

Town of Nantucket Town Manager Organizational Study

The Executive Suite was retained by the Town of Nantucket, Massachusetts to perform an organizational study relative to Town Administration's administrative responsibilities, with review of documents that detail the authorities and responsibilities of the Town Manager. Additionally, interviews were conducted with appropriate elected and appointed officials and department managers to develop information on the Administration's workload responsibilities, time utilization, review of communication systems utilized, and recommendations.

Tasks involved the following:

1. Review Charter, other Town documents describing Town Manager and Administration responsibilities and authorities
2. Interview Department Managers
3. Interview Board of Selectmen
4. Interview Manager, Assistant Manager, and other necessary staff
5. Interview Town Counsel
6. Review communication systems and time utilization practices
7. Review Administrative workflow
8. Recommendations

Documents Review

The Town of Nantucket Charter was most recently updated in 2007, updating Chapter 289 of the Acts of 1996, as amended at the April 11, 2007 Annual Town Meeting and approved by the Attorney General on May 21, 2007¹. It provides a name change from Town Administrator to Town Manager for the previously approved 1996 Charter.

Summary Document Review Findings

Given the Town's strong history with a Board of Selectmen and Executive Secretary form of government, the 1996 Charter amendment was substantial in that it provides the Town Administrator now Manager considerable authority in overseeing and implementing administration of Town affairs, as further detailed in Article IV Town Administration, section 4.2 – Town Manager.

The Town Manager has implemented organizational changes in the delegation of authority by consolidating certain departments and functions, notably in Public Safety where Emergency Management and Marine Services have been consolidated into the Police Department, the

¹ See Appendix A on page 13 for other Town documents reviewed.

Human Services Department where the Council of Aging, Senior Services, and Our Island Home have been consolidated under one department manager, the Planning & Land Use Services department where the Building Department, Health Department, Planning Board, Historic District Commission, and Zoning Board, have been consolidated, and the Public Works & Parks Department, where Operations, Engineering Services, Central Fleet Maintenance, Operations, Public Facilities, Solid Waste Management, and Wastewater Treatment functions have been consolidated.

The Charter authorizes the Town Manager to “negotiate and sign on behalf of the Town contracts and contract amendments for the Town and initiate contract terminations and enforcement actions, subject in each case to resolution of approval or disapproval of the Board of Selectmen, and including any Town employment (but not union) contracts, subject to the availability of funds.”

The Town Charter further requires the Board of Selectmen “(t) o hear and decide upon license applications as may be provided by Town bylaws or by Special or General Laws.” This provision is mentioned as it relates to feedback from interviews relative to the impact of this provision on the Selectmen’s Agenda activity.

Given the amount of contracts and procurement actions performed by the Town this clause itself as well as a corollary Charter clause relating to the Board of Selectmen’s authorities, the Board of Selectmen have significant Charter responsibility to the issuance of licenses, permits, and the approval or disapproval of contracts. This appears to significantly impact the Selectmen’s agenda on a regular basis.

Interviews

Interviews were conducted on Nantucket on June 2 and June 4 and by phone on June 9 and June 11, 2014². The consultant also attended the Town Manager’s Cabinet meeting on June 2.

The general scope of each interview was to identify the areas of interaction that each official has with the Town Manager’s office, how regularly this interaction occurs, what specific decisions the official requires of either the Town Manager or the Board of Selectmen, the type of advice and assistance requested from the Manager’s office, and the primary methods used to communicate (verbally, written, email).

Additional information and feedback was requested relative to any concerns or observations these officials have with respect to information processing within the Manager’s office. Officials were also asked about the process used to set goals and objectives for their department and the Town, with direction from the Town Manager.

² See Appendix B on page 14 for a list of elected and appointed officials who were interviewed.

Summary Interview Findings

All of the officials interviewed see the Town Manager as highly organized, interested in being readily accessible to Town officials, residents and businesses, highly competent in her knowledge of Town issues, and in her ability to understand who to involve in resolving critical issues.

It is this consultant's observation that the current Town Manager, who served previously for the Town in the capacity of Executive Secretary and Town Administrator, has taken a deliberate, considerate, and progressive approach towards implementation of her Charter responsibilities and authorities.

