

HADLEY, MA – TOWN ADMINISTRATOR RECRUITMENT  
FINALIST INTERVIEWS

<b>WEDNESDAY, 7/8</b>	
12:00 PM	Convene
12:10 PM – 12:55 PM	Tom Guerino
1:05 PM – 1:50 PM	Joshua Garcia
2:00 PM – 2:45 PM	Carolyn Brennan
2:55 PM – 3:55 PM	Discussion

Location: Hadley Senior Center, 162 Russell St., Route 9

Candidates advised to park in the American Legion parking lot which is shared with the Senior Center.

Carolyn Brennan  
1 Miles Morgan Court  
Wilbraham, MA 01095  
413-896-3385  
[carolynsfaith8@gmail.com](mailto:carolynsfaith8@gmail.com)

May 5, 2020

Dear Search Committee:

Please see the attached resume, which in addition to this letter, is being submitted in support of my application for the position of Town Administrator. Since I started in municipal government in 1986, I have taken on increasingly complex challenges and have furthered my education, all with the goal of taking on a leadership role in municipal government.

Seeking a career in Town Administration may seem like a non-traditional path for a Council on Aging Director, however, my years of experience working for three very different communities, has fueled my passion for municipal government. My experience has equipped me with a valuable perspective about the benefits of effective and meaningful municipal management.

Highlights of my qualifications, education and experience include the following:

- Masters of Business and recent completion of the masters level Certificate in Local Government Leadership & Management from the Massachusetts Municipal Association and Suffolk University Moakley Center for Public Management.
- 1<sup>st</sup> Vice President of the Board of Directors for the Massachusetts Municipal Association of Town Finance Committees.
- Member of the Massachusetts Municipal Association's Board of Directors.
- Chair of the Wilbraham Finance Committee, requiring knowledge of municipal finance, capital planning, debt service and forecasting.
- Human resource development and supervision of nineteen employees, which has included recruitment, progressive discipline, training and compliance.
- Establishment of multiple strategic initiatives, policies and procedures to enhance the productivity of my department and the Town Emergency Operations Team.

- Strong, established relationships with state and local elected officials.

In 2017, I received my MBA from American International College and in June of 2018, I received my Certificate in Local Government Leadership & Management from the Massachusetts Municipal Association and Suffolk University Moakley Center for Public Management.

The nine-month long Certificate Program held in Andover, provided me with a comprehensive understanding and practical application of municipal management from highly respected colleagues in the Massachusetts municipal arena. Although I have worked as a Department Head for over twenty-five years, the content that I learned from each teacher enriched my understanding of the aspects and challenges of managing a municipality.

What can't be taught in a classroom however, is initiative and creativity. I believe my experience working in Hampden, a small rural town of 5,000 residents, provided me the opportunity to complete a major construction project by successfully engaging volunteers, philanthropists and leaders in the community. Unlike Hampden, my time employed in East Longmeadow focused on a diverse and denser population that required different approaches in providing services.

Funding the needs of a small community, without raising the tax rate, is always a balancing act. My role on my local finance committee in Wilbraham and my involvement on the Board of Directors of the MMA Association of Town Finance Committees, has given me the ability learn what fiscal challenges communities are dealing with and how they creatively solve those problems.

Personally, my commitment to live a healthy lifestyle and training for fitness competitions has helped me physically and mentally deal with the complexity of the day-to-day operations of a busy Senior Center and my volunteer work for the Town of Wilbraham.

I feel, and hope you agree, that my combination of experience, worth ethic and familiarity with the issues facing towns like Hadley, make me a good candidate for the position.

I am very excited about this opportunity and hope you will agree that I have the education, skills and experience you seek. I understand that a position like this ultimately comes down to fit so if you feel I have the qualifications you are looking for, I would welcome the opportunity to explore that fit with you.

Sincerely,  
Carolyn Brennan

1 Miles Morgan Court  
Wilbraham, MA 01095  
(413) 896-3385  
carolynsfaith8@gmail.com

# Carolyn F. Brennan

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## OBJECTIVE

To pursue a position as a Municipal Manager or Administrator in Massachusetts.

## CAREER and MUNICIPAL VOLUNTEER PROFILE

### **The Town of East Longmeadow** — *Executive Director, Council on Aging*

April 2007- present

- Perform Department Head duties including hiring and supervision of 19+ employees, manage the day-to-day operations of a large multipurpose center.
- Project Manager for the multiyear renovation of the Senior Center.
- Created and implemented an inter-municipal agreement to provide paratransit services for the towns of East Longmeadow, Hampden and Longmeadow.
- Member of the Emergency Operations Center team and designated Director of Shelter Operations.

### **The Town of Hampden** — *Executive Director, Council on Aging*

January 1989-2002

- Performed department head duties as stated above for a small and rural town.
- Project Manager for the construction of a new Senior Center. Responsible for data collection and collaboration with Pioneer Valley Planning Commission to secure funding from the Community Development Block Program, as well as the additional fundraising needed for completion.

### **The Town of Amherst** — *Co-Director, Jean Elder Elder House*

January 1986 - December 1989

- Shared management responsibilities of the Jean Elder House, a congregate living apartment setting for older adults.
- Worked under the supervision of the Council on Aging.

## **Member of the Massachusetts Municipal Management Association's Board of Directors**

2016 – present

## **Association of MMA's Town Finance Committees Association**

2016 present

- Assist in planning the Annual and Spring Conference to provide educational opportunities for local Finance and Appropriation committees to enhance their understanding of municipal budgeting.

## **Wilbraham Finance Committee Chairman**

- Facilitate the committee's charge to prepare Wilbraham's Annual Budget and Capital Plan and make recommendations to the voters at the Annual Town Meeting.
- Work in collaboration with a diverse group of Finance Committee members and members of the Regional School District School Committee to reach agreement on departmental budget requests. Wilbraham has a AA+ Bond Rating and a \$45,000,000 annual operating budget.

## SKILLS AND AREAS OF EXPERTISE

- Highly developed leadership skills in local government and management
- Confident public speaker and presenter
- Creative problem solver
- Ability to analyze emergency situations quickly and stabilize escalating situations
- Effective communicator and ability to engage and influence stakeholders and residents.
- Experienced supervisor for a large number of staff and volunteers
- Willing to delegate to staff and encourage independent thinking
- Over 28 years of successful grant writing
- Passionate about responding to constituent affairs and improving civic engagement.
- Positive attitude and goal setter with a warm and appropriate sense of humor.

## DEMONSTRATED ACHIEVEMENT

### Project Management

- Renovation of the East Longmeadow Senior Center, a 100-year-old building. Responsible for the management of the project, weekly contractor meetings, public engagement, budget and oversight. Directed and participated in the Senior Center Feasibility Study.
- Project Manager for the design and construction of a new senior center for the town of Hampden. Facilitated weekly meetings with contractors and architects. Provided data and research for the Pioneer Valley Planning Commission to secure funding from the Community Development Block grant program. Directed procurement procedures and protocol. Provided support to the Building Committee.
- Development of a strong history of working with local State Senators and Representatives to secure funding for state budget line items relative to senior center construction.

### Human Resources

- Developed a highly skilled and cohesive team of full and part-time employees who embrace a shared vision for the senior center, providing support and training opportunities resulting in extraordinary service to constituents and stakeholders.
- Working knowledge of progressive disciplinary procedures and employee recognition. Course work in Human Resources from the *Masters in Business at American International College*, and from the *Suffolk University Certificate Program in Local Government Leadership and Management*.
- Member of the Search Committee for a new Fire Chief for the town of Wilbraham. Participated in the interview process as well as the day-long assessment center, evaluating candidates for their technical and management expertise.

### Inter-Municipal and Regional Coordination

- Created and implemented an inter-municipal agreement to provide paratransit services for the towns of East Longmeadow, Hampden and Longmeadow. Secured funding from the Executive Office Administration and Finance, PVTA and the Executive Office of Elder Affairs.

### Director of Shelter Operations

- Managed Shelter Operations during the 2011 June Tornado and October Storm for over 500 residents. Member of the Emergency Operations Center team for the Town of East Longmeadow.

### Veteran's Services

- Strong advocate for Veterans of all ages to ensure education and awareness. Chair of the Annual Veteran's Picnic in the Park, Celebrating Veterans and their Families which takes place every fall in different locations throughout Western Massachusetts. Work closely with the local Veteran Service Officers.

## EDUCATION

**SUFFOLK UNIVERSITY, MOAKLEY CENTER FOR PUBLIC MANAGEMENT AND THE MASSACHUSETTS MUNICIPAL ASSOCIATION** — Andover 2018

*Certificate in Local Government Leadership and Management*

*Recipient of the Nancy Galkowski Legacy Fund Scholarship*

**AMERICAN INTERNATIONAL COLLEGE** Springfield, MA 2017

*Masters in Business Administration*

**UNIVERSITY OF MASSACHUSETTS** Amherst, MA 1983

*Bachelor of Science in Human Development*

**LASELL COLLEGE** Newton, MA 1981

## PRIOR WORK EXPERIENCE

Griswold Special Care 2004-2007

*Client Service Coordinator*

Orchard Valley of Wilbraham 2002-2004

## LEADERSHIP AND PROFESSIONAL AFFILIATIONS

### **Wilbraham Senior Center Feasibility Committee**

2015-2019

### **Massachusetts Association of Council's on Aging and Senior Center Directors**

Executive Board 2008-2016

Regional Representative 1996-2002

### **Pioneer Valley Transit Authority**

1990 - 1992 , 2007- present

### **Statewide Coordinating Council on Community Transportation**

2013-2015

## AWARDS AND SPECIAL RECOGNITION

Director of the Year Award, MCOA 2010

Step Up Award, MCOA 2012

MCOA Senior Center Director Certification 2001

Minnechaug Alumni Hall of Fame - Awarded June 11, 1999

Citizens Legislative Seminar Senate, State House Boston - Spring 2002

## REFERENCES

Stephen Crane

Town Manager, Concord MA

978-318-3000

Nick Breault

Town Administrator, Wilbraham MA

413-244-9718

CAROLYN BRENNAN

1.

The impact of Covid-19 has and will continue to strain the ability of municipalities to balance budgets for the next few years. Lost revenue and uncertainty in the ability of the economy to recover is unknown and challenging.

The Federal Cares Act provided \$471,000 to the town of Hadley. The second major stream of funding is an educational component that will be passed to Boards of Education to assist in reaching students. The last major source of funding is the FEMA disaster declaration, which will reimburse 75% of direct Covid-19 related expenditures during the incident period that began March 13, 2020. This will continue until FEMA announces that the incident is closed, assuming late 2020. In my opinion the 75% FEMA reimbursement, coupled with the Cares Act pass through to Hadley, and the educational money, has the potential to prevent issues from balancing the FY20 and FY21 budgets and help fill in the gap (not replacement) of lost revenue.

As Hadley's Town Administrator, I would work with the accountant and present this information to the Board of Selectmen. My role would be to carry out the desires of the Board of Selectman and return that plan to the department heads and work collaboratively with them if after final analysis, additional cuts are necessary.

I do not think that there is one single approach to reduce spending. I would not recommend a unilateral approach such as furloughing staff across the departments. To minimize impact, there needs to be a variety of options explored.

Use of Reserve Funds should only be used in an emergency, however it is clear the Covid-19 pandemic is an emergency and I would consider recommending using Reserve Funds to sustain core services if needed. I would suggest that a commitment would be made to restore Reserves as soon as possible.

If revenue reduction expectations were expected long term, my goal would be to first look at staff reduction of non-essential staff by attrition and creatively look at ways to share responsibilities between staff instead.

I would carry out decisions with the Board of Selectmen's direction and then administer the changes through the staff collaboratively, then transparently communicate the need to reduce services to the public if necessary. I would act deliberately, methodically, and with transparency with an abundance of clear communication to personnel and the public.

Finally, I would work closely with the David Nixon to get his input and advice during this difficult time.



2.

Of the three municipalities that I have worked in, the town of Hampden has been the most interesting and has had the strongest sense of community. I came to the realization after completing a class entitled “Administrative Strategies of Local Government” from the Suffolk University Certificate in Local Government and Leadership Management program, why the town of Hampden tugged so closely on my heartstrings and why Hadley is a community I would be excited to work in. They have many similar characteristics.

Our coursework involved researching and classifying Massachusetts’s towns and cities using a community-based typology to establish a comparative context for analyzing the development and implementation of public policies and public services by managers and leaders. Professor Michael Lavin created five types of Communities; Shopkeeper, Patrician, Worker, Yeoman and Manager. His premise was that if we could identify town characteristics, we would learn the best management style, strategies and policies that would be the most effective in meeting the diverse range of challenges and needs of that specific type of community. We studied multiple communities and learned that Town Administrators or Managers who understand the various “types” of communities in Massachusetts are more likely to be better planners, leaders, public policy makers and are more likely to become productive, and excel as managers and administrators. There are many unique factors that predict how a community responds to policy making and changes that may be needed to sustain a town’s character, charm and its financial stability. Knowing and understanding why a community reacts to change is crucial in knowing how to introduce change. I believe my personality, management and leadership style is the perfect fit for a Yeoman type community such as Hadley. Lavin summarizes the Rural Yeoman community as a town made up of agricultural tracts of land and residents who value hard work and want to keep the small town character.

