

Report of Entry Findings



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INTRODUCTION

I am grateful for the opportunity to serve as the Hubbardston Town Administrator. Gaining the trust of the community, staff and elected leadership is an on-going commitment, but I appreciate the words of support and the willingness of all parties to help me learn what is expected from the position. Specifically, I would like to thank the Select Board for their candid guidance, my staff for their willingness to act and the community for entrusting me with their future visions.

I am also very thankful to inherit a strong and professional staff. It should be noted that despite repeated discussions of staff cohesion and employee turnover, the current staff is extremely capable and willing to invest their time and energy on behalf of the town

My entry plan listed my immediate priorities as learning as much as I could about the town, advising on improving areas of weakness and finding existing initiatives from which to build. To achieve this goal, I planned to gather information from a wide range of sources to include elected officials, volunteers, town staff, businesses, residents and third-parties consultants. Primary data for this plan included gathering information through direct observation, one-on-one meetings and group sensing sessions. My goal was to create a comprehensive assessment for the purposes of informing a strategic action plan focusing my second year.

Here are the goals stated in my entry plan:

- Learn about key events, issues and concerns as it pertains to sustainability
- Learn about the norms, values, expectations and goals of the community that should ultimately drive governmental processes
- Develop a written assessment of the town's sustainability that is available to the public and capable of steering future actions in a coherent manner
- Develop objectives with specific priorities and action steps that will guide future initiatives

Here is a listing of the data collection techniques used to create this report:

- Reviewed published materials to include studies, regional reports, old emails, old files and a comprehensive review of guidance documents from similarly situated towns
- Structured interviews with town staff, elected officials, volunteers, residents and applicable third-party actors
- Directed conversations with the Select Board, Planning Board and Board of Health
- Reviewed town infrastructure and existing public projects
- Began discussions with town groups, committees and businesses

Based on data collected and the identified goals, this report will offer an analysis of the following areas:

- Operations (Department Level)
- Human Resources

- Budget
- Financial Management
- Economic Development
- Infrastructure
- Communication

The report will end with my recommendations and a call for completing a five-year strategic plan guiding Hubbardston's executive functions.

OPERATIONS (DEPARTMENT LEVEL)

Observations

For a variety of reasons to include talent, executive turnover and budgetary constraints, it's fair to say the town's current operational strength is in its department heads and employees. Each of the larger departments are led by consistent leaders with strong operational capability. The smaller departments (and boards), although staffed correctly and competently, have seen greater overall turnover, resulting in a lack of employee consistency that is preventing true growth and cohesion.

Missing pieces at the operational level is a cohesive vision and department coordination. While this is largely the result of executive turnover, aging software and neglected policy/procedure, it makes the departments/boards reliant on employee-to-employee training that is not grounded in best practice nor department specific training. It is also siloed in the sense that there is little commitment to cross-training or learning from surrounding communities.

Department/board identity is also difficult in many areas as the charter/bylaws/past practice are not always clear on distinctions between professional staff and volunteers. This can create situations where employees feel beholden to several managers, not necessarily a bad thing, but confusing at times. For example, does the town have/want a planning, assessing and health departments that compliment/differentiate from their elected boards? Do he contracted employees answer to town leadership or their base organizations? These are not easy answers, but ones that may help staff understand how to create long-term sustainability in positions that do not depend on who is in a position and what a board's make up might be.

Overall, the town is operationally sound at the department level as evidenced by the performance ratings of department heads, the town's bond rating and the staff's ability to meet all key deadlines. However, to move to the next level, the staff must continue to focus on the day-to-day while executing a goal-based performance improvement plan that is designed to implement sustainable best practices that compliment an overall vision.

Current Interventions

- 1.) Establishing a goal-driven and transparent culture

- 2.) Investing in staff through training and coordination meetings
- 3.) Creating the first drafts of department improvement plans
- 4.) Documenting policy and procedure

Future Goals

Year 1 – Tie all department operation to centralized goals

Year 2 – Publish policy and procedure, create improvement/sustainability plans

Year 2/3 – Implement best state/regional practices

HUMAN RESOURCES

Hubbardston is on the precipice of needing formalized human-resource management. Although the Town Administrator serves as the Human Resource Director based on history and charter, it has been a largely reactionary focus and highly dependent on the experience of the administrator. Without a formalized human resources approach, the town is increasingly taking on liability and not positioned to offer competitive and sustainable employment.