It is further this consultant's observation that the Town Manager can take additional actions to implement her Charter responsibilities through delegation and higher levels of department manager accountability.

There is general agreement that the current level of information processed within the Town Manager's office is considerable and at times excessive. There is also agreement that this can contribute to a lack of long term planning, effective delegation, and holding department managers fully accountable. There was further agreement that the Board of Selectmen's meetings have contributed to the Town Manager to be in constant preparation for the next Selectmen's meeting, thereby inhibiting administrative efforts to prioritize other goals.

Planning

Based on the interviews it is clear that the Town has not developed a short or long term strategic plan. Several departments appear to have developed their own plans, but these are not tied to Town strategies, goals, or objectives. The municipal budget is not linked to strategic objectives. The absence of a strategic and operational focus contributes to the perceived lack of accountability for timely follow through by department managers to work requests from the Town Manager.

Various discussions with Town officials focused on the Town's objective to establish a 5-year Capital Improvement Program, a long-term financial forecast, and performance budgeting – each of which have not been fully addressed.

There is strong consensus that the creation of a strategic plan and operational plan can assist the Board of Selectmen, Town Manager, and all departments in achieving a better focus on managing the current and planning for the future. There was not a clear consensus on how these could be achieved or even if they would be effective, but the consensus remains that more proactive steps to guide official actions would be helpful.

Use of Technology

The Town's information technology system manages all email, web, printers, 23 servers, and an in-house email server for most Town departments, and also serves as the MUNIS administrator.

Police, Fire, Wastewater Treatment Plant, Airport and School are not supported by the Town's IT department, although the IT department supplies the connection.

There is not a clear understanding amongst officials interviewed on the ability of the email system to schedule meetings through the calendar functions, and the ability of the task function within Microsoft Outlook Exchange to track follow up on tasks and projects. It does not appear that the information technology system is being utilized by departments efficiently to facilitate task and function accomplishments.

Information Overload

The Manager and Assistant Manager each indicate they receive well over 200 emails daily, as well as responding to walk-in visits or phone calls from residents and/or other Town officials. A significant basis to this volume overload is the Manager's interest in being accessible to town officials and to residents. No one can fault this interest; however, the volume of information processed appears to be inhibiting the Manager and her staff from effectively accomplishing certain department and town goals.

As noted above, the Town does not have either a short or long term strategic and operational plan to guide its policy and actions. As a consequence, officials indicated that issues of the day seem to take precedence, while department objectives may be placed on the back burner while Board of Selectmen responses to citizen requests take priority.

The information being processed varies from face to face communication, phone calls, emails, and instant messaging. Email preference for many officials interviewed indicates its use helps to clarify direction and follow through actions. Preference for face to face and phone calls occur with respect to employee issues so that clear description of issues is made and clear direction is received.

There is consensus that departments need to go through the Town Manager in order for the Board of Selectmen to accomplish its statutory and charter responsibilities. Officials clearly indicated that the level of information flowing through the Town Manager's office can be considerable and constant from week to week, given the time of the year and the issues which are being addressed by the Board of Selectmen. Examples include: approval of all alcoholic beverage and common victualler licenses (annual and seasonal), issuance of shellfish permits, approval of other licenses or permits, approval of labor contracts, approval of procurement contract awards, various regulations, health insurance and other employee benefits, to name a few.

As noted in the Summary Documents Review Findings above, the Town Charter specifically requires the Board of Selectmen to issue these licenses and permits and to approve or disapprove contracts. That authority notwithstanding, however, there are alternative methods available for the Board to increase its efficiency in this and other areas.

Amongst the Board of Selectmen members interviewed there is consensus that the Board would welcome the opportunity to free up agenda time to focus with the Town Manager on discussion of important Town policy issues. Board members appeared willing to look at ways, with the Town Manager, to develop consent agendas, where appropriate, as well as encouraging the Town Manager to exercise greater long term leadership to address Island needs, along with the Board.

Prioritization

Many interviewed commented on the volume of requests for assistance and information to the Manager's office as being overwhelming, inhibiting the Manager and staff from being able to keep up with the issues of the day as well as provide timely response to action requests from either the Board of Selectmen or department managers. There was a clear consensus to establish a process to enable the Manager's office to prioritize actions based on agreed upon goals.

