

# **SUCCESSION PLANNING ANALYSIS REVIEW & RECOMMENDATIONS**

## **TOWN OF CHELMSFORD, MASSACHUSETTS**

**EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT**

**MAY 2022**

**Edward J. Collins, Jr. Center for Public Management**

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**MCCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES**



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## Introduction

The Town of Chelmsford retained, under a grant provided by the Commonwealth of Massachusetts Community Compact Program, and the Edward J. Collins, Jr. Center for Public Management (Collins Center) to assist the Town in succession planning and development. As part of the review, the Collins Center Project Team (Project Team) completed a succession planning analysis, including reviews and recommendations.

## Succession Planning

Succession Planning is the process of identifying critical positions in an organization and developing action plans to fill those positions. Developing a plan requires an evaluation of an organization's readiness to face the realities and challenges of staff retirement, turnover and loss of institution knowledge. Historically, organizations have focused on "filling" a job. While filling jobs is critical, it is important for organizations to prepare for the transfer of knowledge, increase competencies and capacities of employees to assume the role and/or responsibilities of a position that becomes vacant. This work should be done on an ongoing basis and not in reaction of a vacancy or crisis. A succession plan should be applied across the organization regardless of any anticipated vacancy. The Collins Center's approach and findings are detailed within this report.

## Methodology

The Project Team conducted an initial meeting with the Town Manager and department leadership to obtain context and relevant information for the review of human resources policies and to assist the Town in succession planning and development, refining the scope of the project and identifying specific concerns. The Project Team was provided with positions, names, longevity, and relative ages of all staff members in departments identified as a priority for this review.

After the initial meeting with municipal leadership, a kickoff presentation was conducted by the Project Team for department leadership to introduce project expectations and foster participation. Individual interviews between the Project Team, departmental leadership, and key municipal leadership were utilized to gather relevant data and inform the Project Team's review.

After conducting the initial meeting, department leadership were asked to complete documentation verifying core services for their respective departments, core competencies, current staff positions, and to rate each current employee on their experience and aptitude for identified core competencies. This allowed for a quantitative assessment of departmental "depth" – its ability to continue to deliver services in the event of staff disruption by way of retirement, resignation, leave of absence, or personnel otherwise leaving their position(s).

After merging information gathered from departmental interviews and worksheet data, the Project Team conducted an independent assessment measuring the readiness level of each department to transition responsibilities in the event of staffing changes and/or disruptions, assigning each a risk factor. Risk factors were ranked as follows and will be reflected in the body of this report:

- **Priority 1 departments**, requiring staffing and responsibilities be reviewed immediately
- **Priority 2 departments**, requiring staffing and responsibilities be reviewed in the short term
- **Priority 3 departments**, requiring minor review - otherwise poised for leadership succession

## Summary of Findings and Recommendations

The Town of Chelmsford has numerous talented and dedicated staff. Like many municipalities, Chelmsford is experiencing the impact of an aging workforce, demographic and populations shifts, and competition for qualified candidates. As a result, Chelmsford needs to address succession planning in the immediate, short term and long term to continue to provide exceptional public service for all of its stakeholders. The following Table summarizes the priority designation of each department, the details of which are contained within this report.

Priority 1	Priority 2	Priority 3
Human Resources	Accounting	Building
Town Manager	Cemetery	Information Technology
	Community Development	Finance
	Council on Aging	Library
	Health	Public Works
	Telemedia	Town Clerk
	Veteran's Services	

## Findings & Recommendations

The following sections are presented alphabetically by the Priority designation. Within each department discussion, the key position is identified, with reference to retirement potential, number of staff, responsibilities of the department, competencies needed and a discussion of current staff skills and potential.

