2/8/10

13

INTER-OFFICE MEMORANDUM

From: Town Manager
To: Board of Selectmen
RE: Town Manager Evaluation Process
Date: February 3, 2010

As the Board is aware, on December 31, 2009, the SJC issued a significant decision construing the Open Meeting Law and the Public Records Law as they apply to personnel evaluations, *District Attorney for the Northern District vs. School Committee of Wayland.* In part the SJC stated:

> The open meeting law expressly directs the school committee to convene in open session to discuss the professional competence of an individual. G.L. c. 39, § 23B(1). However, the public records law explicitly exempts employee work evaluations from public disclosure. G.L. c. 66, § 10, pursuant to G.L. c. 4, § 7, Twenty-sixth (c). In light of the requirements of both the open meeting law and the public records law, the correct procedure in this case would have been for the school committee to meet in open session to discuss the professional competence of the superintendent. When the school committee reached the state of deliberations where the preparation and drafting of the written performance evaluation was imminent, it should have voted to adjourn to an executive session under G.L. c. 39, § 23B (7), which allows a governmental body to meet in executive session to comply with the provisions of any general or special law, here, the public records law.

Historically, the Acton Board of Selectmen has conducted its discussion of the of the Town Manager's evaluation in open session, without adjourning to an executive session. In keeping with the Board's historically open evaluation process and in light of the recent nature of the SJC decision with which members of the public may not yet be fully familiar, I am willing to consent to the Board not adjourning to executive session during this year's Town Manager evaluation process, should the Board so choose.

At the same time, consistent with the public records law exemption of employee work evaluations from public disclosure - which the Town has always observed - I respectfully request that the written performance evaluation documents themselves remain confidential.

Town of Acton
Performance Appraisal / Supervisory-Management
TOWN MANAGER

PLEASE PRINT (if form is being filled out by employee, please include all comments on your own performance that you wish to share with Board of Selectmen)

Employee Name: Steve Ledoux
Position: Town Manager Department: Manager

Period Covered: Feb 2009 to Feb 2010

Reason For Review:

X Annual ☐ Unsatisfactory Performance ☐ Other _____
☐ Promotion ☐ End of Introductory Period

Instructions: Carefully evaluate the employee's work performance in relation to the essential functions of the job. Choose one of the performance ratings below that best defines the employee's performance.

Definitions of Performance Ratings

Outstanding: Performance is exceptional in all areas and is recognizable as being superior.
Very Good: Results clearly exceed most position requirements. Performance is of high quality and is achieved on a consistent basis.
Good: Competent and dependable level of performance. Meets performance standards of the job.
Improvement Needed: Performance is deficient in certain areas. Improvement is necessary.
Unsatisfactory: Results are generally unacceptable and require immediate improvement. No merit increase should be granted to individuals with this rating.
N/A: Not Applicable or too soon to rate.

General Factors	Performance Rating (Please choose one from above)	Supportive Details/Comments
1. Decision Making – Accumulates all relevant information prior to decision making, presents well-considered alternates when making recommendations, makes decisions in a timely manner, and notifies all affected parties prior to implementing decisions.	4.2	Mr. Ledoux is an effective decision maker.
2. Interaction– Expresses ideas and Information accurately and clearly in both oral and written form; interacts and cooperates; resolves conflict effectively; shows interest in the job and in the organization; promotes departmental teamwork and interdepartmental teamwork; has a positive attitude towards his or her work.	3.4	Mr. Ledoux keeps a positive attitude during hard times and deals with conflict in a proactive manner.
3. Motivates Others – Sets a cooperative atmosphere; explains how work contributes to the department; holds people accountable for completing work on time; acknowledges success.	4.2	Mr. Ledoux delegates responsibility to dept heads while remaining supportive.

