

Q1. I hold an MCPPO designation. In addition to this designation and my legal and financial skill-sets; (acquired through years of experience, an MPA and a Juris Doctorate) I am also a registered home improvement contractor with direct construction experience. Therefore, I am very familiar and comfortable with blueprints, schematics and the various construction trades. These attributes serve me well in handling construction administration and/or procurements under MGL ch.149 and/or ch. 30 § 39M.

In Rehoboth and in Millbury I was involved with numerous construction projects in varying degrees of involvement and responsibility. In Rehoboth I was there from the onset to the end of the COA building project. (architect selection through building) Once completed, a situation presented itself which allowed the Town to add solar photovoltaic arrays, passive solar hot water and solar heat systems: for free. I turned an \$18,000 DEP fine into a \$143,000 grant which built the arrays on the COA and the DPW for free. I similarly used my legal skills to create partnerships and agreements with various nonprofits and public/private groups to complete 4 large scale projects valued into the millions, with zero tax dollars. The projects were an entire football/baseball complex, a tot playground, a municipal community garden and the GIS/GPS mapping of the Town's catch basins and outlets.

In Millbury I was involved in an elementary school project from architect selection, design stage and up to and including the selection of the OPM. No construction had begun by the time my contract ended. However, it was my policies that placed the Town in an extremely secure and sustainable position to fund this and other projects. My novel concept required special legislation as well as Town Meeting approval. Therefore, 1st I had to petition the General Court for a special Home Rule Legislation, then I required Town Meeting approval. And, lastly, I had to establish a methodology that would ensure the funding sources' sustainability.

I presented before the Legislature my Home Rule Petition. Once adopted by the Legislature, other towns quickly followed suit with their own versions. My idea was so well received that the Legislature adopted into the General Laws a watered-down version. (MGL ch 40 sec 5 p. 4.) My Home Rule Legislation uses marijuana-sale receipts to auto fund 5 designated lines, without the need to annually debate or receive annual Town Meeting approval. It established a process where the Town Manager has discretion, as defined in the legislation, on where the Manager, can deposit the revenues, for the limited purposes and uses as defined in the legislation.

I established "development fee" agreements tied to the special permit land-use. These "development fees" are in addition to marijuana license revenue-sharing agreements and/or yearly flat fees. This distinction is important because, per the MGL, marijuana license fees were designed to account for public safety and traffic concerns and they sunshine after 5 years. Moreover, the applicant often mitigates the license fees through security or 1 time infrastructure improvements reducing the amount that the applicant has to pay to the town. And, again, any payment is only for 5 years; therefore, it is a very short term gain to the town. To the contrary, my "development fee" agreements are sustainable because they run with the use / special permit at that location and will not ever sunshine. The revenues continue into perpetuity and escalate by 2.5% each year. Thus, the Town is assured funding sources for the legislation's established purposes, outside of the operational or capital budget.

My Home Rule Legislation, with a unanimous Town Meeting vote, established 5 particular lines with the designated purposes to: 1) to create a special savings line for or to make payments of BANS and bonds for infrastructure 2) to create a special savings line for or to make payments for/of the MS4 Stormwater permit 3) to create a special savings line for or to make payments of OPEB liabilities 4) to create a special savings line for or to make payments of unfunded liability payments 5) to create a special savings line for or to make payments of capital projects, improvements or purchases.

This legislation gives the Manager plenary authority and full discretion over how the deposits are to be divided into those five lines. Therefore, depending on the needs of that year, the Manager could adjust how much to deposit into any of the accounts. Moreover, during Town Meeting, it is noted that a particular appropriation on the Warrant is being funded from a particular line to pay for the designated aforementioned limited purpose of that line. Thus, perpetual funding is now established and available (to pay for and/or offset the costs of) BANS/bonds - such as the elementary school's Bond as well as the other 4 designated purposes.

