



Town of Chatham

Office of the Selectmen
Town Manager
549 Main Street
Chatham, MA 02633



Jill R. Goldsmith
TOWN MANAGER
jgoldsmith@chatham-ma.gov

Tel: (508) 945-5105
Fax: (508) 945-3550
www.chatham-ma.gov

2017 Annual Performance Evaluation of Town Manager Jill Goldsmith Presented by Board of Selectmen Chairman-Cory J. Metters

Ms. Goldsmith was hired as the Town Manager in 2011. Members of the Board of Selectmen have the responsibility of an annual performance evaluation of the Town Manager. To assist the Board in preparing their evaluation, Ms. Goldsmith provided a summary of the accomplishments and activities which occurred in the review period. The Town Manager's performance was evaluated on six general managerial categories:

- 1) Personnel/Professional
- 2) Board Support/Relations
- 3) Financial Management
- 4) Personnel Management/Organizational Leadership
- 5) Community Leadership/Public Relations
- 6) Town Operations/Infrastructure

Each member of the Board of Selectmen awarded "performance points" based on a total of 38 different sub categories using the following 4-point rating scale:

- 4 points=Excellent/Highly Commendable
- 3 points=Strong Performance
- 2 points=Satisfactory/Commendable
- 1 point=Improvement Needed
- N/O=Not Observed

The Town Manager's evaluation was performed by four members of the Board of Selectmen. Currently there is one seat open on the Board so that seat recorded no scores. The participating members awarded Ms. Goldsmith a composite score of 3.64. This compares to Ms. Goldsmith's previous composite score of 2.83 from last year. This was an improvement from a scoring range of Satisfactory/Commendable to Strong Performance in 2016 and Strong Performance to Excellent/Highly Commendable in 2017. The four participating Selectmen appeared to be in agreement with many of their scores on the evaluation. The 38 sub categories broke down with the following results:

- 11= 4.00 (perfect score)
- 12= 3.75
- 1= 3.67
- 6= 3.50

5= 3.25
2= 3.00
1= 2.25

These results show that 37 of the 38 sub categories placed the Town Manager in a range of Strong to Excellent/Highly Commendable. Only one category under Personnel Management/Organizational Leadership rated the Town Manager as Satisfactory/Commendable. The area of "recruits, selects and retains quality personnel" scored 2.25.

BOS Comments – 2017 Town Manager Performance Evaluation

Each Selectman was given the opportunity to provide their own written comments regarding Ms. Goldsmith's performance in the last year. They were also provided the opportunity to meet with the Town Manager prior to completing the evaluation. The following comments were provided:

1. Personal/Professional

The Town Manager is certainly a person of integrity and honesty. While very strong in this evaluation group, there is some room to improve conflict management.

The Town Manager is a consummate professional, ethically dedicated to her responsibilities, even-tempered under pressure, and continually working to advance her professional development. Chatham is fortunate to have someone of her ability and integrity as Town Manager.

The Town Manager is a leader with great integrity

2. Board Support/Relations

The Town Manager is always accessible to individual Selectman questions, concerns, and input. Most notably, her principal goal is to do what is best for Chatham-which makes for a most positive interaction between TM and BOS.

The Town Manager and the Board have a very strong and productive relationship. I would only like to find a way to address the growing list of agenda items requests. A balance of Board and staff resources should allow many of these items to be scheduled and discussed. Also the monthly reports are very valuable.

Excellent goal setting and subsequent attainment. The Town Manager is always available to the BOS!

3. Financial Management

Very strong area for the Town Manager. Works very hard to maintain AAA rating for the Town. No concerns in this area.

A+! The FY19 level-service & essentially level-funded budget is a remarkable achievement. The Town Manager will need to continue efforts at improving capital project planning, as recommended by FinCom, and as she has undertaken with the Collins Center.

Stellar performance. The Town Manager & Finance Director make a strong financial team.

4. Personnel Management/Organizational Leadership

Achieving/sustaining a "happy," stable, and productive workforce is a challenge in any organization. The Town Manager has made greater progress toward this goal in recent times, and will need to continue along these lines as she works to fill pending (e.g. Conservation Agent) and future job openings.