Delegation & Accountability

The Town Manager clearly has the respect of both the Board of Selectmen and each of the department managers interviewed for her job knowledge, commitment to help them and others be successful, and problem solving abilities.

Based on a review of the Town Charter and Table of Organization, all departments, except several noted below, report to the Town Manager. Reorganization has lessened the direct reports to the following: Police, Fire, Public Works, Human Services, Human Resources, Information Technology, Visitor Services, Finance & Budget, Natural Resources, and Planning & Land Use Services. Except for direct reporting of the Natural Resources Director to the Assistant Town Manager, all other department managers report direct to the Town Manager.

The Town Manager also has indirect reporting on a regular basis with the Airport and Water Company department managers as well as the School Superintendent. The Director of the Planning and Economic Development Commission has an intramunicipal agreement with the Manager to oversee the PLUS departments.

Every organizational change will have its challenges, and these challenges are evident in Nantucket, with organizational stresses noted in the Planning & Land Use Services Department where there is concern from several officials that the transitional process with employees has been difficult.

There is consensus that effective follow through on work requests from the Town Manager to certain department's needs improvement. This appears due in part to the high volume of work requests being made and the absence of an effective tracking mechanism, as well as certain departments not placing a priority on fulfilling the Manager's request. It appears a regular challenge and frustration for the Town Manager to keep on top of work requests made and not fully complied with.

There is clear consensus that the Town's growth contributes to increased work requests for the Town and affects all departments. Some commented that while work requests have increased, town staffing has decreased. Some officials commented on the impact this has had with the collective bargaining process.

Several officials suggested establishing a clearer structure for reporting, more regular meetings outside of the weekly Cabinet meeting, and delegation of authority for the Assistant Town Manager to include direct responsibility for several departments so the Manager would have fewer direct reports and be able to focus efforts better on plan development and implementation.

Interview feedback indicated support for the weekly Cabinet meetings and sound suggestions were made to restructure the agenda to focus more on policy issues and select operations issues in order to leverage the senior management team's expertise.

In part the perceived lack of accountability may also be a reflection of the Town Manager's prior role as Executive Secretary, wherein department managers did not directly report to the Executive Secretary, and certain department managers not fully understanding the extent of the Town Manager's authority under the Town Charter.

Recommendations

As noted previously, the Town Manager's Department is a central activity point for the Town and County of Nantucket. Staffed with 5 personnel, the department is significantly overloaded given its authority and responsibility. The recommendations made below consider a combination of delegation, increased staffing, reporting, use of technology, longer term planning, and exercise of authority.

Board of Selectmen Calendar

In order to establish more efficient management of the Board of Selectmen's Weekly Meeting and Agenda the following recommendations are suggested. Currently the Board of Selectmen's Agenda is structured efficiently. The following are recommended enhancements:

1. Meeting Schedule: The Board of Selectmen has commenced a summer meeting schedule, meeting every other week. It is highly recommended that, along with other recommendations below, the Board of Selectmen continue the every other week schedule through the Fall and evaluate its ability to manage its responsibilities to the Town through an every other week schedule. It is important to note that other recommendations contained herein need implementation in order to complement this recommendation.
2. Licensing and Permitting:
 - a. The Town Manager through her Town department managers should provide recommendations to the Board of Selectmen in a concise written report for each license or permit scheduled for issuance in advance.

- b. Establish a consent agenda for the approval of monthly licenses and permits listing all to be issued. Members of the Board can request a hold on those they wish to discuss in detail. Once all holds are requested, the Chair can ask for a vote on those remaining, ensuring each license or permit is read into the record individually. Once that vote is taken on the consent licenses and permits, those placed on hold can be discussed.³
 - c. The Town Manager should frame an approval motion for each license or permit to be issued, either as part of the agenda itself, or as part of the written staff report.⁴
3. Financial Update:
- a. Schedule a portion of a meeting every other month for a financial update of prior month's revenues and expenditures to be presented to the Board of Selectmen by the Town Manager through the Director of Municipal Finance.
4. Strategic Plan and Policy Discussion:
- a. Schedule a portion of a meeting every other month for a discussion and update on implementation of the Town's Strategic Plan (see recommendation below).
 - b. The Town Manager presentation should focus on implementation, areas needed for further discussion and policy development, and cost implications.

