

**Town Manager Performance Review**  
**Fiscal Year 2025 (July 1, 2024-June 30, 2025)**  
**Summary of Comments**

**PART A. *ACHIEVEMENT OF FY2025 GOALS***

**Organizational Resilience**

How are the merit pay plan, training, and recruitment strategy working so far? SB should hear an update.

Good progress has been made updating personnel systems to support improvement. However, most of the accomplishments have deployed late in the evaluation period. Monitoring the programs and tuning them to provide the desired benefits will require continued effort over the next year or two. I have also observed on-going reconfiguration of the HR resources to meet the changing needs and deficiencies in legacy systems have been addressed. Recommend continued focus on the employee experience with Payroll, Merit, Time and attendance, and self-service HR to ensure lasting benefits.

Implementation of merit pay plan has been accomplished. Some success in recruiting has also come with turnover in some key positions. Would like to see more on org design – what are unmet needs, is org optimized for success, and how that feeds into position recruitment approach. Need to continue making progress on position controls and reporting.

Implementation of the merit-based system which aligns the goals of depts and staff to those of the Town Manager and Select Board is a significant achievement and positions the town to focus and coordinate activities on key priorities. Kerry has also thoughtfully implemented organizational changes to adapt to evolving business needs, particularly in Community Development and Sustainability.

**Diversity, Equity, Inclusion & Belonging**

Sufficient progress has been achieved given the limits on resources and other priorities in FY25.

Kerry has an approach that recognizes and enables DEIB, with a particular focus on inclusion. She has identified a staff lead to handle internal work which seems to be working well.

Kerry has been supportive of diversity in recruitment, highlighting individual staff accomplishments and promoting diversity through workplace education on cultural observances, relevant articles, workplace practices and practical tools for engagement. The new Inclusion Chronicles are informative, relevant and incorporate both staff and citizen activities/accomplishments – a true best practice on DEI education.

**Effective Governance & Communications**

6-month timeline for CMLP project seems overly optimistic. Web site project moving too slowly. Is new staff person using automated agenda system?

Progress on website is mixed. Links for major projects (MCI, Land Use, 250<sup>th</sup>) worked well but other links were often out of date and had incorrect/obsolete info. The bi-weekly report does a good job informing residents of what town departments have done yet misses an opportunity to talk about plans for the future and instill a sense of forward momentum.

Select Board support for agenda creation and management is effective. Tools for other committees can still be improved. Tool availability is evolving quickly, so we should look for more progress soon. From the perspective of the Select Board, collaboration and coordination among LMT member is positive and productive. This is an improvement in the climate over the not very distant past. Regular communications have been improving, the Civic Concord podcast and Economic Vitality report are good examples. Social media channels could be improved to help engage additional citizens.

Bi-weekly communications working well, and being enhanced for both Select Board and more community newsletter format. While we have started to make progress on CMLP and website, they are behind original track and expectations for FY25. Will need to keep on these to ensure successful FY26 delivery.

Kerry has consistently published the bi-weekly Town Manager report and the revised graphic format of the e-newsletter format has been well received. Dedicated web pages have been created for key projects and they have been critical for citizen engagement (250<sup>th</sup> and MCI). Status on the other internal projects (e.g. 8,9,11) have not been broadly shared/discussed. Improving future communication on project status, delays and accomplishments would be beneficial.

## **Financial Resiliency**

Capital plan is a welcome development. Should have been done earlier, by Finance Dept. To be honest, the indirect cost project cannot be blamed on the 250<sup>th</sup>, but rather on the CFO. Unfortunately, we knew of these deficiencies at least a year ago, and action should have been taken at that point.

Presentation of FY26 Operating and Capital Budget was exceptional and targeted to those who have a good working knowledge of the town budget. A simplified, more user-friendly format that ties spending to property tax bills would be helpful. There appears to be no progress made to review and update the formulae used to charge out to Enterprise and Revolving funds.

While these two areas showed progress in FY25, there were also some problems with forecasting and presentation of material supporting the guideline and budget development processes that resulted in more tension than would likely have been present if the information had been timely and accurate. Workload related to the completion of the Munis financials project that carried over into FY25 coupled with vacancies in staff positions in the Finance Department suggest that some improvement in capabilities are needed.

Progress has been made on the capital plan – improved visibility. Limited progress on chargebacks/cost assignment.

The 10-year capital plan was detailed and well organized, and the integration of other grant funding was useful. Implementation of the Munis budgeting module modernized the submission, tracking and management of operational and capital budgets and provided an online graphical interface for the public. Finalizing indirect costs for the Recreational Revolving fund was completed, but the evaluation and refinement on charge back of indirect costs remains outstanding. Roll out of the proposed PILOT program was also delayed and will need to be advanced in FY2026.

## **Strategic Planning**

Item 15- Not sure what strategy has been developed to ensure tracking/implementation of goals from key planning documents. SB needs an update on this.

The road program initiative, progress on MCI, as well as work one Historic preservation plan demonstrate a good commitment to establishing horizon-line goals that influence tactical action. Similar progress on Land Use and facilities should be key FY26 initiatives.

On item #15, starting point feels like we need to identify scope – what is the problem we are trying to solve, what exists today, what are the gaps, what are some practical starting points and then the ultimate end state. This goal as stated is very broad and could take on a variety of formats. Good progress on stormwater and rate setting

The proposed rates for the Stormwater Utility were well researched, documented and presented to the public very successfully. Allocation of state funds for the assessment of the MCI Wastewater treatment plant has positioned the Town well for successful financial negotiation with the state. Kerry has also supported continued funding for strategic projects including MCI, and revision of the Climate Action & Resiliency Plan.

## ***PART B. GENERAL LEADERSHIP, GOVERNANCE, COMMUNICATIONS, FINANCIAL & MANAGEMENT SKILLS***

### **Board**

ARPA updates were well-done and appreciated.

Kerry continues to interact with the board with openness, professionalism and integrity. Surprises, especially around meeting deadlines in the finance function, undermine an otherwise excellent rapport.

This is an area of strength already, and improvements in presentation of regular information and communication were evident during this period.

Kerry is consistent and collaborative. She always maintains a professional working relationship and is accessible as appropriate. We have discussed her being more proactive in framing the implications of different choices on town staff and budgets.

Kerry is very attentive to achieving Board goals – she has aligned her goals and those of Town departments to ensure success. Kerry makes time to meet individually with board members and willingly shares her knowledge, perspective and provides constructive feedback on issues. Kerry keeps the Select Board informed on critical events (public safety, storm response) and emerging issues (planned staffing changes, family shelter, cell service, etc)

### **Leadership**

Generally excellent: open, diplomatic, and professional. Innovation, active listening, and transparency are exceptionally strong. However, response time is often slow, taking multiple years to begin and to accomplish projects, such as personnel plan, Gerow Park, and capital planning. These took longer than necessary but did end with a good result. Meanwhile, other important projects have hardly started (transportation, budget indirect costs, PILOT, streamlined permitting).

Also a strength, very professional and diplomatic. Especially patient in with citizen inquiries.

Kerry has a positive attitude and maintains a calm demeanor. The staff worked hard through the 250<sup>th</sup> which was a lot of work and came through it with a sense of accomplishment.

Kerry is a strong leader and takes action as needed. Kerry was instrumental in responding to the citizen escalation for the turf replacement at Doug White field. She collaborated with the leadership of the Friends of CC Playing fields and expedited the evaluation, planning and schedule for the implementation. This process thoughtfully included input on environmental concerns and school schedules. Based on the Boards direction, she assigned resources and funding to support the unanticipated use of clickers for Town Meeting.

## **Management**

We need to better utilize “best practices” and IT innovations, including streamlined permitting, PILOT program, and public transportation initiatives. Management needs to move from being a “caretaker” government to a genuine leader. Once upon a time, Concord was a leader among its peers, but it gradually lost ground over the last few decades and then lived off its reputation. Now we need to grow that reputation again. It’s admittedly very hard to turn a big ship around. We have slowly started to turn the corner and improve, but progress needs to move at a faster pace. Becoming a leader again will also improve staff morale and loyalty. The 250<sup>th</sup> was a fantastic event, extremely well done!! And very appreciated by the community. I am somewhat concerned, however, that staff was thoroughly exhausted by this effort. What can management do to help staff work at a high level over a sustained period, without exhaustion?

Acknowledging that there are ongoing efforts on morale and loyalty, these are notorious difficult to gauge. I think that clear support for resources to address major investments and close engagement with SMT member in the design of programs as well as the execution is key to excelling in this area.

I would like to see more benchmarking of best practices, and more ideas on how we can make our government services more efficient – can we outline a vision for how IT innovations will help us reduce cost, how we might partner with School Committee to leverage services for example.

Kerry has established a strong management team and is well respected by staff and town citizens. She routinely recognizes the accomplishments of town staff and promotes use of new tools for community benefit (GIS maps for 250/MCI, pod casts). New leadership in the Finance Department will require additional guidance and oversight in FY2026.

## **Finance**

I was happy to see a long-term capital plan this year. Budget presentation to SB was excellent. Great job stepping in for the CFO, although it was unfortunate that this was necessary. Eliminating the Sustainability Director was difficult but necessary, and showed courage and creative management.

Clear identification of productivity improvements and their impact on spending and property taxes is missing.

Budget presentations for FY26 were noticeably improved in detail and clarity. Responsive to input and reflect creative adaptation to prevailing conditions.

There was progress in FY25 in presenting budgets and financial figures to the Select Board in a way that enables drilling down into the issues and getting to meaningful discussion. I believe there is more work that can be done to manage resources to increase productivity. On services, I believe there is very high quality, the question is more value in relation to taxes paid as some state figures I’ve seen we have the 4<sup>th</sup> highest taxes in the state and the 20<sup>th</sup> highest home values.

Kerry did an excellent job of preparing and presenting the FY2026 Town Operating budget, which included explanation for cost escalation and FTE trends by dept. She made critical staff reductions but ensured related program support would continue. Communication on the need and funding strategy for the Road Program was well supported and executed. Tighter management and oversight of revenue and free cash projections are needed to optimize financial strategies and reporting of future tax impacts.

## **Communications**

Presentations are well-organized and informative, but more enthusiasm and energy are needed when presenting to Town Meeting. Good to recognize and commit to the need for more frequent and pro-active communication. Staff talent is not always being used effectively, so our government is not providing the highest level of service. Unfortunately, Concord is

no longer a leader among its peers. LMT meetings, in-house training, and expanded community newsletter are all good first steps. What else are our peer communities doing that has proven to be effective?

Written communications are a strong point. Public speaking can sometimes feel a little soft-spoken. Good grasp of the community and is always appropriately professional and respectful.

Kerry communicates well and consistently. She encourages community involvement in a positive manner.

Kerry has excellent communication skills. She is always well prepared, and commands respect from others based on her level of knowledge, expertise and honesty. Kerry also follows-up with citizen concerns, providing thorough and thoughtful written responses.

## **Personal**

“Can-do” attitude was well-displayed during the 250<sup>th</sup> events, and in the months of planning leading up to them. Follow-up is often too slow, as discussed above.

Personal integrity is very high. May be a little too patient with cases of under-performance.

Kerry is approachable and operates with honesty and integrity. I would like to see a higher level of attention to detail on some “run the operations” financial and policy items where I have seen feedback suggesting there are improvement opportunities.

Kerry is very approachable, honest and willing to admit mistakes. Kerry does not jump to conclusions, and she is careful to consider various aspects of a situation before offering a recommendation. Kerry maintains good relationships with many individuals in the community and is well respected for effective leadership and integrity.

## **OVERALL COMMENTS**

Concord is in a much better place than it was 5-10 years ago, with improved staff morale and better organizational structure. However, we are not yet at the desired “highest level of service”, and still lagging behind our peer towns in several key areas. Kerry has re-organized creatively and hired talented department and division managers; now she needs to figure out how to utilize this talent at their highest potential, over a sustained period, without exhaustion.

Kerry continues to foster positive relationships with the LMT that maintain good morale and loyalty to the town. She has earned the respect and trust of town staff. She continues to sustain excellent relationships with Select Board members because of her integrity, intelligence, insight and approachability.

### **Areas for Improvement include:**

Communication: This includes everyday issues such as accurate, timely updates to the website. Most importantly, communication to the town must focus more on forward looking initiatives, strategic planning and productivity improvements that build confidence in town leadership. More delegation of day-to-day, internal operational activities vs. outward-facing, strategic issues. The voice of the town manager should be present in public meetings that address strategic issues.

FY 25 was a challenging year with the 250<sup>th</sup> celebration interfering with regular order in many aspects. Kerry did a good job of supporting that need without sacrificing too much regular work. I feel that overall, the organization got stronger, but is still experiencing some key position vacancies. Addressing the staffing needs and strategic planning for facilities is beginning to take place and needs to continue. My overall impression is above average in a particularly off-nominal year, which required flexibility and creativity. The tactical planning skills demonstrated by Kerry and her team in response to the 250<sup>th</sup> should provide the basis for addressing some of the long-term structural challenges in FY26 and beyond.

Overall, I have rated Kerry's performance as Satisfactory. There have been some highlights in FY25, in particular a successful 250<sup>th</sup>; strong progress on Doug White field replacement; and improvements in some areas of capital and budget planning. FY25 also brought FY26 budgeting challenges that Kerry and team met and successfully managed.

There was success in personnel items such as merit pay and some recruiting into key roles (in particular Light Plant), but also challenges with turnover/disruption in key positions. While progress was made or started in areas such as cell phones, Light Plant governance, website, etc., I would continue to challenge Kerry with a sense of urgency to make faster progress on key priorities. And, from a finance/operations standpoint, we need to get the books closed and make sure we are operating with clear policies and reporting.

Importantly, I find Kerry is open to feedback and willing to lean in to figure out how to improve what we do for Concord. Building off her consistent, thoughtful approach and calm demeanor, I believe she can take even more of a leadership role in framing choices and implications and demonstrating excellence in delivery. I look forward to working with her (and the rest of the Select Board, Town staff and Concord citizens) to identify opportunities and deliver the greatest value for our tax dollars.

Kerry is a strong leader, and she has established an effective and engaged management team. This has been a challenging year with many large initiatives demanding time and attention from Kerry and her staff, including MCI, the 250<sup>th</sup> celebration, new merit program, and the Munis conversion & implementation. Kerry has helped the team by making strategic staffing changes and supporting the reprioritization of work. There have also been many unexpected challenges that Kerry has gracefully and competently handled. Kerry is resilient, very hard-working and committed to the success of her team and the Town. I am grateful for her ongoing leadership and contributions!

**A. Achievement of 2024-2025 Town Manager Goals**

<b>Organizational Resilience</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
1	Implement a merit pay plan with a criteria based evaluation system which provides larger increases for exceptional performance	2	2	2	2	3	2.200
2	Document recruitment strategy and develop recruitment materials which highlight Concord as an employer of choice with a specific focus on inclusion. Develop and promote organizational branding.	2	2	2	1	2	1.800
3	In conjunction with the Leadership Management Team, develop an organizational values statement.	2	2	2	2	2	2.000
4	Provide regular in-house training opportunities for employees with topics that are in alignment with the Organizational Values Statement, maximizing internal talent and free trainings offered through MIIA	2	2	2	2	2	2.000
5	Adapt existing compensation plan to create a system that recognizes growth in position resulting in value to the organization regardless of formal promotion	1	1	N/A	2	N/A	1.333

<b>Overall Category Rating</b>	1.867
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<b>Diversity, Equity, Inclusion &amp; Belonging</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
6	Finalize a strategic plan that will move the Town from being (merely) EEO-compliant to one that integrates and leverages differences to create business value; begin implementation of plan	1	2	2	2	2	1.800
7	Complete a review and assessment of internal policies and practices; identify opportunities to improve diversity, equity and inclusion efforts; incorporate best practices for Town operations.	2	2	2	2	3	2.200

<b>Overall Category Rating</b>	2.000
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<b>Effective Governance &amp; Communications</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
8	Develop standard agenda template and standard protocol for remote and hybrid meetings. Evaluate automated agenda management systems to improve efficiency, functionality and access to information	2	2	2	2	N/A	2.000

9	Draft IMA or other legally appropriate agreement, to address long-standing governance issues between Town and CMLP; generally surrounding appointment powers and procurement.	2	2	2	1	2	1.800
10	Monthly Leadership Management Team meetings, inclusive of Senior Management Team and Division Manager; work from formal agenda, providing specific opportunities for division managers to make presentations and be directly involved in problem solving	2	3	2	2	2	2.200
11	Update website layout to a more user friendly format; audit for inclusion of key documents and dedicated pages for key projects and initiatives	1	1	2	1	1	1.200
12	Bi-weekly communication from Town Manager in a newsletter format (reboot of existing report).	2	2	2	3	2	2.200

<b>Overall Category Rating</b>	1.880
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<b>Financial Resiliency</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
13	Develop ten-year capital plan for FY2026-2035; include major projects, cost estimates, debt forecast and tax burden projections. Format should be more user friendly and informative than what currently exists	2	2	2	2	3	2.200
14	Update methodology to fairly and accurately assign indirect costs to Enterprise and Other funds, including Recreation Revolving Fund, ensuring that user fees versus tax dollars are supporting business-type operations	1	1	2	1	1	1.200

<b>Overall Category Rating</b>	1.700
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<b>Strategic Planning</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
15	Identify and develop strategy to ensure implementation of recommendations, goals and objectives of key planning documents and a mechanism to track the same	1	1	2	N/A	1	1.250
16	Plan for long-term utility needs by continuing to work with MWRA and other regional partners and neighboring communities to investigate the feasibility of regional water.	2	2	2	2	2	2.000
17	In conjunction with the Public Works Commission, finalize the stormwater utility asset inventory and capital improvement plan; set rates to fully fund program	2	3	2	3	2	2.400

18	In conjunction with DCAMM, negotiate transfer of MCI Concord Wastewater Treatment Plant thus adding significant treatment capacity allowing for both redevelopment of MCI Concord and beneficial infill in CWMP area	2	2	2	2	2	2.000
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<b>Overall Category Rating</b>	1.913
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<b>OVERALL RATING SECTION A</b>	1.72	1.89	2.00	1.88	2.00	<b>1.899</b>
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**B. General leadership, governance, communications, financial, and management skills**

<b>Board</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
1	Interprets, supports, and implements Board policies and directives	2	3	2	2	2	2.200
2	Keeps the Board informed on issues, needs, and operation of Town departments	2	3	3	2	2	2.400
3	Fully informs the Board of the implications of major personnel and program changes	3	1	3	2	3	2.400
4	Advises the Board about the potential impact of government regulations and legislation	2	3	2	2	2	2.200
5	Maintains a professional working relationship with the board based on mutual respect and trust	3	3	3	3	3	3.000

<b>Overall Category Rating</b>	2.440
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<b>Leadership</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
6	Effectively implements Board policies and relevant Town Meeting decisions	2	2	2	2	2	2.000
7	Responds quickly and decisively to unexpected circumstances	2	2	2	2	3	2.200
8	Identifies innovative solutions and builds consensus while allowing for diverse opinions	3	2	2	2	3	2.400
9	Promotes a positive culture, civil discourse, and professional decorum	3	2	3	3	3	2.800
10	Manages Town affairs in an open, diplomatic, and transparent manner	3	2	3	3	3	2.800

<b>Overall Category Rating</b>	2.440
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<b>Management</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
11	Develops good staff morale and loyalty to the organization	2	3	2	2	3	2.400

12	Maintains positive working relationships with SMT and staff; coaches and mentors as needed	2	3	3	2	3	2.600
13	Uses best management practices and leverages IT innovations for local government excellence	2	2	3	1	2	2.000

<b>Overall Category Rating</b>						2.333
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<b>Finance</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
14	Presents budgets to the Select Board in a manner which promotes their full understanding	3	3	3	2	3	2.800
15	Considers input from town officials and constituents when formulating budgets and plans	2	2	3	3	2	2.400
16	Demonstrates thoughtful, creative financial budget management and strategic capital planning	3	2	3	2	3	2.600
17	Provides creative management of available resources to increase productivity and economy	3	1	3	1	2	2.000
18	Maintains confidence of the residents in quality and value of service in relation to taxes paid	2	1	2	1	3	1.800

<b>Overall Category Rating</b>						2.320
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<b>Communications</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
19	Demonstrates strong public speaking and presentation skills	2	2	2	2	3	2.200
20	Communicates the mission and accomplishments of the Town to staff and community	2	1	2	2	2	1.800
21	Understands the needs and aspirations of the community	3	2	3	2	3	2.600
22	Empowers local government to provide the highest level of service and professional results	2	2	3	2	2	2.200
23	Encourages community involvement of an active, engaged, knowledgeable, and diverse citizenry	2	2	2	3	2	2.200
24	Earns the respect and confidence of the community	2	2	3	2	3	2.400

<b>Overall Category Rating</b>						2.233
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<b>Personal</b>		<b>Ackerman</b>	<b>Hartman</b>	<b>Howell</b>	<b>McKennitt</b>	<b>Rovelli</b>	<b>Average</b>
25	Maintains high standards of ethics, honesty, and integrity in personal and professional matters	3	3	3	3	3	3.000
26	Approachable leader: encourages open communication with staff, the public, and Select Board	3	3	3	2	3	2.800

27	Pays attention to detail and follows through on plans and decisions	2	2	2	1	3	2.000
28	Demonstrates passion, energy, commitment to excellence, and a "can-do" attitude to guide Concord into the next decade	2	1	3	2	2	2.000

<b>Overall Category Rating</b>							2.450
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<b>OVERALL RATING SECTION B</b>	2.39	2.14	2.61	2.07	2.61	2.364
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<b>OVERALL RATING</b>	2.174
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