Only area of concern in the Town Manager evaluation. Improvements in recruiting and maintaining quality personnel, recognizing the limited talent pool the Cape can provide. Also would like to increase steps for all staff to become more familiar with each other. This could lead to a stronger work environment and increased staff morale.

Appointments have improved (Fire Chief). Very good with negotiations. A bit too much turnover in critical positions. (Not sure about morale...) Not afraid to try new organizational models.

5. Community Leadership/Public Relations

The Town Manager generally excels at leading with the public on communicating information about Town issues. This remains an important and ongoing objective.

Very strong area for the Town Manager, Always visible in the community and has increased interactions with various civic and business groups in Town.

Stellar performance on all metrics in this Community Leadership/PR category.

6. Town Operations and Infrastructure

Would like to see improvement in enhanced use of technology to assist/monitor operations of the Town. Possible improvements in communication with/by Department Heads to provide better coordination of ongoing Town programs, services, and infrastructure reviews.

The Town Manager takes a proactive and holistic approach to the Town's overall operations and infrastructure needs. This approach is essential to the disparate facets of Town government.

The Long Range Plan is on its way...Transfer Station ops starting to be addressed.

Conclusion:

The four Board members concluded that Ms. Goldsmith is performing as a very strong and effective Town Manager. Improvements were made in the scores of all sub categories of the Town Manager's Performance Evaluation. The scores for the category "recruit, select and retain quality personnel" remains at a Satisfactory level. The Board and Town Manager have worked well together. They are able to discuss both the positive and negative issues in a professional manner.

Overall Rating: 3.64 out of 4.00



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MEMORANDUM

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TO: Honorable Board of Selectmen

FROM: Jill R. Goldsmith, Town Manager

DATE: April 16, 2018

SUBJECT: Town Manager Performance Evaluation #6 Transmittal–
Fiscal Year 2018/Calendar Year 2017

Attached, please find the Town Manager Performance Evaluation form for Fiscal Year 2018/Calendar Year 2017. To assist the Board of Selectmen in preparing the evaluation, I wanted to share with you some of the accomplishments and activities that have occurred in the review period driven by your goals as well as my day-to-day core Town management duties for our municipal corporation with a \$49M omnibus budget and 132 full-time employees. I have also included a preview of the Town Manager's and BOS 2017 Annual Town Reports.

The accomplishments of our administration are the result a strong partnership with Town Officials, the hard work of Town employees, and the diligence and commitment of my management team. The ability of this team to work together to continuously strive to improve our processes and services, shift gears for required responsiveness, proactively work to identify issues, and provide our citizenry with the programs and services expected is both impressive and critical to achieve the goals set by the Board as well as maintain our organizational culture. I am proud of the team we have built, community partnerships, and maintaining a sense of community over the past six years.

Building on initiatives since August 2011, I have worked to be a high energy, communicative and compassionate leader who seeks to balance progressive initiatives with our traditional community values. In 2017 this commitment remains. Much of my efforts are behind the scenes, but I maintain high expectations for performance and accountability as a whole. Below are highlights with narrative to follow:

Personal/Professional

- Work to remain accessible and available 24/7 in both my role as Town Manager and resident

- Commitment to continued professional development; ICMA Credentialed Manager in 2016 (40 hours of professional development per year);
- Leadership roles on Statewide Committees -
 - Joint Labor Management Committee serving three Governors, and Management Chairman since 2012
 - MA Municipal Association – Committee on Manager/Police Chief Relations, Chairman
 - League of Women in Government; Founding Member of MA Affiliate in 2017
- Excellent relationships with local, state, and federal legislators and administrations. Many call/email or text on a regular basis to check in on Chatham’s needs or initiatives

Board Support/Relations

- No appointment needed; walk-ins encouraged
- Continuing to improve BOS agenda reports and meeting packets
- Communications to/from BOS shared in an effort to keep the BOS similarly informed and employees connected to our policy makers
- Board included on Chatham everyone (.gov) emails and Community events e-calendared

Financial Management

With a priority for financial prudence and efficient direction of resources to maintain a stable tax rate:

- Implementation of initiatives approved by Town Meeting - Capital Bond Article - \$11.3M; Waterways User Fee (WUF) Revolving Fund; IMA with Harwich; Property Acquisitions
- Maintain and improve bond rating – comprehensive review of budget and financial policies; OPEB funding obligations
- Collective bargaining cost containments since 2013- \$200,000 in savings in health insurance premium cost sharing in FY2018, limited buy-out liabilities
- Senior Tax Work-off Program – initiated at my recommendation in 2012 when the previously (2010) approved debt -excluded projects repayment hit the tax rate in 2012 – continues to flourish
- Encourage staff to seek grant opportunities
 - Bike racks
 - Community Compact Grants – CIP and Class/Comp
 - Fire Engine Pumper
 - Second COA Bus Replacement (by June 30, 2018)
 - Transfer Station Compactors
 - Seaport Grants

Personnel Management/Organizational Leadership

- Continuing work to stabilize employee turn-over - separation or retirement; CMEA and CMA contract ratifications in 2017 – first successor for CMEA and initial contract for CMA. Working to recruit/hire Cape based employees

- Promotional and succession efforts – internal appointment of the Fire Chief (Deputy Fire Chief) triggering other FD advancements; Community Development Director (Principal Planner), Facilities Foreman (Hwy/Transfer Station Operator), Facilities Technician (Community Center Building Supervisor) and Parks/Grounds Foreman (P/G operator)
- Encouraging Departments to collaborate - COA/Public Safety/Health/Elder Services Team; Emergency Management Team
- Regular meetings with staff, enhancing performance evaluations and training

Community Leadership/Public Relations

- Attendance at Chamber of Commerce, Community social events and fundraisers
- Awards- One-Cape and Muddy Creek Bridge engineering design
- Channel 18 shows – ATM Warrant Preview, Monomoy Refuge
- Citizen Academy - Fire and Police departments
- Community Forums on Policing and Race Relations
- Meals on Wheels Delivery in March – National Program for Mayors or City Managers
- Strategic Planning participant for the Atlantic White Shark Conservancy

Please also refer to the 2017 Annual Reports for more details.

Town Operations and Infrastructure:

As you are well aware, early in my first appointment, I began providing a compilation monthly report to the BOS which is also published on the Town’s website. Much is guided by the BOS commitment to the annual goals and objectives process, Committee and Board priorities, proactive best practices, and outputs/responses to the welcome demands of the public. Additionally, I continue to fine-tune leadership efforts in line with BOS priorities to retain a strategic focus and organizational culture established by the BOS; communications via regular weekly Department Head meetings, bi-weekly meetings with off-site Department Heads and staff, and an open door policy for BOS, employees, citizens, and visitors. I also continue to devote much time and effort behind the scenes to coach staff as we manage many priorities – from staff liaison activities to the 40+ Boards/Committees to presentation of weekly BOS agenda staff reports to ensure the BOS has the information and resources necessary to contemplate any action, and core functions.

In 2017, I continued to focus on identifying reforms and developing strategies to enhance the delivery of services, maximize resources, and strengthen operations at all levels of government. In partnership with the BOS, many strategic planning initiatives came to fruition – see attached BOS 2017 I continued to focus on Budget Summits as initiated in 2012; cost-containment/return on the Implementation of health insurance reforms/tiered benefits; completion of land acquisitions as voted by the Town Meeting; roadway infrastructure projects; and advocacy for the Town’s position on HR1157 locally and in Washington DC with bi-partisan letters of support for legislation. In addition, we worked to response to citizen inquiries and numerous public records requests in a timely manner.

The COA facility initiative was a great example of thoughtful strategic planning. Utilizing the key findings and recommendations from the COA's comprehensive Community Needs Assessment, we initiated the COA Space Need Analysis. The firm of Bargmann Hendrie + Archetype, Inc. (bh+a) was engaged to provide a Space Needs Analysis and Program Development Pre-Design Planning for the Council on Aging. Working sessions with Town leaders and community stakeholders were held to receive input throughout the process to formulate a presentation/recommendation to the BOS for next steps. Other stakeholder initiatives related to waterfront infrastructure which resulted in a potential price tag in excess of estimates. While politically difficult, the preliminary results identified strengths and weakness with our master planning process and for a Board objective on a better process for prioritization of capital projects.

Other infrastructure highlights relate to our focus on water consumption/conservation - the installation of additional automatic water meter reading devices and staff recommendations to the BOS as Water/Sewer Commissioners to manage water consumption, production, and successful re-bidding of the Water Treatment project which is due to be completed in 2018.