When I began my career in Hampden, the Council on Aging was located in the basement of the Town Hall. One of my greatest accomplishments was overseeing the construction of a new Senior Center. It was the newest municipal building that Hampden had built in many years. I became the Procurement Officer and the Project Manager, which gave me the skills and knowledge that I would need for future building projects.

I paid a great deal of attention to every concern that was expressed during the planning stages and throughout construction. Concerns from residents that may have sounded trivial to an “outsider”, were extremely important.

- Would the building “fit in” with Hampden’s character?
- Would there be an increase in traffic?
- Would there be a need for a traffic light? (There is still no traffic light in the town).

I believe that the effort I took to listen and share those concerns with the architect, the planning board and other individuals and committees, helped residents gain trust in me as a leader. The architect took great care in studying the community and designing a building that matched the rural character of Hampden.

Hadley’s Master Plan and the Town’s Ten Year Capital Improvement Plan are one of the most comprehensive documents that I have seen for a community. They are clear road maps for Hadley, providing detailed action steps, which bring clarity to the document’s key strategies.

The only way to bring fuel to energize those strategies highlighted in the Master Plan, is for the new Town Administrator to identify the key players in Hadley. As I will mention further into this narrative, I will be the most effective Administrator after I have established relationships with every Department Head, Committee Chair and what I like to call the town matriarchs and patriarchs. These are the residents who've been in Town for most of their lives and influence thought and perspectives among their neighbors.

As Hadley's Town Administrator, my success would depend on my efforts to effectively utilize the intellectual and historical knowledge of department heads, employees and involved citizens who volunteer on committees and town projects.

I enjoy getting to know my employees and volunteers and it's been through those discussions that I have recognized a skill or perspective that would be an asset to an initiative that I was working on.

Hadley has a vast area of important landmarks, parks and points of interest. It would be important for me to understand their significance in the community and "visualize the vision" of the Master Plan. I would need to learn from the "experts" who have invested their passion and expertise in their knowledge of the physical and cultural landscape of Hadley.

The combination of relationship building, becoming familiar with Hadley in general and bringing the right people together will be the strategy I would use to bring the Master Plan to a reality, but it would take time. The excitement of moving too fast can be as dangerous as going to slow. There is nothing more frustrating than realizing that a plan needs to be updated and the former plan hasn't been acted on. I've experienced that while working on the Open Space Plan for East Longmeadow. The lack of consistent leadership has forced the Open Space Plan to stagnate and we are once again dealing with a dormant document that needs to be updated.

The Hadley challenge statement focused on what seems to be the major theme in the Hadley Master Plan – how does a municipality balance the desire to maintain its' rural character, maintain open space and grow as a community. As Chair of the Wilbraham Finance Committee, we have been faced with examples of this dilemma several times during the last three years. Although CPA funds are not a part of the capital plan or operating budget, the Finance Committee makes a recommendation at the Annual Town Meeting. There is always a robust discussion about using CPA funds to purchase large tracts of land for Open Space. Committee members consistently express concern over potential loss of revenue from buildable lots, but they also value Open Space preservation. My role as Chair has been to address these concerns and ask for more information about viable building lots, potential revenue loss from taxes and more details about the land in general.

I believe that in each of these requests, as Chair, it has been my responsibility to help the Finance Committee members make the most informed decision. I've done this by bringing in anyone that has knowledge about the requests into the process and share details with the committee. I would use those similar efforts to accomplish the key strategies outlined in the Master Plan.

Throughout my municipal career, I have seen far too often, projects fail due to poor civic engagement and not bringing the stakeholders into the planning and presentation process.

3.

The first priority as a new Town Administrator is to get to know each member personally on the Board of Selectmen. The most effective way to do this is for me to meet with them informally and find out what issues are most important to them and to learn what the most effective way is to communicate with them. The role of the Town Administrator is to carry out their directives and this can only be done by knowing their own communication styles and their individual concerns and desires for their town.

When I was hired in East Longmeadow, I was replacing a beloved woman who had passed away suddenly and had been the Director for 25 years. She also had been my mentor throughout my career. The Town was mourning the loss of this wonderful woman and I faced many challenges during my first few years. We had different leadership and management styles and I was much younger than she was.

The East Longmeadow Council on Aging was just about to begin a two million dollar renovation of the Senior Center and I had been hired because of my COA background and my experience managing the new construction of a Senior Center in Hampden. I was also in the middle of helping to manage the construction of the Hampden Spray Park.

Because of my experience, I was able to identify areas of concern in the layout and accessibility of the building. The contractor did not have experience building for an older generation and I had to tactfully educate the building committee with examples and explain the importance of renovating a senior center for easy access and with efficient program space.

The senior participants were cautious and leery of the changes I wanted to make, but I spent time getting to know them and they learned to trust me because I directed change very slowly. The advice I give new COA Directors when I lead New Director Trainings for MCOA is to make changes slowly your first year and spend more time building trust.

The senior management team in a community also works best when they trust their administrator and feel like they are a part of a team. My experience in East Longmeadow working with department heads has been one of my more enjoyable aspects of my job. In a sense we are family and work collaboratively and support each other through tornados, October storms and now Covid-19. In East Longmeadow, we have experienced a change to a new charter and we've had several Town Managers in a short period of time. We've supported each other, encouraged each other and we trust each other. I value this camaraderie and replicating and sustaining that in a community will always be a priority for me as I pursue a career in Town Administration.

I tend to be a strategic thinker as a manager. I am focused on the task ahead and try not to let distractions prevent me from getting the job done. I learn how a department works as well as how outside influencer's impact the management. I look and study what is working well and then I look for new opportunities to introduce and communicate ideas and goals with my employees and board members.

My leadership style is reflected in my positive and friendly attitude towards life and the people around me. I've learned to be patient and mellowed in how I "express" my passion over an initiative or project. I enjoy public speaking. I believe that my employees and volunteers are the backbone to my department. I allow employees and volunteers to own their role. My desire is that when my employees are driving to work, they are excited to start the day and don't dread it. My

management philosophy is to “train my employees for their next job”. To do that, I ensure that my budget includes adequate funding for training.

It's important for me to be engaged with the community. My home address is not my only “home”. The community I work in becomes my second home. I am passionate about getting to know as many people in town as possible. It is why I love small, rural communities. I want to meet the matriarchs and patriarchs. These are the residents who have lived in Hadley most of their lives. They tend to know the pulse of the community and are trusted influencers in town. I want to be able to walk into a restaurant, visit a farm stand or visit a sporting event and know people by name. My office is not constrained to bricks in mortar, it is the entire community.

Undoubtedly, there will be conflicts that I will be confronted with not only during my first 100 days, but also throughout my career as Town Administrator. Mediation and problem solving have been skills that I have worked diligently to master. Chairing the Finance Committee and leading as a Department Head are positions that deal with conflicts. Being a good listener and becoming familiar with all of the issues involved provides a platform for a successful outcome. I find most effective is listening privately with each person or party that is in disagreement to see how the information I've researched is in line with each viewpoint. I would then facilitate a meeting involving all parties and ask key questions that will require suggested solutions from each person. This approach has proven successful in the majority of conflicts I've mediated, however there will be times when neither side will be in agreement. It is then that I would have to decide what the best solution is. At that point, clear communication and action steps need to be prioritized and agreed upon by all parties involved.

Onboarding will most likely look different during fiscal year of 2021 due to the budgetary challenges that Covid-19 has and will bring to staffing. Personnel is the largest expenditure in the budget.

It will be important to see what succession planning is in place and who will be retiring in the next few years and see how that may assist using attrition to address budgetary shortfalls.

Part of onboarding is to meet with department heads and see if needs have changed, which could reflect new hiring and modifying job descriptions. I would review the town's organizational chart to gain an overall picture of the staffing needs. Updating job descriptions is an important function in attracting new employees and ensuring that rates of pay are in line with other similar positions in comparison to similar towns.

Onboarding is another area that I am very comfortable with. Job posting is no longer restricted to traditional advertising and I've found that social media platforms have drawn in more qualified job applicants. Experience has shown me that what an applicant submits on paper is not always the measurement of being the most qualified candidate. I interview as many people as I can. “Fit” has always been the final indicator for me when I offer a candidate a job. That can only be measured during a face-to-face interview. When I am interviewing candidates, I always ask myself throughout the process, “How will this person interact with my staff and fit into the department”? During the last several years, I have filled almost 15 positions and I can say with sincerity and pride, that I have an amazing staff that supports and encourages each other.

I strongly believe that a great team provides great customer service and helps me to be a great supervisor.



Town Administrator search

# Resume & Cover Letter

Town of Hadley, MA

Joshua A. Garcia  
Connect | Build | Grow

2 Dunn Avenue  
Holyoke, MA 01040  
[garcia.joshua@hotmail.com](mailto:garcia.joshua@hotmail.com)

April 21, 2020

Municipal Resources, Inc.  
recruitment@mrigov.com

Dear Representatives,

I hereby submit to you this cover letter and resume for the position of Town Administrator currently available at the Town of Hadley, Massachusetts. It is my intent to seek longer-term career opportunity within town government in the Commonwealth of Massachusetts that is in need of someone with exceptional planning, leadership, and management abilities with a background and keen focus in Public Administration. Upon review, you will recognize the combination of my education and experiences working with local governments on a local and regional capacity will be a good fit to address the unique challenges and opportunities in the town, collaboratively with the town's Selectboard and personnel.

Sustaining a high level of public service is the center focus of my practice in the effort to secure the safety of local public resources, maintain good governance, and improving the quality-of-life of residents. The beginning of my career started after undergrad school at a local housing authority where I worked for five years. My role at the housing authority began in Resident Services and concluded as their Property Manager, managing 448 subsidized housing units. Right after grad school upon receiving a Masters Degree in Public Administration (MPA), I expanded my skill-set in the role of Municipal Services Project Manager in the Community Development Section of a metropolitan regional planning agency. My 5+ years of experience in this management position allowed me to work closely with local government leadership across the Pioneer Valley region to improve the efficiency of direct municipal service functions and achieve economies-of-scale for taxpayers. This work included facilitating the Governor's Community Compact program within our region and working with municipalities to prioritize 'best practice' efforts to improve local government services. I have facilitated cross-departmental and cross-jurisdictional collaboration between department-heads and elected officials to draft feasibility studies and strategic action plans, and have created new programs to meet local and regional needs. Some of these include regional municipal accounting services which Hadley currently participates in, municipal IT services for 5 towns, shared Economic Development Director services for 6 towns, and shared police between two towns. I have also lead efforts to establish a regional partnership for animal control services between 4 towns and leveraged resources to draft pre-development plans for a new regional animal control shelter. Soon after, I transferred these skillset to help the Town of Blandford as Town Administrator where I have been directly responsible for assuring effective management of town affairs and operations in accordance with all federal, state, and local laws and regulations. A notable accomplishment was the immediate need to get its financial house in order and we did this while cultivating an environment of collaboration at Town Hall. We professionalized and reorganized financial departments and made system changes to provide greater efficiency and accountability. The changes implemented allowed for an improved budget setting process, timely closing of books of previous fiscal year, and timely completion of annual audits. Together, we maximized on the town's available resources and made strategic investments in infrastructure and capital upgrades, and multiple investments in stabilization. It's very important for me to note that none of this would be accomplished without the commitment and follow through of town employees and volunteers. On my personal time, I have made multiple contributions to my hometown by serving on municipal boards and committees that were directly responsible for achieving growth and improving the quality-of-life in the community. My combined experiences in housing, community development, municipal planning, public education, town administration, and public safety coupled with my education has equipped me with the diverse skills necessary to advance in the complex field of Public Administration and serve strongly in town government.

I am deeply committed to grow in this field and would be honored to make a significant contribution to the Town of Hadley. I look forward to discussing my qualifications in greater detail. References are available upon request. Also, I invite representatives to feel free to contact anyone within my network at any time should they want to learn more about my professional background and character.

Thank you for your consideration.