Examples of human resource disorganization include payroll functions that lack policy/procedure, unequal pay/parity, ad hoc raises, a disorganized employee review process, an uncoordinated employee trainings schedule and non-standard employee records process. This is entirely the responsibility of the executive office and must be addressed immediately.

Potential fixes for increased human resource management include hiring an outside consultant, promoting existing employees (stipend) or regionalizing the service. These fixes are highly dependent on budget availability, but should be addressed in the near future to stabilize Hubbardston's human resource management.

Current Interventions

- 1.) Rewriting human resource policy
- 2.) Creating new hire and annual employee checklists
- 3.) Reviewing and stabilizing wage growth/parity
- 4.) Organizing employee files
- 5.) Investing in human resource training (executive office)

Future Goals

- 1.) Year 1 – Continue to invest in HR education
- 2.) Year 1/2 – Public policy and procedure tied to best practice
- 3.) Year 2/3 – Outsource HR function

BUDGET

The town continues to have a structural budget deficit that is limiting/decreasing services growth. Three main factors driving this deficit are slow economic development, limited revenues and increased school spending. If revenues and growth continue to remain flat and school budgets continue to grow, Hubbardston will own a structural deficit that will result in severe decreases in basic residential services.

Additionally, while the town is financially sound and traditionally well budgeted, recent executive turnover has placed the budget into a year-to-year context rather than one that identifies long-term strategies and values. This is primarily due to a lack of published policies or guidance for creating the budget, using one-time revenues and developing town reserves.

The FY20 budget process will be heavily policy based. Although the structural deficit and limited one-time revenues will not allow for meeting all policy goals in year one, it will create a policy/goal driven process for future years.

Current Interventions

- 1.) Semi-monthly finance team meetings
- 2.) Heavy investment in publishing financial policies
- 3.) Communicating budget goals to elected officials and town staff
- 4.) Investment in long term planning (financial management, reserves and capital)

Future Goals

- 1.) Year 1 – Publish all financial policies and ground the budget in goals/policy
- 2.) Year 2 – Solidify forecasting and planning process
- 3.) Year 2/3 – Improve local revenues (investment)

FINANCIAL MANAGEMENT

Observations

Hubbardston has seen the most turnover recently within its finance team. While two key actors remain in place, both are outsourced contractors, providing stability, but less in terms of cross-training or long-term strategic planning. It must be said here though that without the stability provided by the assessing and accounting team, the town would not have its AA+ bond rating nor its sound standing with the Department of Revenue (DOR).

Currently, the town employs five personnel on its Finance Team with less than two years' experience in Hubbardston. This has created a situation where employees are reliant on experienced staff members and not yet able to focus on long-term, policy driven financial management. However, considerable efforts have been made in this area, from June to

November, to train and focus financial employees in a long-term strategy to solidify Hubbardston's financial management procedures.

This is my most important focus area in the coming year as all long-term planning and success is highly dependent on a policy grounded financial management approach that creates stability.

Current Interventions

- 1.) Cross-training staff
- 2.) Completing training with third-parties and the DOR
- 3.) Documenting policy and procedure

Future Goals

Year 1 – Publish financial policies, complete directed employee training

Year 2 – Implement financial best practices

ECONOMIC DEVELOPMENT

Diversifying Hubbardston's revenue base should be a primary focus for all elected officials and volunteers. The town's reliance on residential taxes makes project capacity limited, leaving little resources for creative and even necessary town improvements. This scarcity of resources also creates a further divided political environment that can prevent the type of cohesion necessary for large-scale projects like building construction or bridge replacement.

