

**Town Manager Performance Review**  
**Fiscal Year 2024 (July 1, 2023-June 30, 2024)**  
**Summary of Comments**

**PART A. *ACHIEVEMENT OF FY2024 GOALS***

**Organizational Resilience**

Kerry has creatively re-organized and assembled a very talented workforce. With better coordination and strategic planning, they will become a highly performing team.

Excellent management performance.

Kerry has done an exceptional job building a senior management team and fostering commitment at all levels of employees. Completion of the comp plan is a major milestone.

In general, the organizational resilience progress has been acceptable. A highlight is the improvement in HR implementation effectiveness and the relationship with the Personnel Board. Given the existing conditions up to 2023, clear improvements have been achieved. There remain significant opportunities, maintaining a continued focus should result in the area moving from a neutral to an organizational strength.

**Diversity, Equity, Inclusion & Belonging**

The inherent difficulties have been well managed.

More diversity in town hires is needed. Work with DEI commission was excellent.

DEIB efforts have resulted in some progress. However as a community there is a learning curve. Ongoing focus is needed to build on the limited progress. I recognize that fully populated senior and supervisory management enable this and so that must be prioritized.

**Effective Governance & Communications**

Staff should be more pro-active in this area. For example:

1. Items 18, 19 and 20 updates should be done annually, and not only when we point out errors.
2. Several committees still need better staff coverage. Hopefully this is being improved for TAC and 250<sup>th</sup>, but someone should periodically check if there are others.

The Select Board needs to be more effective and proactive in selection and management of committee members.

While communication with the town has improved, we still need a more user-friendly website. Also, a robust communication strategy to more effectively promote town achievements/wins from the perspective of a town resident would be helpful, e.g. describe why police training is beneficial to the average citizen.

Efforts to support Board and Committee operations are evident. The Town Manager's leadership and support for this is evident. This is an area where delegation to a senior leader in the organization could result in better progress.

## **Financial Resiliency**

Great start on Capital plan. Forecasting and aggressive grant applications will be ongoing every year. Good start on budget analysis in recreation. More basic analysis is needed to maximize efficiency in recreation, ambulance, town-school chargebacks, revolving and enterprise funds, other areas.

Excellent job on capital forecasting, risk management and grant opportunities. Chargebacks and other special revenue opportunities still need review and updating.

The results of building a strong Town Finance Department team are emerging in the financial resilience area. Continued focus on these priorities through effective management of the financial systems improvement projects should result in more progress as the staff is able to use the improved systems.

## **Regional & State Interests**

Relationships with our state and federal elected officials is healthy and we do a good job advocating for the town. MWRA is a slow-moving project over which we have little control.

Good progress representing Concord at the state level was evident to me this year.

## **Economic Vitality & Strategic Planning**

Excellent work with Mimi and business community. Now it is time to research and implement streamlined permitting. Strategic planning is obviously needed. To do this, Kerry will have to find ways to say no to other projects, to free up some time for reflecting and strategizing. She could also show leadership by pushing the Select Board to do more strategic planning, perhaps by drafting a high-level plan/timetable and presenting it to the Board for feedback.

Has done as well as could be expected in this area.

The business community, esp. Economic Vitality Committee, is still operating under the impression that permitting is impeding new business in town. More education and communication is needed. Strategic planning, especially around facilities, is urgently needed.

Tracking and reporting of project status could be improved to ensure that the Select Board has ready access to interim status as needed. This would benefit from a senior staff focal point being clearly identified to consolidate the portfolio of reports for the Town Manager.

## ***PART B. GENERAL LEADERSHIP, GOVERNANCE, COMMUNICATIONS, FINANCIAL & MANAGEMENT SKILLS***

### **Board**

Supports Board policies but is not able to implement all of them. Generally informs the Board of major program changes, but occasionally fails to do so in a timely manner. Excellent mutual respect and trust.

Open and reliable; spends time to communicate with select board members and keep them informed.

Outstanding communication and collaboration with the Select Board.

Meets expectations in all areas of board communications and support. Manages diverse perspectives of the board professionally.

### **Leadership**

Kerry shows leadership by identifying innovative solutions, building consensus, promoting positive culture, and being open/transparent. More strategic leadership is needed. Need to identify a few top priorities and base all else on those priorities. Kerry should lead the Board and staff in this effort.

Excellent in staying on top of emerging situations.

