



## Town Administrator Performance Review 2023

### Key Dates

March 6 – March 24	<ul style="list-style-type: none"> <li>• Town Councilors meet with Town Administrator</li> <li>• Town Councilors complete their individual written evaluations of the Town Administrator</li> </ul>
March 24	<ul style="list-style-type: none"> <li>• Town Councilors submit their individual written evaluations of the Town Administrator to the Town Council Vice Chair</li> <li>• Town Administrator submits his self-evaluation to the Town Council Vice Chair</li> </ul>
April 10	<ul style="list-style-type: none"> <li>• Town Council delivers performance evaluation to Town Administrator at regular meeting</li> </ul>

### Evaluation Form

<p><u>Fiscal Management</u></p> <ul style="list-style-type: none"> <li>• Spending maintained within approved budget for fiscal year, with all potential exceptions communicated to and approved by Town Council in advance</li> <li>• Maintenance of AAA bond rating</li> <li>• Maintenance of Free Cash, Stabilization Fund, Capital Budget, and Debt Service within fiscal policies</li> <li>• Maintenance of accurate and complete financial recordkeeping in accordance with applicable accounting standards, state law, and Town bylaws</li> <li>• Development and distribution of an annual financial report, and preparation of semiannual financial forecasts/updates for Town Council in collaboration with Finance Committee</li> </ul>	<ul style="list-style-type: none"> <li><input type="checkbox"/> Not Acceptable</li> <li><input type="checkbox"/> Needs Improvement</li> <li><input type="checkbox"/> Meets Expectations</li> <li><input type="checkbox"/> Exceeds Expectations</li> <li><input checked="" type="checkbox"/> Greatly Exceeds Expectations</li> </ul>
<p><u>Comments:</u></p> <ul style="list-style-type: none"> <li>• Steve has led the fiscal stability of our town really well. He has organized the entire budget process well. He starts early in the budget process laying out budget/revenue needs and expectations and we have consistent visibility into changes from the tri-board meeting through Town Meeting. The Town's finances are well-maintained and budgeting is line-by-line specific and transparent. With the new Council members, Steve has taken the time to explain the budget process.</li> <li>• Steve continues to maintain strong fiscal discipline and controls in an uncertain financial environment. We are in a good position today as well as for tomorrow due to careful planning.</li> </ul>	

<p>Steve sees the importance of maintaining free cash, stabilization fund. The capital budget assures that we are planning for capital improvements, and maintenance of our facilities.</p> <ul style="list-style-type: none"> <li>• The maintenance of AAA bond rating for an extended time is extraordinary and results in tangible savings to the town. Maintenance of Wakefield's AAA bond rating was a particularly important outcome this year as we are contemplating bonding for the high school project</li> <li>• Despite the budget uncertainties of the last few years, Steve has worked collaboratively with the Finance Committee to develop thorough and detailed financial forecasts that have supported our ability to perform scenario modeling and develop reality-based budgets. The October tri-board meetings are a great addition to our annual meetings and I am happy these are part of our regular agenda.</li> <li>• He led the new high school vote and worked with the school department and the permanent building committee and the school buildings subcommittee. I appreciate the conversations with the Town Assessor about how to tell more seniors about the Circuit Breaker. The slides for Town Meeting were great and a true real effort. Equally importantly, Steve and his team's foresight, creativity, and financial acumen were especially evident in the development of the proposed bonding plan for the high school project, where he was careful to develop an approach that minimized the residential tax impact in the early years of the project, while maintaining Wakefield's flexibility to adjust bonding amounts based on project circumstances.</li> <li>• Since May 2022, I have been the Town Council member responsible for reviewing the warrants for payment of bills. I have read the entries on every page and am consistently impressed with the accuracy and completeness of the warrants.</li> <li>• In the coming years, it will be important to be deliberate with applying for grant monies and state funds to offset our budget wherever possible. We look forward to Steve and his team sharing where they have applied for funds.</li> </ul>	
<p><u>Human Resources Management</u></p> <ul style="list-style-type: none"> <li>• Settlement of all outstanding labor agreements prior to expiration</li> <li>• Direct report positions filled, with individuals in these positions meeting job and performance expectations</li> <li>• Annual performance reviews completed for all direct reports, with documented remediation plans for any individuals not meeting job expectations</li> <li>• Annual trainings on diversity/equity/inclusion, sexual harassment, and workplace conduct for all town departments and staff</li> <li>• Development and review with Town Council of succession plans for all direct reports and core administrative staff, including Town Administrator</li> <li>• Maintenance of an up-to-date personnel manual for Town staff, with distribution to all employees upon hire and as updates are made</li> </ul>	<p> <input type="checkbox"/> Not Acceptable  <input type="checkbox"/> Needs Improvement  <input checked="" type="checkbox"/> Meets Expectations  <input type="checkbox"/> Exceeds Expectations  <input type="checkbox"/> Greatly Exceeds Expectations </p>
<p><u>Comments:</u></p> <ul style="list-style-type: none"> <li>• Steve does great on the labor contracts. Despite the inflationary pressures driving labor negotiations in many communities, Steve continues to pursue a thoughtful and strategic approach to collective bargaining agreements that balances Wakefield's fiscal priorities with the need to recruit and retain high-quality staff in a challenging labor market. He has been instrumental in aligning agreements across various groups which provides equity and consistency going forward.</li> </ul>	

Not all labor agreements are resolved, but we are in a rating period that does not extend to the expiration of the agreements.