My Home Rule Legislation grounded Millbury in a very solid financial position. It allows the Manager funding sources, outside of the operational and capital budgets and is very predictable and sustainable. Moreover, any fluctuation in the market can be absorbed by the fact that each fund has ample revenues to cover any annual fluctuation. As time moves on, future budgets can adjust how much is deposited or withdrawn to account for the particular needs of that budget. This strategy conservatively earmarks revenues that the Town had never seen prior into very flexible "pseudo-stabilization lines." These lines allow for fluid budgeting and appropriations that do not require debate or a 3/4 majority vote. Moreover, they cannot be fought over or devoured by other budgets. The legislation sets aside money for important and recurring needs that the Town will always have: such as capital improvements, OPEB and infrastructure. In the unlikely event that marijuana revenues should come to a complete halt, free cash, overlay or even a debt exclusion could be voted if needed.

In Millbury and also in Lunenburg, I was involved in the early to middle stages of the TIP project well in excess of \$20M, and also with complete streets as part of the Millbury's \$15M infrastructure and \$4M MS4 stormwater programs. In addition to the noted \$15M infrastructure project, and the \$4M MS4 permit, I was directly involved in a \$5M dam construction project in Millbury. The OPM for the dam project was initially a collaboration of the DPW Director and the Town's civil engineering contractor, Pare. However, the Director took a job with another town, leaving me front and center on the project. As the Chief Procurement Officer, and working closely with Pare and the construction co., we brought the dam project under budget and over the original scope. Similarly, with the infrastructure and stormwater projects, the new DPW Director, Pare and I, worked collaboratively in the OPM function while I took the lead as the CPO, to establish and coordinate project deliverables and schedules. These projects spanned multiple years and addressed roadway re-construction, bridge repairs/construction and tens of miles of roadway resurfacing. We met with citizens and businesses to address any concerns and the projects' schedules were designed cognizant of these concerns.

I would use my above noted skills to keep a tight reign on the Municipal Complex Project's costs. However, if rising costs force a material change in the original scope, or if the need for additional funding becomes evident to maintain or expand the original scope, a serious discussion / deliberation and debate will have to be undertaken. Ultimately, these decisions belong to the elected officials and the citizens, not the TA. The appropriate board, committees and sub committees will need to take votes on these changes. These votes will be made at open meetings and public input should be sought prior to any material alteration of the initial plan. Moreover, any decisions on any additional debt exclusions or capital outlay will require Town Meeting and/or general election votes. Therefore, I will ensure that everyone has the information necessary to come to the conversation prepared through transparent, timely and open - honest full disclosure of all material facts.

As described in more detail below, **(answers 2, 3)** I will utilize all forms and means of communication to ensure that every stakeholder, board, committee and interested party has the information needed to make informed decisions. Once those decisions are put in place, it will be my job as TA to implement them accordingly.

Q2. In establishing my presence and leadership style I will take the first few days and weeks to get to know each person, department and board/committee on a personal level so that I can relate to their needs and issues. I have always made myself known and approachable to everyone at work and the community at large because I understand that I cannot learn the who, what, when, where and why behind a closed door or behind a desk with reports and ledgers. It is only through time and effort that I can get this education. Therefore, I will attend board/committee meetings and introduce myself so I can become familiar with them, their projects and their charge: And, they with me and mine. I will take the time to stroll the halls each morning and stop and say hello to each employee with whom I encounter. I likewise will keep a monthly meeting at the COA to meet with the community and hear about any citizen's needs or concerns. Moreover, I will attend community events and become involved and ingrained in the community as much as I can. I have learned the importance of these encounters and how they build the foundations for relationships: because through relationships, sprouts trust.