### PRIORITY ONE - IMMEDIATE

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Human Resources	Human Resources Director	1 full-time	Retirement Eligibility: <5 years

#### Overview

The mission of the Human Resources Department is “To attract and retain a qualified workforce, to maintain fair and equitable personnel policies, and to promote a safe, healthy work environment.”<sup>1</sup> The Department’s core services include processing new hires and changes in employment, including onboarding, health, dental, vision, life benefits ( including the 3 Water Districts), separations, insurance elections, schedule physicals, process employee change forms, emergency leaves, and associated changes in benefits, managing personnel issues, employee relations, grievances, processing payroll changes and retiree deductions, processing worker’s compensation and life insurance claims (including injuries while on duty claims for public safety personnel), hiring throughout the municipality (including posting positions, job descriptions, and participating in interviewing), managing requests for absences and FMLA, managing school employee active/retiree benefits, retirement payments, and comanaging employee relations. The Department is, functionally, one full-time Director of Human Resources. For the purposes of succession planning, any immediate short-term replacement would likely need to be an external hire.

<sup>1</sup> 2021 Annual Town Report. Town of Chelmsford, MA. Accessed March 11, 2022.

<https://www.townofchelmsford.us/DocumentCenter/View/13697/2021-Annual-Town-Report>.

### Findings and Succession Assessment

Based on the Project Team’s succession assessment, the Department has been highlighted as Priority 1 for continuity of operations currently and potentially devastating in the event current departmental director cannot continue in the position. For a community, the size of Chelmsford (with over 300 active full-and part-time municipal employees and over 1,000 retirees on insurance, 800 school personnel, and 30 water district employees), a Human Resources Department of one is simply unsustainable. The lack of direct personnel support does not allow for the Director to effectively execute the department’s mission, explore cost saving efficiencies, technology enhancements, provide training for personnel, much needed policy updates relating to Human Resources generally and provide adequate Human Resource Services to the employee base. Currently, the Assistant Town Manager fills in when the Human Resources Director is unavailable or out of the office. The Human Resources Department currently does not have the resources that would sustain continuity of operations in the event the Director leaves or is unable to continue in the role. No potential internal candidates able to perform the duties at this time.

### Recommendations

- Conduct a full organizational structure review of Human Resources, inclusive of all tasks and responsibilities handled by the Director, handled across various departments and positions, and handled by outside vendors or agencies to gain valuable insight, create greater efficiency, and create an opportunity to appropriately grow the Department to an adequate size or distribute tasks across appropriate positions within municipal government.
- Create a Human Resource generalist position to manage benefit program for active and retiree personnel, retirement counseling, be the interface with school department and water district personnel, life insurance claims, public safety injury claims, work with Assistant Treasurer to manage school employee retirement payments, scheduling physicals and workers’ compensation claims, OSHA filings, accident investigation, and insurance reporting.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Town Manager	Town Manager	3 full-time	Retirement Eligibility: <5 years

### Overview

The Office of the Town Manager is responsible for Chelmsford’s municipal operations and its administration, directing departments as well as various boards and commissions. The Town Manager, along with the Select Board, form the Executive Office of the Town of Chelmsford. The Town Manager also functions in an advisory role to the Select Board, recommending actions for the broad purposes of benefiting the Town. The Department consists of the Town Manager, an Assistant Town Manager, and a Support Services Coordinator. However, in total, the Town Manager has 16 direct reports.

### Findings and Succession Assessment

Based on the Project Team’s succession assessment, the Department has been highlighted as a Priority 1 for continuity of operations in the event current departmental leadership cannot continue in the position. The Office of the Town Manager has responded to critical needs unmet throughout municipal government – ranging from economic development, mental health and social welfare, and personnel safety – through a patchwork of positions housed in its own Department as opposed to the creation of positions in more appropriate departments. While the Town Manager deserves credit for recognizing these key needs, the organizational structure is a fairly siloed which impacts the ability to create clear succession plans.