Cohesion is also lacking in this area. Several boards in town are focused on economic development, namely the Select Board and the Planning Board. So too are outside groups, namely MRPC, CMRPC (grant funded) and the newly created Quabbin Educational Municipal Partnership (QEMP). Yet efforts on each of these fronts are largely siloed, creating an environment where much is being done, but little is moving forward in harmony. Coordinating these efforts through a single board or actor may assist in diversifying the Hubbardston portfolio; however, it should be noted that Hubbardston is not likely to ever generate a high percentage of its tax revenue from commercial development due to infrastructure and open space concerns.

Another area deserving increased attention is the existing business community. Hubbardston is not without a small business community, but there is little focus on bringing the existing business community together to help plan support mechanisms and avenues for future growth. Existing business owners report that Hubbardston is a great place to do business, but few supports exist for the crucial start up period. This needs to be addressed immediately.

Hubbardston has three main economic development strengths. First, the recently created "Quabbin Region" focus is a strong step forward, moving the town's energy away from single business attraction to a larger investment in regional growth. Second, the largely volunteer effort to "put Hubbardston on the map" through its special events coordinator is a step that will

encourage residents and small businesses to invest in the community. And third, Hubbardston's relatively untouched open space is a draw both ascetically and recreationally. Efforts should be made to not shy away from open space, but rather use it to help draw attention to Hubbardston as a community and a place to do business.

Three main efforts need to occur simultaneously to move Hubbardston from a town that talks about development to a town that smartly develops. First, there needs to be a movement to consolidate efforts and communicate amongst boards. This can be done through the economic development coordinator, the economic development board or through empowering the Town Administrator. Second, resources need to be devoted to branding the town/region and advertising local strengths in order to draw outside investment. And finally, the town needs to reinvest time and energy into its existing business community, communicating long-term growth goals and ensuring the small, but important, business community remains intact.

Current Interventions

- 1) Economic Development Coordinator
- 2) Loosely organized local development meetings
- 3) Coordinating actions between board through sharing information

Future Goals

- 1.) Year 1 – update Web site, empower economic development board, gain stronger understanding of the existing business community
- 2.) Year 2 – find additional funding for EDC position
- 3.) Year 2/3 – Invest in local/regional branding

INFRASTRUCTURE

Observations

Recent time and resource investment in Hubbardston's infrastructure is starting pay off with projects either concluding or beginning in the next two years. It is highly evident that between town staff and elected officials, no area of town's operations has made more improvement than in rebuilding bridges, roads and ancillary infrastructure. This is also the result of direct advocacy from the Department of Public Works and the Select Board to use Chapter 90 money nearly exclusively for road repairs. Additionally, the town has made considerable investment in terms of engineering and design costs to leverage free cash into larger multi-million-dollar grants. Officials from the state all the way to individual residents can see the investment of time and money into creating a plan that both reduces the town's road maintenance backlog and revitalize the town's center as a destination for economic development.

While there is still much to do in terms of paving maintenance, the majority of large-scale infrastructure needs to include Route 68, the Town Center and bridge repair are already

planned and/or underway. However, what is needed in this area is coordination and follow up. It was unclear initially what projects were already underway and/or at what stage during my initial entry months. It was also obvious that while each project had key advocates, there was little coordination at the executive level except to move things forward when prompted. This is not unexpected with the level of executive turnover since 2016.

Several initiatives could increase coordination. First, a consistently updated project inventory nested in a long-term maintenance plan would allow for seamless leadership transition. Second, well developed checklists for each project would allow multiple staff members to be able to service a project when necessary. And third, each project should have a champion, someone to advocate for continued development to make sure each stage of a project is completed.

Lastly, the number one need in terms of town infrastructure is public building space. Public safety departments are operating in patchwork environments, town offices are crowded, the library is unable to secure critical grant monies and the Senior Center is overtaxed due to little or no public gathering spaces in the community. This is a generational issue that must be addressed before a critical mass is hit and there are no further options.

Current Interventions

- 1.) Creating inventories
- 2.) Cross-training employees on infrastructure tasks
- 3.) Developing relationships with state and local officials
- 4.) Updating building infrastructure improvement plans

Future Goals

Year 1 - Create inventories and update schedules

Year 2 - Nest all projects in a long-term plan; create checklists and assign champions

COMMUNICATION

Hubbardston is an engaged community with a wealth of talent in its volunteer boards. Communicating information about the budget, economic development, staff operations, events and infrastructure are an important part of ensuring the town continues to draw educated town meeting voters and board/committee volunteers.

