

5 = Strong
1 = weak

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.		✓	Goal: Start this process earlier, work with Finance Director and Dept. Heads to gain greater understanding of details of departmental budgets.			
2. Employs sound fiscal management procedures for the development of the budget recommendations.		✓	Example: expense lines			
3. Effectively monitors and controls budget expenditures, to manage waste and inefficiency.		✓	Work with Dept's to ensure budget presenters have data necessary to address questions/concerns			
4. Provides complete and accurate financial information to facilitate budget deliberations of the board.		✓	Keep pushing innovative measures to control costs			
5. Creatively manages available resources to increase productivity and efficiency.	✓		this is a strength			
6. Works effectively with the Finance Director and the Finance Committee.	✓		Excellence in knowing who to contact with "2's" and reaching out			
7. Analyzes crises and responds effectively to problem situations.	✓	✓	Need to incorporate a public education component - give for Boards, Committees - staff			
8. Presents Budget information in a manner that promotes full understanding of the issues and needs.	est. Facebook	✓	AAA rating a testament to strong capabilities in this area			
9. Manages the Town's debt program to balance the needs of the Town and the rating agencies.	✓		This has not been requested, explicitly, by the Bos. CIP should be dusted off; assessed w/ FD; DEPT Heads. A goal for next year			
10. Develops and maintains a long term financial plan to assist in investment planning by the Board.			This is a great strength			
11. Seeks to maximize revenue opportunities through non-tax mechanisms/grants.	✓					

Optional Comments:

Attention to detail and support of Finance Dept excellent. Budget development strong - could move preliminary work earlier to help gain greater "granularity" of ~~understanding~~ detail in budget communications to Board i.e., expense line items but on the whole, very good. Execution on financial operations of Town outstanding.

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.	✓	Communications are timely and thorough				
2. Interprets, supports, and implements Board decisions, while effectively handling routine requests and duties.		✓ Delegate as appropriate, as much as possible Delegate				
3. Offers professional advice to the Board, including appropriate alternatives and recommendations, based upon thorough study and analysis.	✓	Involve members of admin. team as best you can				
4. Keeps Board members informed on major issues, events, and concerns that may affect the Town.	✓	This is a strength espec. emerg. response				
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.		✓ Financial! Personnel policies work has been strong				
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.	✓	This is a strength				
11. Keeps Board members informed of issues and activities in town government and the community.		✓				

Optional Comments:

Level of communications between TA and BOS is timely, comprehensive & efficient. Possibly, expectations need to be re-oriented so less time need be spent, but close working partnership is vital, so need to work with BOS to consider an optimal solution. Network and contacts throughout state government an enormous benefit to the Town. Resourceful need: energy a plus, delegate: lean on staff for support as appropriate

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.			✓	Goal: implement routine schedule for annual evaluations		
4. Establishes high standards of performance for all managers under the Boards authority. Recognizes, develops, and utilizes their leadership abilities.			✓	Leadership team meetings beneficial		
5. Strives to maintain good staff morale and maintains open, honest, and professional relationships with staff.			✓	Goal: schedule regular individual meetings w/ Dept. Heads and staff to the extent these are not already taking place		
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.	✓		Excellent			
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.		✓	See goal above on scheduling individual meetings			
11. Evaluates performance and takes necessary action to resolve negative results.		✓	See goal above on implementing routine evaluations (annual)			

Optional Comments: Accessibility is excellent, just be attuned to the reality that some personnel will take greater advantage of it than others. So touch base regularly with all departments, even above and beyond the leadership team meetings. Incorporate Dept. heads into capital planning early and pro-actively.

GENERAL MANAGEMENT

Teamwork excellent
- School Budget

	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.	✓					

Make sure give consistent time & attention across all departments

Push Bos to bring more systematic structure to this

Resolving union! Dept. Head contracts a great strength.

Bos needs to do more here - structure

Collins Center work a positive - implementation will be a challenge
close cooperation/ teamwork will be key

Needs to move earlier Delegate

Personnel moves a positive especially restructuring

Website! a great improvement

Optional Comments:

Open door policy is positive - consider scheduling office hours and individual, regular meeting
- Dept. heads; staff to create time necessary to meet TA ~~total~~ work obligations.

⇒ A more structured approach may be helpful.

Emergency planning, communication? notification a strength
attention; time spent planning for these events is very constructive.

Transition to RECC was excellent, on the whole

COMMUNITY AND INTERDEPARTMENTAL RELATIONS

	5	4	3	2	1	N/A
1. Maintains harmonious working relationships with other agencies of Town government.		✓	Can never do enough on this. Make sure to be your own toughest critic - if there is a Dept. you have not had contact with in more than a week, put in a call, schedule mtg.			
2. Attends meetings of Town agencies at which matters relating to the Board's responsibilities appear on the agenda.		✓	Delegate where possible			
3. Responds to community and citizens' concerns and complaints.		✓	This is a shared responsibility with BOS - let's work to set a goal on how to approach the issue of communications with the community generally			
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:

Customer service nature of municipal corporation must always be at forefront of what we do every day. Work to encourage corporate culture that ~~is~~ places greatest emphasis on meeting the needs, questions & concerns of the public in a friendly, solicitous and comprehensive manner. MMA may have advice on resources for workshops that provide support/training/team building consulting services.

PLANNING AND ORGANIZATION

	5	4	3	2	1	N/A
1. Creates and facilitates an environment for long-range and strategic planning.		✓	this goal is pervasive, but we need to set more concrete structure around this, it's too ad hoc in execution. But, nevertheless, execution has been good.			
2. Develops proposals for cost effective reorganization of Town operations.		✓	/ BOS & TA need to work more in this area			
3. Establishes appropriate goals and objectives for performance.						
4. Negotiates and keeps realistic commitments.		✓				
5. Manages expectations of others appropriately.		✓				

Optional Comments:

Look to communities that are doing this type of long-range strategic planning well and evaluate what aspects of their practices Wenham might use as a model for implementation.