Sincerely,

Joshua A. Garcia

## Joshua A. Garcia

2 Dunn Avenue ♦ Holyoke, MA 01040 ♦ (413) 306-8926 ♦ garcia.joshua@hotmail.com

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### EDUCATION

- Westfield State University, Westfield, MA. Masters Degree in Public Administration (MPA), concentration in Public Management, May 2012
- Westfield State University, Westfield, MA. Bachelors Degree in Psychology and Minor in Regional Planning, May 2008

### EXPIERENCE

*Town of Blandford*

*April 2, 2018 to Present*

#### **Town Administrator**

- Keep the Selectboard informed of all important matters involving the town and make reports and recommendations to the Selectboard as it so directs or as deemed advisable.
- Attend meetings of the Selectboard, preparing and providing supporting documents and information pertinent to agenda items.
- Assist the town achieve permanent solutions to handle its municipal finance needs in the area of Accounting, Treasurer, Tax Collector, and Assessors.
- Assisted with strengthening the Finance Committee and its role in budget management process.
- Leveraged community compact best practice resources to establish town-wide financial policies and a financial forecasting budget tool.
- Coordinate and execute new and/or existing grants and other municipal projects on behalf of the Selectboard that support strategic goals and priorities. These grants include Green Communities, Small Bridge Grant, Efficiency & Regionalization Grant, Municipal IT Grant, DLTA, Municipal Vulnerability Preparedness (MVP) Grant, etc.
- Collaborate with personnel and municipal committee volunteers as-needed to support department and town objectives.
- Managed capital needs of building and equipment.
- Facilitate procurements of goods and services in accordance to M.G.L.

*Pioneer Valley Planning Commission (PVPC)*

*June 3, 2013 to June 2018*

#### **Municipal Services, Manager**

- Work closely with Town Administrators/Managers, Mayors, and Selectboard members with priority setting and leveraging resources to achieve city/town goals.
- Developed and facilitate municipal support service programs for member municipalities, including serving as interim-Town Administrator at Town of Blandford, created a Regional Municipal Accounting program, and developing a Municipal IT Support services program.
- Collaborate with State officials to implement State priorities together with local leadership in the Hampden and Hampshire region.
- Project/Grant/Financial Management Coordination and Administration.
- Coordinate procurements according to M.G.L.
- Serve as an advocate for the regional community as needs and circumstances dictate.
- Assist communities with implementing innovative strategies that change the way local government meets local needs for the purpose of achieving efficiency when meeting mandates.
- Facilitate cross-jurisdictional sharing of Municipal Services, including conducting feasibility analysis and assist with developing Inter Municipal Agreements that determine the governance structure of the shared service.
- Work with municipalities to leverage state resources to encourage and incentivize efforts for collaboration, partnerships, and shared service opportunities.



*Holyoke Housing Authority*  
**Property Manager – Federal**

*July 2012 to May 2013*

- Managed 448 Public Housing Units, a combination of Elderly/Disabled and Family developments.
- Co-supervised all on-site personnel at properties assigned and personnel assigned on special projects.
- Maintained relationships with other departments within the agency, including Resident Services, Maintenance, Admissions and Modernization departments - worked toward achieving cross-departmental collaboration.
- Worked closely with residents, resident council, and the community as appropriate.
- Oversaw the timely turnaround of all vacancies.
- Educated residents on all pertinent policies.
- Ensured effective lease compliance.
- Monitored and acted upon delinquent payments in a timely fashion.
- Maintained operational consistency.

*Holyoke Housing Authority*  
**ROSS - Service Coordinator**

*September 15, 2008 to July 2012*

- Coordinated housing assistance with supportive public and private resources in the community to enable assisted families to achieve economic self-sufficiency.
- Strategically collaborated with FSS Case Managers and Clerk Cashiers to increase participation in the FSS program.
- Maintained relationships with other departments in the agency to meet departmental objectives.
- Trained FSS Case Managers on how to do case management.
- Maintained open escrow accounts for FPH and HCV FSS participants.
- Provided Resident Service Director with detail monthly report on department progress and future objectives.
- Assisted with Property Management functions as-needed.

## **MEMBERSHIP AND AFFILIATIONS**

*Holyoke Community College Foundation, Inc.*  
**Board of Directors**

*January 2018 - Present*

*Public Health Institute of Western MA*  
**Board of Directors**

*January 2018 - Present*

*Holyoke Fire Department, Holyoke, MA*  
**Vice-Chair, Fire Commissioner, appointed by the Mayor**

*December 2015 to December 2018*

- Engage in regular Board of Commission meetings.
- Oversee the duties and responsibilities of the Fire Chief and operations of the Fire Department.
- Oversee policy setting and enforcement of policies, rules, and regulations.
- Appoint and/or promote, subject to the laws of Commonwealth's rules and regulations relating to Civil Service, members of the fire department and define their rank and duties.
- Suspend and/or remove members in accordance to what's allowable under Civil Services.
- Participate in grievance hearings.
- Advocate for Fire Department needs to achieve department purposes.
- Participate in collective bargaining.

*Small Town Administrator of Massachusetts (STAM)*  
**Member**

*2015 - Present*

- Attend regular Association meetings.
- Network with other Town Administrators from across the Commonwealth to share best practices.

- Regularly attend the Massachusetts Municipal Association (MMA) Annual Meeting and Tradeshow.

*Holyoke Public Schools, Holyoke, MA.*

*January 2012 to December 2013*

**Elected Official - School Committee Representative – Ward 1**

- Chaired the Communication and Policy sub-committee.
- Met federal and state mandates for the Holyoke Public Schools.
- Provided important administrative oversight relative to the educational policies and programs the committee institutes.
- Appointed and oversaw the duties and responsibilities of the Superintendent.
- Developed and adopted an annual budget for the Holyoke Public Schools.

*Nueva Esperanza, Inc., Holyoke, MA.*

*January 2011 – Present*

**Board of Directors, local community development organization**

- Served as Chair for 4 years of the 6 years.
- Provided administrative oversight relative to the organizations policy and programs.
- Advocated on behalf of the disenfranchised neighborhoods, including resident and business interests, on issues directly effecting their housing and social needs.
- Assisted with establishing and maintaining affordable housing for low-income families and individuals.
- Worked in partnerships with all stakeholders to create and provide supportive services that assist with self-sufficiency efforts for low-income families and at-risk youth to gang violence.
- Grew capital reserves and maintained strong cash-flow at existing residential developments.
- Self-sustained and maintained all existing assets owned by the organization.

**TRAININGS AND CERTIFICATIONS**

- Leadership Pioneer Valley, 2016
- BusinessWest 40 Under Forty recipient 2015
- Town Manager/Administrator Boot Camp, October 2014
- Certified Specialist Public Housing Manager (CS-PHM) certification through Mass NAHRO, December 2012
- Attend yearly the Massachusetts Municipal Association Annual (MMA) Meeting & Tradeshow

**SKILLS**

- Keen understanding of local government and public administration.
- Solid knowledge of Massachusetts General Laws.
- Excellent capability to adopt a unifying vision and mission.
- Experience with coordinating procurements.
- Strong ability to soliciting and balancing the participation and input of stakeholders.
- Great comprehension of Spanish and basic conversational skills.
- Excellent knowledge and use of social media networks.
- Solid knowledge of community issues and community planning.
- Experience working in a team environment in support of departmental and organizational objectives
- Knowledge of municipal budgets and ability to comprehend local departmental needs to meet legislative obligations.
- Knowledge in capital planning/budgeting.

- 1. Although the Town of Hadley is currently well positioned financially with good reserves and the entire landscape of municipal governance and fiscal planning has dramatically changed with the recent spread of the COVID 19 virus and its obvious detrimental impact on the national and local economies. As stated in the Challenge Statement, the Town has \$2.1M in its stabilization account, \$2.5M in Community Preservation Act funds and “Free Cash” of nearly \$1M. How would you begin to deal with the obvious negative impact on the FY-2021 budget and the reductions in anticipated revenues (property tax, local aid, and meals and hotel occupancy taxes, etc.) for the next fiscal year? In your career, please cite examples where budgets needed to be reduced and what approach you used with department managers, elected officials and the general public to explain the necessity of budget reductions and their related impact to the community. If you have no similar experience, please outline your plan to address this issue in Hadley during these fiscally challenging times.**

The budget is a moving target and with the fiscal landscape constantly shifting, it makes managing finances and services much more complex than what it already is. How local governments position their budgets through planning using best practices greatly determines how communities will best navigate those changes especially when they are unanticipated such as our current situation with COVID-19. Since we are talking about any possible negative impact on the FY21 budget caused by COVID-19, my approach to mitigate the impact is to maximize the town’s budget planning efforts using creative financing strategies available to the town while monitoring revenue collections for updated fiscal projections and using clear guidelines for spending.

First, recognizing the towns financial position with stabilization, reserves, and how free cash is governed coupled with the existing financial management policies proves to me not only is the town committed to responsible planning of town finances but also that the town is prepared to navigate the financial storm which is a peace-of-mind for any Town Administrator. These tools are the foundation of which local leadership has the flexibility to leverage and supplement fund gaps so that expected services are not interrupted.

My strategy to deal with the obvious as the question asks would be to work collaboratively with the Finance Committee, the Board of Selectmen, and departments to proceed with agreed upon conservative guidelines until there is a much clear vision forward in the revenue forecast. Most communities across the Commonwealth are planning for reductions of 20% in state aid and 30% in local receipts. For Hadley, that is a combined possible shortfall total of approximately \$1,634,232 the town can start planning to supplement using a combination of conservative approaches and available funds in free cash or stabilization. Additionally, the town can hold off on hiring new employees beyond its

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existing capacity to refrain from adding to the budget. The town can also hold off on planned large capital purchases for another year or until there is a much clear financial picture of any shortfalls.

In addition to this, there are funds made available to cities and towns through the CARES Act. The Town of Hadley has available \$471,345 to cover any expenditures that have to do with COVID-19 related expenses. I understand the funds do not close gaps due to loss of revenue, however there is an opportunity here to be creative and it's another tool I would add in my planning efforts.

Lastly, I would work departments to identify inefficiencies and control spending which will be an ongoing strategy even beyond the pandemic. Through my experience working at Blandford, there are always opportunities to improve inefficiencies and achieve economies-of-scale including leveraging several grant opportunities through the Commonwealth that are specifically focused on these very efforts through programs like the Community Compact, Green Communities, Small Bridge program, Massachusetts Vulnerability program, and more.

- 2. Please explain your experience and philosophy in managing growth issues in a town and how that growth needs to be balanced to protect its historical and agricultural heritage as well as the character of the community. Hadley's Planning Board updated their 2005 Comprehensive Master Plan in 2017 to better manage its growth and help retain its image as a desirable community for residents to live, work and enjoy its natural amenities while becoming a regional commercial and agricultural center. How would you help to implement the strategies identified within that document to lead the community forward? What is your experience in implementing strategies for targeted areas that will be consistent with the Master Plan? How do you balance the arguments for continued growth versus preservation of land? Please explain how you would engage the elected officials, the local residents and the business community in moving this plan forward. Please provide specific examples.**

*Please explain experience and philosophy in managing growth issues in a town and how that growth needs to be balanced to protect its historical and agricultural heritage as well as the character of the community.*

These are the very discussions we have been having in the Hilltown region which includes the Town of Blandford where I currently serve as its Town Administrator. My general philosophy in navigating this along with anything else I attempt to mitigate is - you get what you plan for. An inclusive, transparent, clear, and consistent planning process determines greatly what the final outcome will look like.

For the past few short years, local leadership through an initiative called the Hilltown Collaborative that I help form have been working together in the attempt to leverage opportunities for growth that will reverse some of its unsustainable trends which include population decline; student body population decline at its regional school district; aging population; shrinking tax base; and costs for services continuing to climb. Although at the moment the Hilltown municipalities do not have the kind of commercial development concerns Hadley has presently, local leadership involved continues to proceed forward while being very much aware of how they can experience drastic growth changes if they are not careful. Communities such as Hadley are often looked upon to learn from their experiences as they work together to reverse trends and achieve sustainability while not losing its rural character and charm. As a collaborative, Community Compact resources were leveraged to initiative a regional economic development plan. Once the plan was developed, it was clear that the towns needed someone to facilitate implementation of the plan, therefore Efficiency and Regionalization grant funds were leveraged to supplement first year costs for a shared Economic Development Director. The towns now sustain its shared cost annually through local appropriation and are entering its 3<sup>rd</sup> year. Together, we work with the shared Economic Development Director to implement key strategies identified in the plan, including but not limited to: marketing and promotion of the communities; liaison for existing small businesses and new businesses considering to move into the area; implementation of last mile

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broadband project; facilitation of marijuana business interest; elevating discussions around importance of exit from mass pike into the Hilltown region; facilitation of solar projects; and updating antiquated zoning bylaws.