- Steve has a great leadership team. Steve maintains strong working relationships with his direct reports, and has instilled a positive culture in Town Hall through his leadership and personal example. Steve does a great job supporting his employees, which creates a loyal workforce, motivated to work hard. Town Hall staff, fire, police – all employees are hardworking, and caring.
- Jobs are posted and we have hiring panels. This more open process of hiring has produced better candidates for key jobs.
- There is an opportunity for more trainings for staff, and possibly collaborations with the new town wide social worker leading on training for staff, on issues of mental health, stress reduction and working in collaborative ways.
- Internal work is needed around job descriptions and performance evaluations. I have not seen or heard of any metrics that show how direct reports are being evaluated. While there are no issues now, potentially there could be if clear evaluations are not completed on an annual basis. Performance, positive and negative should be documented so employees are clear on what they are doing well and not so well. Goal setting for each direct report each year is important.
- It may benefit Steve to have more formal, scheduled one-on-one meetings with his direct reports. Steve is a hands-on manager and is in frequent communication with his direct reports, and others, but scheduled time on a regular basis may help move the organization forward and help employees reach their goals.
- Steve has begun to develop a high-level succession plan for his position, as well as members of his core administrative staff, with demonstrated success in identifying potential successors within Town Administration. Work must continue in the coming year to enhance this process.
- Steve may have too many direct reports. There may be potential opportunities to develop a more consistent and standardized employee development planning for Town employees that allows staff to assume greater leadership responsibilities in Town Hall, lessening the burden on Steve to directly manage as many staff members as he does.
- The personnel manual is up-to-date and is an outstanding work product, and core annual trainings exist. However, there continue to be opportunities to expand and professionalize employee development opportunities in the area of diversity, equity, and inclusion. We should strive to excel at setting (and achieving) very concrete diversity metrics with an emphasis on not just inclusion, but also belonging.

#### Communications Management

- Distribution of Town Administrator Notes at least monthly
- Responsiveness to Town Councilor requests within 24 hours
- Responsiveness to direct resident requests within 2 business days by Town Administrator or designee
- Distribution of Town Newsletter twice each year
- Maintenance of current information and functionality on town website
- Wakefield 101 scheduled at least annually

- ☐ Not Acceptable
- ☐ Needs Improvement
- ☐ Meets Expectations
- ☒ Exceeds Expectations
- ☐ Greatly Exceeds Expectations

#### Comments:

- We have progressed leaps and bounds on town communications. While communication was always good amongst those with access to town hall, in the past several years our communications efforts have excelled to reach those who are not integral to town functioning - which is to say, the average resident. The website, email lists, newsletters, and special events, like

Wakefield 101 and Town Day, are excellent tools. Steve and the staff are excellent at both responding to and anticipating needs.

- It was wonderful to see Wakefield 101 return after its COVID hiatus, as it continues to be a creative and effective way to connect new residents with the community
- Wakefield has taken the lead relative to surrounding communities in soliciting resident feedback for key initiatives, including the use of ARPA funds, planning for the new high school, and development of the new master plan
- Steve and his team do a great job of responding to requests in a timely (incredibly timely) manner. We could change the response time for a Town Councilor's request from 24 hours to 24 minutes and the response time for a resident's request from 2 business days to a matter of a few hours and he and his staff would still greatly exceed expectations. Responses are always taken seriously and Steve takes every effort to help people in the community.
- While initial responses are well within time frames, in some cases responses are not complete and follow-up is required. Examples include follow-up on collecting one amount owed to Town; no request timely for reimbursement of ARPA funds paid on behalf of an individual; and that the \$760,000 available for housing assistance was not communicated to the Council as being available to be used, and was in fact recently found to exist due to research by a Town Councilor.
- Steve is a Town Administrator that is seen throughout town and that goes a long way in developing relationships with people and organizations within town. There may be an opportunity for Steve to engage in community meetings more often to allow residents to voice their concerns, as well as for Steve to let residents know what he is doing to make their lives better.
- There has been a very noticeable improvement in the quality of the Town's website over the past year. Website functionality and content continues to improve, with regular updates to front-page informational content. Wakefield's presence on social media also continues to improve.
- Town Administrator Notes have been distributed every 1-2 weeks, including important updates on Town activities and information related to future decisions for the Council
- Resident feedback remains positive about the Town Newsletter
- This year Steve and his team created Town Day and it was a huge success. We hope that continues.
- The Town Administrator's office should continue to issue press releases that are released to local media about the successes we have. For instance, a AAA bond rating should be a press release that we share to the world.