Not only have I always attended various board/committee and community meetings, I have always espoused to the keeping of *routine* department head meetings as well as those that are required along the way to monitor a particular project; because this gives us the opportunity to learn of each other's on-goings and needs. Through reciprocal dialog, I am made aware (and can therefore apprise the BOS in my weekly report) of how each department could share resources to create efficiencies and/or assist one another. At these meetings I relay pertinent information back from the BOS to the department heads which fosters cooperation, input, guidance, instruction and brainstorming. This open flow of information keeps all stakeholders apprised in real time. Moreover, maintaining such a dialog, builds a sense of team, which is especially needed in the beginning while I take the time to get to know who, what, when, where and why.

Trust, relationship-building and teamwork require effort and time. Relationships are built on trust and the confidence established though tests along the way, proving that one is predictably trustworthy. Transparency and information-symmetry are cornerstones to creating positive, symbiotic relationships. Likewise, the human element cannot be forgotten. It is important to always remain friendly, approachable, familiar, relatable and empathetic. Most importantly one must remember that, as Town officials, we are a service provider to the citizens. And, as an employer, our biggest resource is the people around us. If we lose the citizens' trust or the trust from the people among and around us, then we have lost everything. Therefore, I will include all relevant stakeholders in the discussion and keep them abreast of material information and progress of any issue to which they have a stake. All of my dealings with each board, committee, official, staff member or citizen will remain professional, fair, equitable, transparent, predictable and participatory. By my maintaining a professional, friendly, fair, equitable and predicable posture, trust and confidence will be built.

This is important in Middleton because, similar to Rehoboth where I was the Administrator for 10 years, Middleton has sovereign elected boards, officials and committees who do not answer to the Selectmen or the TA. In order to move important town business, it is imperative that a symbiotic relationship be maintained, regardless of the station to which a person finds him/herself. Information asymmetry becomes a core reason for distrust because keeping vital information away from any interested party eliminates any possibility for fruitful relationships to be established. Even an innocent oversight in timely reporting, or in one party receiving information that another does not receive, (such as 4 members of a committee receiving an email in a timely fashion while a 5th does not receive / see the email in a timely fashion) can be seen as nefarious in nature or a means to place a party at a disadvantage. This is especially true prior to any good-will being established through

long standing relationships. Therefore, one must be vigilant in always ensuring that information asymmetry is eliminated: Technology is the manner in which this can be significantly reduced if not eliminated.

People are inundated with countless emails. Simply placing someone on an email chain *DOES NOT* assure that the information will be received. It may create a trail that information was sent, but it does not ensure that the busy individual actually read the email. I have always utilized technology, as well as old fashioned telephone calls / voice mails, to guarantee that all interested parties have the information that they need to do their jobs and/or make informed decisions. A holistic technological approach can be instilled to keep everyone informed of general and also urgent information in real time. Text message blasts, "Tweets" and alerts via GIS mapping that send alerts to anyone in the general area can be used. Reverse 311 auto-calls can be programmed to remind people about special events / meetings or important votes. Web postings, Facebook updates, updates on the town scroll or a simple mailer sent to everyone in town, can help us achieve our goal of complete information distribution. I will use all means available to me, (technology as well as phone calls and text messages) to insure that all information is readily available and distributed *to every interested party - prior to joining the conversation*. By maintaining information symmetry, not only can people and entities make informed decisions and come to the conversation with all the tools they need, but it likewise builds a sense of trust with these individuals and the Administrator. More importantly, a positive light is likewise cast upon the Selectmen as well.

Initially, annually and throughout the TA's tenure, the BOS will assign tasks and set goals. But, throughout the process, the Board must remain apprised in real time of the programs' progress so that they may give direction, take votes and/or make changes, or re-prioritize any individual goal or task, as is appropriate.

