and difficult situations. In some cases in municipal government, staff are promoted to managers without property training or mentoring. In my opinion, it is important for the Town Manager to provide tools to new and existing managers to effectively navigate public service in a business fashion, with accountability and results-based performance. Throughout my career, I have attended various management and leadership seminars, training sessions and classes. This has provided me the opportunity to more effectively evaluate, train and support staff and management.

Succession planning is an important and inevitable element of a high performing local government organization. My personal approach is to first evaluate with Department Heads and middle management whether there are individuals from within that could serve in the succession role. If there are, then a process should begin to mentor, train, and evaluate those employees. It is also important to communicate and ensure that Department Heads are continually sharing their institutional knowledge and resources, as that is valuable for successful succession planning. If no internal candidates are identified however, then

a process should begin with the Department Heads to prepare documentation of their institutional knowledge and to begin recruitment of a suitable candidate for the position.

If selected for the Town Manager position, I will evaluate the structure, efficiency and effectiveness of the current administration and the organization of Town Departments by meeting with each Department Head and other applicable staff. I will also review appropriate feedback from local residents and business owners. I will establish criteria to evaluate and determine whether changes are needed, and then will begin a series of discussions with key stakeholders to further evaluate and plan any changes.

I have municipal experience with consolidating departments, regionalization, and shared positions. Specifically, in 2010, the Town of Shrewsbury explored Regional Health services with the City of Worcester and several other municipalities. Shrewsbury has been regionalized with the City of Worcester since that time, and the Central Massachusetts Regional Health Alliance is the first accredited Health Department in Massachusetts. I currently serve as the Alliance's chairperson. I am also a member of the Central Massachusetts Veteran's District board, in which Shrewsbury, Grafton, Northborough and Westborough have a regional agreement to share Veteran's services. Furthermore, the Town of Shrewsbury is regionalized with Westborough and Grafton for shared Animal Control services. Shrewsbury and Westborough also have reciprocal services in the Building Inspector Department for coverage due to staff vacations, illnesses and/or periods of excessive workload.

I was personally involved in the consolidation of separate departments into the Department of Public Works in 2018 that originated from a DOER study from 2015. Additionally, I have been involved in centralizing the Administration and Finance role into a second Assistant Town Manager role in 2021 that also originated from the DOER report.

**Question 3:**

With the Town Manager FY24 operating and capital budget (the budget) already presented to the Select Board (the Board) and the Finance Committee (the Committee) at the time I would take on the new role, I view that as beneficial to me in the overall budget process. I foresee being able to review the document fully before it is voted on at Town Meeting. Additionally, I would attend or review relevant Board and Committee meetings held in FY23 that discuss the FY24 budget and strategic vision. I would also review the past two fiscal year budgets presented and approved at Town Meeting and any adjustments that may have been made in prior Special Town meetings. This assessment would provide me with a baseline understanding of how the budget has been prepared and presented in the past. Then I would make observations and suggestions for potential changes to the process and presentation for FY25.

I have estimated revenues and expenses, managed operating budgets, and developed 5-year capital budget plans for the Town of Shrewsbury. To estimate revenue, we prepared a Revenue Manual that is adjusted each fall and reviews trends for the past five years for taxation, Schedule A, State Aid, and other sources of revenue. Then we forecast estimated revenue conservatively, primarily based upon known conditions. The Revenue Manual is shared with the Board, Committee, and all municipal departments when they are solicited for input on the next FY budget. When the COVID-19 pandemic started in March 2020, we had to quickly adjust our estimated revenue just a month prior to the Town Meeting vote on the budget due to the economic uncertainties at the time. I develop operating budgets for the Community Development and the Health & Human Services departments and review and comment on Operating Support, School, Department of Public Works, Finance, Police and Fire budgets. I participate in workshops with the Board during review of the draft budget and have made adjustments based upon the feedback received. For the past 7 years, I have been responsible for soliciting and collecting 5-year capital budget requests from all departments. I then prioritize the requests and solicit feedback from Board members to determine the FY capital plan. I work with the Town Manager to determine resources to fund the capital plan such as free cash, taxation or other resources. My experience maintaining budget sustainability stems from the historically solid financial planning of the Shrewsbury Town Manager, Board and Committee. We maintain a stabilization fund for the overall general budget that is further increased when possible. The Revenue Manual speaks to the best practices for the balance of the stabilization fund.

My experience managing debt has been through several capital projects. Shrewsbury has traditionally used declining debt when borrowing for large-scale capital projects such as school building projects, the public library renovation and expansion, and the new police station. We have found that the declining

debt model allows us to take on more debt if necessary while maintaining our excellent credit rating. We have also taken advantage of the Mass School Building Authority funding and the State Library Building Committee funds to provide supplemental funds when designing and constructing projects. I have been involved in the planning and presentations to Town Meeting and Town residents for Prop 2 ½ debt exemptions including a new elementary school in 2018 and a new Police Station in 2020. The Town of Shrewsbury has traditionally struggled with passing overrides; however, in 2014 an operational override passed, and then in 2020 a \$9.5M operational override passed. This was the second largest override in the Commonwealth to support both Town and school budgets. This override was based upon the Arlington Model, and subsequently the Town Meeting established a Reserve Fund to stabilize the process knowing that the Town would seek another override in the next seven to nine years.

I have been involved in collective bargaining discussions and agreements for six unions in Shrewsbury and have developed good relations with Union Presidents and representatives. I also have general labor relations experience with non-union staff. The Town of Shrewsbury has a Personnel Board, where I have provided materials for their review and have attended their meetings on a regular basis. I have assisted in preparing cost of living adjustments, performance based adjustments and the establishment of a new salary schedule for non-union employees.

I have experience with Moody's and most recently S&P related to our bond rating. I am involved in annual calls with the rating companies as well as preparation and calls associated with new debt financing. Shrewsbury is also a AAA-rated community and has been so since 2019. We achieved this status by carefully preparing and implementing a stabilization fund plan, a revenue manual, and positive economic growth.

Shrewsbury staff in general, especially the Town Manager's office have an excellent relationship with the school superintendent and school committee. We work in the same building, which aids good relations. My philosophy to maintain good relations is to set forth clear expectations and understandings, review any prior agreements made between the Board and School Committee and make adjustments as necessary.

Shrewsbury is part of the West Suburban Health Group, a collaboration of municipalities and school districts. I attend Insurance Advisory Committee meetings where rates are reviewed and voted upon for both current employees and retirees. The Town of Shrewsbury has an established Insurance Trust Fund but it is only for insurance claims, not for health insurance.