#### Operations Management

- Resident service requests to Department of Public Works to be acknowledged, triaged, and/or addressed within 1 business day
- Maintenance of current operating hours at the Senior Center and Town Hall
- Police, fire, and emergency response times to remain in compliance with federal/state best practices
- Maintenance of industry standards for data security
- Maintenance of operations continuity and recovery plan for Town government
- Maintenance of all Town buildings and other public facilities in good repair, assuring continued access for

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residents and proactively planning for capital improvements	
<p><u>Comments:</u></p> <ul style="list-style-type: none"> <li>• This is a difficult area and one that is constantly evolving based on external standards, tools and threats. Steve and his team work hard to stay abreast of changing dynamics and incorporate new procedures. Perhaps the greatest example of solid operations management was the town's ability to maintain uninterrupted services during the pandemic. That ability to pivot has now become part of the town's ethos, for which Steve and his team deserve credit. The usage of the online portal for events is another example of streamlined operations that meets town needs.</li> <li>• Despite a significant increase in workload, police, fire, emergency and DPW response times remain exceptional. The current Capital Plan addresses critical maintenance issues for Town facilities.</li> <li>• While in prior years many of us frequently received resident complaints about the services provided by Town departments, those complaints have been replaced consistently by compliments about the responsiveness, kindness, and respect shown by all employees.</li> <li>• DPW works hard and there are clear ways to communicate problems with DPW. With that said, we do not hear much about DPW responses and would love to get updated on that during a Town Council meeting. The pace of road and sidewalk replacement/repair will also be a continuing issue, although good work was done in the rating period.</li> <li>• There may be an opportunity to place more of an emphasis on beautifying certain sections of town, making sure that debris and trash is taken care of, cross-walks and signs are not faded, telephone poles are not leaning over.</li> <li>• Thanks to the excellent work of Tom Walsh, Wakefield maintains best practices for emergency management and disaster recovery operations.</li> <li>• The IT team is in the process of migrating to the cloud, enhancing data security for Town government and reducing reliance on locally-hosted servers.</li> <li>• For next year, we should get a debrief on all Town buildings and other public facilities, including the Hurd School. This has been on the agenda for a few years. The town was also working on a survey of all our town own land and I'm looking forward to seeing that list.</li> </ul>	
<p><u>Ethical Standards</u></p> <ul style="list-style-type: none"> <li>• Assure that all town employees, elected, and appointed officials complete state ethics training and attestations as required by state law</li> <li>• Assure compliance with state law in all procurement processes</li> </ul>	<div> <input type="checkbox"/> Not Acceptable         <input type="checkbox"/> Needs Improvement         <input type="checkbox"/> Meets Expectations         <input checked="" type="checkbox"/> Exceeds Expectations         <input type="checkbox"/> Greatly Exceeds Expectations       </div>
<p><u>Comments:</u></p> <ul style="list-style-type: none"> <li>• This year's enhancements include a new electronic process for employees and officials to complete ethics training online, with more robust tracking and reminders from the Town Administrator's Executive Assistant. This was a good decision and should allow is to make sure everyone is in compliance.</li> <li>• Between May and August 2022, an outdated version of the Annual Summary of the Conflict of Interest Law for Municipal Employees was on the Town's website. When apprised of this matter, Steve ensured the most recent version was immediately posted on the website</li> <li>• There is an opportunity for updates on the Town's compliance with state procurement laws, as well as annual reporting with the percentage of employees, elected officials, and appointed officials who are in compliance wit state ethics training requirements.</li> </ul>	

- While we are in statutory compliance, we believe that ethical standards go far deeper. It is about having respect for every level of resident, staff and official, which Steve does. Steve knows the difference between equal and equitable, and I believe he goes out of his way to meet our residents needs with respect and dignity and in ways that are unseen by most.

### **Overall Rating**

- ☐ Not Acceptable
- ☐ Needs Improvement
- ☐ Meets Expectations
- ☒ Exceeds Expectations
- ☐ Greatly Exceeds Expectations

### **Comments:**

- Steve has done an exemplary job as Town Administrator. Wakefield is fortunate to have a Town Administrator with Steve's experience, skill, and can-do attitude. We are grateful he has signed on for another 3 years.
- During our professional careers, many of us have worked extensively with local, state, and federal government officials. Steve is one of the best. He is an extremely compassionate, dedicated, and professional Town Administrator, and it is a pleasure to work with him.
- Steve's skills in financial management have been an especially important part of his success as Wakefield's Town Administrator, and he is a large part of the reason why Wakefield has maintained healthy reserves and a AAA bond rating. During the budget process, he listens to everyone to get a final product that all can support.
- In the past year, Steve managed the process of approving the new high school in a thoughtful way, building a team to successfully achieve positive votes at Town meeting and in the Town election. He managed a process for ARPA funds that addresses the needs of the Town while also empowering the Town Council to advocate for its priorities.
- Steve's dedication to his job is evidenced by the fact that he is extremely responsive to Town Council and resident concerns, often following-up on emails and phone calls within the hour, day or night
- Steve has built a positive culture at Town Hall that is reflected in the excellent service provided to Wakefield residents, and he has hired strong leaders for all of Wakefield's key departments

**Completed By:** Wakefield Town Council (aggregated responses)

**Date:** 4/10/2023