I have always kept a large whiteboard flow-chart of projects and deadlines. The chart plots how each individual project is progressing as well as how they all may intersect. I include this information in my weekly BOS report given to the BOS prior to their meeting. During the Administrator's portion of the meeting, I update the Board with progress and provide them with information necessary for them to make informed decisions / votes in relation to ongoing business. This weekly report is given during the BOS meeting (or executive session if appropriate) for all to see. It is placed in the minutes and is kept on file as a public record. The whiteboard, and its corresponding report given to the BOS, is a running record of the concurrent projects and goals. Updates in the hard-copy report given to the BOS, and presented to them at their weekly meeting, allow all involved an opportunity to review added information and discuss any changes/data. Moreover, the discussion keeps everyone equally apprised. These timely updates allow stakeholders the opportunity to raise issues, give direction, take votes and/or make adjustments contemporaneously. This balances the immediate goals and tasks with the broader picture by avoiding the micro benchmarking of short term goals consuming the macro benchmarking of the Town's bigger Master Plan.

I have utilized this methodology for my entire career and it is a very transparent and efficient method of keeping everyone informed and the communication lines open. These methods allow for clear and concise directions to be passed on to the TA at the BOS meeting. Directions and courses of action are then noted, the report is updated and follow-through is discussed at subsequent meetings. Objectives and projects are constantly updated / amended as processes unfold with future meeting updates. Changes are noted until a goal/project has reached its fruition, upon which it is then removed from the whiteboard. This methodology creates realistic metrics for each directive as well as its outcome. More importantly; its fluidity takes into account the possibility of unplanned externalities while maintaining the Board's broader goals.

Q3 In both Rehoboth and in Millbury I was directly involved in the development and implementation of their Master Plans. I assisted in their “meet-n-greets / get to know the project” nights and all of their other community outreach events. These and other participation/information efforts all have their place in the process and each have their own measure of utility. But, getting the community excited and interested is the easy part. Achieving buy-in and then avoiding continuing and building public apathy and/or distrust is the larger challenge.

In both Rehoboth and Millbury it was my charge to coordinate, guide and direct all of the stakeholders in drafting the plans over multiple years and then to coordinate and budget for the Master Plan. The various levels of contractor / committee / volunteer / and staff involvement with their tasks’ differing timetables, required constant (flexible) coordination. This will remain the case in Middleton. Teams, committees, boards, groups, volunteers, businesses, staff, and contractors will all require resources and direction to progress through their charges. In order to avoid distrust and/or growing apathy in the project, the Administration must prevent confusion, logjams, repetition / overlap and stagnation throughout the process. This requires the TA’s constant vigilance and frequent check-ins with any ad-hoc committees and volunteers to ensure that they are not only kept on task, but to make sure they are not overstepping their authority or charge. Everyone must be kept in the communication-loop and on task to insure that all of these *individual charges* are all working toward a coordinated *greater single goal*.

It is important to break the process into 3 key parts: **1st**, identify the stakeholders and their interests, specialties, tools, assets, qualities and strengths. **2nd**, get the stakeholders involved taking into account all of the things noted in step one. **3rd**, keep them involved and believing in the process and its mission.

1) **Identify the stakeholders:** Start off getting all the people and groups actually speaking with and meeting with one another. It is important that each and every person be actually heard in order to be understood. Thus, one must actually listen and hear them and their message, not simply discuss and talk. **2) Engage in and with the stakeholders:** In speaking with the stakeholders, take note of their concerns as well as their optimism and enthusiasm. Make sure everyone is participating and most importantly *hearing each other*. One does this by first making sure that you understand them, before you try to make them understand you. Once you understand where they are all coming from, it is easier to relay your message (and the Plan’s mission) to them. Most importantly, always maintain a consistent posture with and between every stakeholder. Never leave anyone questioning how to approach or communicate with you. **3) Maintain stakeholder engagement and belief, trust and enthusiasm for the project’s mission:** The process and every participant must remain consistent, transparent, participatory, and ethical. If someone is given reason to question the honesty of the project or any of its participants; or if a person is given reason to question the project’s scope; or if a person is given reason to believe that the project has grown a life of its own and/or shrunk beyond what the Town expects and believes they have voted for/funded, then any good-will or buy-in earned by the Administration will be forever lost. Therefore, *every effort* must be made to avoid it from happening. This is accomplished through vigilant transparency.