Organizationally, having an Assistant Town Manager position provides for the Town Manager position to be filled from within. However, currently, that potential is unlikely. Additionally, because the organization is flat, there are no successor positions identified. The nature of municipal chief executives in Massachusetts is for Town Managers and Administrators to not be promoted from within. No clear successors for any of the positions in the Town Manager department were identified.

- Continue to mentor and provide professional development opportunities for departmental staff as well as managers across the organization.

**PRIORITY TWO – SHORT TERM**

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Accountant	Town Accountant	4 full-time 1 part time	Retirement Eligibility: >5 years

**Overview**

The responsibilities of the Accounting Department are record keeping of all financial transactions of the town; processing of all bills, warrants, receipts, payroll, and ledgers; and supplies departments with financial reports and payroll information. The Accounting Division ensures the town is in compliance with generally accepted accounting [principles], federal and state laws, and town meeting authorizations.”<sup>2</sup>

Core services of the Accounting Department include the administration of payroll, the processing of accounts payable for the Town and the School District, recording leave time, processing budget/financial reports for municipal departments, and the posting of financial/budgetary entries. The Town Accountant reports to and is hired by the Select Board.

**Findings and Succession Assessment**

The Department is made up of four full-time employees and one part-time employee: the Town Accountant, Assistant Town Accountant, Payroll Administrator, Principal Clerk II, and a retired part-time helper with certain routinized projects. At the present time, it appears that the current Town Accountant is more than five years removed from retirement eligibility and has no immediate plans to leave the position. At this time, it would be a challenge to fill a sudden vacancy from within the department. However, over the longer term, with cross training, mentoring and professional development, it is likely an internal candidate could be promoted. Based on the Project Team’s succession assessment, the Department has been highlighted as being at a Priority 2 because of the ability of the current resources to maintain continuity of operations in the event of an absence for a short period.

**Recommendations**

- Continue mentoring, training and educating the existing personnel with an emphasis on public management as well as technical skills and accounting industry knowledge.
- Consider further assessing the aptitude of the Principal Clerk II as an appropriate candidate for succession to leadership positions in accounting as well as in the Finance Department generally.
- Focus on overall continuing education for all personnel.

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<sup>2</sup> *Accounting*. Town of Chelmsford, MA. Accessed March 10, 2022. <https://www.townofchelmsford.us/115/Accounting>.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Cemetery	Superintendent	4 full-time 1 part time	Retirement Eligibility: >5 years

### Overview

The Cemetery Department is responsible for the maintenance and care of all of Chelmsford’s cemeteries. The Department is managed by a Superintendent appointed by a three-member, elected Board of Cemetery Commissioners. Core services include the maintenance of six cemetery grounds at approximately 70 acres, customer service, coordination with funeral homes for events, planning and assisting in burials, selling plots on an as needed and pre-needed basis, and departmental budgeting and bookkeeping.

### Findings and Succession Assessment

The Department is made up of four full-time employees and one part-time employee: the Superintendent, Foreman, two Truck Drivers/Laborers<sup>3</sup>, and a part-time Clerk. In the next one to three years, the Department will most likely rely on its current incumbent to lead its operations. Over the longer term, with mentoring, training and professional development, the Department is potentially prepared for an internal candidate to assume leadership responsibilities. Based on the Project Team’s succession assessment, the Department has been highlighted as being at a Priority 2 because there currently no one to step into the Superintendent position. However, over time, it is likely an internal candidate could be promoted.

### Recommendations

- Consider an organizational review that would allow for cross training and shared services across and between divisions and departments and create greater efficiency.
- Begin to identify opportunities to share knowledge with and provide specific training to current staff on administrative aspects of the department.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Community Development	Director of Community Development	3 full-time	Retirement Eligibility: >5 years

### Overview

The state mission of the Community Development Department is to “provide a coordinated and comprehensive approach to the town's land use management, planning, economic development, conservation, historic preservation, and future objectives.”<sup>4</sup> Core departmental services include providing administrative and technical support to the Conservation Commission, Planning Board, Zoning Board of Appeals, Community Preservation Committee, and Housing Advisory Board, as well as a variety of temporary committees, advising on policy matters for the Town's long-term and strategic planning initiatives related to housing, economic development, transportation, open space, and natural resources, customer service and stakeholder engagement, project management, and identifying, obtaining, and managing relevant grants.