Town Manager Staff Responsibilities

This consultant has reviewed the level of effort for each of the five staff within the Town Manager's office. While improvements in workflow can be achieved by implementing the several recommendations, it is this consultant's recommendation to add one additional staff person to the Town Manager's office at an administrative support level.

The following recommendations flow in order of priority. The first recommendation concerns assignment of supervisory responsibilities for the Town Manager and the Assistant Town Manager. This allocation of supervisory responsibilities should have the impact of lessening the number of department managers needing regular assistance from the Town Manager as well providing more effective ability to work with department managers to fulfill their responsibilities on Town Manager requests.

1. Assignment of Assistant Town Manager – realign responsibilities of Assistant Town Manager to include direct management on behalf of the Town Manager to the following departments:
 - a. Natural Resources
 - b. Human Services
 - c. Planning and Land Use Services
 - d. Information Technology
 - e. Visitor Services
 - f. Energy Office
 - g. Continuation of current Union bargaining role

³ A sample consent agenda is attached in Appendix C on page 15.

⁴ A sample approval motion is attached in Appendix C on page 15.

A sample staff report is attached in Appendix C on page 16.

2. Town Manager should remain directly responsible for:
 - a. Police, including Marine and Emergency Management
 - b. Fire
 - c. Human Resources
 - d. Public Works & Parks
 - e. Finance and Budget
3. Delegation and Reporting
 - a. Delegate more responsibility to Human Resources for all recruiting activities with Department managers and full development and implementation of human resource policies for approval by the Town Manager.
 - b. Continue to require all departments to regularly submit monthly reports in a bulleted format, put on a shared department manager drive for other department managers to review prior to the second Cabinet meeting of each month.⁵
4. Reassign and upgrade the current Executive Assistant as Assistant to the Town Manager to provide full support to the Town Manager.
 - a. Responsibilities should continue in her major support roles for the Town Manager and Board of Selectmen.
 - b. Additional responsibilities should incorporate supervision of Town Manager administrative personnel and project and task management for daily operations.
 - c. Redesign and/or relocate her office and put the new Customer Service Assistant in current Executive Assistant location.
5. Add a full time Customer Service Assistant to:
 - a. Responsibilities should include support to the Assistant Town Manager and Assistant to the Town Manager, serving as the primary customer service contact for phone, walk ins, processing and following through on requests for assistance at the Town Manager office, filing, managing staff meeting schedules, confidential support functions, and related work.
 - b. Responsibilities should also consider assumption of accounts payable function current being performed by Licensing Agent.
6. Establish public office hours for Assistant Town Manager, similar to Town Manager office hours each Monday from 2:00 pm to 4:00 pm for the general public.
7. Set up times for the Assistant to the Town Manager and Customer Service Assistant so that there are times during the day when office work can be done.
 - a. Advertise and publicize that the office is open to the public from 9:00 am to 11:30 am and 2:00 pm to 4:00 pm, daily.
8. Continue implementation of all Procurement Officer functions, and examine the need for expanded support for the function in the next five years.

Requests for Assistance

1. Develop a Request for Assistance process that is routed from the Town Manager's office to department managers with required time frames for replies, using the Microsoft

⁵ A sample reporting form is attached in Appendix C on page 18.

Outlook Exchange Task function⁶. A Request for Assistance process should address requests that come into the Town Manager's office and would include:

- a. Town Manager requests
- b. Personnel Action requests from Human Resources
- c. Citizen requests
- d. Board of Selectmen requests
- e. Other board or committee requests
- f. This RFA would need development with IT staff assistance and IT staff training of department managers to utilize.
- g. Insert on each assignment a reply by time frame.

Strategic and Operations Plan

During the interviews a question arose from several officials concerning the ability of a strategic and operations plan making the Town function better. As noted below, every organization needs a plan to be successful –

- To be able to implement a vision, the Town has to be able to describe it.
- To have a Town organization be fully committed, the organization, its officials, its employees, its businesses, and its residents have to understand why it is important.
- To reach the Town's goals, they must be specific, accountable and in writing.
- To build a highly effective and efficient Town organization, everyone involved must know what action is expected from them.
- The Town organization needs to define how to get from Point A to Point B.

