

TOWN OF CHELMSFORD

Annual Non-Union Employee Performance Review

Employee Name: Darlene Lussier

Current Level and Step: Grade 9 Step 5

Department: Town Manager Office

Proposed Level and Step:

Position: Town Accountant

Review Period: FY20

Section I: Objectives/Accomplishments

Assess the employee's performance based upon objectives previously set for this review period. Describe below each major objective and accomplishments against each objective.

GOAL #1

Implement Munis Updates: COMPLETED. I have implemented the latest version of Munis 11.5. All functionality is working very well. The school and town are integrated into one system.

GOAL #2

Hire and train new staff: COMPLETED. I hired two new staff members. They have been on the job for 10 months. They are both doing a good job. They required training, but quickly learned their positions.

Goal #3

- 1) Update W-9 requirements for Vendors: COMPLETED. We have been able to complete the W-9 updates of all current vendors. We now have a process that we collect all W-9 information during the setup of any new vendors. During the Audit process with the outside audit firm, they found no issue with the W-9's.

Section II: Other Key Performance Factors

Comment upon strengths, effectiveness in dealing with people/teamwork creativity, problem solving, leadership, communication, initiative, and productivity. Outline areas requiring improvement which will be addressed in the Training and Development Section.

Again, the auditors gave a great review of Mrs. Lussier and her Department.

SECTION III: Overall Performance Evaluation (Check One)

Taking into account all areas of the employee's performance described above, please mark (X) in the appropriate place on the continuum below:

In FY20 Darlene continued to execute her responsibilities as town accountant in an exceptional manner, achieving all of her goals for the year. She has effectively addressed staffing attrition and hiring as well as unexpected challenges associated with the pandemic. Darlene's reports and communications on the fiscal status of the town are thorough and to the point, consistently demonstrating her breadth and depth of knowledge as well as her skilled insight in interpreting the data. Darlene is always accessible and responsive.

I think she has done an outstanding job to hire and train two new staff associates, allowing for a seamless transition to their duties.

The COVID-19 crisis has impacted everyone in unexpected ways. Darlene has maintained the operational functions of her department without fail. She has met the challenges of keeping a critical eye on all aspects of town finances, including proactively preparing for submission for reimbursement of expenses related to the crisis.

Her reports to the Board of Selectmen continue to be precise and informative, providing an excellent, objective view of the status of the budget, and alerting us to any areas of concern.

Darlene's level of skill and understanding are evident in the review she receives from the auditors.

All Interactions we have had with Darlene this past year are again open and direct. Discussions, weather in the BOS meetings or one on one are always well thought and complete.

___ Does Not Meet Requirements ___ Requires Improvement ___ Meets Expected Level of Performance ___ Consistently Exceeds Expected Level of Performance ___ Exceptional Performance
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Section IV: Goals and Objectives

List and clearly define each goal and objective for the next performance cycle. Target a total of 3-5 goals. Add additional pages as needed.

FY21 Goals & Objectives:

- 1) Development and continued awareness of official duties.
 - Demonstrate leadership with committees and board members
 - Professional representation of Town's fiscal practices
- 2) As part of the Town's finance team, continue to provide guidance with respect to financial matters of the Town.
 - Review of all purchasing under department purview
 - Reduction in overall expenditures through constant management
 - Analyze receipts versus revenue estimates on a regular basis
 - Anticipate possible revenue shortfalls and make decisions on how to deal with them
- 3) Enhance Staff Training.
 - Bring Assistant Town Accountant to state association school in March
 - Train Assistant Town Accountant to perform higher level routine accounting tasks
 - Send staff to additional training as needed and as funding permits
 - Continuing cross training of all staff members

Section V: Training and Development Plan

Please list the specific developmental objectives and activities which may improve current performance, help accomplish company/department objectives, broaden skills in the current role, or develop a skill/ability essential for assuming additional responsibilities.

- Attend professional meetings, annual school and conferences
- Maintain membership in professional organizations

SECTION VI: Performance Appraisal Approvals

First Level Management

Date

Second Level Management

Date

Other Signature (If Needed)

Date

Human Resources

Date

I have reviewed this appraisal and discussed its contents personally with my manager. I accept the objectives and development plans we have agreed upon.

Employee _____ Date _____