Financial Management:

The fiscal condition of the Town remains stable due to conservative budgeting, multi-year forecasts, and the review/implementation of reforms which result in savings and efficiencies. The economic outlook included in the Town Manager's budget message illustrates activities of a coordinated department permit review and a component of the Town's increased valuation in 2017 – with a tax rate of \$4.87 per thousand, down from \$5.03 in 2016. As noted, I initiated a comprehensive review of the Town's Budget and Financial policies, and submitted grants via the Commonwealth Community Compact for CIP Investment/Rating program and review of employee compensation via the Collins Center.

Work is done throughout the year with Department Heads to evaluate and prioritize departmental needs and financial requests recognizing the need to be flexible and adapt to changing situations. As variables arise, such as broken equipment, staff injuries/illnesses/retirements, new regulations or requirements, or storm/weather-related issues, each Department Head keeps me apprised as to the issues and proposed remediation. All department and division heads review budget to actual spending reports on a monthly basis, and are encouraged to review costs/charges for services and continually seek alternate funding sources to augment their programs and services.

Personnel Management/Organizational Leadership:

Personnel management is not always apparent to the public - or the Board, but my commitment remains to team-building, professional development, and transition/succession planning. Enhanced benefit cost sharing and limitation to employee pay-outs implemented in 2013 for new employees contributing 35% to benefits (legacy employees' share is 30%) has resulted in initial cost containment. As we have seen a turnover in more than 40% of our workforce since 2010 when the State offered Early Retirement- many more expected due to retirement eligibility, I directed our new Human Resources Director in 2017 to proactively plan for such transition and succession planning in collaboration with the Departments. Feedback to Department Heads is provided on information received in exit interviews with separated

employees, review of operations when a vacancy occurs, and the encouragement of feedback on an ongoing and regular basis is encouraged, in addition to goal setting in annual performance evaluations based on the adoption of the BOS annual goals. On-going efforts and enhanced attention is committed to employee relations, review of administrative procedures, and resources for our most important asset.

I continue to have weekly Department Head meetings to ensure interdepartmental communication and collaboration, but also to provide a forum to preview agenda items or contemplated new practices. I continue to meet bi-weekly with department heads/staff at their off-site locations to remain current on personnel and operational matters – and available if an employee wants to chat with me at their workplace. I remain open to refine administrative procedures with input from any Town employee, and this past year continued to focus on centralized human resources functions and standard practices which was an area that needed refinement.

To protect the rights of employees under the law and to protect the Town from liability exposure, I have kept the Board apprised of personnel matters to the extent possible within the law. A notebook is maintained in our office (public information) with employment contracts since the initial appoints of the Finance Director, Fire Chief, and Police Chief. Current and previous collective bargaining agreements with the Town's unions are also included, along with the Town Manager Employment Agreements. All contracts/employment agreements are now available on the Town's website as well. The BOS is also included on the internal email distribution list – Chatham Everyone as they now have emails on the Town server.

Professional Development/Community Leadership/Public Relations:

Communications with my peers continues to remain a priority. As a member of the Massachusetts Municipal Managers Association (MMMA) and Cape Cod Managers Association, I attend regular meetings throughout the year in order to stay apprised of pertinent legislative initiatives, best practices and compelling issues of my colleagues. Further, I worked with the MMA to inform the legislature of our needs or any impacts contemplated to the Town. For the past three years I have served as the Management Chairman for the MA Joint Labor-Management Committee (JLMC) for Municipal Police and Fire contract disputes. I was originally appointed in 2006 by the Governor Patrick and reappointed by Governor Baker.

In late 2016, I received certification as a Credentialed Town/City Manager by the International City and County Managers Association (ICMA). The ICMA Voluntary Credentialing Program recognizes professional local government managers qualified by a combination of education and experience, adherence to high standards of integrity, and an assessed commitment to lifelong learning and professional development. I became the 29th credentialed Town Manager/Administrator in MA. In 2017, I continued professional development – 40 hours per year and commitment to a professional development plan. In 2017, I received recognition by the International City/County Management Association (ICMA) for Significant Contributions and Achievements in the Advancement of Local Government Administration and in honor of 25 years of service to local government.