Municipal, non-profit, and private organizations increasingly measure their performance, effectiveness, and value through their strategies, systems, processes, customer reputation, and their executive team. An organization's value today is much more dependent on non-traditional assets and things not measured on the income and balance sheet.

1. It is recommended that the Town Manager with the Board of Selectmen, department managers, and employees develop a strategic and action plan to better set and guide activities. The plan(s) should have:
 - a. A five year strategic focus
 - b. A five year Capital Improvement Plan focus, to include a facilities master plan, and a
 - c. A ten year financial forecast.
2. The Town Manager should consider engaging a facilitator to work with Town officials to develop the strategic and action plan. There are a variety of models and methods that can be utilized that have proven successful in municipal and in corporate use.
3. The drivers to develop the planning process include the Town Manager, the Assistant Town Manager, and the Director of Municipal Finance.

⁶ A sample RFA Process is attached in Appendix C on page 19.

4. The Town should use goals as a basis for evaluating program budget and department performance.
5. Included within this recommendation for strategic and action plan development is a further recommendation for the Town Manager to engage Town employees in the development of these plans. Involving employees in the short and long term planning of municipal goals, objectives, and strategies has proven to improve employee engagement and workforce alignment, as employees will become more emotionally invested in and focused on creating value for their organization.⁷

Further, an aligned workforce can increase employee productivity. Organizational needs, strategies, and plans that are defined and communicated to employees can assist the Town Manager to better communicate her management strategy to employees in order to illustrate what the Town needs to do for its future success.

During discussions with Town officials it was evident that Nantucket's physical location is a significant asset, yet there concerns were also expressed that the Town's employees, because of the Town's remote physical location, may not best people for the job. Town employment is valued by many, yet, if employees had a choice for another employer, how many would commit to stay with the Town until retirement? For Town employees, what are the motivators for them to want to stay working with the Town? It is common for staff to express a desire to be more a part of the organization's growth process by being involved in developing processes, serving customers better, and trying to reduce costs. This recommendation can assist in achieving that objective.

6. Planning – so much is written, so much is expected, so much is done – or not – depending on whether or not the Town, Board of Selectmen, Town Manager and management staff have developed a plan. Each department, each project, each employee can all have a plan or series of sub-plans.
7. The standard elements of a strategic plan include a vision, a mission, goals and objectives, implementation strategies, and action plans. Each plan should address these questions below.
 - a. Who you are
 - b. What you do
 - c. When you do it
 - d. Where you are going
 - e. Why you do it
 - f. How you are going to get there and
 - g. What resources do you need to get there

⁷ A variety of organizational studies reflect the success of this strategy for improving workforce alignment and employee engagement, including the Center for Advanced Human Resource Studies at Cornell University and Gallup, Inc.

Restructure Cabinet Agenda

If the Town does develop a strategic and action plan the Cabinet could more effectively serve that higher management level discussion of policy and operations, and to receive, review and discuss monthly financial reports and trends. The Town Manager should consider a restructuring of the agenda to effect a more time sensitive and action oriented focus, minimize reporting, and work to develop the management team to interact and help each other more.⁸

Time Management

1. Emails: There were several observations made during the course of the interviews relative to excessive amounts of time being spent viewing and responding to emails by the Town Manager, the Assistant Town Manager, and several department managers. Communication, when managed effectively, should not become a time waster. Fortunately or not, the increased use of and reliance upon email as a communications medium can, when combined with an “instant gratification” desire, contribute to an overt reliance on the medium.
 - a. From a time management perspective, it is recommended to learn how to prioritize emails, and then check them only 1 or 2 times daily. The process would look like this:
 - i. Develop system to categorize and prioritize emails into daily buckets
 1. Urgent – act on today
 2. Refer – send to other department or Town Manager office staff with reply by as a task
 3. 2nd Priority – follow up within 5 business days
 4. Immediate, 3 months, 6 months, 1 year actions
 5. Use Microsoft Outlook Exchange auto response and task functions to assist in the implementation of this recommendation.
 - ii. The intent of this recommendation is to cause the Town Manager and other Town officials to consciously think through: “do I have to do this now?” This may sound dramatic, but the effect of implementing an email auto response management system will be to reduce the number of emails as well as enable the Town Manager, Assistant Town Manager, and others who have become compelled by the medium to manage their time better, principally by communicating to others that immediate response may not be expected or needed.
 - iii. Those who successfully develop this or a similar email management system are able to train others to learn in kind.⁹
 2. MS Outlook Exchange Training: As noted earlier several managers were unfamiliar with their ability to manage calendars and use the task function (To Do List) within Outlook Exchange. The Town Manager should direct the IT staff

⁸ A sample agenda is attached for the Cabinet in Appendix C on page 21.

⁹ For example, when the sender of an email receives an automated message indicating that the receiver only checks her/his email 2x daily, the sender will start assessing how “urgent” it is to receive an immediate reply. See a sample auto responder attached in Appendix C on page 22.

to develop training that will provide managers the knowledge to better manage time and task accomplishment.

3. As noted earlier the Town Manager should direct the IT department to develop a department manager shared drive for document sharing, reporting, and project updates.

Appendix A

Documents Reviewed

- a. Town of Nantucket Boards, Commissions & Committees Manual
- b. Town of Nantucket Administrative Code and Charter
- c. Town and County Charter
- d. Numerous places on town website

Appendix B

Officials Interviewed

1. Town Manager, Elizabeth Gibson
2. Assistant Town Manager, Gregg Tivnan
3. Town Manager staff
 - a. Procurement and Project Manager, Heidi Bauer
 - b. Executive Assistant to the Town Manager, Erika Mooney
 - c. Office Administrator/Licensing Agent, Anne McAndrew
4. Chief of Police, William Pittman
5. Fire Chief, Mark McDougall
6. Human Resources Director, Pat Perris
7. Human Resources Assistant, Amanda Johnson
8. Information Technology Manager, Linda Rhodes
9. Assessor, Deborah Dilworth (as Acting Director of Municipal Finance)
10. Natural Resources Coordinator, Jeff Carlson
11. Planning & Land Use Group, Director of Planning, Andrew Vorce
12. Public Works Director, Kara Buzanoski
13. Board of Selectmen
 - a. Chairman, Rick Atherton
 - b. Bruce D. Miller
 - c. Matt Fee
 - d. Tobias Glidden
14. Finance Committee Chair, Matthew T. Mulcahy
15. Town Counsel, John Giorgio

Appendix C

Sample Consent Agenda Language

Consent Agenda Example

Approval of Minutes, Warrants, Pending Contracts, Licenses and Permits

Action requested: Motion to approve, accept or ratify items listed on consent agenda as submitted.

Chair: Are there any requests for a HOLD from members of the Board?

Chair: Hearing none, I request a motion to approve, accept, and ratify the items listed below on the consent agenda as submitted.

1. Approval of Minutes, Board of Selectmen Meeting June 4, 2014, June 11, 2014, June 18, 2014, and June 25, 2014.
2. Approval of Payroll Warrants for Weeks Ending June 29 and July 6, 2014
3. Approval of Treasury Warrants for July 2 and July 9, 2014
4. Approval of Pending Contracts for July 2, 2014 as recommended by the Town Manager and set forth on the spreadsheet identified as Exhibit 1, which exhibit is incorporated herein by reference.

Sample Approval Motion

1. Move to approve the request from Our Island Home for acceptance of a gift of \$ 100 from Gregory Elder for the Our Island Home Music Program.

Sample Staff Report

AGENDA ITEM SUMMARY

Agenda Item # ____

TO: Board of Selectmen
FROM: C. Elizabeth Gibson, Town Manager
DATE: (Leave Blank)
SUBJECT: (Use brief caption)

The purpose of the Agenda Item Summary is to provide Selectmen with a brief summary of an item on the Selectmen agenda. All requests for Board of Selectmen action shall include an Agenda Item Summary completed by the originating department and approved by the Assistant Town Manager and/or Town Manager. The outline below describes the type of information to be included in each section. All information should be included in a one or two page Agenda Item Summary whenever possible. Attachments to the Agenda Item Summary should be kept to a minimum and only include items essential to the Board of Selectmen understanding of the issue. All other relevant information should be incorporated into the Agenda Item Summary. Departments submitting an Agenda Item Summary should provide the information electronically to the Manager.

BACKGROUND/DESCRIPTION

This is a general discussion of the agenda item. Summarize the background and purpose of the item, and all key points in the support material. Include discussion of critical issues and objectives. Identify the specific Town needs(s) that will be satisfied by the proposed action. Address the who, what, where, when, and why questions.

ANALYSIS

The analysis should include a detailed description of the information/concept of which the Board of Selectmen is to be made aware. If appropriate, options or solutions should be identified and discussed. The pros and cons of each should be discussed. All discussion in this section should be based on supportable/documentable fact rather than supposition and personal opinion. Known or expected difficulties associated with implementation of each option should be addressed. The information provided in this section should be presented in such a manner that it builds on the findings identified herein. The reader should have no doubt that the recommendations and conclusions presented later follow logically from the information that she/he has just finished reading. All questions raised need to be answered. Refer to the Manager's response checklist below as a guide for the analysis section.

FISCAL IMPACT

Summarize the financial impact of the proposed action, if any. State the amount to be expended. Indicate whether the funds were budgeted in the CIP or operating budget. Indicate whether there are matching funds required, and if so there amount. If there is no fiscal impact, explain why.

TOWN MANAGER'S RECOMMENDATION

This is in fact the recommendation of the originating department. No requests will be made of the Selectmen unless accompanied by staff recommendations. State very clearly and specifically the action requested of Council and the reasons for recommending approval or disapproval.

BOARD AND COMMISSION ACTION

Specify actions taken by boards and commission or N/A if not applicable. State the official vote and recommendation. If action is not expected until after the agenda item must be submitted, state the expected action date and follow up immediately after that date with a memorandum to the Selectmen (for the Town Manager's signature) describing any action taken.

ADDITIONAL MATERIAL

If applicable, list any forms or support material attached. Additional material should be limited to fiscal analyses, maps, field notes, ordinances, resolutions, confidential summaries, work force reports, etc. Do not include interdepartmental memoranda, grants, lease agreements, and actual legal agreements.

MANAGER'S RESPONSE CHECKLIST for ANALYSIS

	1. Provide a brief history of the issue/problem.
	2. Identify the critical issues/problems.
	3. Develop goals or objectives and performance measures Identify alternatives.
	4. Develop an action plan. Include action steps and a timeframe.
	5. Identify any benefits, costs, and problems.
	6. Analyze fiscal/budgetary impacts.
	7. Is action/recommendation consistent with current policies? If no policy exists, determine if one should be developed.
	8. Explain basis for recommendation. Include decision matrix where applicable.
	9. Identify the concept's applicability to Nantucket.

Sample Department Manager Reporting Form

Department:

Date: (Leave Date Blank)

Monthly Report for (Insert Month)

1. EXECUTIVE SUMMARY (suggested maximum length is one paragraph)
 - a. This paragraph should provide an abstract of the monthly report to follow.
2. MONTHLY ACTIVITY (suggested maximum length is one to two paragraphs)
 - a. This section should provide the reader with a brief, succinct statement of the department activities for the prior month.
 - b. It should list out all the relevant department activities that are important for the Town Manager and other department managers to be aware of.
 - c. If there is an activity requiring action by either the Town Manager or other departments, there should be ACTION NEEDED, and requested further below.
3. ACTION NEEDED (list specific action needed, why, by whom, by date specific, for what purpose)
 - a. This section should begin with a direct statement concerning the action requested.
 - b. The key information about each issue and its development should be presented. It should answer all the questions raised.
 - c. It should provide relevant fiscal or budgetary background information and financial impact on action, if appropriate.