Negotiations/conversations involving Gerow Park, Cell Towers, Flag policy, etc. are testaments to Kerry's ability to seek solutions amid a strident and diverse group of residents.

Highly responsive to day to day communications, promotes civility, especially with regard to citizen interactions and inquiries.

### **Management**

Concord is not at the level of local government excellence, but we should be. We need to catch up to our peers with streamlined permitting, public transportation, safe streets, and other best practices and innovations. Overall leadership will be needed if we are to improve in these areas.

A good leader and respected by employees and colleagues.

Kerry's strong suit is her ability to build a loyal, well-functioning management team who respect and admire her to the benefit of the entire town.

Staffing appears to be a priority; progress is being made. It remains a challenging aspect of the role.

### **Finance**

Creative financial management and creative use of resources are two of Kerry's top strengths. More basic analysis is needed to maximize efficiency in recreation, ambulance, town-school chargebacks, and other areas. This basic analysis will help improve communication to residents, which will then increase public confidence in the value of services in relation to taxes paid.

Excellent performance in this area.

A better communication strategy would help (see comment after #21 above) residents understand the value they derive from town service.

## **Communications**

Concord government is not always providing the highest level of service. We have the resources to do so, but better coordination and overall planning is needed. Kerry is a great listener who definitely understands the needs and aspirations of the Concord community. However, she is sometimes hesitant to communicate accomplishments and plans back to the community in a clear and timely manner.

Citizens respect Kerry. She listens well and works hard to understand all perspectives. People feel that they are heard. As said earlier, there is room for improvement communicating the value of town services to average citizens.

Her experience is growing with the community, she is a good match and results are emerging.

## **Personal**

Highly approachable; high ethical standards. At times, lacks energy and passion. Some improvement needed on follow-through and “can-do” attitude.

Unquestionable integrity. Easily approachable. I think the community would welcome more enthusiasm for new ideas.

This is a strength of this Town manager. She appears to be building a team that also exhibits these values and that is a positive sign for the future.

## **OVERALL COMMENTS**

Overall good job in a challenging and constantly changing environment. Now that the pandemic and staffing shortage are hopefully behind us, it is time for strategic leadership, commitment to excellence and a “can-do” attitude. Kerry has assembled an excellent talented team, now she needs to set a high bar and lead them to consistently perform at the highest level. Making time for reflecting, developing, and managing overall strategy should be Kerry’s top priority this year. I am disheartened when I see her time wasted answering details for a few citizens. I am hoping these inquiries can be delegated to free her up to do top management work.

Overall excellent performance especially in view of the circumstances under which she assumed the responsibilities of the position after several years of poor management and recovery from the COVID era.

Kerry is a great asset to our town and we are lucky to have her.

Her strengths include:

- Integrity and Honesty
- Ability to Attract and Retain a competent, engaged, loyal, senior management team
- Good understanding of Concord’s “personality”
- Solid budgeting skills

- Respect from staff and townspeople
- Excellent communication, transparency and support between town manager's office and the Select Board
- Ability to navigate a solution to complex problems among diverse and passionate opinions.
- Excellent listening skills

Areas for improvement:

- Reset priorities to pay more attention to strategic planning. Do less work that could (should) be delegated.
- Carefully establish deadlines for projects and then consistently meet deadlines.
- Develop an outward facing communications program to compellingly demonstrate to townspeople the value of town government.

Kerry is performing well, building a strong team and providing good leadership by example. I feel that major holes in the organization have been filled and assuming that these new leaders can stay in place and develop it bodes well for the future. Her performance is meeting my expectations for leadership and is addressing the most critical needs. My expectation is that she will continue to be successful especially as her staff gains experience with the town.

## A. Achievement of 2023-2024 Town Manager Goals

Organizational Resilience		Ackerman	Dane	Hartman	Howell	Average
1	In conjunction with the Personnel Board, complete review of recommendations from Personnel Study Task Force report and finalize list of next steps and implementation timetable.	2	3	3	2	2.5
2	Develop compensation strategy aligned with FY25 budget planning process and future years.	2	3	2	2	2.25
3	Analyze the employee benefits package to identify gaps, strategies and programs that will help to attract and retain qualified personnel.	2	3	3	2	2.5
4	Analyze all Collective Bargaining Agreements, identify needed adjustments and prepare for upcoming negotiations for all CBA's expiring on June 30, 2024.	2	3	3	2	2.5
5	Identify and document recruitment strategy and develop recruitment materials which highlight Concord as employer of choice, with a specific focus on inclusion. Establish employee task force to help.	1	2	1	1	1.25
6	Fill staff vacancies: continue review organizational structure to determine if current alignment is optimal.	2	2	3	2	2.25
7	Review management and reporting structure to ensure efficient and effective operations; to enhance communications; to support optimal organizational performance; and to ensure the efficient delivery of public services.	2	2	3	2	2.25
8	Develop a long-term plan, including strategies for training, professional development and succession planning, that can guide future decision-making and supports a highly competent municipal workforce	1	2	3	1	1.75

9	Provide regular in-house training opportunities for employees with topics that are in alignment with the Select Board's Statement of Vision and Values, promote exceptional customer service delivery model.	2	2	1	1	1.5
10	Finalize and implement "Remote Work Policy" designed to balance the provision of excellent public service and municipal operations with the needs and desires of a modern workforce.	n/a	3	n/a	n/a	3

<b>Overall Category Rating</b>	2.175
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<b>Diversity, Equity, Inclusion &amp; Belonging</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
11	Review May 2023 DEI Needs Assessment, develop a strategic plan that will move the Town from being (merely) EEO-compliant, to one that integrates and leverages differences to create business value; and begin implementation of plan.	1	2	1	1	1.25
12	Complete a review and assessment of internal policies and practices; Identify opportunities to improve diversity, equity and inclusion efforts.	1	2	1	2	1.5
13	Continue monthly "Tea with Town Manager" providing employees with regular opportunity to connect with management outside of formal protocol.	2	3	2	2	2.25
14	In conjunction with internal Professional Development Committee, institute monthly diversity training program for employees; utilize existing resources, including current employees. Rotate training venues and modalities.	2	2	1	1	1.5
15	Work in collaboration with the DEI Commission to research and implement diversity, equity, and inclusion best practices for Town operations.	2	2	3	2	2.25

<b>Overall Category Rating</b>	1.75
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<b>Effective Governance &amp; Communications</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
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16	Evaluate automated agenda management systems to improve efficiency, functionality, and access to information; Identify resources to support Town volunteers with scheduling, facilities, compliance, training & access to information.	1	3	2	1	1.75
17	Institute monthly management team meetings, inclusive of SMT and division managers; work from formal agenda, providing specific opportunities for division managers to make presentations and be directly involved in problem solving.	2	2	2	2	2
18	Coordinate a review of the website to ensure accuracy of information; inclusion of key documents; and that it meets our functionality, utility & communication needs.	1	2	1	2	1.5
19	Coordinate a review of Town information to confirm Committee charges, board membership, names of officers, and ensures that contact information is up to date.	2	2	3	2	2.25
20	Review all Select Board staff liaison assignments, volunteer terms, and vacancies to ensure accuracy with the Town Volunteer Database.	2	2	3	1	2
21	Review Board and Committee operations to evaluate systems, ensure that efficient practices are in place, ensure each board and committee has a staff liaison, and recommend new procedures if needed.	1	3	3	2	2.25

**Overall Category Rating** 1.9583333

<b>Financial Resiliency</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
22	Plan and allocate remaining ARPA Funds; Ensure that FY25 ARPA Funds are included as a funding resource for the FY25 Budget and Capital Planning processes.	2	3	2	2	2.25
23	Develop Five-Year Capital Plan for FY2025-FY2029; Include major projects, cost estimates, debt forecast and tax burden projections.	2	3	3	2	2.5



24	Develop 5 and 10 Year Financial Forecasts of revenue and Non-Guidelines Expense and highlighting projection of "Available for Guidelines" to share with Finance Committee	2	3	3	2	2.5
25	In conjunction with the cross-departmental Risk Management Committee, develop a town-wide Risk Management strategy; work closely with CPS/ CCRSD to help identify and mitigate risk.	2	2	3	2	2.25
26	Continue to aggressively monitor and track all grant opportunities, applying for those that meet agreed upon business need.	2	2	3	2	2.25
27	Review means, methods and formulas for budgetary chargeback to Enterprise and other special revenues to ensure that they accurately capture associated costs. Continue to look for ways to streamline and/ or eliminate costs, particularly from General Fund budget.	1	2	1	2	1.5

**Overall Category Rating 2.2083333**

<b>Regional and State Interests</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
28	Continue to develop relationships with state and federal legislative delegation & staff, state leaders and municipal colleagues.	2	3	3	3	2.75
29	Continue work with MWRA and neighboring communities to investigate the feasibility of regional water.	2	2	2	2	2

**Overall Category Rating 2.375**

<b>Economic Vitality and Strategic Planning</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
30	In conjunction with task force, research and report on the potential acquisition of 2229 Main Street, including insurance costs, risk implications and next steps.	2	3	3	2	2.5

31	Implement strategies, innovations & staffing models to streamline permitting and regulatory processes in support of businesses, residents and visitors of Concord.	1	3	1	2	1.75
32	Identify and develop strategy to ensure implementation of recommendations, goals and objectives of key planning documents and a mechanism to track the same.	1	3	1	1	1.5

**Overall Category Rating** 1.9166667

<b>OVERALL RATING SECTION A</b>	1.67741935 2.46875 2.225806 1.77419	<b>2.03654</b>
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**B. General leadership, governance, communications, financial, and management skills**

Board		Ackerman	Dane	Hartman	Howell	Average
1	Interprets, supports, and implements Board policies and directives	2	3	3	3	2.75
2	Keeps the Board informed on issues, needs, and operation of Town departments	2	3	3	2	2.5
3	Fully informs the Board of the implications of major personnel and program changes	3	3	3	2	2.75
4	Advises the Board about the potential impact of government regulations and legislation	3	3	3	2	2.75
5	Maintains a professional working relationship with the board based on mutual respect and trust	3	3	3	3	3

**Overall Category Rating** 2.75

Leadership		Ackerman	Dane	Hartman	Howell	Average
6	Effectively implements Board policies and relevant Town Meeting decisions	2	3	3	2	2.5
7	Responds quickly and decisively to unexpected circumstances	2	3	2	2	2.25

8	Identifies innovative solutions and builds consensus while allowing for diverse opinions	3	3	3	2	2.75
9	Promotes a positive culture, civil discourse, and professional decorum	3	3	3	3	3
10	Manages Town affairs in an open, diplomatic, and transparent manner	3	3	3	2	2.75

**Overall Category Rating**    2.65

<b>Management</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
11	Develops good staff morale and loyalty to the organization	2	3	3	3	2.75
12	Maintains positive working relationships with SMT and staff; coaches and mentors as needed	3	3	3	2	2.75
13	Uses best management practices and leverages IT innovations for local government excellence	1	3	2	2	2

**Overall Category Rating**    2.5

<b>Finance</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
14	Presents budgets to the Select Board in a manner which promotes their full understanding	2	3	3	3	2.75
15	Considers input from town officials and constituents when formulating budgets and plans	3	3	3	2	2.75
16	Demonstrates thoughtful, creative financial budget management and strategic capital planning	3	3	3	2	2.75
17	Provides creative management of available resources to increase productivity and economy	2	3	2	2	2.25
18	Maintains confidence of the residents in quality and value of service in relation to taxes paid	2	3	2	2	2.25

**Overall Category Rating**    2.55

<b>Communications</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
19	Demonstrates strong public speaking and presentation skills	1.5	3	2	2	2.125

20	Communicates the mission and accomplishments of the Town to staff and community	2	3	2	2	2.25
21	Understands the needs and aspirations of the community	3	3	3	2	2.75
22	Empowers local government to provide the highest level of service and professional results	1	3	3	2	2.25
23	Encourages community involvement of an active, engaged, knowledgeable, and diverse citizenry	2	3	3	3	2.75
24	Earns the respect and confidence of the community	2	3	3	2	2.5

**Overall Category Rating** 2.4375

<b>Personal</b>		<b>Ackerman</b>	<b>Dane</b>	<b>Hartman</b>	<b>Howell</b>	<b>Average</b>
25	Maintains high standards of ethics, honesty, and integrity in personal and professional matters	3	3	3	3	3
26	Approachable leader: encourages open communication with staff, the public, and Select Board	3	3	3	3	3
27	Pays attention to detail and follows through on plans and decisions	2	3	2	2	2.25
28	Demonstrates passion, energy, commitment to excellence, and a "can-do" attitude to guide Concord into the next decade	1	3	1	2	1.75

**Overall Category Rating** 2.5

**OVERALL RATING SECTION B**    2.30357143    3    2.678571    2.28571    **2.56696**

**OVERALL RATING SECTIONS A&B**    1.97457627    2.71667    2.440678    2.01695    **2.28722**