In October, I attended the annual ICMA conference in San Antonio TX (received the above service award) which focused on citizen engagement, implementing strategic plans, and managing social media and e-hostility. I also attended the annual MMA Conference and Manager's Fall/Spring professional development conferences.

Collaboration locally continues with our regular Finance Team meetings with the Harwich Town Administration, Monomoy Regional School District Administration and our Town Finance Team including the Finance Director. That launched our Muddy Creek grant initiative with the two Towns and Pleasant Bay Alliance (One Cape Award) as well as the Wastewater Intermunicipal Agreement with Harwich. I am also regularly in communications with State Legislators and I serve on the Lt. Governor's Working Group.

Throughout the year, during regular and after-hours at various events, I meet or speak with many residents, property owners and business owners to listen and address matters of concern; sometimes it is a quick compliment or specific issue, other times it may relate to a policy matter or administrative procedure. I make every effort to respond to phone calls, emails, visits and letters in a timely fashion and/or delegate to the appropriate staff person with the same expectation. Over the past year, I received and responded to approximately 5,000 emails (a record high!) relating to issues before the Board or general community issues or questions, and public record requests. I will continue to remain accessible to the members of our community and strive to be responsive personally to inquiries in a timely manner – a directive I have made to staff as well.

Additionally, I worked to enhance multi-media approach to public information - Channel 18 cable show on the budget and ATM available on-line on demand, *YouTube* shows on Monomoy Refuge and special events, as well as *Chatham Today* programming highlights. *Budget Central* and *Town Meeting Central* enhancements to the Town's updated website gets us closer to 24/7 access to information, including links to the Town Manager's proposed Budget and Budget Book as promoted in the Town Manager's annual budget message

Board Support/Relations:

I have kept the BOS informed of major issues throughout the year including emergency situations, legislative updates, new initiatives and significant issues in our administration. This includes regular email notifications to inform the Board of various issues or concerns so that any member can respond to constituent inquiries, including but not limited to storm updates, roadway projects, public safety issues, as well as community events, development projects, and various issues that residents have brought to my attention. In addition to these communications, I have also provided or asked staff to provide numerous reports, information and updates to the Board at BOS meetings and in Executive Sessions, if necessary.

While I strive to effectively oversee and manage the daily operations and administration of town government, I do not hesitate to seek input from the Board. I meet regularly with the Chairman of the Board of Selectmen to review agendas, discuss policy issues for future agendas, as well as word on street. I have been and remain open to direction and guidance by the Board and I actively work to provide feedback and implement when feasible those suggestions provided. Communication with the Town Manager is integral to our partnership

and I appreciate your continued efforts. I am always available to meet with Board members and will continue to keep all similarly informed.

Final Thoughts:

Every Sunday evening, I take a moment to reflect on the previous week and to plan for the week ahead. It is always amazing for me to look back at the pace for which staff and I work on day-to-day matters in addition to established goals and items for/from weekly BOS meetings. While I have worked to highlight accomplishments, I am very self-aware that challenges still exist in my role as Town Manager and I work to be as responsive as possible.

Our workforce is aging and while we work on succession planning many departments do not have a deep bench to call upon. Cape-based entrance into the public sector – professional or skilled positions is challenging coupled with market competition for Cape employees and cost of living. In the past two years there has been significant turn-over in the Finance Division and Community Development which has since stabilized due to excellent hires (and returning of some separated employees). More work needs to be done and we are working on a better onboarding program. In our “small/rural” community as defined by the State due to its year-round population, staff is tackling issues that now persist year-round in recent years - coastal resiliency/storm preparation/response; public safety call volumes; maintenance of the Town’s infrastructure, facilities, streets; and basic core service requests. Increasingly staff is experiencing a trickle up of performance demands and challenges. It’s a matter of balancing workloads, appropriate training and productive feedback.

Our employees are very dedicated -whether it’s serving as staff to the many Town committees or call backs for emergency management to protect our citizenry – all welcomed in addition to day to day duties.

It is an honor to serve as Chatham’s Town Manager! I especially appreciate the open discussion by individual members of the Board of Selectmen for personal feedback throughout the year and via the formal evaluation process. I am always open to suggestions to serve you and the community better and I hope to continue to serve as your Town Manager for many years.

Thank you!