<sup>3</sup> One Truck Driver/Laborer is currently on staff, another has had the position funded and is to be hired.

<sup>4</sup> *Community Development*. Town of Chelmsford, MA. Accessed March 11, 2022.

<https://www.townofchelmsford.us/136/Community-Development>.

### Findings and Succession Assessment

The Department is made up of three full-time employees: the Community Development Director, Conservation Agent, and Planning Board Assistant. Over the next five + years, the Department will likely rely on the current incumbent to lead operations or an external hire in the event the Director leaves or is unable to fulfill job requirements.

Based on the Project Teams' findings, the Department can continue in the immediate future at its current operational level: as a group of professionals with roles that are more administrative and procedural as opposed to operating as strategic Department with an active role in the Town's planning and development. Based on the Project Team's succession assessment, the Department has been highlighted as being at Priority 2 for continuity of operations because currently there is no one able to assume the Director's role. The Community Development Director has held the position for approximately 15 years and is well-respected and effective amongst the various boards, commissioners, and key players the Department interacts with. The Conservation Agent is the environmental authority and not operationally involved in the departments planning efforts. However, if an immediate vacancy occurs, the department could function until a replacement is found.

### Recommendations

- Consider an organizational review of all positions across departments that participate in land use, economic and community development activities, inclusive of all tasks and responsibilities handled across various departments and positions to gain valuable insight and plan for the future, particularly as incumbents plan for retirement.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Council on Aging	Council on Aging Director	10 full-time	Retirement Eligibility: >5 years

### Overview

The Council on Aging offers care, enrichment programming, and key services for the Town's aging population. The Department's core services include social work, outreach to families, and dealing with elder services, program coordination for elders and those in the Department's overall area of focus, the service of meals prepared in the Senior Center full-service kitchen, otherwise provide meals, and nutrition assistance, offer respite care services for elders and their caregivers, the management of a senior transportation program, the operation of elder daycare, and managing the companion program.

### Findings and Succession Assessment

The Department is made up of ten full-time employees: the Director, Assistant Director, Social Day Program Manager, Social Day Activities Coordinator, Social Services Coordinator, Companion Coordinator, Transportation Coordinator, Department Assistant, Kitchen Manager, and Cook. In the next one to three years, the current incumbent is likely to continue leading departmental operations. Based on the Project Team's succession assessment, the Department has been highlighted as a Priority 2 because there currently no one to step into the Director's position. However, for a short term vacancy the current staff could continue the operations of the department.

The Project Team found that education and cross-training is a serious concern for the Department. Based on interviews with the Department, programming often seems to interfere with staff meetings and trainings or prevents them from being conducted in general. Additionally, the Director often fills in for

program managers when they are absent or on leave to manage their programs as opposed to dealing with the global operations of the Department. The chronic lack of cross-training, skill-building, and continuing education lead to generally lower scores in the succession assessment. Both a new Companion Coordinator and Food Services Manager have been hired since the conducting of the Project Team’s succession assessment, with the intent to also hire another cook under the Food Services Manager.

However, in the long term, with appropriate staffing, mentoring, sharing of knowledge and professional development, the department is poised to promote from within if succession planning processes are put in place.

