

IN BOARD OF SELECTMEN
SATURDAY, DECEMBER 11, 1999

Present: Chairman John C. Drobinski, Kirsten D. Roopenian, and Maryann K. Clark, Selectmen.

The statutory requirements as to notice having been complied with, the meeting was convened at 8:15 a.m. by Chairman Drobinski in the Loring Parsonage, 288 Old Sudbury Road.

Town Manager Interview – Greg L. Balukonis

Present: Candidate Greg L. Balukonis and Mark Morse, MMA Consulting Group.

Chairman Drobinski convened a public meeting to interview Greg Balukonis for the position of Town Manager for the Town of Sudbury. Mr. Balukonis is currently employed as the Norfolk Town Administrator. Mr. Drobinski welcomed Mr. Balukonis to Sudbury, asked him to present a brief overview of his experience, what he liked about Town government, and any information Mr. Balukonis felt pertinent to the proceedings. He explained further that there were eight finalists for the position and plans were to have a selection made by mid-January. Chairman Drobinski stressed the importance of having the new Town Manager in place in order to prepare for the Annual Town Meeting in April.

Mr. Balukonis stated he is a lifelong resident of Shrewsbury, now living there with his wife and daughter. He stated his entire career has been in local government in Massachusetts and added he has a good understanding of the system. In his current position of Town Administrator for the Town of Norfolk, he opined the character of the community to be similar to Sudbury's. He stated there had been some recent zoning improvements that mirrored goals in Sudbury. Mr. Balukonis stated he is interested in the position of Town Manager as it is a larger opportunity for him and presents new challenges.

Mark Morse, MMA Consulting Group, commented Mr. Balukonis had maintained a position in the Town of Orange longer than most people do, and noted that the Town of Hopedale is rumored to be difficult as well. Mr. Balukonis stated Orange was a good place to start, though tough, and Hopedale was also a tough community with a highly charged political atmosphere.

Mr. Balukonis responded to questions from the Board as follows:

Attraction to Sudbury – He stated the atmosphere and character of the community has always interested him. As a youth, he used to play hockey against the team from Sudbury, and later attended college with a Sudbury resident. At this point in his career he would like to work in a community that can use the skills and experience he has gained over the years. He opined it might have less to do with the job than just the attraction for Sudbury itself. He opined further he would feel good about going to work every day.

His contract with Norfolk expires in June, and he informed his Board that, while he was not seeking to leave, this was an opportunity for advancement that needed to be explored.

With regard to balancing a budget, he stated the Town Manager needs to spend a great deal of time with capital planning and budget and financial planning. He was responsible for developing a long-range capital plan for five years, as well as specific budget items. He stated it is crucial to be sure all departments are adequately represented at budget time and that priority is developed to ensure accomplishment over time. His main goal is to keep

things on track so that all priorities are met. Debt exclusion and capital exclusion have been the primary ways of handling 61A and 61B properties in Norfolk.

With respect to management style, he would make every attempt to meet all department heads before starting the job, including School Department at the schools. He believes the key to communication is to be approachable, meet with people as necessary and be a decent individual. He stated the communication between department heads to keep everyone informed ensures that appropriate paperwork and research are accomplished in order to meet goals and objectives, such as receiving Chapter 90 monies.

He stated he prefers informal communications in many instances, but acknowledged that could be difficult in Sudbury as not everyone is located in the same building or area of Town. In Norfolk he can "touch base" with people daily. Weekly meetings would be a requirement for most departments such as Finance, Police and Fire, etc. as well as utilizing email communications whenever possible.

Describing his role at Town Meeting, he stated having all facts and figures prepared and publicized is critical to getting issues appropriately addressed. He acknowledged also that residents are busy and no matter how much information is made available there will always be those who have not retrieved it. He emphasized being organized at Town Meeting is important, knowing who will speak to what issue, and perhaps breaking an issue into smaller pieces which are presented by different individuals.

He stated key transition issues to be familiarization with department heads and staff to see the entire organization, ask for suggestions/ideas from those individuals, and attend as many meetings as possible to learn what issues are important to everyone. The budget for Town Meeting would be a high priority.

With respect to grant applications, he stated his experience has been successful, and cited the example of Norfolk's new Town Hall in which the land was obtained for no cost and a grant for \$500,000 was obtained for road work. Grant writers are recruited from the community, with many volunteers obtained through the Senior Center.

He stated Norfolk does not have sewers, though there is a need for them for corporate development, mostly in fringe areas of the Town. They intend to join forces with another town to build a facility just outside the Norfolk line. Norfolk wants to encourage commercial growth and knows sewers are a key part of that development.

The permitting process sometimes impedes commercial growth but Norfolk is also near many other communities with commercial centers. Norfolk is 95% residential. He hopes growth will slowly come into Norfolk, utilizing the Master Plan and an organized approach.

The Board responded to Mr. Balukonis' questions as follows:

Transportation and traffic issues – Chairman Drobinski stated it is a priority for the Board, taking a reactive rather than proactive position on traffic problems. Mass. Highway Dept. is sometimes difficult to work with in solving issues.

Town Planner – This position has been in effect since the early 1980s, sometimes a reactive position responding to growth in Town. Chairman Drobinski stated the main planning issues are traffic, development, land use, finances, and economic sustainability. He added that economic sustainability would be a key task for the Town Manager.

Mr. Morse remarked on Mr. Balukonis' experience in the Town of Orange. Mr. Balukonis responded when he started the job there had been no one there for six months, which left him with six months' of mail to open and deal with. There were serious issues, which forced him to "hit the ground running". He referred to himself as a risk taker and likes to get things done.

Mr. Balukonis closed by stating he appreciated the opportunity for an interview, he is interested in the Town and the position, and promised to do whatever it takes to get the job done in a friendly, but hard working manner.

The Board thanked Mr. Balukonis for his time and interest in the Town Manager position.

Town Manager Interview – Maureen Valente

Present: Candidate Maureen G. Valente and Mark Morse, MMA Consulting Group.

The Board interviewed Maureen G. Valente, currently serving as Interim Town Manager and Finance Director for the Town of Sudbury. Chairman Drobinski welcomed Ms. Valente and asked her to tell the Board about herself and her experience, and anything she might like to add to information on her resume. He explained eight finalists are being interviewed with final selection targeted for January.

Ms. Valente stated she has been with the Town of Sudbury since August of 1997 in the position of Finance Director. She stated she originally applied for the Assistant Town Manager position in Sudbury but Mr. Steve Ledoux convinced her to come in as Finance Director instead. She stated her career has been varied, in areas of municipal finance, training, and teaching, as well as a ten-day visit to Slovakia helping them get some new systems going. She stated this breadth of experience gives her a strong background to address many different issues in Town government.

The Board posed various questions; Ms. Valente responded as follows:

With regard to "budget busters", she feels those decisions belong to the Town at Town Meeting. The Town Manager's role is to bring those issues together in such a way that conscious and knowledgeable decisions and tradeoffs can be effected. She stated the Financial Summit was a way to do this. She believes the Town Manager's role also includes finding creative ways to get things done. Department heads and staff work hard to accomplish goals and packaging capital expenditures along with a revenue stream is a reward for their hard work.

She stated more ways are needed to educate people, as proponents of short-term goals often wear "blindfolds" and may not realize the detrimental impact a short-term goal may have toward accomplishing a long-term goal. Compromises are essential to finding solutions toward moving forward as a community. The Town Manager needs to facilitate this dialogue and cross-referencing so everyone understands goal interaction.

Ms. Valente stated the other department heads have been fabulous in working with her during this short time period of taking on additional duties. Teamwork and willingness to work hard have been outstanding. In terms of reorganization suggestions, she stated there is a conflict in the structure of Town Manager, Assistant Town Manager and Personnel positions, as they seem to be somewhat disjointed in assignment of duties. She would move the budget responsibilities over to the Finance Department under a Director of Finance and Budget, and revamp the Assistant Town Manager position to be a Personnel Director, specializing in that area as well as taking on special projects in support of the Town Manager. The Finance Department needs to be more involved in the budget process. Each department needs to draw on the strengths and skills of the people employed there.

Creating a “super department” of Human Services would be beneficial. The Council on Aging, Youth Coordinator, and Health Department all have outreach programs, and a structured program would strengthen their effectiveness.

Ms. Valente also espoused consolidation of land use departments such as Planning, Conservation, Public Works, etc. to work together on permitting issues in a more integrated fashion so that people do not have to go to different buildings to get things done. She favors a more customer-driven, output-related way of handling items.

She stated her personal working style to be much like the “Steven Covey” approach to plan out her time and effectiveness and attempt to get support staff to take on more responsibility toward accomplishing tasks. She referred to Ms. Silva as an “enabler” who keeps her on track and reminds her of things that need to be done. She would like to see a clerical position in Accounting to handle the routine tasks, freeing up the accountants to deal with financial issues. She stated the Town employs many bright, capable people who are able to handle much more than they currently are.

As for a management style, she likes to bring people into brainstorming sessions and idea exchange. While it can happen at a department head meeting, a smaller group is more effective for brainstorming, with the assistance of a facilitator skilled in drawing out their ideas. “We have to involve our people, develop them and make them care about coming to work in the morning and doing the best they can.”

Economic development is comprised of many factors that are difficult to control. Looking at what can be done to accommodate growth is the first step. The Town Manager could create a management intern position, for a period of one year, not responsible for daily tasks but to attend to the larger issue of securing grants and working on long-range projects. Key players are the Town Manager and the Town Planner. She stated the Master Plan lists many ideas and options to be explored and pursued with great dedication. She feels the residents are comfortable with the present character of the Town and are not really ready to open the doors to wide scale commercial development.

For complaints registered with the Town Manager’s office, she stated a tickler system works well to keep important date and events in mind, as well as to check back to see how a problem was resolved. Open-minded communication is crucial, taking down the information, assure the individual the matter will be looked into, contact the department head and then follow up. People want to know someone will listen to their concerns, whether it is

a Conservation, Master Plan, Zoning, or Planning issue. An issue may seem small to some while it is a large concern to others, such as a senior feeling she could only afford one pay-per-throw bag at a time. She stated some departments get more complaints than others, and the Town Manager needs to know whether that is typical because of the nature of the work, or if there is another problem. Follow-up needs to be fair, respectful and timely.

The Town should be doing more risk management to alleviate/lessen litigation issues. Staying on top of an issue and making sure people respond in a timely manner can work toward resolution. Even though the Town Manager is not in charge of those things, he/she can supervise the activity to ensure everything that can be done is accomplished. The Town Manager also conveys the wishes and intent of the Board to Town Counsel and vice versa.

There should be a “no surprise” policy regarding legal issues. Conservation Commission, who utilizes separate counsel from Town Counsel, has to request access through the Town Manager, and must inform the Town Manager if an issue is ongoing or has been resolved. As the Town Manager is the one who approves the bills, that person needs to be able to control those costs by being kept informed.

She remarked that most Town Managers generally follow a strict upward career path, moving from smaller towns to larger ones. She wondered though that people with this experience might just be looking at Sudbury as a safer place to practice what they already know. She views the Town Manager position as one of great growth potential for her as it presents new challenges. She believes the knowledge and experience she has gained in following a different career path gives her strong background for the position. She believes there is a “glass ceiling” for women in this profession, and alternate experiences can produce as much skill and expertise as if it had occurred on a typical career path.

She stated she loves what she does, and that keeps her interested and motivated. She loves town government and the challenges it presents. As for balance in her life, she enjoys working hard and putting energy into things, and stated her children are involved in many activities. Her family organizes their time well, both as individuals and family, as her husband is also involved in Town government. She stated the Town Manager position does afford her some flexibility in working her schedule around that of her family if need be. As for aggravation, repetitive mistakes are annoying, and feeling like that employee is either not working up to standard or there is a problem with the duty versus job description.

It was her policy as Finance Director to be friendly and congenial with staff, but not to socialize with them a great deal in order to maintain some supervisory distance. Maintaining a peer dialogue and being straightforward is the only way to manage situations.

The Board responded to Ms. Valente’s questions as follows:

Selectman Clark stated Mr. Ledoux was instrumental in the consolidation of the Finance Department and the Department of Public Works. As the first Town Manager, he had a difficult task and initiated much departmental reorganization. The next person will need to refine and fine tune operations to keep them effective. Selectman Roopenian stated Mr. Ledoux worked hard at getting the Strategic Planning Committee going. She stated she would like to see a strong team approach take hold. Chairman Drobinski stated he had been

skeptical about the switch from Executive Secretary to Town Manager, but added it worked out well and was a fairly smooth transition.

As for the community's expectations of the Town Manager, Chairman Drobinski stated it is an ongoing process to understand all the nuances of what residents think. Selectman Roopenian stated the overall nature of the community has changed over the past few years, even in the time she has served on the Board. Selectman Clark stated the residential growth spurt has attracted many newcomers who bring new ideas with them. She cited the demand for walkways as an example of things these people have seen elsewhere.

Ms. Valente stated the Board has the benefit of seeing her in action for the past couple years as Finance Director and three months as Interim Town Manager. She thanked the Board for the opportunity to serve the Town in those capacities and hopefully as Town Manager.

The Board thanked Ms. Valente for her time and interest in serving as Sudbury's Town Manager.

Town Manager Interview – Mark W. Haddad

Present: Candidate Mark W. Haddad and Mark Morse, MMA Consulting Group.

On behalf of the Board, Chairman Drobinski welcomed Mark W. Haddad to interview for the position of Town Manager for the Town of Sudbury. Mr. Haddad is currently employed as the Town Manager for the Town of Cohasset. Mr. Drobinski asked Mr. Haddad to present a brief overview of his experience, what he liked about Town government, and any information he felt pertinent to the proceedings. He explained further that there were eight finalists for the position and selection is planned for mid-January. Chairman Drobinski stressed the importance of having the new Town Manager in place in order to prepare for the Annual Town Meeting in April.

Mr. Haddad reminded the Board he had interviewed for this position three years ago and has served as the first Town Manager for the Town of Cohasset for the past two and a half years. He stated it was definitely a challenge as the Cohasset Board of Selectmen was not totally behind the change of government. His duties included developing and implementing the Town's Operating Budget, serving as Chief Procurement Officer, coordinating all Town departments, preparing all Town Meeting warrants, and negotiating all union contracts. The Town Manager was sued in several instances. He stated it was a difficult transition but not without its successes. He stated he believes this experience has made him a viable candidate for the position of Town Manager for Sudbury.

Mr. Haddad responded to questions from the Board as follows:

Regarding economic development and grant writing, he stated Cohasset has a Growth Development Committee whose purpose is to revitalize the downtown area and bring forth commercial growth. There has been an attempt to develop a walkway system to connect Cohasset Harbor with the village to stimulate businesses. He stated development is difficult as the residents prefer to keep their town primarily residential at this time. He would like to hire a part-time planner to assist in small projects.

In dealing with department heads, he used an open communication approach in asking each one what their issues and concerns were, talked to committees, and various boards to insure their needs would be met and that finances would not be redirected from one board to

another, i.e., library funds used to purchase highway equipment. There was much distrust in the Town Manager form of government.

He stated Cohasset is in the middle of school projects with a School Facilities Committee. The Maintenance Division, created by the Dept. of Public Works, has taken over the maintenance of the school buildings, which needed a great deal of attention before new buildings can be provided and ready for occupancy. He has created a database to keep track of dates various maintenance functions were last attended to.

As to management style, he uses an "open door" policy for everyone, including the public. He answers his own phone. He believes he has dispelled all concerns that the Town Manager is unapproachable. To deal with budget requests from department heads, it is sometimes a difficult choice, but he tries to phase requests in slowly as priority demands, but notifying those whose requests are not met this year that their project will go in next year. A police cruiser was cut this year to allow the purchase of a fire truck.

He meets with all departments as a whole once every two months but actually deals with them individually on a daily basis. All departments are located in one building.

He delegates out the tasks that he needs to oversee but not be directly involved in. At this time he handles many tasks, including personnel, but depends heavily on the Town Accountant who is the Director of Finance.

The Town of Cohasset is currently examining traffic patterns to assist downtown businesses and is looking at grant money to help fund it. Businesses are also donating money toward this goal via the Chamber of Commerce. He stressed the importance of finding the best "mix" of goals and funding as people are hesitant to accept change.

He presents the budget at Town Meeting and sometimes speaks on other issues to explain them to residents.

He recently hired four additional firefighters who are also paramedics. As Cohasset is not located on any major highway, it is difficult to get people to medical facilities in emergency situations. This was heartily accepted at Town Meeting as was the fire truck purchase.

With litigation issues, he tries to resolve as much as possible before the case goes to court and will appoint a small committee to deal with a specific issue.

He stated Sudbury is an intriguing community, similar to Cohasset but larger. If selected, he would sit down with department heads to see where needed improvements lie, and eliminate any duplication of effort. He questioned if there is enough work to keep an Assistant Town Manager busy.

The Board responded to Mr. Haddad's questions as follows:

The new Town Manager would have to embrace the budget with the knowledge that he/she was not responsible for it, given the short time before Town Meeting. The Finance Committee, as well as the Capital Improvement Planning Committee, will explain any budget issues.

As to collective bargaining matters, most are almost concluded.

The Board has not taken a position on the possibility of increasing the Board of Selectmen to five members. Selectman Clark stated more ideas and opinions can only improve things. All surrounding towns have five-member boards. As administrative duties are handled by the Town Manager, the Selectmen can focus their energies on policy making. She expressed concern for violating the Open Meeting Law and not speaking to a Selectmen even in a social setting.

Chairman Drobinski stated Interim Town Manager Valente is a consummate professional and would be an integral part of the management team if she were not selected as the new Town Manager. The interests of the community are first priority.

Mr. Haddad thanked the Board for their time and the opportunity to interview for the position.

Town Manager Interview – Candidate 8

Present: Candidate 8 and Mark Morse, MMA Consulting Group.

NOTE: Candidate 8 requested confidentiality with regard to interviewing and not being named in meeting minutes or press releases without consent.

On behalf of the Board, Chairman Drobinski welcomed Candidate 8 to the interview for the position of Town Manager for the Town of Sudbury. Mr. Drobinski asked Candidate 8 to present a brief overview of work experience, likes and dislikes about Town government, and any pertinent information for these proceedings. He explained further that there were eight finalists for the position and selection is slated for mid-January. Chairman Drobinski stressed the importance of having the new Town Manager in place in order to prepare for the Annual Town Meeting in April.

Candidate 8 stated he has been involved in municipal government his entire adult life. He stated he often considered pursuing a career in politics but decided he preferred the administrative end as he likes to get things accomplished. He has been in his current position for twelve years, with earlier experiences in planning, teaching economics, and a stint in the Peace Corps. He stated that town government “turns him on” and that he is well suited to it.

Candidate 8 responded to the Board’s questions as follows:

Coming in as Town Manager, he would want to know what the key issues are, “who cares about what”, in order to address concerns by various departments and committees. He opined that process could take up to a year, to be comfortable with all issues.

Schools can be a “budget buster”, setting their budget requests high and being unhappy with cuts. Costs have to be controlled, and departments (schools) have to be accountable for their expenses and attempts to control them. He meets monthly with the School Committee, beginning in October all the way through the budget process.

He stated he is seeking to make a move now, as the position of Town Manager has different responsibilities and challenges than his current Town Administrator position. He feels many issues have been accomplished and that he would be leaving little behind undone. Zoning

bylaws have been retooled to allow development, grant monies pursued, housing complexes started, open space acquired, etc.

He stated, if a Town is not already sewerred, it should seriously consider it as a precursor to development.

He has divested himself of routine finance and personnel issues due to having excellent people in those positions. He estimated 60% of his time when he was first employed in this position was spent on finance issues.

As to general management style, he stated listening is the most important function, and then think about what needs to be done. He does not believe in micromanagement and prefers to hire the best and brightest individuals possible. He holds a department head meeting once a month, and "function groups" meet on their own schedule once a month. Issues must be aired and resolved as soon as possible. He related a street redesign project that was very contentious in Town and the steps he took to handle residents' concerns, even changing engineers in the middle of the project.

He stated he stays motivated by knowing he can trust the key people around him, and sometimes finding the funny side of an issue. He does not take it so seriously that stress becomes critical. There are also many positive aspects to this type of position. People who are self-absorbed and not interested in the community bother him. Everyone should be willing to bend a little.

He usually does not attend Town Meetings in the town where he lives. He believes little gets accomplished there, and feels the most progress can be made at Finance Committee meetings.

As a Town Administrator, he sometimes makes presentations at Town Meetings, and usually relies on his Board to be fully prepared.

He stated they are currently improving their Town Center from an aesthetic standpoint. When it is completed, it will be beautiful and really add to the village feel.

The Board responded to the candidate's questions as follows:

Selectman Clark stated the first Town Manager had to win the trust of the department heads and still make changes that are needed. Some consolidation of duties was effected. It is difficult to maintain daily contact as departments are spread out in several locations. The new Town Manager will need to hone the current Town government so that the Town is running as efficiently as possible and not duplicating services and effort.

Selectman Roopenian stated she is looking for an individual who can work effectively with the individuals who are already here and form a good management team. Growth is an issue, and communication skills will be critical.

Chairman Drobinski stated the role of Town government is to serve the citizens and for the Town Manager to make sure they get the services they pay for. He is looking for a person

who can sustain what Sudbury wants from a financial and land use perspective as well as a municipal and educational perspective.

The Board stated growth and land use is the most important issue at this time. There is limited infrastructure. Sudbury is considered affluent, yet there is little spare money for projects. Community character must be considered before beginning projects, and the things that need to be done are costly to accomplish.

The Board stated the Master Plan process went very well. It is a good document that sets forth a strong framework of where the Town will be going. A lot of citizens became involved in preparing the Master Plan.

The Board thanked Candidate 8 for his time and interview. Candidate 8 thanked the Board for their time and the opportunity, and wished them luck in their search.

The meeting was adjourned at 12:10 p.m.

Attest: _____
John C. Drobinski, Chairman