While the town has always had communication efforts, more is necessary to educate volunteers and residents about town operations. In a small town with limited staff, it can be easy to overlook the tremendous amount of effort necessary to keep things running. Small towns must complete all the functions large towns do except with less staff and less resources. Communicating the activities of government creates residents who better understand the equations of investment versus services.

While platforms existed for communication with residents, few were in place for communication between boards. Given limited opportunities for growth and limited budget resources, cross-communication between peer boards is vital, ensuring revenue producing projects continue to find support in Hubbardston. Communication is also important for understanding how town officials are investing tax money. With limited resources, each funded project is critical, creating an environment where informed decision making can make the difference between a stable town and one in disarray.

Improving communication is a current staff priority. We continue to publish the All Department and All Board Reports in an effort to inform interested parties about the activities of their local government. Similarly, we have been working with staff on how to communicate to their boards and volunteers in an effort to take the wealth of information available and spread it throughout town. The Web site redevelopment has become a tool for communicating, nested heavily with an increased online presence. These reports and published materials allow residents to quickly view community initiatives.

Current Interventions

- 1.) All Department and All Board Reports
- 2.) Updated town Web site integrated with Social Media
- 3.) Emphasis on consolidating information into easy to read reports

Future Goals

Year 1 - Publish additional information in local blogs/newspapers

Year 2 - Create multiple communication platforms both online and off

CONCLUSIONS AND RECOMMENDATIONS

It is important to note that Hubbardston has a strong bond rating, excellent department heads and improving approaches to infrastructure and economic development. Its strength lies with its elected officials and volunteers, all committed to keeping Hubbardston a growing town with a keen sense of its history and open space. The purpose of the following recommendations is to move Hubbardston from a strong foundation to a model for small-town municipal success.

While the town has several strong visions, the primary challenge facing the community is bringing cohesion to future planning. This lack of coherence is limiting the effectiveness of long term planning and large scale projects, especially when coupled with the limited resources that all small towns in Massachusetts face.

Secondary issues speak directly to coordination and sustainability planning, largely the result of executive/employee turnover. To correct this issue, much is needed in terms of publishing

policies on financial controls, budgeting process, department procedure and the responsibilities/conduct of elected/volunteer boards. While this will take time, it is not an insurmountable issue and should be correctable within the next year.

Finally, to further increase public trust and increase the effectiveness of each department, the executive office must invest in long-term planning for department improvement, tying goals and policy to the central mission of the community. This would allow for maximizing time and resources to create larger output.

To these ends, this reports recommends a Hubbardston 2024 focus. As a simple exercise, town officials should ask themselves what they want to the community and its government to look like in five years and focus on accomplishing that goal. This has been the primary driver of my first year as Town Administrator, consolidating information into five year plans. But more direction is needed as to how updating this reports can become official policy.

Here is my list of community priorities for Hubbardston 2024. I encourage all town officials to engage with this list and send comments.

1.) Strengthen policies and procedures related to the town's financial management in order to serve as a model for financial best practices. This includes tying all decision-making to clarified goals revolving around the following:

- Financial Forecast
- Capital Planning
- Reserves
- Debt management
- Financial Management

2.) Continue to improve communication mechanisms from town to resident

3.) Upgrade building infrastructure

4.) Invest heavily in improving driving surfaces

5.) Commit to coordinating economic development function through a dedicated employee with a primary focus of coordinating existing business to attract new investment

6.) Finalize the Master Plan

7.) Consider an operational budget override once sustainable practices are in place to secure the next 5-10 years

It is my recommendation that the Select Board empower the Town Administrator to continue to develop these recommendation areas, in concert with each Hubbardston peer board, in order to

create a Hubbardston 2024 vision that is capable to taking on challenges that include residential growth, school spending growth, financial crisis and employee turnover.

With this type of centralized guidance, all improvement plans, long-range plans, annual goals and budget decisions can truly align with one strategy understandable from the Select Board down to the newest Hubbardston resident.