General Factors	Performance Rating	Supportive Details/Comments
4. Identifies & Resolves Problems – Identifies and investigates problems; implements solutions; develops alternative methods of problem solving; standardizes and integrates best practices.	4.2	Mr. Ledoux is responsive and handles emerging issues in a timely, efficient manner. He is open to alternative solutions to problems.
5. Planning – Establishes both short and long term plans to meet future needs; shows foresight in recognizing problems in areas of responsibility; foresees changes and trends relevant to areas of responsibility; adheres to schedules and plans.	4.2	Mr. Ledoux has initiated several long range efforts that will improve efficiency and service at town hall. Digitizing more town records is a long range effort with a big pay back. Consolidating some of the town functions to create a 'one stop' environment for building projects will be a significant improvement as well.
6. Financial & Budgetary Oversight– Tracks and adheres to financial plan; makes sound decisions that consider cost/benefit; accurately estimates expense levels, capital budgets and other factors; shows innovation in reducing expenses; accurately forecasts and maintains budgetary projections; controls operating costs by effectively utilizing staff, materials, and equipment; carefully monitors expenditures; contributes to budgetary planning by providing comprehensive justification for budgetary requests; meets established time frames for submitting budget requests; controls capital costs by effectively utilizing staff, materials, and equipment...	4.8	.Mr. Ledoux has done an outstanding job in financial management. His early and firm budget freeze allowed the town to respond to late season state budget cuts while managing the impact on services. The budget he has created for FY11 incorporates all of the priorities established by the Board of Selectmen while also remaining within the bounds suggested by the Finance Committee in their annual 'Point of View'.
7. Asset Management – Effectively manages and maintains town assets: buildings and facilities, vehicles, parks & grounds, technology, infrastructure, and revenues; balances the maintenance necessary to avoid major capital expenses in the future; fully utilizes town resources in order to maintain current assets/cost avoidance; maximizes revenue earnings.	4.2	Mr. Ledoux has staff continually monitoring the town's infrastructure. The relevant departments address needs as they occur. This may be more difficult in the coming years as budget cuts force cut backs in ongoing maintenance.
8. Management Effectiveness – Delegates responsibility, effectively supervises staff; maintains composure under trying circumstances; resolves conflict effectively; supervises with a positive and appropriate attitude; communicates effectively; establishes annual goals for department, and puts time and effort into improving performance of assigned area of responsibility.	4.25	Delegation is a strong suit for Mr. Ledoux. He expects much of his professional staff. He issues deadlines and follows up accordingly. He has set goals for his managers and checks in to insure they are progressing. His weekly staff meetings foster excellent communication between departments.
9. Employee Relationships – Selects adept employees; trains and develops employees; flexibly adjusts administrative techniques and styles when working with employees of different skills and abilities; fosters diversity; gives positive or negative reinforcement promptly to improve employees performance; periodically meets with employees to share information that will affect them.	4.2	Mr. Ledoux manages a diverse set of highly qualified employees. When hiring has occurred, he has made good choices. He has also been effective at dealing with employee issues with sensitivity and skill.

10. Administration – Gives attention to those areas of responsibility that are of an ongoing nature; follows up on problems and decisions. maintains control over areas of accountability; keeps own areas of responsibility and all associated procedures functioning smoothly over extended periods of time.

Performance Rating	Supportive Details/Comments
4.6	Mr. Ledoux is an excellent administrator. He stays on top of the various issues that come before him and follows through to completion. His experience shows in his ability to keep many 'balls in the air' simultaneously yet keeping the mission critical issues close at hand.

General Factors	Performance Rating	Supportive Details/Comments
11. Innovation and Change – Initiates change when necessary; takes action quickly to correct or prevent problems; generates ideas and creative solutions; shows enthusiasm for new ideas, programs and procedures.	4.2	Mr. Ledoux has been proactive in embracing the 'Greening of Acton' initiative that the Board of Selectmen have set as a high priority. In addition, he has pursued opportunities for combining services such as back office finance (with the schools) and regionalizing emergency dispatch and aid services with neighboring towns.
12. Knowledge – Demonstrates technical knowledge; displays knowledge and expertise of sound management practices; directs efforts toward personal improvement of job knowledge; enrolls in professional activities and organizations/associations to grow job knowledge and build professional relationships.	5	Mr. Ledoux's experience in other towns is invaluable. He seeks out 'industry best practices' not just 'municipal best practices'.
13. Organizational Relationships – Executes directions and plans received from superiors and higher administrative units; accepts criticism and feedback from management with minimum defensiveness; demonstrates skill in communicating with others orally (Example: conducting meetings or speaking); provides information or help to superiors or peers when needed; shows appropriate professional assertiveness in expressing and advocating points of view; writes reports and memos that are clear and useful; expends the effort and time necessary to do the job well.	4.6	Both Mr. Ledoux and Dr. Mills are to be commended for their efforts to build a better relationship between the town and schools. Increased transparency and a high level of cooperation serve the town and the schools well in both the short term and the long term.
14. Leadership qualities – Fosters and encourages support from his/her department and/or others to accomplish objectives, follows procedures and accept suggestions; inspires confidence and respect in departmental personnel; motivates employees to achieve departmental, business and municipal goals and objectives; participates in municipal and governance activities; promotes respect, honesty, integrity and fairness to all.	4.25	Mr. Ledoux is skilled at delegating responsibility and authority to his senior staff as appropriate to getting the job done. This results in a high degree of individual autonomy and ownership of tasks within each department.

