

## Town Administrator Review for Mark Andrews - March 4, 2014

### Financial Management

1. The budget process has run very smoothly this year within Wenham, and Mark was timely in getting his review done and in developing the "TA Budget." It would have been helpful to have a bit more discussion on his budget priorities and the reasons supporting his recommendations – with more discussion regarding long term capital needs. Problems have arisen with Library and HWRSD but these have not been of Mark's making and he has worked diligently and effectively to address.
2. See comment 1
3. Greater "real time" budget monitoring is desirable, although substantial strides have been made this year. At a minimum there should be a comprehensive review of budget status prior to fall town meeting and perhaps a quick review on a quarterly basis to identify "major problem" areas. The bi-monthly Finance Department reports, new this year, have been very helpful.
4. Smooth progress of this year's budget negotiations/development testifies to the accuracy and helpfulness of the budget provided. BMAG willingness and ability to answer questions and information requests rapidly has also been very helpful.
5. Mark has been very successful in structuring Town Hall personnel positions to control costs and increase efficiency. Mark may consider taking a more frugal approach in the hiring of new positions, setting salary ranges on the low side and then adjusting as the tight candidate comes along. Obvious disparities within Town Hall have been addressed and Town/union personnel appear to be satisfied with their fair treatment.
6. This has been a problem in the past and the problem appears to have been requested with both sides of the relationship. Current dealings with the Finance Department consultants and staff appear to be excellent.
7. Few problems have arisen in the Finance Department since BMAP has come "fully" on board. Although Mark may be held accountable in part for the major problems, personnel and otherwise in late 2012 and 2013, he is not alone in this and the situation has undergone a remarkable improvement, with additional savings found for the town due to errors by previously assigned Town personnel.
8. Solid performance here, supplemented by BMAG reports; However, greater transparency in both the ongoing status of Town budgets and the comparative cost of current Finance Department billings would be helpful.
9. The AAA Credit rating speaks for itself.
10. See comments on capital planning.

11. Mark's success in obtaining grant dollars has been very good, I believe superior to previous administrations. His extensive contacts in state government do not hurt him in this regard.

## Board Relations

1. Works successfully and hard to maintain Board relations and communication.
2. Mark is highly responsive to the BOS, but often temporarily loses sight of the longer terms issues in the day to day crunch. Mark should work a bit harder in prioritizing his tasks and feel free to discuss those priorities with the Board.
3. Recommendations are often timely and helpful, but often come only verbally at the BOS meeting. More written documentation and background would be helpful to the Selectmen.
4. Yes, but see comment number 11 above. There is some concern that mark takes too much time in keeping the Board informed as there are some things we do not need to know "real time."
5. See other comments – providing relevant information has gotten much better in the last 6 months, but more direct written communication from Mark might be helpful.
6. This is not really relevant nor do I think it is fair to impose this burden on Mark. Rather, the BOS needs to take more of a leading role in this regard.
7. See comments 1 and 3
8. Good progress on personnel policies but follow-up and finalization are needed. Excellent progress on financial policies, with more to come with proposed procurement training for Committee chairs, etc.
9. Excellent. Agendas, are thorough, responsive to ongoing issues in the Town and submitted for review and comment by other members of the BOS with adequate time to respond or edit. The TA office has gotten better in providing back-up information to Selectman ahead of time for review, but more needs to be done by the TA to provide background, history, and summary of the relevant facts and specific recommendations.
10. Although there are TA "details" that still need to be worked on (procedures, OML, etc.) Mark's command of municipal government management and procedures has served the Town well, and his knowledge of "where to call and who to call" has been of unquestionable benefit/ He has not hesitated to seek advice when he considered it to be needed. Mark is conservative in his decision making and seeks consensus, this is valuable and appropriate.
11. If anything, and speaking only for the Chair, Mark may go a bit too far with regard to keeping the BOS informed. It is hoped that as he gains confidence in his position with Wenham he will feel free to exercise more independent authority and/or to more forcefully recommend various courses of action. 7. Addressed elsewhere, but again I add the note of

prioritizing needed responses with agreement on priorities from the Board.

## Personnel

1. Mark has participated in diligent reviews of candidate personnel and has effectively sought input from department managers. Whereas in the past his loyalty to support staff may have been disadvantageous to the workings of his office, these problems appear to have been resolved. Mark's recommendations on hires have been suitably researched and validly based.
2. Some have accused him of being over-solicitous of these in positions of authority although I have not observed this to rise to a problem level, and every employee needs to be responsive to the demands of his or her management. Although this has not affected the quality of his personnel decisions he needs to continue to work hard to ensure that he reviews everyone's performance and deals with everyone evenly and reliably independent of personality or demeanor.
3. This area needs some work. I am unsure of current status and we need to make sure we have a reliable and document-based system in place.
4. Mark's practices and demands high standards of performance, although I sense a tendency of being on occasion somewhat overcritical when pursuit of those standards is affected by difficult circumstances or communication issues.
5. Overall morale throughout Town Hall and with Town employees is good and Mark has worked effectively to address this. More work needs to be done, especially where communications with certain employees does not occur on a regular basis.
6. I don't have enough information to realistically address the point, and would defer to my fellow Selectmen on this point.
7. Mark has provided for substantial training in the budget (this was previously a problem but seems to have been addressed in concert with the BOS). His efforts to support training of "seconds in command" in the Finance and Assessors office will likely be advantageous to the Town.
8. Department managers have reported that Mark gets an A++ for his collective bargaining efforts. Our current labor peace has been very beneficial for the Town.
9. Again, major progress here after the bleak days of late 2012, early 2013. Mark needs to be continually sensitive to these issues and to respond in a solicitous yet firm manner, and he has demonstrated the ability to do so on most occasions.
10. Leadership team meetings are frequent but much communication also seems to occur on a perhaps too frequent *ad hoc* basis. I suggest "rotating meetings" and quarterly financial/budget/capital discussions with the major departments.
11. Addressed previously. Personnel reviews need to be carried out on a more formal basis