At Blandford specifically, we have been working with our Planning Board to update our antiquated zoning bylaws in its entirety not only to bring them to the 21<sup>st</sup> century, but also make changes in areas of the zoning bylaws that welcome growth and manages it in a way that anchors the rural character of the town. These bylaws have been an important communicative tool that sets the community standard and expectation for folks looking to build in town. Involved in the process have been numerous updates at Planning Board meetings, several hearings, and a final presentation at town meeting where Blandford, just like Hadley, gets to practice its truest form of local control by voting on any such changes in the bylaws. Additionally, having a master plan is another strong tool since the vigorous process for drafting a master plan results on the desires of the community. The level of community engagement that concludes the strategic outcomes of a master plan makes it easier for local Select Boards and Planning Boards to make the important decisions with town resources that are in line with the interest of the community. At Blandford, we haven't had the opportunity to engage in a process for updating our master plan but we have been discussing with the Pioneer Valley Planning Commission on how to be creative of available resources to execute such an undertaking.

*How would you help to implement the strategies identified within that document to lead the community forward? What is your experience in implementing strategies for targeted areas that will be consistent with the Master Plan?*

It's great to know there already is an existing master plan in which the next Town Administrator can begin to help implement. Although I haven't had my first experience yet implementing strategies for target areas identified in a master plan, I have had plenty of experiences drafting studies and facilitating strategic goals and objectives for several different municipal initiatives. The master plan, like many plans drafted with community input, serve as the guiding beacon. There are many moving parts in Hadley that correlate with the strategies identified in the plan and I would begin by first developing my own set of immediate/short and long term objectives of what I can accomplish for the town as Town Administrator and ensure that those objectives are in line with the community interest drafted in the master plan. This prioritizing would begin first with many discussions with members of the Select Board as the Chief Executive Authority of the town and discussions with other departments that are working hard toward

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advancing the quality of life in the town. Upon conclusion of these preliminary efforts, I can then streamline attention and available resources toward those priorities and accomplish within a given time period.

*How do you balance the arguments for continued growth versus preservation of land? Please explain how you would engage the elected officials, the local residents and the business community in moving this plan forward. Please provide specific examples.*

I get this often at Blandford as we continue to have discussions regarding growth. There are ways to cultivate both interests in a much more strategic and effective manner and Hadley has already started with it – by finalizing a master plan. The next step I believe is updating the zoning bylaws. I see the town is looking to hire an experienced planner and/or an economic development director which can be the opportune moment for this process. The process should be inclusive and transparent with appropriate stakeholders to seek their input prior to presenting a final draft for a vote at town meeting.

- 3. As the new Town Administrator you will be following a well-respected Town Administrator who's retiring after 15 years of dedicated service to Hadley. With this in mind, how would you: A. Establish your relationship with the Select Board? B. Develop your own leadership and management presence? C. Work with the senior management team to understand their role and contribution in the community? D. Address any conflicts brought to your attention within your first 100 days? E. Engage with and get to know the needs, wants and desires of the community? F. Describe your "on boarding" plan for your first year?**

*A...Establish relationship with the Selectboard?*

My first and immediate priority would be to establish two-way expectations between the Select Board and me to build trust and gain direction. This is important because it's their community and I want the Select Board to know that I walk on that fine line delicately. I recognize the Select Board is the Chief Executive Authority of the town elected by the people to govern the affairs of the town. As Town Administrator, I operate under their strategic direction and assist with overseeing town departments, activities, and projects for which I am given authority, responsibility, or control. I do this hand-in-hand with Select Board direction so as long as it doesn't conflict with any federal, state, and local laws, rules, and regulations.

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*B...Develop your own leadership and management presence?*

I have to admit, this is a difficult question especially when I am expected to follow the footsteps of David Nixon whom I have always looked up to in the profession of Town Administration since I first became interested in wanting to become a Town Administrator. I would develop my leadership and management presence by establishing credibility and building trust with constituents. I would do this by acknowledging the contributions of those before me and cultivating strong and trusting relationships as we look to proceed forward.

*C...Work with the senior management team to understand their role and contribution in the community?*

If I'm chosen, I understand my start date won't be until late summer or early fall, just prior to the start of budgeting season for FY22. This is a good time to start as Town Administrator because it's when I expect to be heavily involved working with department heads to understand service needs, their role, and contributions to the community. There is also sometime to review existing reports and engage with other constituents to get a clear grasp on strengths and potential gaps. I look forward to ensure a collaborative process that is transparent and inclusive so that we produce a budget document that has an accurate representation of meeting local needs based on the limitations of the town.

*D...Address any conflicts brought to your attention within your first 100 days?*

In local government, conflicts are inevitable and my approach to addressing conflicts is to acknowledge them as they appear and prioritize on how to best mitigate them to reduce harm and/or liability to local resources.

*E...Engage with and get to know the needs, wants and desires of the community?*

As described earlier, my immediate priority is to have this level of discussion first with the Select Board. These discussion would continue as I connect with department heads and become familiar with the services they provide and what they know of the community through their experiences. In tandem, I would give a much more thorough review of the master plan which provides in-depth details of the desires of the community. Upon my knowledge gained with these approaches, I'll be better prepared to have much greater discussions with community members – residents and businesses alike.

*F...Describe your "on boarding" plan for your first year?*

The following is an overview of what I look forward to achieve during my first year:

- Discussions with members of the Select Board to identify priorities, goals, and objectives – including Finance Committee.



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- Discussions with department personnel to identify in their perspective priorities, goals, and objectives.
- Identify strategies that will achieve the identified priorities, goals, and objectives which will include building on strengths and work toward bridging any gaps.
- Review last audit.
- Review system of internal financial controls and assess in-house capacity to understand the culture of how the town operates its finances and introduce new ideas, if any, on how to improve.
- Regular meetings with financial team to monitor revenue and lookout for any budget shortfalls because of COVID and conclude a plan of action to address as needed during year-end.
- Prepare process and help facilitate FY22 budget setting.
- Engage dialogue with members of community – residents and businesses alike.

**Thomas M. Guerino**  
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Please accept this brief statement of qualifications as an indication of my objective to be selected for the position of Administrator for the Town of Hadley, as advertised in the online edition of the Massachusetts Municipal Association's ***Beacon***.

As the enclosed resume indicates, I have enhanced my credentials and have held increasingly responsible professional positions. Until recently, I served as the Town Administrator for the Town of Bourne (February 17, 2005 – September 30, 2019). I have served as a Massachusetts and Vermont Municipal Administrator, Economic and Community Development Director, and as previously indicated, most recently (September 30, 2019) as the Town Administrator for the Town of Bourne. **Currently**, I am assisting the Town of Wareham in a consulting capacity to the Town Administrator by conducting a thorough review of the organizational and financial status of the Wastewater Department. I am also serving as the Acting Town Administrator in Vernon, VT on a part-time basis.

As you are aware, Bourne is a full-service community of 20,000 residents (40,000 in the summer months), currently with a budget of \$72 million. In addition to the General Fund and Education budget, Bourne also owns and successfully manages a municipal regional integrated solid waste facility (\$11.7 million) and a wastewater enterprise fund. I am charged with budget and union negotiations and work under the provisions of the Bourne Home Rule Charter, as amended. The Town currently boasts a combined "Free Cash and Stabilization balances of \$12.95 million as opposed to the Town being \$1.9 million in the red in 2005 when I was hired. I also currently serve as the Chair to the Cape Cod Regional Transit Authority. During my tenure on the Cape, I have had an excellent working relationship with the Cape Cod Commission.

I formally served as the Executive Director of the Massachusetts Rural Development Council, Inc., Amherst, MA, a member state of the National Rural Development Partnership (9.5 years). I have also served as a municipal selectman and a finance committee member. All of the above positions have necessitated the acquisition of a comprehensive toolbox of skills and expertise. These include negotiating, administrative, public budget preparation and presentation, wage and classification preparation, preparation of policy and administrative documents, staff oversight, annualized goal, benchmark/work plan/ Town Meeting preparation and other varied abilities that are utilized in an ever-changing public environment.

Also, as noted within my resume, I have been involved in both exempt and non-exempt negotiations, prepared grant and compliance reports for state and federal agencies, served both as a hearing officer and appellant, and have worked within the parameters of local, state and national policies.

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I have also worked with many Massachusetts and Federal Departments and agencies and am quite familiar with Massachusetts state Government (EOHCD, DOR, DEP, MDOT), having worked with many during my tenure as an administrator and MRDC Director in the Commonwealth. I am familiar with Mass. MGLA Chapter 30B, 32B, 40B, etc.

Further, I am comfortable with and have experience in working with groups of extremely diverse constituencies. I am frequently recruited to present as an invited speaker or panelist locally and at national functions. Thus, my extensive and varied experience in Municipal Government, human resources, public-sector administration, public policy, budget, negotiation and team building create a confluence, which will be beneficial to the entire community of Hadley, as it moves forward to continue its reputation of professional excellence within the municipality.

I look forward to the opportunity in discussing how my experience and qualifications meet the needs of and will maintain professional operations within the Town of Hadley, as it moves toward securing a permanent Town Administrator. Note, I am very excited about the possibility of returning to work in the Pioneer Valley.

It is anticipated that the salary will be commensurate with the responsibilities depicted within the position profile, take into consideration with the growth pressures of the community and, of course, be aligned with the level of professionalism required.

Respectfully,

*Thomas M. Guerino*

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**Town of Bourne, MA – Town Administrator – Feb. 17, 2005 to September 30, 2019**

- Chief Administrative and Executive Officer of full-service municipality 20,000.
- Prepare and Administer \$68M annual budget plus an \$11.7M Regional Landfill Enterprise Fund, pursuant to Town Charter.
- Strong Chartered Town Administrator. Excellent Budgetary skills.
- Instituted town wide performance appraisal system.
- Reorganized the Zoning and Planning staffing organization.
- Brought town from \$2M deficit in FY05 to undesignated fund balance of \$6.6M in FY07.
- Halted use of Free Cash and Stabilization Funds for general operations without repayment plan over 24 months.
- Orchestrated and justified general overrides – infrequent and only as absolutely necessary.
- Increased public safety staffing.
- Revised long-term financial model.
- Created Capital Expenditure working group, Wastewater working group, Department Head working subcommittees, and Integrated Solid Waste Management (ISWM) Futures Working Group.
- Lead collective bargaining with 9 separate units. Prevailed on all arbitration challenges.
- Revised several antiquated policies and created new travel and vehicle use policy while reducing and then stabilizing size of municipal fleet.
- Opened communications within municipal departments and made the Administrator's office accessible to employees and the general public.
- Harnessed school spending with close collaboration with School Superintendent.
- Brought self-insured health insurance budget under control through union negotiations.
- Established and funded Facilities Maintenance Department.
- Guided Board of Selectmen into professional goals-setting sessions. Working well with an 80% board change over 8 months including a recall of two former members.
- Hired several department leaders including Director of Facilities, Human Resources, and Director of Finance. Terminated employees as necessary and appropriate.

**Town of Putney, Vermont – Interim Municipal Manager – May 2004 – Feb. 2005**

- Chief Administrative/Financial/Human Resource/ Officer for full-service community.
- Charged with administrative, human resource, financial, and development functions.
- Administer and prepare general fund and special appropriation budget.
- Oversight of all invoice and payroll functions.
- Project Director and administrator of multi-million dollar capital improvement budget including water and wastewater system development and upgrade, new library (charged with selling existing library building), moved toward new EMS station.
- Revised benefit program to improve and reduce health and illness leave benefit costs.

- Chief procurement officer. Retained by community to assist in reviewing current governance structure and recommend upgrades or transition to more appropriate form/staffing core.

### **Massachusetts Rural Development Council – Executive Director –August 1994 to Dec. 2003**

- Served as a leading advocate and spokesperson for 177 small and rural Massachusetts communities related to policy and regulatory change requirements and the principles of New Governance. Chief operating professional.
- Creatively facilitated more than 180 divergent teams on National, State, and local levels, utilizing distinctive models for facilitation, achieving consensus, and team building.
- Led program effort in providing technical assistance to USDA – Rural Development in missionary change from program administration to customer service outreach provider.
- Participated and trained in intensive diversity and inclusion program.
- Successfully constructed/participated and provided leadership with teams that continue today, ranging from welfare reform to entrepreneurial training, and local government participation methods.
- Developed curriculum for National Partnership meetings in CO, DC, FL, AK, MA, NH, PA, OH, WY.
- Leader in formulating professional development training curriculum. Was responsible for creating opportunities for and oversight of Graduate student interns/work study students.
- Team member in creation of National guideline for Outcomes Standards and Success Measurement.
- Created policy guidelines as team member for new National Network Management Team. Elected to such in 1998, under new name of National Rural Partnership Executive Board.
- Expanded revenue source as Federal Participation declined through fundraising and legislative action.
- Member Board of Directors for Central Massachusetts Regional Employment Board (Workforce Central).
- Member Executive Committee Better Access Through Organized Networks (BATON/MASSCARES – EOHHS - Hampshire County).
- Representative to Federal Reserve Bank Community Development Advisory Council.
- Member Technical Advisory Committee for Northeast Center for Rural Econ. Development (Penn. State).
- Member Performance and Accountability Committee for the Strategic Accountability Task Force (NRDP).
- Selected to participate in International Learning Cluster on Partnering @ Johns Hopkins University.
- Leader in drafting, submission and “lobbying” the passage of the NRDP act of 2002 and subsequent Congressional Authorization and budgetary earmark. Extensive work with appropriation subcommittees and entire Massachusetts Delegation.