15. Organization – Adheres to priorities & deadlines; completes work within scheduled time frames; follows through on assignments despite setbacks; plans and schedules work for him/herself or his/her department to ensure the organizations objectives and goals are met; follows established schedules for work objectives; shows consistently low level of errors; produces neat, accurate, through and organized work; demonstrates flexibility in responding to priorities and organizational change.

4.4

Mr. Ledoux is very organized. He keeps track of a large number of running issues and maintains deadlines.

Rate employee's OVERALL PERFORMANCE in comparison to position and responsibilities:

Please circle one: **4.2 – Very Good**

Additional Comments (Please include a summary of which areas most significantly affected the overall review):

This was another extremely difficult budget year. Mr. Ledoux's conservative spending decisions this year have helped to replenish free cash and will help the town weather what is likely to be a multi-year recession.

Mr. Ledoux has shown a commitment to continual improvement in town processes that is already having an impact and bodes well for the future. For example, the town has taken advantage of IT technology to improve internal processes and improve communications with the public.

Mr. Ledoux is actively engaged in the investigation of combining back office functions with the schools on common services and in regionalizing with other towns on public safety dispatch and emergency services.

Complete all the following sections:

1. Accomplishments or new abilities demonstrated since last review Summary of overall rating. Please include summary of which areas most significantly affected the overall review:

2. Specific areas of needed improvement, and suggestions if applicable.

3. Recommendations for professional development (seminars, training, schooling, etc.):

   Ongoing professional development is always valuable. Mr. Ledoux participates in professional organizations that enable him to bring back state of the art ideas and techniques that benefit the town. We encourage him to continue to do so.

4. Future goals:

   Many of our department heads have been with the town for many years. We need to begin to implement a succession plan for key positions when they start to retire.

5. Performance improvement development plan, if necessary:

Employee's Comments:

Evaluator's Signature: _____ Date: / /
Follow-up stipulated by Evaluator: ☐ Yes ☐ No
Follow-up Date: / /

Human Resources Signature: _____ Date: / /

Discussed with employee at Board of Selectmen's Meeting held on / / .

A copy of the minutes from the Board of Selectmen's Meeting at which the employee was evaluated, as well as a copy of this Evaluation Form, will be placed in the Employee's Personnel file.

Employee acknowledgement of receipt only:
(Employee signature acknowledges receipt of review and does not constitute agreement with content.)

Signature: _____ Date: / /
Employee Signature

Follow-up requested by employee/desired: ☐ Yes ☐ No
Follow-up Date: / /

Town of Acton
Performance Appraisal / Supervisory-Management
TOWN MANAGER

PLEASE PRINT (if form is being filled out by employee, please include all comments on your own performance that you wish to share with Board of Selectmen)

Employee Name: Steve Ledoux
Position: Town Manager Department: Manager

Period Covered: Feb 2009 to Feb 2010

Reason For Review:

X Annual ☐ Unsatisfactory Performance ☐ Other _____
☐ Promotion ☐ End of Introductory Period

Instructions: Carefully evaluate the employee's work performance in relation to the essential functions of the job. Choose one of the performance ratings below that best defines the employee's performance.

Definitions of Performance Ratings

Outstanding: Performance is exceptional in all areas and is recognizable as being superior.
Very Good: Results clearly exceed most position requirements. Performance is of high quality and is achieved on a consistent basis.
Good: Competent and dependable level of performance. Meets performance standards of the job.
Improvement Needed: Performance is deficient in certain areas. Improvement is necessary.
Unsatisfactory: Results are generally unacceptable and require immediate improvement. No merit increase should be granted to individuals with this rating.
N/A: Not Applicable or too soon to rate.