with management (i.e., BOS) involvement.

### **General Management**

1. Addressed previously, noting that Mark needs to continue to treat all subordinates with an equal degree of respect and confidence.
2. Yes, good compliance with Board procedures and preferences
3. As discussed elsewhere, we need more transparency on long-term planning. Mark has shown some real strengths in this regard, i.e., the Collins Center report, but there are weaknesses as well. Mark needs to share his thoughts and recommendations on his 5-8 years capital plan and work with BOS and FinCom to round this out. I believe he needs to communicate more extensively with school authorities to obtain a clearer idea of how they will address unacceptably high per pupil costs going forward. Yet, at the same time, Mark's work in implementing the challenges of the RECC have been exemplary.
4. Mark's ability to work under pressure has been compromised to a certain degree by an attitude expressed by some who consider him to be a "short-timer." As Mark continues to earn and enjoy the respect of the community I suspect he will continue to recognize that his decisions may be sometimes questioned that will nonetheless be respected.
5. Mark has been generally successful in meeting his short and intermediate term goals expressed last summer. Goal-setting should be a continuous process and the BOS should ensure we articulate mutually acceptable goals for end of year evaluation of BOS and TA. Mark needs to develop his own goals review, as he has done, and inform the BOS as to their needed role in helping to accomplish them.
6. See above
7. To achieve this goal very close communication with the Department of Public Works will be necessary, especially so now that certain provisions of the Collins Center study may begin to be implemented. I suggest a renewed effort with DPW in the year ahead in an effort to successfully accomplish this very ambitious year potentially highly valuable program.
8. This remains to be seen. Factors appear to be in place for a successful Annual Town Meeting, and Fall Town meeting was successful. This is an important aspect of the TA position and needs to be done right, although there is always the possibility that individuals may seek to disrupt that meeting for their own purposes. I am confident Mark will suitably address any such challenge.
9. previously addressed.
10. New assessors' database, IT replacement plan, Town website, Collins Center initiative etc.: there are substantial activities going on in this regard. More work needs to be done to ensure that the website remains updated.

## **Planning and Organization**

1. Mark's efforts at long-range planning with particular attention to capital planning, although known to exist, are not sufficiently transparent. More discussion and consideration of Mark's thoughts and recommendations are needed. These are discussions are perhaps best done at times NOT during the budget season but rather when budgetary pace is less frenetic.
2. Mark has been effective in re-arranging personnel and job descriptions within Town Hall to both promote training and to bring junior staff along to more responsible positions. Although generally in favor of conclusions regarding Town operations via the Government Study Commission, he has not engaged in this primarily because he has been given no direction by the BOS to do so. Mark has been a proponent of innovation and efficiency, although this has not always been well-received by more conservative members of the community. His work on the Collins Center CIC grant has been nothing less than extraordinary.
3. On several occasions Mark has laid out his goals on an annual or semi-annual basis. A more "real time" re-visitation/refinement of these goals over the course of the year would be valuable to the BOS and, I think the Town. Mark has always been forthcoming with those goals, built appropriately and in large part as to how he is advised by the BOS.
4. Mark is realistic in his expectations and dogged when necessary to "wear down the competition." He is not afraid to speak up and support his understanding of Town priorities. Nevertheless, he does not let disappointment become discouragement and advises alternate ways to accomplish the ultimate objective. More thoughts and advice along these alternate approach lines would also be welcome.
5. There is a thin line between ambitious goals and unrealistic goals. Mark sets high standards for himself and others, and works with them to help them achieve those goals. However, I think Mark's management style would be improved by reaching out and responding to a broader range of employees and, where feasible and sought by others, town residents.