Sample RFA Process Requests for Assistance (RFA)

1. A request for assistance is a request for information or assistance regarding a Town function that is generated by a citizen, business person, or Town official with a Board of Selectmen, department, Town Manager or Assistant Town Manager and communicated to the Town Manager office.
2. There will be different levels of assistance requests. The Assistant to the Town Manager will support the Customer Service Assistant in the evaluation of requests, and ensure appropriate routing and processing of said requests. The Assistant to the Town Manager will, along with the Customer Service Assistant, monitor and track timely request responses from departments.
3. All department responses to the Board of Selectmen, Town Manager, or department requests are to be sent through the Town Manager's Office.
4. All RFA's are due to the Town Manager's Office by 3:30 p.m. on the work day before the Town Manager due date.
5. If a deadline extension is needed, department managers should contact the Customer Service Assistant in the Town Manager's Office. If a RFA is such that the amount of work necessitates a longer timeframe, than a brief memo needs to be prepared for the Town Manager or Assistant Town Manager to issue within the original due date. This memo shall explain the scope of the project and the date the response will be ready. That date must be met. This memo would then be used as an interim reply to the originator of the RFA.
6. The body of the letter/memo should address all concerns of questions contained in the request. The department manager or department staff may need to contact other departments for information in order to provide a complete response by the designated date. Information should be concise and complete.
7. The department manager or department staff should put all pertinent information in the letter/memo instead of referencing attachments. Attachments should be used for documentation.

The control procedures below should be used by departments to ensure timely responses to RFA's.

RFA Control Procedures

	1. Customer Service Assistant sends RFA form from Town Manager's Office to appropriate department manager by email with response date indicated.
	2. Customer Service Assistant uses Microsoft Exchange Task To Do List function to track the RFA request, noting date sent; return date requested, percent completion, and related information.
	3. Department manager assesses RFA and it is forwarded to appropriate staff person for action for reply with response date indicated.
	4. Designated staff person completes RFA and gives to appropriate person for email return to Department manager within time frame required.
	5. Administrative department staff process RFA, and gives back to Department Manager within time frame required.
	6. Department Manager reviews response and notes any follow-up indicated in response and signs off on RFA.
	7. Approved RFA is distributed as needed within department and original RFA is replied to Customer Service Assistant in the Town Manager's Office within time frame required.
	8. Completed RFA is delivered to the Town Manager or Assistant Town Manager within time frame required.
	9. If, after review of completed RFA, Town Manager staff determines additional information or review is necessary, the Assistant to the Town Manager and Customer Service Assistant will initiate follow through with appropriate department manager, repeating process as necessary.

Sample Cabinet Agenda

Cabinet Meeting Agenda

Date:

1. Progress Report

- a. **Achievement of Department Goals & Objectives** – this section relates to monthly department goal and objective achievements, once established. It is intended to provide each Manager the ability to provide a brief, informative report. Expectation is that other Managers have read the monthly reports posted on shared drive, so this should not be repetitive information; rather it should be focused on seeking assistance, as necessary from others on ways to accomplish the goals.
 - b. **Financial Reporting & Trends** – Municipal Finance Director should lead this discussion, providing municipal and department level summary information and trends.
2. **Policy Issues for Discussion** – this section of Agenda should focus on policy matters the Town should address. In recognition of time limits to the 1 hour agenda, it is recommended the Town Manager moderate, and considers no more than 2 policy issues at each meeting. Any discussion should result in an action plan to resolve.
 3. **Operations Issues for Discussion** – this section of Agenda should focus on operations matters the Town should address. In recognition of time limits to the 1 hour agenda, it is recommended the Town Manager moderate, and considers no more than 2 operational issues at each meeting. Any discussion should result in an action plan to resolve.
 4. **Follow up Required on Board of Selectmen Actions** – this section of the Agenda should focus on department manager of Town Manager follow up to specific action requests from the Board of Selectmen, resulting in an action plan to resolve within a time certain by certain managers.

Sample Email Auto Responder

RE: I only check my mails once a day... RE: Subject of Request

Thank you for your email, it has reached my inbox.

To control distractions, I only check my mails once (or twice) per day. That means it could be up to 48 hours from you sending the mail, to me reading and replying to it.

If it's more urgent than that, please call my office direct at (508) 228-7255.

Thank you for helping me to stay focused on the priority needs of the Town of Nantucket.

--

Town Official Name

Town Official Title