General Factors	Performance Rating (Please choose one from above)	Supportive Details/Comments
1. Decision Making – Accumulates all relevant information prior to decision making, presents well-considered alternates when making recommendations, makes decisions in a timely manner, and notifies all affected parties prior to implementing decisions.	4.2	Mr. Ledoux is an effective decision maker.
2. Interaction– Expresses ideas and Information accurately and clearly in both oral and written form; interacts and cooperates; resolves conflict effectively; shows interest in the job and in the organization; promotes departmental teamwork and interdepartmental teamwork; has a positive attitude towards his or her work.	3.4	Mr. Ledoux keeps a positive attitude during hard times and deals with conflict in a proactive manner.
3. Motivates Others – Sets a cooperative atmosphere; explains how work contributes to the department; holds people accountable for completing work on time; acknowledges success.	4.2	Mr. Ledoux delegates responsibility to dept heads while remaining supportive.

General Factors	Performance Rating	Supportive Details/Comments
4. Identifies & Resolves Problems – Identifies and investigates problems; implements solutions; develops alternative methods of problem solving; standardizes and integrates best practices.	4.2	Mr. Ledoux is responsive and handles emerging issues in a timely, efficient manner. He is open to alternative solutions to problems.
5. Planning – Establishes both short and long term plans to meet future needs; shows foresight in recognizing problems in areas of responsibility; foresees changes and trends relevant to areas of responsibility; adheres to schedules and plans.	4.2	Mr. Ledoux has initiated several long range efforts that will improve efficiency and service at town hall. Digitizing more town records is a long range effort with a big pay back. Consolidating some of the town functions to create a 'one stop' environment for building projects will be a significant improvement as well.
6. Financial & Budgetary Oversight– Tracks and adheres to financial plan; makes sound decisions that consider cost/benefit; accurately estimates expense levels, capital budgets and other factors; shows innovation in reducing expenses; accurately forecasts and maintains budgetary projections; controls operating costs by effectively utilizing staff, materials, and equipment; carefully monitors expenditures; contributes to budgetary planning by providing comprehensive justification for budgetary requests; meets established time frames for submitting budget requests; controls capital costs by effectively utilizing staff, materials, and equipment...	4.8	.Mr. Ledoux has done an outstanding job in financial management. His early and firm budget freeze allowed the town to respond to late season state budget cuts while managing the impact on services. The budget he has created for FY11 incorporates all of the priorities established by the Board of Selectmen while also remaining within the bounds suggested by the Finance Committee in their annual 'Point of View'.
7. Asset Management – Effectively manages and maintains town assets: buildings and facilities, vehicles, parks & grounds, technology, infrastructure, and revenues; balances the maintenance necessary to avoid major capital expenses in the future; fully utilizes town resources in order to maintain current assets/cost avoidance; maximizes revenue earnings.	4.2	Mr. Ledoux has staff continually monitoring the town's infrastructure. The relevant departments address needs as they occur. This may be more difficult in the coming years as budget cuts force cut backs in ongoing maintenance.
8. Management Effectiveness – Delegates responsibility, effectively supervises staff; maintains composure under trying circumstances; resolves conflict effectively; supervises with a positive and appropriate attitude; communicates effectively; establishes annual goals for department, and puts time and effort into improving performance of assigned area of responsibility.	4.25	Delegation is a strong suit for Mr. Ledoux. He expects much of his professional staff. He issues deadlines and follows up accordingly. He has set goals for his managers and checks in to insure they are progressing. His weekly staff meetings foster excellent communication between departments.
9. Employee Relationships – Selects adept employees; trains and develops employees; flexibly adjusts administrative techniques and styles when working with employees of different skills and abilities; fosters diversity; gives positive or negative reinforcement promptly to improve employees performance; periodically meets with employees to share information that will affect them.	4.2	Mr. Ledoux manages a diverse set of highly qualified employees. When hiring has occurred, he has made good choices. He has also been effective at dealing with employee issues with sensitivity and skill.

10. Administration – Gives attention to those areas of responsibility that are of an ongoing nature; follows up on problems and decisions. maintains control over areas of accountability; keeps own areas of responsibility and all associated procedures functioning smoothly over extended periods of time.	4.6	Mr. Ledoux is an excellent administrator. He stays on top of the various issues that come before him and follows through to completion. His experience shows in his ability to keep many 'balls in the air' simultaneously yet keeping the mission critical issues close at hand.