**Recommendations**

- Focus on cross-training across higher level departmental personnel with a particular focus in public management, budgeting, program coordination, and event management.
- Offer continuing education opportunities in public management to the Director and in various services ranging from social services, transportation, companionship, etc. to personnel across the Department to offer better service delivery in the event certain personnel cannot fulfill their immediate duties.
- Coordinate time for staff meetings and continuing education and training.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Health	Health Director	8 full-time (2 ARPA-funded)	Retirement Eligibility: <5 years

**Overview**

The mission of the Health Department is to assist the Town’s Board of Health in achieving “the highest level of wellness for all Chelmsford residents and employees by reducing the incidence of illness and death.”<sup>5</sup> Core services for the Health Department include policy development and the execution of inspections, the management of disease and various health hazards, initiating and managing preventative health programs, and public health advocacy and visioning. The Department is made up of eight full-time employees (two of which have had their positions bolstered through ARPA funding): a director, 3 Health Inspectors, a nurse, a Human Services Educator, a Health Educator and a Department Assistant. For the express purpose of succession planning, the Director and two inspectors have been highlighted as positions for which to begin planning and preparation. Over the next one to three years, the Department will most likely be relying on the current incumbent or external candidate to lead its operations. Over the longer term, the Department should work towards preparing an internal candidate for leadership succession. The Health Director is hired by the elected Board of Health. The current resources can maintain continuity of operations in the event the director leaves or is unable to fulfill job requirements.

**Findings and Succession Assessment**

Based on the Project Team’s succession assessment, the Department has been highlighted as Priority 2 for continuity of operations in the event current departmental leadership cannot continue in the position. One Health Inspector showed a strong aptitude for the role of the Director and appeared to be a strong candidate for succession with additional training. Other personnel show promise, but require more training, skill-building, and continuing education to grow to an appropriate skill level to be considered for succession planning.

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<sup>5</sup> *Health*. Town of Chelmsford, MA. Accessed March 10, 2022. <https://www.townofchelmsford.us/156/Health-Department>.

## Recommendations

- Continue preparing staff for succession to the role of Director in the longer term.
- Cross-train current employees to build the overall skill level and competency within the Department and allow for the Director to focus on the more technical and strategic aspects of departmental management.
- Review current responsibilities and consider changes to position descriptions.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Telemedia	Executive Director	4 full time 1 part time	Retirement Eligibility: >5 years

## Overview

The Telemedia Department (also known as Chelmsford Telemedia) has a mission to “empower our community to stay connected and informed by using digital media technology.” The Department’s core services include broadcasting, producing, recording, and archiving public access, municipal, and education video content, the provision of live cable broadcasts and livestreams for selected essential content, designing and implementing CHSTV programming, teaching video production and media literacy to the community at large, provision of community stakeholders with A/V technical assistance, and to fill the needs left otherwise vacant by local press/media.

## Findings and Succession Assessment

The Department is made up of four full-time employees and one part-time employee: the Executive Director, Production Engineer/Educational Program Manager, Program Director, Staff Producer/News Director, and a Media Assistant. In the next one to three years, the current incumbent is most likely to continue leading departmental operations. Based on the Project Team’s succession assessment, the Department has been highlighted as being at a Priority 2 because there is no obvious successor to the Executive Director. With several positions both eligible for retirement in the next five years and indicating no interest in assuming the role of Executive Director, it will be difficult to find someone who can succeed the current Executive Director. Most current successful personnel began as community volunteers decades ago., the Project Team recommends initiating and otherwise expanding or promoting an internship/volunteer program which may or may not be able to make payment available to prospects to fill positions in the future. With appropriate mentoring, sharing of knowledge and professional development, the position of Executive Director could be filled with an internal candidate in the long term. In the short term, the department could continue operations if a vacancy occurs.