To necessitate this, the Town should assure constant clear, open, transparent communication is maintained with frequent multi-level contacts between all of the stakeholders and the Administration. This multi-pronged approach should utilize everything from old fashioned face to face meetings all the way through technological tools. Information should be sent to the expected committees/chairpersons etc., but also placed on the Town’s webpage (made easily searchable and linkable in 1 location). There, interested parties can find all relevant and pertinent information in real-time. All financial documents and any material updates must be posted contemporaneously and the page kept current. Executive summaries should be attached to all documents,

(especially financials) so that the average person can understand what the document means and how it affects the project. Running totals should update estimates/budgets. Over-runs/savings and material change-orders affecting the project must be explained. These efforts will foster/maintain good-will. Additionally it will give the applicable authorities the information necessary to make adjustments in timetables and/or priorities. This transparent information symmetry, in real-time, allows the Town to effectively and appropriately manage stakeholder expectations and maintains trust in the plan, the process, and the Administration.

The Master Plan does not belong to the BOS or any other person/committee/stakeholder. It belongs to the citizens. It was approved, voted on and funded by the citizens. It will be the citizens who will approve/disprove any future Master Plan budgets. There currently exists buy-in. The Town Meeting voted for this Master Plan, the citizens supported the purchase of the land for the future municipal complex, and there is a desire to see this plan come to fruition. The challenge is to ensure that this enthusiasm *and expectation*, is maintained as the Plan unfolds. The only manner in which to accomplish this is with the aforementioned transparent communication. People can handle bad news, so long as it is honestly presented. If there comes reason to financially adjust the process, be open. Give the citizens the opportunity to make changes to THEIR Maser Plan. Otherwise, any reason for the citizens to lose trust, will be catastrophic to the entire process, and the Master Plan.

Resource allocation is a large portion of a TA's job. But, allocating funds is simply a ledger entry: Deciding on what the priorities are, and making those policy choices, is the hard part. Luckily for the next TA, this decision is already made for him. The Master Plan has already laid the timetables and those choices are already set in stone. So, the distribution part of how to fund those policy choices is just administrative in nature. It merely requires planning for each portion to be rolled out.

Rolling out each section with the necessary resources should be done by utilizing one time monies for 1 time expenses and recurring revenues allocated for recurring costs. In example: grants, outside private / state / federal funds, partnerships, released excess-overlay and free cash should be set aside for 1 time and capital costs. (such as capital purchases or project studies, etc.) In contrast, recurring costs, (such as the need for new staff to run a new housing program or additional maintenance of a park) should be budgeted within the operational budget. With this conservative, sustainable approach, one-time costs are paid for as they occur and ongoing costs are absorbed and planned for. Once the Town, through its elected officials and their processes, sets the prioritized policy, the TA simply has to plan for the priorities given him. Softer resources (such as staff support for the volunteers and their committees, printing, supplies etc.) should be acknowledged, tracked and re-debated annually in future budgets. Sub-lines can be added into a particular line to account for added paper or printing - etc. Through the annual budget process, those sub-lines are presented to the Administrator where he will amend up or down and/or or remove the sub-line as the case may be. This way, the recurring cost will be appropriately, and not overly, absorbed within the operational budget. Moreover, it will assure it remains within the Town's levy.

Each volunteer group will be appointed as an ad hoc committee. I will instruct and guide the committees on everything they will need to conduct their charge. (i.e. parliamentary procedure, Robert's Rules, MGLs regarding voting / authorizing expenditures / the use of their budget and how to vote warrants etc.) Like all committees and boards, they will be made to submit their monthly reports to the Accountant who will ensure that they remain in compliance and within budget. All necessary support staff under my control will be assigned to assist the ad-hoc committee as is appropriate. Moreover, any necessary adjustments in staff resources and/or hours will be similarly debated and adjusted in the annual budget discussions and with any appropriate board or union.