General Factors	Performance Rating	Supportive Details/Comments
11. Innovation and Change – Initiates change when necessary; takes action quickly to correct or prevent problems; generates ideas and creative solutions; shows enthusiasm for new ideas, programs and procedures.	4.2	Mr. Ledoux has been proactive in embracing the 'Greening of Acton' initiative that the Board of Selectmen have set as a high priority. In addition, he has pursued opportunities for combining services such as back office finance (with the schools) and regionalizing emergency dispatch and aid services with neighboring towns.
12. Knowledge – Demonstrates technical knowledge; displays knowledge and expertise of sound management practices; directs efforts toward personal improvement of job knowledge; enrolls in professional activities and organizations/associations to grow job knowledge and build professional relationships.	5	Mr. Ledoux's experience in other towns is invaluable. He seeks out 'industry best practices' not just 'municipal best practices'.
13. Organizational Relationships – Executes directions and plans received from superiors and higher administrative units; accepts criticism and feedback from management with minimum defensiveness; demonstrates skill in communicating with others orally (Example: conducting meetings or speaking); provides information or help to superiors or peers when needed; shows appropriate professional assertiveness in expressing and advocating points of view; writes reports and memos that are clear and useful; expends the effort and time necessary to do the job well.	4.6	Both Mr. Ledoux and Dr. Mills are to be commended for their efforts to build a better relationship between the town and schools. Increased transparency and a high level of cooperation serve the town and the schools well in both the short term and the long term.
14. Leadership qualities – Fosters and encourages support from his/her department and/or others to accomplish objectives, follows procedures and accept suggestions; inspires confidence and respect in departmental personnel; motivates employees to achieve departmental, business and municipal goals and objectives; participates in municipal and governance activities; promotes respect, honesty, integrity and fairness to all.	4.25	Mr. Ledoux is skilled at delegating responsibility and authority to his senior staff as appropriate to getting the job done. This results in a high degree of individual autonomy and ownership of tasks within each department.

15. Organization – Adheres to priorities & deadlines; completes work within scheduled time frames; follows through on assignments despite setbacks; plans and schedules work for him/herself or his/her department to ensure the organizations objectives and goals are met; follows established schedules for work objectives; shows consistently low level of errors; produces neat, accurate, through and organized work; demonstrates flexibility in responding to priorities and organizational change.

4.4

Mr. Ledoux is very organized. He keeps track of a large number of running issues and maintains deadlines.

Rate employee's OVERALL PERFORMANCE in comparison to position and responsibilities:

Please circle one: **4.2 – Very Good**

Additional Comments (Please include a summary of which areas most significantly affected the overall review):

This was another extremely difficult budget year. Mr. Ledoux's conservative spending decisions this year have helped to replenish free cash and will help the town weather what is likely to be a multi-year recession.

Mr. Ledoux has shown a commitment to continual improvement in town processes that is already having an impact and bodes well for the future. For example, the town has taken advantage of IT technology to improve internal processes and improve communications with the public.

Mr. Ledoux is actively engaged in the investigation of combining back office functions with the schools on common services and in regionalizing with other towns on public safety dispatch and emergency services.

Complete all the following sections:

1. Accomplishments or new abilities demonstrated since last review Summary of overall rating. Please include summary of which areas most significantly affected the overall review:

2. Specific areas of needed improvement, and suggestions if applicable.

3. Recommendations for professional development (seminars, training, schooling, etc.):

   Ongoing professional development is always valuable. Mr. Ledoux participates in professional organizations that enable him to bring back state of the art ideas and techniques that benefit the town. We encourage him to continue to do so.

4. Future goals:

   Many of our department heads have been with the town for many years. We need to begin to implement a succession plan for key positions when they start to retire.

5. Performance improvement development plan, if necessary:

Employee's Comments:

Evaluator's Signature: _____ Date: / /
Follow-up stipulated by Evaluator: ☐ Yes ☐ No
Follow-up Date: / /

Human Resources Signature: _____ Date: / /

Discussed with employee at Board of Selectmen's Meeting held on / / .

A copy of the minutes from the Board of Selectmen's Meeting at which the employee was evaluated, as well as a copy of this Evaluation Form, will be placed in the Employee's Personnel file.

Employee acknowledgement of receipt only:
(Employee signature acknowledges receipt of review and does not constitute agreement with content.)

Signature: _____ Date: / /
Employee Signature

Follow-up requested by employee/desired: ☐ Yes ☐ No
Follow-up Date: / /