## **OTHER PROFESSIONAL EXPERIENCE**

### **City of Pittsfield, MA (TMG ASSOCIATES)**

Selected consultant to maintain and redefine the Human Resources function and provided staff training/oversight for active personnel office.

**Massachusetts Municipal Consulting Group** – recruitment and wage/classification specialist/Assessment Centers panelist

### **Town of Rockingham / Bellows Falls Village Corporation, Vermont 1986 - 1991**

Municipal Manager/Economic Development Director

**Town of Warren, MA** - Town Administrator/Coordinator -Local Assessment Committee (MGLA Chapter. 21D)

**Massachusetts Municipal Circuit-Rider Administrator**

## **EDUCATION/OTHER CAREER EXPERIENCE**

- University of Southern Maine, Portland, Maine, Bachelor of Arts (Magna Cum Laude)
- Greenfield Community College, Associates Degree in Liberal Arts
- Partnering for Results – Extensive training – Johns Hopkins University
- Grant Reviewer - National Institutes of Health (NIH)
- Substantial legislative and administrative advocacy experience at State and National level
- Extensive Professional Development course work and seminar training in facilitation, Americans with Disabilities Act, team building, achieving consensus, outcomes framework, benchmark and achievement measurements, financial, administrative compliance, grants writing and administration, New Governance, throughout entire professional tenure.

## **COMMUNITY SERVICE**

Cape Cod Regional Transportation Authority (Chair through October 2019)

Member of the Metropolitan Planning Organization (MPO – Through October 2019)

Future Connector Executive Task Force – The FIX - Canal Bridges task force

Bourne Financial Development Corporation

Barnstable County Substance Abuse Council (Past member)

New England Youth Theater (Past active parent)

*Selected References –*

Astrid Glynn, Assistant Secretary  
Rail and Transit – MassDOT  
10 Park Plaza – Suite 4160  
Boston, MA 02116

Mr. Robert Troy, Esquire  
(Bourne Town Counsel)  
Troy Wall Associates  
Sandwich, MA  
(508) 888-5700

Ms. Michele Ford, Co- Chair  
Bourne Finance Committee  
C/O South Coast Health (NB  
Hospital)  
New Bedford, MA  
(617) 480-2195

Mr. Thomas Cahir, Executive  
Director  
Hyannis Transportation Center  
215 Iyannough Road, PO Box 1988  
Hyannis, MA 02601  
(508) 775-8504

Ms. Kelly Haverkamp  
Nicolet College  
5364 College Drive  
Rhineland, WI 54501  
(715) 365-4410

Ms. Marie Oliva, Executive Director  
Cape Cod Canal Region Chamber of  
Commerce - Main Street

George “Bud” Dunham, Town  
Manager  
c/o Sandwich Town Hall  
Sandwich, MA

George Slade, Selectman  
Town of Bourne  
Eldridge Ave  
Pocasset, MA  
[gslade@townofbourne.com](mailto:gslade@townofbourne.com)

Galon (Skip) Barlow,  
(former Selectman)  
Hideaway Village Association  
Buzzards Bay, MA 02532  
[skiane@verizon.net](mailto:skiane@verizon.net)

Mr. Barry Johnson, Town Clerk  
Town of Bourne  
24 Perry Avenue  
Buzzards Bay, MA 02532  
(508) 759-0600 Ext. 1313

Jamie Sloniecki, former Selectmen  
Weldon Park  
Sagamore, MA  
(774) 313-8888

Mary Jane Mastranglo, Chair  
Bourne Finance, Capital Outlay,  
Wastewater Construction Committees  
c/o [mjm@mrainc.org](mailto:mjm@mrainc.org)

**Town of Hadley - Responses to required  
essay questions**

**Respectfully submitted,**

**Thomas M. Guerino**



1. **Finance** – Some of this response is predicated based on the date of its drafting. Over the next 10 days the landscape on economic recovery plans and health assessments could change dramatically, a little or, none at all, from the Governor’s “opening up the Commonwealth” announcement and the results of the two weeks moving forward with the Commonwealth’s plan. With the above being noted, my response to the this first query follows:

Municipal Administration must, as completely as possible, assess what the true estimates for loss of revenue will be and the duration. This, at a minimum, must include Chapter 70 for local and regional school entities, Unrestricted Government Aid, tax delinquencies, loss of revolving account moneys, and Charter School/School Choice Tuition reimbursements. Rooms and meals tax limitations for at least the 4<sup>th</sup> quarter of FY 20 and at least the first two quarters of FY 21 must also be placed in the calculation. If the colleges are NOT going to open for the fall term, the sales and meals tax revenue loss will be more substantial for the end of the first quarter and full second quarter of the FY. I anticipate Motor Vehicle excise will remain relatively stable. While openings may be allowed via the Governor’s 4 phase plan, there is no guarantee that citizens are going to flock to retail establishments and eateries, etc. There are currently several different scenarios being discussed. Governor Baker’s recent comments that the Commonwealth will try to leave the municipalities “in decent shape” is both encouraging and a bit disconcerting at the same time. The Town must reach out to the agricultural community to assess its anticipated losses or other hardships. This much be communicated to the Dept. of Ag Resources, EOHCD, USDA, Rural Development, and the Farm Service Agency.

The dynamics of the municipal operation must be reviewed in this context by Administration and several working scenarios must be considered. Town leaders must look to what is necessary to fulfill the corporate function by law, and regulation. It must assess the following, what is required by federal, state, and local by-law. What are the municipal priorities that are not required via bylaw, and what are “nice to have.” Some of the latter may be priorities. Examples may include Recreation Department programs and Library offerings. These are not mandated by statute. However, they may play such an important function as to be seen as essential for community wellbeing and character. Summer programs may be necessary (with proper safeguards) to allow other parts of the economy to re-open. Further, non-essential ATM or STM articles should be taken off the warrants and/or otherwise deferred, including non-critical Capital expenditures. This may cause some short-term consternation by civic groups, Town Boards/Committee’s, and municipal departments. However, it may be absolutely required. This may extend to matching grant programs. What are the local bargaining units’ position on assisting during this difficult period. Will lay-offs or reduction in hours be required? Are furloughs a possibility throughout the organization, including schools? Department leaders need to be prepared to offer reduction scenarios. These leaders know their budgets and trends the best and their expertise is needed and respected. Across the board percentage reductions are generally not a good way to go. Smaller departments with little in the way of expense lines or departments of only 1 or 2 FTE’s (OR LESS) are many times subjected to more devastating cuts of programs and service by straight percentage reduction. Once again, prioritization is, the key. Public Safety and Public Health are of the highest of priorities. Additionally, local and regional schools, while having to spend \$\$ to shift educational methods and deliver meals etc., could be saving a good sum on transportation and out of district special education transportation costs. Any surplus (above current policy) should be returned to the locality(ies) prior to the close of the FY 2020 books and be counted toward the free cash certification. As of today, FY 22 will prove to be more difficult than the close out of FY21. All possible state and federal revenue sources that specifically deal with the COVID 19 downturn

should, where applicable, be applied for with the Regional Planning Commission and University systems being tapped for assistance. Finally, override capacity should be looked at as a tool as should excess levy capacity, though the latter was minimal in FY20 and the former is not too likely, based upon the historic review of override vote outcomes in Hadley.

All of the above need to be vetted and thoroughly discussed with all town departments, bargaining units, School Administration professionals, and elected leaders. Assuming consensus can be achieved, plans need to be brought to the public for review, comment, and amendment where required. Also, how are the Town's financial policies impacted and what is the need to adjust these for the short term. What will be the plan to "pay back" or achieve policy adherence and over what terms. Of course, coordination with the MMA, STAM, and the Town's legislative delegations will be important. It is necessary to tell the Town's story thoroughly, completely, and transparently.

During my tenure in Bourne, there are many examples of having to constrain and/or reduce budgets dating back to my first day on the job in 2005 and during economic downturns in FY 11/12 and again in FY 16. Each of these reduction times required different approaches but all required elected official, Finance committee, School Department, Departmental leader(s), bargaining unit(s) and public participation and buy-in. FY 05 depicted a \$1.5 million dollar shortfall in the Health Insurance Trust (Bourne is self-insured for health, dental and unemployment insurance). I gathered a multi-participant group known as the "High Level Huddle" to work out various scenarios to correct the invert in the revenue/expenditure equation for several years forward. Staff was reduced and a plan to limit the use of free cash for the budget was undertaken. An override was requested (the first since 1990) and was successful. Staff was not reinstated as the amount requested from the voters included a reduction in current (at the time) expenditures. The Health Trust was split into two-trusts employee and employer, which halted the town from using these moneys for anything other than health and dental insurance. Bargaining units agreed to forego step increases.

In 2011, during the continuing fallout of the 2008/2009 recession's economic downturn, I renegotiated the LIUNA contracts to reduce the growth of wage, primarily due to 3.9% step raises, on top of any COLA ( 5.9%/6.4% annual increase in total) to a more justifiable step plan of 2.50% between steps for new employees who commenced employment post 07/01/12. Later, we agreed to cap the town's investment in the LIUNA pension fund at a fixed fee as opposed to an amount per-hour per-employee that was tied to the wage and step plan. The net savings over the term of the step plan was estimated at \$867,000.

In FY 16, the Town's use of free cash toward the budget was becoming unsustainable. It was a long-standing policy to do so, utilized by the former full-time Select Board. The Town was going to fall below policy and the spread would be worse in the out years. An override was attempted and supported in FY 16 (2015). It failed and departmental reductions and staff consolidations, department elimination ensued. \* The Town Administrator worked closely with Department and town/school department leaders to work through budget and staff reductions. Public hearings were held, CATV, and on-line platforms were utilized for outreach. Attached, please find the report to the Select Board and Finance Committee of the probable outcomes of a failed override and, the document brought to the public during the outreach effort. In the end, departments were eliminated, consolidation of duties occurred, wage freezes (steps) were implemented and transfers was undertaken. The positive outcome was a group consisting of the School Supt., School Committee, Finance Committee, Town Administrator, Finance Director and Select Board, revamped the entire financial policies of the Town including a sustainable OPEB contribution policy.

2. **Growth** – The management, advocacy, or curtailment of growth is a proposition that is uniquely local, often complicated by regional pressures. Tensions can also occur within different neighborhoods of the same community. Having served on a number of Regional Development Organizations throughout my tenure, being a leader on a number of local development task forces, my 10 years as the Director of the Mass. Rural Development Council, and being a Franklin County native, positions me to understand the needs and tensions of a community like Hadley. I am experienced in assisting communities assess what their growth priorities are, how to keep a Town’s sense of place, and understand the need to honor, respect and preserve a community’s rich history. I note that Agriculture is as much economic development as is commercial, retail and industrial activity. Supporting and maintaining a vibrant agricultural sector is a key to preserving community character, history, and economic well-being. It is the balance amongst these competing interests, along with the pressures of residential development that becomes the “secret sauce” to a successful community. On this, the positive update of the **Master Plan** is an achievement to be celebrated. How will the community operationalize the vision contained within the **Master Plan**.

Initially, I would sit down with the Planning Board in a work session to receive a primer on how the Board came to consensus on the outcomes within the **Plan**. This includes all the outreach that was undertaken and where the points of tension may have been leading up to the final draft of the **Plan**. I would then move to read the recent history on how the **Plan** was being implemented, who was being engaged and if the Town Departments were actively incorporating the priorities in the **Plan** into their departmental goals. This would be a piece of Department Leaders annual review. I would also see how the Town’s Boards and Committees, including the Select Board, were developing strategies to keep the provisions of the **Plan** front and center in as they conduct regular business. A vision statement for each of the above should be front and center noting the intention to work toward achieving the outcomes of the **Plan**. I would incorporate the vision statements into the preamble of each agenda and have is noted publicly. Finally, I would call an annual joint session of Boards, Committees and Department Heads, led by the Planning Board, to benchmark achievements made to date and where impediments have been encountered. Where necessary, I would seek, or recommend that others seek the expertise from the Regional Planning Commission for assistance, look to EOCHD and other agencies for both planning and implementation funding, work with CISA and other regional advocacy, business, educational and agricultural groups to help in areas where there are specific proficiencies.

In Bourne, the Town updated the Long-Term Comprehensive Plan (LCP) twice during my tenure. It was a difficult task as Bourne is a Town of many villages, similar to the Town of Montague, with each village having a unique character and sense of community. We conducted town wide visioning sessions to gage the citizens priorities of what they wanted Bourne to be, in its best sense. While there was some agriculture that was seen as very important to the Town, aquaculture, the blue economy, honoring/preserving the Town’s historic past, and the revitalization of Buzzards Bay village and as the “Main Street” of Bourne were key components of the LCP. Keeping an excellent relationship with the various military service branches and leadership at Joint Base Cape Cod (JBCC) was also a high priority. On these, strategic plans were created for each. Farmland preservation was established, zoning by-laws were amended to assist in this endeavor. Aquaculture harvesting and planting areas were granted for expansion of the commercial shellfishery, a municipal position description was reworked to bring in a science-based expert, strategies for nitrogen reduction into the waterways and embayment areas were commenced.

Marketing to encourage sport fishing along the Cape Cod Canal and noting this as a most desirable tourist area was undertaken. Strong endorsements for industrial expansion of Hydriod Corporation (world class manufacturer of underwater search vehicles) was brought forward to the regional regulatory Commission. A historic district was formed, and a number of properties were placed on the State and National Historic Registers.

The Town commenced a concerted effort in Buzzards Bay. This retail and main street area had been long dormant and in a state of blight for decades, after Camp Edwards (now JBCC) changed its mission and the strategic air squadron was moved to Westfield, MA in the last Base Closing Commission round of cost saving measures. These measures included but are not limited to, zoning changes to increase density and height maximums, the designation as a growth incentive zone through the Cape Cod Commission. A number of Mass Works Main Street grants for street scape improvements were applied for and received. A citizen committee was engaged to redesign of the Town park ( common ) to include a walking path ear the Cape Cod Canal, and \$2.3 million dollars from the Capital improvement program for a new playground with a splash pad was approved by town meeting and completed. Boards of Survey were engaged to note blighted buildings and they were either repaired by the owner or ordered to be torn down. A new hotel, market rate apartment complex, and mixed-use development are complete or currently under construction as a result of the zoning changes noted above. The Town was also successful in securing a \$2.3 million EDA infrastructure grant, complimented by an addition \$1.5 million Mass Works grant and \$4 million of Town bonded funding for the construction of a small wastewater treatment facility. As Town Administrator, I was a leader in moving all of the above forward with great multi-sector teams, all in accordance with the goals established by the **LCP, or Master Plan**. By focusing on Buzzards Bay as one of the two major growth areas of the Town, the historic areas and quaint residentially oriented villages are better able preserved. The key to success is balance. If one exceeds to the detriment of the other, i.e. Commercial Development taking over historic parts of town, overall development will soon cease. The Town will not be a desirable place to live, work and recreate. Conversely, if such stringent restrictions are placed on commercial, housing or agricultural development to preserve community historic character, that character will be lost, as the means to maintain it are not there to help the Town to afford to support it.

I believe the examples noted above depict how I would engage all sectors of the community are noted in paragraph two of this question.

### 3. Succession of Town Administrator Nixon, et. al.

Mr. Nixon is not only regarded in high esteem within the boundaries of the Town of Hadley, he is most respected throughout surrounding Towns, by STAM and the MMA. He is seen as a person who has done well for the communities he has served over his tenure, and has been able to achieve a good work/life balance. Any subsequent Administrator will be unable to fill the large footprint left by Mr. Nixon. The new Administrator will have to establish him/herself and create her/his own path forward.

Within the sub-topic areas of this question A., B., C., E., require one important ability. That ability is to **listen**.

a. **Establish Relationship with Select Board** – The first and foremost thing to fostering a good working relationship is to understand that the Town Administrator is not a sixth Select Board member. It is key to sit down with the Board to understand what the collective priorities are, how they come to these priorities and how they best receive information. Assuring that no one member has a monopoly on the TA's focus and setting the ground rule that any action requested by a member of the Board should be brought before the full body for discussion and possible action. The TA must distribute information timely, accurately and to each member equally. Providing timely responses to the Board is imperative. This is the case even when information requested is not readily available in the timeframe initially required by the Board. It is better to inform the board of this than providing incomplete data which could lead to poor or inaccurate decision making by the Board. I would also suggest that one workshop per month be held on topical areas or goal achievement strategies. This would be in addition and separate to the regularly scheduled Select Board meetings. The current and any subsequent Chair of the Board and TA must have an open and frank dialogue as establishing a consent agenda for Select Board meetings takes good communication and a trusting relationship. Both trust and respect are not granted, but earned.

b./c./e. **Develop Leadership and management presence/work with senior management team/engage and get to know the needs, wants and desires** – Get out of the office!!! Meet with Department leaders individually and within Department head meetings. Set agendas for both. Meet with Public Safety Chiefs and Health Agent and Financial staff immediately. Observe and hear about what the departments are working on, what is going well and where there are challenges. Set up a meeting with the School Superintendent. Meet and be updated by the Assessors, and Conservation Committee. Look at what the DPW is undertaking for projects. Convene a listening session with Senior Management. Find out the troubled areas and become familiar with town wide activities. How are the departments dealing with the current COVID 19 situation? Get to know the administrative support staff by engaging via MBWA (management by walking around). Be engaged and concerned. Get out into the community. Speak with the Chamber of Commerce, business alliances, and be introduced to the Agricultural community leaders. Be available to attend service organization meetings. Immerse in local municipal committee meetings. Meet with the Chairs of local committees. Attend a PTO meeting or two. Establish a rapport with the RTA and the RPC. The key is to be engaged and visible.

d. **Address any conflicts...** - This is not something that is really answerable in a broad context, as any conflict will be very-specific to individual subject matter. Emergency matters are different and generally require a more immediate response and swift communication skills. I will only note that once a conflict is brought to my attention that a review of any history that has had a part in creating this issue. If this is a conflict between departments or staff members, listening to all sides of the problem is necessary. I would seek insight from the departmental leadership, unless the conflict is concerning them. I note that conflict can be anything from “someone ate my lunch in the refrigerator at town hall”, to MassDOT and the Town having issues over proposed work on routes 47 or 9 – or anything in between. Each has to be assessed and addressed in context. Whom may be involved and what the level of outside engagement is necessary, if at all, will be determined on a case by case basis. The priority is to listen, research and be fair in any determination that is required by the TA.

f. **Describe your “on boarding” plan for your first year** – A great deal of the “on boarding” activities I would be engaged with are discussed throughout the context of the responses above. I will hopefully be able to address this without being redundant.

It is important to immerse in the activities of the community. Be present and available. Attend as many meetings of elected and appointed boards as possible and practical. Listen. Engage the departments and learn about their work. Find out what makes Hadley, Hadley. I was brought up in the area and understand that I do not really have the insight to know what makes Hadley a proud and welcoming community. Ask questions. Read minutes and reports of Boards and Committees. I will meet with the Moderator to learn how s/he conducts Town meeting and what her/his expectations and requirements are.

I will need to review the financial and capital needs of the Town and become familiar with the rolling stocks condition. I will also need to have frequent meetings with the financial and public safety leadership. I will not hesitate to call Mr. Nixon with a question, provided he is willing to offer counsel and historic perspective when asked. I certainly will get to know the local legislative delegation. Meeting with neighboring community Town Managers and Administrators will be important as Hadley shares many of the same concerns. These may include traffic, public safety response, development pressures, environmental concerns, wastewater needs, and MassDOT Region 2 mutual concerns.

Not finally, but in a way to conclude, I will do my utmost to work with the Select Board. As noted above, one will not fill the shoes of the outgoing Administrator. The next TA will have to blaze his/her own trail. I hope it will be myself in this role. Communication and deliberate honesty will be the key to success.

\*\*for informational purposes related to question 1 and budgetary reductions.



Attachment A  
MUNICIPAL SERVICE



Attachment B  
FAILED OVERRIDE p|



# Impacts of a Failed Override to Municipal Services

Presented to the Finance Committee,  
School Committee, & Board of  
Selectmen  
7/13/2015

# Summary of Financial Impacts

Department	FY'16 EST Reductions (Mid-Year)	FY'16 EST FTE Loss	FY'17 EST Reductions	FY'17 EST FTE Loss	Notes
DNR	\$ 65,000.00	1	\$ 130,000.00	2.71	3.71 total FTE  4 FTE from budget/8 FTE from grant  1.82 total FTE  1.75 total FTE
Police	\$ 89,856.00	3	\$ 181,186.00	0	
Fire	\$ 115,000.00	12	\$ 230,000.00	0	
Recreation	\$ 35,000.00	0.2	\$ 70,000.00	0	
Library	\$ 51,500.00	2.25	\$ 102,000.00	0	
Council On Aging	\$ 44,000.00	1	\$ 88,000.00	0.82	
Town Hall Departments (General Government)	\$ 85,023.00	1.35	\$ 174,890.00	0.4	
Street Lights	\$ 12,000.00	0	\$ 24,000.00	0	
Misc. Reductions	\$ 8,000.00	0	\$ 16,000.00	0	
Community Building	\$ 25,000.00	1	\$ 50,000.00	0	
DPW	\$ 45,000.00	1	\$ 90,000.00	0	
<b>Total Estimated Reductions Non-School</b>	<b>\$ 575,379.00</b>	<b>22.8</b>	<b>\$ 1,156,076.00</b>	<b>3.93</b>	
School Department	\$ 761,125.00	8.3	\$ 1,530,630.00	5.8	14.1 total FTE
<b>Total Estimated Reductions Including School</b>	<b>\$ 1,336,504.00</b>	<b>31.1</b>	<b>\$ 2,686,706.00</b>	<b>9.73</b>	
Estimated Unemployment benefits from Stabilization	\$ 245,000.00	12.13	\$ 126,000.00	6	FTE Claims at 30 weeks estimated at maximum benefit of 698.00 per week per FTE
<b>Total Estimated Financial Impact</b>	<b>\$ 1,581,504.00</b>	<b>31.1</b>	<b>\$ 2,812,706.00</b>	<b>9.73</b>	<b>40.83 total FTE</b>



# Department of Natural Resources

## Failed Override Budget Reductions

- ***Reductions***

- Reduction of 3.71 FTE's
  - Reduce 1 FTE in FY'16
  - Further reduce 2.71 FTE's in FY'17
- Reduction in expense line items

- ***Primary Impact of Reductions***

- No seasonal patrol boat personnel available
- Elimination of annual shellfish relay program
- Suspend upweller operation. (Annually the department raises 500,000 quahogs and 200,000 oysters in floating upweller systems and transplants them throughout town)
- More management closures of shellfish areas
- Suspend operation of the two town Pump Out Boats, shore-side pump out only

# Department of Natural Resources

## Failed Override Budget Reductions

- ***Primary Impact of Reductions...***
  - DNR permitting process will create additional time, and not guaranteed same day service
  - Overall flow of mooring related requests will be affected. Boat changes, new permits, stickers, etc. will all be delayed
  - Swim floats and town floats will fall in disrepair and will not be deployed

# Police Department

## Failed Override Budget Reductions

- ***Current Staffing***

- Law Enforcement - 47 FTE's (includes chief and lieutenants)
- Dispatch – 4 FTE's
- Administrative – 4 FTE's (including custodian)

- ***Current Services***

- Four cars patrol areas through-out town
- Able to respond quickly and provide backup to other areas as needed – Especially important considering town is busier than ever
- High visibility
- Provide staffing for emergency shelters
- Traffic enforcement

# Police Department

## Failed Override Budget Reductions

- ***Reductions:***
  - Eliminate three (3) FTE's from the law enforcement staff
- ***Primary Impact of Reductions:***
  - Reduce current patrol plan to a three car minimum plan per shift
  - Increase patrol area sizes, and create more issues where patrols will be dispatched to other areas for calls or backup
  - Increase response time to calls for service
  - Reduce the visibility of police in the community
  - Reduce other functions such as staffing shelters or providing traffic enforcement, etc
  - The reduction of these positions will severely impact the current service provided to residents.
  - Calls will be re-prioritized and stacked due to the decrease in patrol staff

# Fire Department

## Failed Override Budget Reductions

- ***Current Staffing***

- 45 FTE's - Includes all fire and paramedic staff
- 1 FTE - Administrative

- ***Current Services***

- Presently handle 4800 calls for service (EMS/Fire/Water Rescues/Haz Mat)
- Staff three stations, maintain four

# Fire Department

## Failed Override Budget Reductions

- ***Reductions***
  - Reduction of 12 FTE's from the Fire/EMS ranks
    - Eight (8) from grant/four (4) from budget
    - Loss of \$1.3 million dollars in federal grant funding
- ***Primary Impact of Reductions***
  - Closure of Sagamore Station
  - Increased response times for emergency service
  - Loss in generated revenue for EMS and Fire
  - Increased reliance on Mutual Aid
  - Increase time required for inspections and plan review
  - Community outreach eliminated

# Recreation Department

## Failed Override Budget Reductions

- ***Current Staffing***

- Two (2) FTE's year round
- Seasonally: lifeguards, tennis instructors and camp counselors during the summer, as well as part-time employees throughout the year based on programs

- ***Services Provided***

- The Recreation Department provides year-round programs including:
  - Swish basketball, lifeguards at 2 beaches, summer camp, tennis lessons, swim lessons, learning programs, taekwondo, after-school enrichment programs, open gym, school vacation activities, field trips, and free community events. We also handle the scheduling of the community building. The department had a total of 1,844 registrations in the 2014 calendar year.

# Recreation Department

## Failed Override Budget Reductions

- ***Reductions (FY'16)***
  - Reduction in expenses line items
  - Seasonal Salary Turn Back (Lifeguards)
  - Reduction of .2 FTE's
  - Shift hours from the Dept. Head Salary Line Item to the Revolving Account
- ***Reductions (FY'17)***
  - Reductions in expenses line items
  - Elimination of Lifeguard program
- ***Primary Impact of Reductions***
  - Elimination of the lifeguards at the 2 beaches
  - No swim lessons offered
  - Cancellation of all free community programs that are currently funded from the expense account
  - Elimination of all subsidies and scholarships for families that cannot meet the financial obligations
  - No summer camp scholarships
  - All program fees would be increased to cover all costs, including equipment and salaries



# Library

## Failed Override Budget Reductions

- ***Current Staffing***

- 8.02 Total FTE's

- 4 professional staff (Director, Asst. Director, Technology Librarian, Children's Librarian)
- 6 part time staff (4 PT circulation asst., 1 PT children's. asst., 1 PT catalog asst.)
- 1 part time custodian

- ***Services Provided***

- Books in regular & Lg. Print, movies –DVD & downloadable, Magazines & newspapers – regular & Lg. Print, eBooks & eReaders, public use computers, museum passes, technology assistance & instruction, reference services –online, in person, etc., fax machine, service for blind & physically challenged, school assistance & resources, online databases, inter-library, access to 33 libraries with CLAMS card, career resources, Wi-Fi, meeting room usage, STEAM resources, children's story times and programming including lap babies, pre-school & toddler programs, music & movement, intergenerational stories, summer reading programs, adult programs, author visits, concerts, book clubs, community outreach.

# Library

## Failed Override Budget Reductions

- **Reductions**
  - Reductions of 2.25 FTE's from part-time staff and custodial staff
  - Materials (books, etc.) reduction
  - Data processing (technology) line item reduced
  - Misc. Line item reductions
- **Impact of Reductions**
  - Probable loss of State certification –Inability to use other libraries in Massachusetts, Inability to apply for LSTA grants, No State Aid funding for Bourne (current year \$24,000).
  - 20% reduction in operation
  - Elimination of all adult programming
  - Elimination of 1 on 1 technology assistance
  - Children's programming reduced by 50% (Reduction of 200 programs a year)
  - Unannounced & unplanned closures due to staff shortages
  - Elimination of important library public databases
  - Reduction in maintenance and upkeep of the building
  - Longer wait times for best sellers and new releases
  - Less materials in the formats desired by the public, including the elimination of some
  - Greatly reduced availability of meeting room use hours

# **Council on Aging**

## **Failed Override Budget Reductions**

- ***Current Staffing***

- Total FTE's of 9.17

- 7.1 Budgeted FTE's

- 2.07 Paid by other resources (revolving fund/formula grant)

- ***Current Services Provided***

- Sustaining seniors in their homes

- Providing earlier intervention

- Minimizing acute episodes requiring hospitalization

- Maximizing more efficient utilization of community resources: Fire, Police

# Council on Aging

## Failed Override Budget Reductions

- ***Reductions***

- *Reduction of 1 FTE in FY'16*
- *Further reductions of .82 FTE in FY'17*
- *Reduction in expense line items (programs)*

- ***Impact of Reductions***

- Dramatic increase of telephone calls receiving and returning calls with inquiries on programs and other resources will impact on the Office staff regular job duties;
- Impact accurate statistical reporting necessary for funding and Annual Reporting to the State; rely on two office staff to maintain this program will impede on their own workload;
- Lack of COA transportation means use of Public Transit for medical, food and other necessities; for those who are disabled this becomes a burden; more telephone calls to the office for information and referral services;
- Over 2,000 elders rely on the Newsletter to learn about current events and or services; impact will be on the office staff with increase telephone calls; putting their regular workload on hold
- Cut in program monies (used for Food purchases) will affect the Supportive Day Program which relies on the Café for their daily lunches;
- Reduce assistance to REC Dept. with program scheduling
- Greatly reduce all program offerings

# Town Hall/Administration

## Failed Override Budget Reductions

- This line item in the summary includes all functions currently staffed at town hall (except for DNR) and well as other general government functions
- Currently, the building is open to the public Monday through Friday, 35 hours per week
- Multiple town committees and boards meet weekdays and in the evenings in the conference room

# Town Hall/Administration

## Failed Override Budget Reductions

- ***Reductions***

- The Full year reductions to Town Hall and Administration will result in an additional loss of 1.75 FTE's
- Additional expense line items will be reduced

- ***Impact of Reductions***

- Contract Custodial services will be reduced by 40%
- All non VNA Human Service Organizations funding will be eliminated
- Street Lights disconnected in most non intersection locations
- All funding for Community Development will be eliminated

# Community Building Operations

## Failed Override Budget Reductions

- ***Current Staffing***
  - 2.0 FTE's (1 full-time, two part-time positions)
- ***Current Services Provided***
  - Custodial services necessary to keep the building open approximately 78 hours per week
  - Facility maintenance service including general repairs, routine and preventive maintenance
  - Operations required for functions and conference room use

# Community Building Operations

## Failed Override Budget Reductions

- ***Reduction:***
  - Reduce staffing to approximately 1 FTE
  - Reduce expense line item for building repairs
- ***Impact of Reductions:***
  - Limit public access to the building to approximately 40 hours per week
  - Emergency repairs will require reserve fund transfers
  - Severely impact Recreation Department and Council on Aging Department programs and offerings greatly



# Department of Public Works

## Failed Override Budget Reductions

- ***Current Staffing***
  - 2.5 FTE Admin
  - 15 FTE Curbside operations
  - 3 FTE Vehicle maintenance
  - 7 FTE Maintenance and hi-way work
  
- ***Services Provided***
  - Curbside trash and recycling
  - Roadway paving and maintenance
    - Line painting
    - Guard rail
    - Curbing
    - Patching
  - Street sweeping
  - Drainage
  - Assist town departments
  - Tree work
  - Roadside mowing
  - Town property landscape maintenance
  - Vehicle maintenance for town fleet
  - Beach and beach-way cleaning and maintenance
  - Snow plowing
  - Emergency response

# Department of Public Works

## Failed Override Budget Reductions

- ***Reductions:***
  - Eliminate one (1) FTE in the maintenance and hi-way line items
- ***Impacts of Reductions***
  - Greatly increase the time it takes to sweep spring roads
  - Increase response times to public emergency events, including snow plowing
  - Dramatically increase response times to public requests for maintenance
  - Impact the time it takes to complete roadside mowing, and brushing
  - Reduce assistance to other town departments including DNR, Clerks office, etc

# **Bourne Public Schools**

## ***FY16 Mid-Year Reductions (\$761,125)***

### **☒ 8.3 FTE Staff**

- 2.4 FTE Administrative Positions
- 1.9 FTE Support Staff
- 4.0 FTE Teachers

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## ***FY17 Reductions (\$1,530,630)***

### **☒ 5.8 FTE Staff**

- 1.2 FTE Administrative Positions
- 1.8 FTE Support Staff
- 2.8 FTE Teachers

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### **☒ 14.1 FTE staff total FY16/FY17 reductions**

# Bourne Public Schools

## *IMPACT*

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- ☒ FY16 reductions progressively work around the classroom only delaying the impact until FY17
- ☒ FY17 progress to meet community expectations for a well-rounded educational experience for all students will decrease
- ☒ FY17 BPS will have to narrowly focus on compliance and regulatory obligations such as educator evaluation, English Language Learners, new student discipline law, special education regulations, and student growth in accordance with state mandated testing
- ☒ FY17 reductions rely heavily on no new compliance or regulatory changes otherwise programs like BHS bus transportation, athletics, and fine arts will be in-play to balance the reductions
- ☒ FY17 BHS will lose New England Association of Schools and Colleges accreditation
- ☒ FY17 School Choice revenue will decrease compounding the financial complexities to the BPS and the community
- ☒ FY17 BHS Access to an Early College Experience Program will cease and desist
- ☒ FY17 students will lose access to electives and special area courses
- ☒ FY17 inappropriate student behavior/distractibility in the classroom will increase with less out of class support/engagement for students
- ☒ FY17 decreased access to embedded communication for parents/caregivers

# Summary

- Majority of departments have cut either personnel or expenses over the last few years
- Most expense line items are cut to the bare minimum, no where left to cut other than positions
- A reduction of these FTE's from the budget will *severely* impact current services provided




# Financial Scenarios



# Assumptions

- ▶ New Growth added to the tax base is 300,000 per year
- ▶ Local receipts increase an average of 1.7%, Cherry Sheet revenues remain stable but Cherry Sheet charges increase 5%.
- ▶ Town Salaries increase at 2.5% and Expenses at 1.5%
- ▶ Bourne Public Schools increase at 2.25%
- ▶ Upper Cape Tech School increases at 8%
- ▶ County Retirement increases at 8%
- ▶ Group Health Insurance increases at 7%



## Scenario 1 – Do Nothing

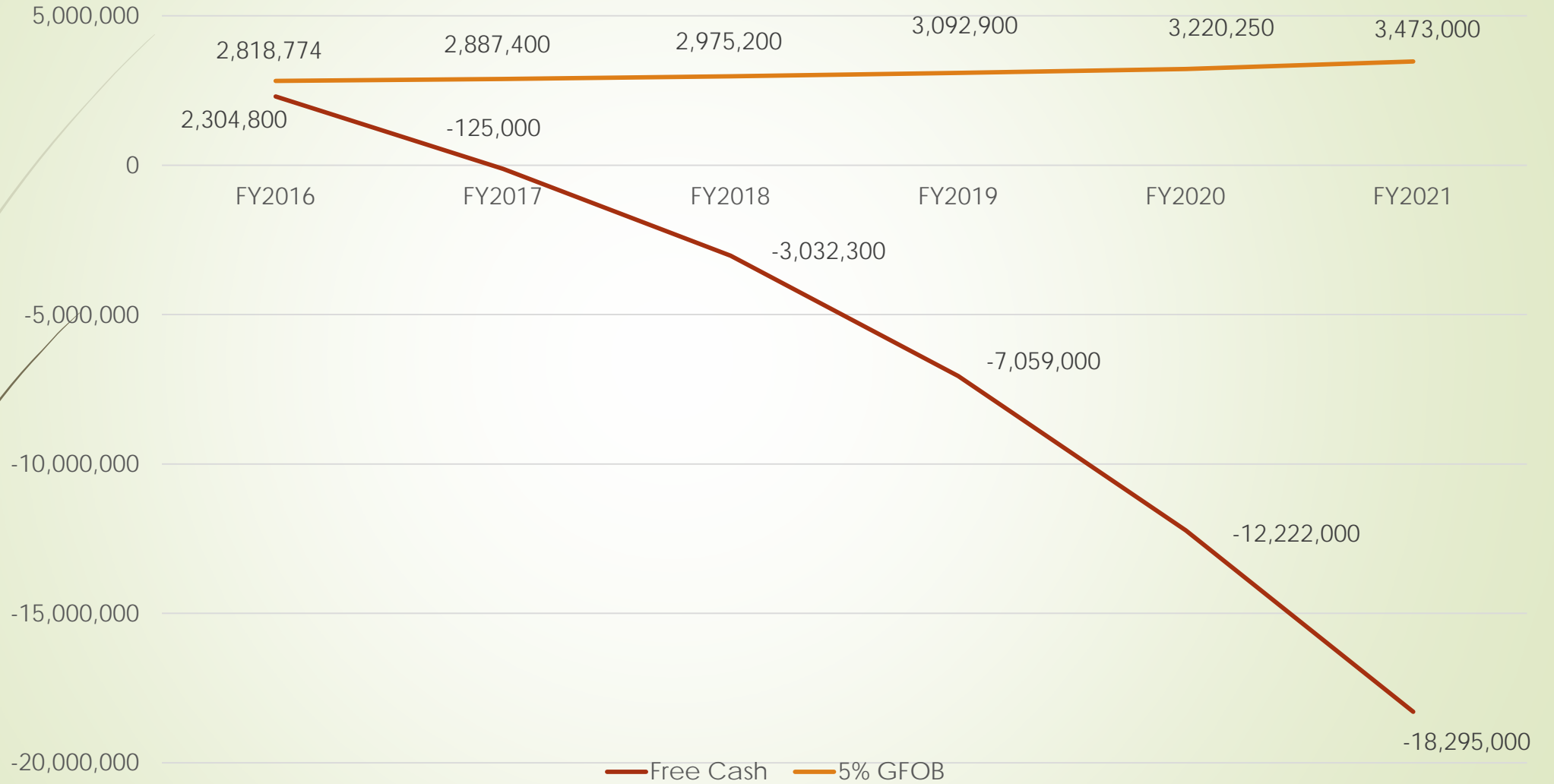
- Free Cash Estimated to be \$2,304,800 in FY16.
- Free Cash being used in FY16 for budget is \$1,792,345.
- The Towns Free Cash Policy is to have a free cash balance of 5% of GFOB. FY16 GFOB of \$57,674,883 equals free cash of \$2,883,744. Free Cash for FY16 is estimated at \$2,304,800 which equals 4% and is below policy.
- Free Cash necessary to balance FY17 is \$2,476,000. Using all available free cash of \$2,304,800 leaves a deficit of 125,000 and no free cash for future years.




# Scenario 1- Do Nothing

BALANCE	Current	Proposed	Assumed	Future Projected Years				
SURPLUS OR DEFICIT	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Revenue Sources	61,538,899.00	62,618,605.00		\$63,045	\$64,575	\$66,179	\$67,793	\$69,460
Expenditures	65,099,800.00	64,854,250.00		\$65,521	\$67,479	\$70,145	\$72,815	\$75,289
Balance	-3,560,901.00	-2,235,645.00		-\$2,476	-\$2,904	-\$3,966	-\$5,022	-\$5,829
Cumulative Balance				-\$4,712	-\$7,616	-\$11,582	-\$16,604	-\$22,432
BALANCE WITH AVAILABLE FUNDS	Current	Proposed	Assumed	Future Projected Years				
	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Free Cash for Expenditures	3,159,000.00	1,792,345.00		\$2,476	\$2,904	\$3,966	\$5,022	\$5,829
Free Cash for Articles	373,901.00	73,500.00						
Free Cash for Capital	28,000.00	369,800.00						
Balance	0.00	0.00		\$	\$	\$	\$	\$
RESERVES	Current	Proposed	Assumed	Future Projected Years				
	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Free Cash (July 1)	4,897,346.00	2,304,800.00	2.00%	-\$125	-\$3,032	-\$7,059	-\$12,222	-\$18,295
Stabilization (July 1)	3,517,265.00	3,605,196.63	2.00%	\$3,677	\$3,751	\$3,826	\$3,902	\$3,980
Total Reserves	8,414,611.00	6,199,996.63		\$3,552	\$719	-\$3,233	-\$8,319	-\$14,314
Free Cash % of GFOB	8.7%	4.0%		-0.2%	-4.9%	-11.0%	-18.2%	-26.4%
Stabilization % of GFOB	6.3%	6.3%		6.1%	6.0%	5.9%	5.8%	5.7%
Other Free Cash at STMs during year	-1,556,901.00							
Free Cash with Override/Reductions		2,304,800.00						
Expected EOY Turnbacks/Revenue	1,200,000.00							
Scenario 1 Do Nothing			4.0%					

# Free Cash Balance to Policy-Scenario 1





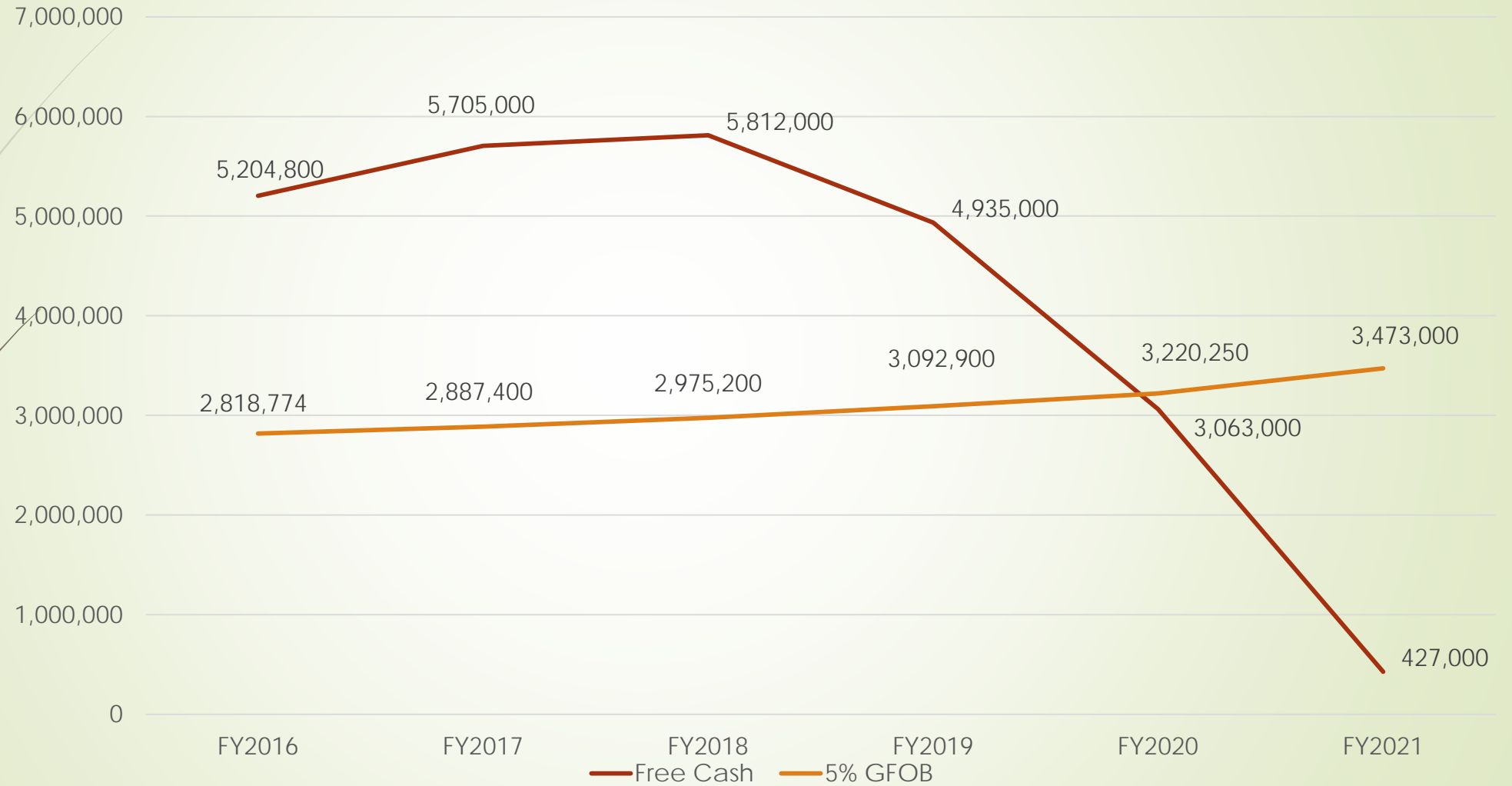
## Scenario 2 – 2.9 million override

- Override of 2.9 million would bring free cash in FY16 to \$5,204,800
- Free cash for FY16 would be above policy at 9% of the GFOB
- Free Cash would not be required to balance FY17's budget. Excess Revenues over expenses would increase free cash in the amount of \$396,000
- Free Cash would begin to be needed again to balance FY18's budget in the amount of 7,000 and in FY19's budget in the amount of \$993,000
- Free Cash would stay within policy almost through FY2020 when it would drop to 4.6% but would fall below policy in FY21 at .6%
- Tax Impact would be an additional .7081cents per thousand. Average house in FY15 is \$290,200. Cost of override in year one estimated at \$205.49 or \$17.12 a month

# Scenario 2 – 2.9m Override

BALANCE	Current	Proposed	Assumed	Future Projected Years				
SURPLUS OR DEFICIT	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Revenue Sources	61,538,899.00	65,518,605.00		\$66,018	\$67,622	\$69,302	\$70,994	\$72,741
Expenditures	<u>65,099,800.00</u>	<u>64,854,250.00</u>		<u>\$65,621</u>	<u>\$67,629</u>	<u>\$70,295</u>	<u>\$72,965</u>	<u>\$75,439</u>
Balance	-3,560,901.00	664,355.00		\$396	-\$7	-\$993	-\$1,971	-\$2,697
Cumulative Balance				\$1,061	\$1,053	\$60	-\$1,910	-\$4,608
BALANCE WITH	Current	Proposed	Assumed	Future Projected Years				
AVAILABLE FUNDS	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Free Cash for Expenditures	3,159,000.00	1,792,345.00		-\$396	\$7	\$993	\$1,971	\$2,697
Free Cash for Articles	373,901.00	73,500.00						
Free Cash for Capital	<u>28,000.00</u>	<u>369,800.00</u>						
Balance	0.00	2,900,000.00		\$	\$	\$	\$	\$
RESERVES	Current	Proposed	Assumed	Future Projected Years				
	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Free Cash (July 1)	4,897,346.00	2,594,800.00	2.00%	\$5,705	\$5,812	\$4,935	\$3,063	\$427
Stabilization (July 1)	<u>3,517,265.00</u>	<u>3,605,196.63</u>	2.00%	<u>\$3,677</u>	<u>\$3,751</u>	<u>\$3,826</u>	<u>\$3,902</u>	<u>\$3,980</u>
Total Reserves	8,414,611.00	6,199,996.63		\$9,382	\$9,563	\$8,761	\$6,965	\$4,407
Free Cash % of GFOB	8.7%	4.5%		9.5%	9.4%	7.7%	4.6%	0.6%
Stabilization % of GFOB	6.3%	6.3%		6.1%	6.0%	5.9%	5.8%	5.7%
Other Free Cash at STMs during year	-1,266,901.00	290,000.00						
Free Cash with Override/Reductions		5,204,800.00						
Expected EOY Turnbacks/Revenue	1,200,000.00							
Scenario 2 \$2.9M override			9.0%					

# Free Cash Balance to Policy-Scenario 2





## Scenario 3 – Cuts

- Cuts would be made in FY2016 in the amount of \$1,300,000 and \$2,600,000 in FY17 forward.
- Free Cash would be above policy FY16-18 but would begin to fall below policy in FY19 at 3.7% and down to negative .2% and negative 5% in FY20 and FY21 respectively.
- Cuts would reduce costs on the employee benefit side of expenses (health insurance, medicare tax and retirement benefits) but increase costs for unemployment insurance.
- Additional cuts beyond the 2.6 million would be necessary beginning in FY19

# Scenario 3 – Budget Cuts

BALANCE	Current	Proposed	Assumed	Future Projected Years				
SURPLUS OR DEFICIT	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Revenue Sources	61,538,899.00	62,618,605.00		\$63,045	\$64,575	\$66,179	\$67,793	\$69,460
Expenditures	<u>65,099,800.00</u>	<u>63,554,250.00</u>		<u>\$62,921</u>	<u>\$64,879</u>	<u>\$67,545</u>	<u>\$70,215</u>	<u>\$72,689</u>
Balance	-3,560,901.00	-935,645.00		\$124	-\$304	-\$1,366	-\$2,422	-\$3,229
Cumulative Balance				-\$812	-\$1,116	-\$2,482	-\$4,904	-\$8,132
BALANCE WITH	Current	Proposed	Assumed	Future Projected Years				
AVAILABLE FUNDS	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Free Cash for Expenditures	3,159,000.00	1,792,345.00		-\$124	\$304	\$1,366	\$2,422	\$3,229
Free Cash for Articles	373,901.00	73,500.00						
Free Cash for Capital	<u>28,000.00</u>	<u>369,800.00</u>						
Balance	0.00	1,300,000.00		\$	\$	\$	\$	\$
RESERVES	Current	Proposed	Assumed	Future Projected Years				
	Budget	Budget	Rate of Growth					
	FY'15	FY '16	Fy '17-'21	FY '17	FY '18	FY '19	FY '20	FY '21
Free Cash (July 1)	4,897,346.00	2,304,800.00	2.00%	\$3,801	\$3,572	\$2,278	-\$98	-\$3,329
Stabilization (July 1)	<u>3,517,265.00</u>	<u>3,605,196.63</u>	2.00%	<u>\$3,677</u>	<u>\$3,751</u>	<u>\$3,826</u>	<u>\$3,902</u>	<u>\$3,980</u>
Total Reserves	8,414,611.00	5,909,996.63		\$7,478	\$7,323	\$6,104	\$3,804	\$652
Free Cash % of GFOB	8.7%	4.1%		6.6%	6.0%	3.7%	-0.2%	-5.0%
Stabilization % of GFOB	6.3%	6.4%		6.4%	6.3%	6.2%	6.1%	6.0%
Other Free Cash at STMs during year	-1,556,901.00							
Free Cash with Override/Reductions		3,604,800.00						
Expected EOY Turnbacks/Revenue	1,200,000.00							
Scenario 3 cuts No override		6.4%						



# Free Cash Balance to Policy-Scenario 3