## Recommendations

- Explore expanding or otherwise promoting a vibrant volunteer/internship program to identify talented candidates for future openings, with the goal of skill-building and mentoring to replace existing staff as vacancies occur in the longer term.
- Focus on building the skill and responsibility level of the current staff with the aim of growing them into a positions which may become available as current personnel approach retirement eligibility.
- Adopt a plan to cross train, when possible, to share knowledge and skills

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Veterans	Veteran's Agent	1 full-time	Retirement Eligibility: <5 years

### Overview

The Veterans Services Department offers public assistance under MGL Chapter 115, which provides short term, temporary, and financial assistance to eligible veterans and their families.<sup>6</sup> Core Department services include the provision of timely monthly payments to Chapter 115 recipients and the ensuring of state reimbursements, veterans enrollment and access to Veterans Affairs (VA) healthcare at both the Bedford VA Medical Center and Boston VA Medical Center, VA federal benefit applications, case management and follow up, management of state and municipal veteran tax exemptions applications and documentation, state veteran bonus applications and annuity application and updates, and the functioning as both a burial agent for deceased local veterans and as the point of contact for Veterans Day, Memorial Day, and other such veteran observations, ceremonies, or commemorations. The Department consists of one full-time employee: the Veterans Agent, who functions as the de facto Department leader. In the short term, the Veterans Agent is expected to meet the leadership needs of the Department. In the longer term, there is a desire to have a prepared internal candidate take over for the position of Veterans Agent.

### Findings and Succession Assessment

Based on the Project Team's succession assessment, the Department has been highlighted as a Priority 2 for continuity of operations in the event current departmental leadership cannot continue in the position. Services are carried out by a sole member of the Department with no additional personnel, creating inherent succession complications. The Veterans Agent has obtained funding for a part-time position to assist in the handling of Department operations, which would also provide a valuable candidate for internal succession. Currently, no internal candidate exists, however, in a short-term absence, the work of the department could continue.

### Recommendations

- The Town may wish to conduct an organizational review of the social service entities to consider if shared administrative staff or physical locations could provide limited back up in cases of absence, for whatever reason.
- When the new position is filled, the employee should be trained on all aspects of the department which will provide coverage and continuity of operations.

### PRIORITY THREE – CONTINUE PREPARING FOR SUCCESSION

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Building	Building Commissioner	4 full-time 2 part time	Retirement Eligibility: >5 years

### Overview

The Building Department is the permit issuing authority in Chelmsford for all building, renovations, and work involving electricity and plumbing/gas. The Department is responsible for the enforcement of the

<sup>6</sup> *Veterans Services*. Town of Chelmsford, MA. Accessed March 11, 2022. <https://www.townofchelmsford.us/260/Veterans-Agent>.

municipal and state building code, local zoning bylaws, and plumbing, gas, and electrical codes.<sup>7</sup> Core services of the Building Department include the review and issuance of building permits and the intake of applications, customer service, retaining information on zoning bylaws, the review of construction and schematic drawings, Certificate of Occupancy and Certificate of Completion issuance, and the enforcement of ADA (521), 780 CMDR., and the Zoning Act Chapter 40A.

**Findings and Succession Assessment**

The Department is made up of four full-time and two part-time employees: the Building Commissioner, a Department Assistant, two Building Inspectors, a part-time Electrical Inspector, and a part-time Plumbing/Gas Inspector. Over the next one to three years, the Department will most likely be relying on the current incumbent to lead operations. Over the longer term, the Department appears prepared and capable to elevate an internal candidate for leadership succession. Based on the Project Team’s succession assessment, the Department has been highlighted as being at a Priority 3 for continuity of operations in the event current departmental leadership cannot continue in the position. Two new building inspectors have been hired who are good candidates for future succession. Department personnel, overall, scored well in assessed departmental core competencies. The current resources can maintain continuity of operations in the event the Building Commissioner leaves or is unable to fulfill job requirements.

**Recommendations**

- Focus on continuing education with an emphasis on utility regulations, zoning bylaws, and ADA requirements
- Create a plan for regular professional development for all staff

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Information Technology	IT Director	2 full-time	Retirement Eligibility: >5 years

**Overview**

The Information Technology (IT) Department offers expertise in and management of the Town’s IT software and hardware, with the core obligation of managing and implementing technology platforms that support core municipal functions.