## **Community and InterDepartment Relations.**

1. Previously addressed.
2. Mark is exceptional in his attendance at meetings and in putting the hours in both within and outside of Town Hall.
3. Mark has been much better in responding to inquiries, and following up, during this past half-year, he recognizes that this is an important aspect of his overall performance review. I am not aware that there have been any serious issues with this aspect of the TA's performance.
4. Yes, this is a strength for Mark. His affirmative efforts to publicize significant developments via press releases are a benefit to the Town. The BOS should consider additional ways that

### FINANCIAL MANAGEMENT

	5	4	3	2	1	N/A
1. Coordinates the annual budget process and prepares a timely and realistic budget proposal for Board departments in accordance with needs, goals, and priorities as set by the Board.		✓				
2. Employs sound fiscal management procedures for the development of the budget recommendations.		✓				
3. Effectively monitors and controls budget expenditures, to manage waste and inefficiency.			✓			
4. Provides complete and accurate financial information to facilitate budget deliberations of the board.			✓			
5. Creatively manages available resources to increase productivity and efficiency.		✓				
6. Works effectively with the Finance Director and the Finance Committee.	✓					
7. Analyzes crises and responds effectively to problem situations.			✓			
8. Presents Budget information in a manner that promotes full understanding of the issues and needs.			✓			
9. Manages the Town's debt program to balance the needs of the Town and the rating agencies.	✓					
10. Develops and maintains a long term financial plan to assist in investment planning by the Board.				✓		
11. Seeks to maximize revenue opportunities through non-tax mechanisms/grants.		✓				

Optional Comments:

### BOARD RELATIONS

	5	4	3	2	1	N/A
1. Maintains a professional working relationship with the Board, promoting a climate of mutual respect and trust.		✓				
2. Interprets, supports, and implements Board decisions, while effectively handling routine requests and duties.			✓			
3. Offers professional advice to the Board, including appropriate alternatives and recommendations, based upon thorough study and analysis.		✓				
4. Keeps Board members informed on major issues, events, and concerns that may affect the Town.	✓					
5. Provides support material and other necessary information to Board members as requested.			✓			
6. Recommends appropriate candidates for appointments under jurisdiction of the Board.						✓
7. Responds to requests from the majority of the Board for action.			✓			
8. Recommends new and revised policies as needed to the Board.		✓				
9. Works with the Chair to establish an agenda that addresses issues in a timely manner.		✓				
10. Is knowledgeable in the field of local government management.		✓				
11. Keeps Board members informed of issues and activities in town government and the community.	✓					

Optional Comments:

**PERSONNEL**

	5	4	3	2	1	N/A
1. Assures nomination for employment of the best qualified personnel.			✓			
2. Assigns, transfers, and promotes employees based on sound decision making.			✓			
3. Assures systematic performance evaluation of personnel under the authority of the Board.				✓		
4. Establishes high standards of performance for all managers under the Boards authority. Recognizes, develops, and utilizes their leadership abilities.			✓			
5. Strives to maintain good staff morale and maintains open, honest, and professional relationships with staff.			✓			
6. Effectively delegates and encourages participation and shared decision making with appropriate administrative staff members and groups in planning, procedure development, and policy interpretation.			✓			
7. Encourages staff development which focuses on continuous professional growth.		✓				
8. Effectively leads collective bargaining efforts with unions under the responsibility of the Board. Keeps the board informed of progress and seeks the Board's authorization for bargaining positions.	✓					
9. Deals fairly and effectively with employee grievances. Is effective in controlling or moderating potential labor disputes.			✓			
10. Provides leadership, motivation, and support to department heads.			✓			
11. Evaluates performance and takes necessary action to resolve negative results.				✓		

Optional Comments:

### GENERAL MANAGEMENT

	5	4	3	2	1	N/A
1. Manages and coordinates departments under the jurisdiction of the Board with good management technique, sound judgment and in accordance with state and federal laws.			✓			
2. Operates within Board policies and directives.			✓			
3. Engages effectively in short and long range planning.			✓			
4. Is able to resolve difficult problems, manages conflict and works effectively under pressure.			✓			
5. Works with the board to annually evaluate and develop goals.			✓			
6. Assures that the Board's goals are implemented.		✓				
7. Monitors and plans for the maintenance and repair of facilities under the Boards jurisdiction.		✓				
8. Effectively oversees the preparation and printing of the Warrant and the Town Report.			✓			
9. Recruits, selects, and retains quality personnel.		✓				
10. Promotes automation and innovation in service delivery.			✓			

Optional Comments:

### PLANNING AND ORGANIZATION

	5	4	3	2	1	N/A
1. Creates and facilitates an environment for long-range and strategic planning.			✓			
2. Develops proposals for cost effective reorganization of Town operations.						N/A
3. Establishes appropriate goals and objectives for performance.			✓			
4. Negotiates and keeps realistic commitments.			✓			
5. Manages expectations of others appropriately.			✓			

Optional Comments:

**COMMUNITY AND INTERDEPARTMENTAL RELATIONS**

	5	4	3	2	1	N/A
1. Maintains harmonious working relationships with other agencies of Town government.		✓				
2. Attends meetings of Town agencies at which matters relating to the Board's responsibilities appear on the agenda.	✓					
3. Responds to community and citizens' concerns and complaints.			✓			
4. Communicates the Board's plans, goals, and accomplishments to staff, Boards and Committees, and the community.		✓				
5. Communicates effectively with the media.		✓				
6. Keeps the citizens informed of current issues in Town government.			✓			

Optional Comments: