

January 14, 2021

Mr. Stephen Crane  
Town Manager  
Town of Concord  
P.O. Box 535  
Concord, MA 01742

Stephen,

**Re: FY'20 Town Manager's Annual Evaluation**

It is the Select Board's responsibility to conduct an annual evaluation of the Town Manager which this document will summarize. As the new Town Manager during FY'20, the Select Board previously completed a six-month evaluation which was contractually required and included feedback from both Select Board members and the Senior Management Team (SMT) as presented to you May 19, 2020. The process followed for this comprehensive first year town manager evaluation included the distribution of the standard town manager evaluation form previously used for town manager evaluations, capturing ratings and comments from all incumbent Select Board members who were still on the board just prior to the delayed FY'20 Annual Town Meeting (ATM) in September 2020. In addition, the Town Manager was simultaneously asked to complete a self-assessment of his first year as Concord's new Town Manager and asked to identify specific town manager goals for the town to complement the anticipated Select Board exercise to do the same for FY'21.

**Entry and Existing Infrastructure**

Stephen Crane was appointed Concord's new town manager and officially began his duties in that role on August 12, 2020 having previously served as Town Manager in Longmeadow, MA.

Recruitment literature for his new role as Concord's Town Manager had already summarized some of the town's defining characteristics and expectations of the town's new town manager.

Stephen's appointment followed the long-term tenure of Christopher Whelan, a well-respected town manager who served the town in that role for more than 26 years. In place at the time of his hire, was also an established, competent and highly effective Senior Management Team (SMT) including a Deputy Town Manager who led an existing department structure and had served as interim acting town manager between June and August of 2019. A town proud of its historical traditions and place in the history of the founding of this nation also provided a citizenry active in town government as the legislative body at the annual Town Meeting and as participants bringing a wide range of expertise to committee work during the year as an integral ingredient in the town's governance structure.

In its six-month town manager evaluation report, the Select Board already noted a predictable period of uncertainty and navigation required for both the new incoming town manager and employees as they established a new working relationship,

particularly in this case, after the long-term tenure of the previous town manager. This transition period also required a steep learning curve for the Town Manager as he was at the same time introduced to myriad of community groups and individuals. Early missteps were made internally and externally, acknowledged, and addressed directly with the Town Manager by the Select Board. Compounding any expected normal transition period was a critical IT technology security breach within 60 days of the town manager taking his new office. This resulted in the departure of several key employees including a department head which no doubt shook everyone up and affected staff morale, much less left questions regarding job security, as this incident involved investigations which limited full public disclosure and communication about the situation. This no doubt also likely impacted any organizational change the Town Manager may have considered at a later point in the year.

As if this was not enough for a first-year transition, the Governor of the Commonwealth declared a state of emergency in March 2020, which is still in effect due to the Covid-19 pandemic. This public health crisis upended business as usual, requiring often immediate actions or adaptations for municipal operations as ever-evolving pandemic-related state and federal laws and regulations were enacted. Dealing with this state of affairs has and continues to produce a climate of much anxiety, uncertainty, and increased demands on all to adapt to an enormous amount of continuous change, further taxing the Town's year of transition with a new town manager. Conducting municipal business in a predominantly virtual world has brought new challenges and sometimes unwanted criticisms of "lack of transparency," less-than-perfect communications to keep everyone informed, etc. Preparations for Select Board meetings which moved from biweekly to weekly due to new challenges related to the pandemic and other ongoing issues, also stressed existing staff resources. Consideration for the well-being of all in the face of individuals hitting the "fatigue wall" at varying times during this elongated period of stress has begged for a sensitivity and responsiveness to what each individual is dealing with at any one time.

### **The Town Manager Evaluation Form**

The evaluation form used by the Select Board in its review included the following categories: 1) relationship with the Select Board; 2) overall leadership; 3) general management; 4) budget and financial management; 5) communications and public relations; and finally, 6) personal qualities and characteristics. In each category, an evaluation and suggestions for continuous improvement will be provided.

### **Relationship to the Select Board:**

The Town Manager was generally seen to be meeting or occasionally exceeding expectations in this category with one notable exception of evaluation ratings which consistently evaluated the town manager's performance as not meeting expectations. Select Board members pointed out that attention to communicating fully with the Select Board about the state of town operations and key incidents and developments is essential for members to be kept apprised and in a position to support the Town and Town Manager. Consistent communication is one element of developing confidence and trust from and building relationship with the Select Board as a working group. As noted in the candidate recruitment material, the Select Board expects the Town

Manager to have a collaborative working relationship with the Select Board, committees and town departments.

The Town Manager was not always seen as being able to keep up with town operations and often over-reliant on experienced staff for information rather than his own due diligence or depth of knowledge. In his first year as Concord's new Town Manager some of this is to be expected, and we look for marked improvement in his own understanding of town operations and his own time management going forward. The Town Manager was praised for his strong public speaking skills and ability to maintain a positive tone when constructive criticism is offered. The Town Manager with his SMT has for the most part effectively managed the disruption caused by the pandemic and demonstrated an ability to continually adapt to changing circumstances. Going forward, however, the Select Board expects clear Town Manager goals for his town leadership plans and his own professional development.

### **Overall Leadership:**

Generally, this category of ratings indicated the Town Manager as meeting or occasionally exceeding expectations particularly in managing the ever-changing pandemic environment for municipal functions and delivery of municipal services to the community. Select Board Members appreciated that they were kept up to date with state and federal-related directives related to Covid-19. The Town Manager has worked with the Select Board to follow through with legislative action required as a follow-up to the annual FY'19 Town Meeting. Existing legal issues when the Town Manager assumed his Concord role have continued to be a challenge along with the other major issues that have already been referenced.

Some concerns were raised that the Town Manager may not always be listening closely and adapting his responses to concerns raised by members of the staff, Select Board and community. More communication with the Select Board as a group on some of the issues that he is dealing with is recommended. Comments were also made that decisions sometimes seem to be made too hastily. One suggestion for the Town Manager is to listen more and do more homework on issues, ask questions of residents, and seek some Concord mentors among the wealth of public service veterans. The Town Manager's ability to lead going forward will depend on his own capabilities and more importantly his understanding of the town and its residents. He will need to continue to adjust his style to better align with the town rather than expect the town to adjust to him, which to his credit, he has already demonstrated that he is doing.

### **General Management**

The Town Manager was generally seen to be meeting expectations in this category by half the ratings with the other half indicative of an inability to evaluate items in this section.

That this was an unusual year was acknowledged by all. It is hoped that the Town Manager is

fully aware of the extraordinary efforts of town employees and recognizes that their capacity is finite. The Town Manager's increased public recognition of employee contributions to various efforts and projects has been noted and appreciated. It is

strongly suggested that the Town Manager work with the Human Resources Director to solicit feedback from the SMT before the end of FY'21 to again gauge the effectiveness of his working relationship with his team and to solicit suggestions for improvement to benefit the effectiveness of the Town Manager and the SMT in the future.

There has been noticeable improvement in the consistent functioning of the Town Manager's Office which is important to continue to strengthen. The Town Manager's own due diligence on all matters, seeking to understand town issues, both their historic basis and bias, is essential to demonstrating commitment to the town.

### **Budget Management**

The Town Manager generally was deemed to be meeting or exceeding expectations in this category with noticeable public ownership of the budget process as it had to be revised for a second iteration related to a delayed town meeting. Additionally, the CARES Act provided increased funding to deal with ongoing Covid-19 expenses which translated into operational responses to benefit the Town and community. It is important to note that the Town has maintained operational strength through this unprecedented pandemic time. Some members of the Finance Committee and Town remain concerned about the budgeting and management of legal expenses. On high visibility issues such as this, responses need to be anticipated and management thoughtfully strategized with the SMT and Select Board. Planning for and addressing other financially related issues needs to address both equity issues, the cost of new initiatives and citizen concerns about sustainable rates of taxation.

### **Personnel Management**

More than half of the Select Board members were unable to evaluate items included under this section referring to recruitment, employee appointments, staff development, personnel policies and visibility on collective bargaining negotiations. While these areas are generally under the responsibility of the Town Manager, the Select Board would benefit from a better understanding of the Town Manager's philosophy and approach to personnel issues. A significant incident was the IT breach that occurred soon after the Town Manager assumed his new role responsibilities which resulted in the departure of key staff members with limited public explanation due to related investigations. Select Board members still feel a lack of closure on this issue and on current IT plans moving forward. The SMT is generally held in high regard by the Select Board, and some comments have come their way causing concern about the morale of employees. See the recommendation provided under the General Management category above about soliciting current feedback from SMT members and staff, particularly after this pandemic year. The Select Board expects to hear more about upcoming collective bargaining negotiations prior to recommending contract approval.

### **Communications and Public Relations**

The Town Manager generally received ratings of meets or exceeds expectations in this category, although some items were rated as lacking in this area or unable to evaluate. While the Town Manager was praised for his good communication skills and relationships with local media, individuals expressed their concern about his real understanding of the needs and aspirations of the town and familiarization with many of

the special interest groups in town. It was noted that the Town Manager is strong in areas of his passion such as working with the business community, though some worried that more time and attention needs to be given to individuals and groups with whom he is less familiar, including some of the municipal functions and town committees. Clearly, the Town Manager has put a lot of energy into outreach with both staff and the community during his initial year, though these efforts have largely taken a new form since March due to the pandemic. It should be noted, that since assuming his new role in Concord, the Town Manager has intentionally worked collaboratively with the School Superintendent, serving the town well as we all had to move into multiple adaptations to Covid-19. Engagement of the community to better understand “all things Concord” is likely to be a much longer-term proposition.

### **Personal Qualities and Characteristics**

The Town Manager generally received strong ratings that meet or exceed expectations in this category with the notable exception of one Select Board member with some reservations on his performance on items covered in this section. He was praised for his demonstrated consistent confidence and approach to issues when presenting to the Select Board; his ability to express ideas logically in verbal and written form; and strong public speaking skills. However, there was some concern expressed for inconsistent follow through on some tasks which may or may not be due to first year experience in Concord, Covid-19 pandemic demands and other simultaneous pressing challenges. Apparent lack of preparation from time to time and frequent apologies for the same are viewed negatively by some, and this along with quick responses to questions that require context and background, should be altered as communication styles to improve effectiveness. The Town Manager is again encouraged to listen before talking and aim for transparency, collegiality and open engagement across Concord departments and sectors.

### **Select Board Goals for the Town Manager for FY'21**

1. The Town Manager will continue to regularly and frequently inform the Select Board and keep them fully apprised about key town operations, incidents, and developments. This is particularly important for high visibility issues as well as for key developments that pertain to Select Board members' liaison assignments.
2. The Town Manager will strive to improve his depth of knowledge of Concord and of town operations. The Select Board expects the Town Manager to diligently pursue a more complete understanding of town operations and the Concord community as a whole and for this to be evident in his decisions and deliberations.
3. The Town Manager will ensure that the Select Board always receives a complete and accurate meeting packet by Friday for each Monday meeting. Furthermore, he is advised to pro-actively preview each agenda item in advance with regard to OML, Town policies, Town Counsel review, etc., giving guidance to the Select Board chair as needed. The Town Manager needs to be prepared for his weekly Town Manager's report and have already discussed with his appropriate staff member(s) weekly Select Board agenda items. Acknowledging attribution for staff content contributions is important.

4. The Town Manager will work hard to keep an open mind, asking questions and listening closely before making a decision. He will make a habit of listening closely to staff, Select Board members, and community voices, including those that he is not inclined to agree with. He will implement Select Board decisions faithfully and bring issues back to the board if any revisions are required.
5. Within the next few months, the Town Manager is strongly encouraged to solicit feedback from the SMT via the HR Director to gauge the effectiveness of his working relationship with his team and to solicit suggestions for improvement.
6. Regarding Personnel Management, the Town Manager will inform the Select Board on issues such as collective bargaining strategy and progress, significant personnel changes at the SMT level, and any planned major organizational change.

### **Summary**

Stephen has weathered a challenging transition year as Concord's new town manager, responding decisively to an IT breach early in his tenure to be followed within months after that with the major disruption of the Covid-19 pandemic upending all municipal operations to the present day. While not all has gone smoothly, in the main he has led his Senior Management Team and the community through some very anxious and demanding days in an effort to prioritize public health and safety and support the continuation of municipal services to meet the needs of the community. All this has required significant adaptation to an ever-changing environment to respond to evolving state and federal regulations and community spread issues related to the pandemic. Typical first year transition activities of relationship building and gaining in depth knowledge of municipal operations and the Town's aspirations and needs have both been accelerated and short-changed at the same time. Legal issues have also required attention and presented challenging dynamics to deal with across our community.

No doubt the Town Manager has had a steep learning curve and gained a growing appreciation for his knowledgeable and dedicated employees and for the breadth of expertise and commitment of town citizens to the town governance process. This was all punctuated with a delayed, but successful FY'20 Annual Town Meeting held September 13, 2020. While it is likely that FY'21 will continue to be challenged by many of the same issues confronted in FY'20, it is incumbent on Stephen to take the feedback and defined FY'21 goals given to him in this evaluation seriously as he deepens his knowledge of the Town and strengthens a collaborative working relationship with its Select Board and Town Departments. We look forward to continuing to work together for a safe and productive FY'21.

Sincerely,

Linda L. Escobedo, Chair  
on behalf of the Concord Select Board