**Findings and Succession Assessment**

The IT Department is made up of two full-time employees: the IT Director and the Network Manager. In the next one to three years, the incumbent Director is most likely to lead departmental operations, whereas in the longer term the Network Manager is to be prepared to take over leadership in the event of succession. Based on the Project Team’s assessment, the Department has been highlighted as being at a Priority 3 for continuity of operations in the event current departmental leadership cannot continue in the position. The Department functions well with high levels of cross-training and effectiveness at meeting departmental objectives and fulfilling services, and the Network Manager is prepared to succeed the current Director.

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<sup>7</sup> *Building*. Town of Chelmsford, MA. Accessed March 10, 2022. <https://www.townofchelmsford.us/123/Building-Inspector>.

## Recommendations

- Continue the skill-building, training, and mentoring of the Assistant Directors to build stronger internal succession possibilities.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Finance	Finance Director	11 full time 1 part time	Retirement Eligibility: >5 years

## Overview

The Finance Department is made up of several, smaller offices ranging from Accounting, Assessing, Information Technology (IT), and the Treasurer/Collector's Office. For the purposes of municipal financial integrity, the Accounting Department reports to the Select Board functionally, but fits into the Finance Department for organizational purposes. Core departmental services include overseeing all of the previously mentioned departments related to overall municipal financial management, directing all municipal financial activity from the management of funds and investments, assisting the Town Manager on budget preparation, managing the capital planning process, developing five-year capital improvement plans (CIPs), management of the budget book, and financial forecasting, engaging with customers, vendors, and other relevant parties, balancing bank statements, and generally handling the Town's cash flow.

## Findings and Succession Assessment

The Department is made up of several full-time positions: the Finance Director (who also serves as Treasurer/Collector), the Assistant Collector, the Assistant Treasurer, two Principal Clerks II, the Chief Assessor, Assistant Assessor, Principal Clerk II, Assistant to the Assessor, IT Director, and Network Manager. The Department will likely rely on the current incumbent to continue lead operations. Over the longer term, the Department will need to have prepared an internal candidate or make an external hire to lead operations.

Based on the Project Team's succession assessment, the Department has been highlighted as being at a Priority 3 for continuity of operations in the event current departmental leadership cannot continue in the position. While the current Finance Director is fully capable of meeting all their current duties, some personnel are more prepared than others to assume leadership of the Treasurer/Collector's office (and subsequently function as Finance Director). In particular, the Assistant Treasurer seems most prepared as of today to assume the functions of the Treasurer/Collector. Other staff may be prepared for promotion in the future, depending on the particular vacancy. The timing of a vacancy in the Finance Director position, and how well a succession plan and professional development plans are implemented will impact the likelihood of promotion to the Finance Director position. For other positions, the department is well poised to promote from within in the short and long term. If an immediate vacancy occurs in the Finance Director position, the current staff could carry on operations until a replacement is found.

## Recommendations

- Focus on immediate mentoring, training and professional development for the position of Finance Director
- Consider in a review of human resources functions, moving the responsibilities for retiree benefits to Human Resources to make time for cross-training within the Finance Department or create an additional hybrid role.

- Pursue mentoring, training, and professional development in the areas of personnel managerial training for all who may be eligible for promotion across all Finance Divisions.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Library	Library Director	24.75 FTEs	Retirement Eligibility: <5 years

### Overview

The Chelmsford Public Library offers educational and entertainment materials for residents of the Town, ranging from books, media, exhibitions, and enrichment programming. The Department’s core services include lending various types of materials (from books to digital), events, programming, the management and operation of a “virtual branch” which provides online programs, information, and technology to patrons, community engagement through partnership with individuals and groups to develop the knowledge, skills, and shared opportunities necessary to build a strong and vibrant civic network, fundamental literacies and fostering life skills such as reading, language learning, computer use, the operation of a “third place” for residents to build community, and the provision of spaces for civic and nonprofit organizations to gather. The Library Director reports to the elected Board of Library Trustees.

### Findings and Succession Assessment

The Chelmsford Public Library has approximately 26 full-time equivalent (FTE) employees, which does not include volunteers and pages. Major positions who were interviewed for the purposes of this assessment include the Director, Assistant Director of Support Services, Assistant Director of Outreach, Head of Technology/Facilities, Head of Youth Services, Head of Reference, Head of Reader Services, Marketing and Outreach Manager, and Office Manager. In the next one to three years, the current incumbent is likely to lead departmental operations. In the longer term, the Department will need to look to the current incumbent or an external hire.

Based on the Project Team’s succession assessment, the Department has been highlighted as being at a Priority 3 for continuity of operations in the event current departmental leadership cannot continue in the position. Department “heads” are often external candidates with advanced educational attainment and experience, reflecting a strong external hiring pool should it be necessary. The Project Team did find that computer networking knowledge is limited amongst personnel and generally restricted to the Head of Technology & Facilities. This could be resolved through cross-training of relevant personnel, particularly if the Information Technology (IT) Department is engaged in this task. Skill-building, training, and mentoring should be strengthened for the Assistant Directors to build stronger possibilities for internal succession candidates.

### Recommendations

- Utilize IT Department in the cross-training of appropriate personnel in the use of relevant technology.
- Continue the skill-building, training, and mentoring of the Assistant Directors and all staff to build stronger internal succession possibilities.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Public Works	Director of Public Works	54	Retirement Eligibility: >5 years

### Overview

The mission of the Department of Public Works is to “maintain all public roadways, public buildings, public parks and public sewer lines as well as conduct and oversee infrastructure improvement projects.” Public Works consists of several divisions: Engineering, Facilities, Highway, Parks, Sewer, and Solid Waste/Recycling.<sup>8</sup> The Department’s core services include (aside from the responsibilities listed above) fleet maintenance and repair, engineering, trash and recycling, energy management and sustainability, stormwater compliance and maintenance, and internal administrative duties such as payroll, accounts payable, budget management, and the overseeing of various bids and contracts.

### Findings and Succession Assessment

Public Works is one of the larger municipal departments in Chelmsford, with 54 FTEs at the start of FY2022.<sup>9</sup> Several personnel have recently departed, and the director is retiring in the end of May. The external candidates for the open positions including a director who is currently working with the retiring director to ensure a smooth transition. The Public Works department is currently in a rebuilding stage and is working to develop internal candidates to potentially fill positions in the future. The Project Team highlighted Public Works as being at a Priority 2 for continuity of operations. In the event current departmental leadership cannot continue in the position. The Project Team recommends the continual mentoring of identified individuals to take over key positions. The current resources can maintain continuity of operations in the event the director leaves or is unable to fulfill job requirements.

Larger departments typically have more capacity for succession planning, which is the case for the Chelmsford Public Works Department. Because the department has had recent turnover, the department is able to focus on succession planning moving forward. The project teams identified many employees with key competencies that would be able to be promoted from within, including the Facilities Manager, Town Engineering Division Manager, Sustainability Manager, Stormwater Engineer, Stormwater Manager, Lead Sewer Technician, Highway Foreman and Facilities Foreman.

### Recommendations

- Continue training and mentoring specific personnel to take over key positions

<sup>8</sup> *Public Works*. Town of Chelmsford, MA. Accessed March 14, 2022.

<https://www.townofchelmsford.us/174/Public-Works>.

<sup>9</sup> *FY2022 Annual Budget and Capital Improvement Plan*. Town of Chelmsford, MA. Accessed March 11, 2022.

<https://www.townofchelmsford.us/DocumentCenter/View/12601/FY2022-Proposed-Budget-and-Capital-Improvement-Plan>.

DEPARTMENT	DEPARTMENT HEAD	FTEs	RETIREMENT RISK
Town Clerk	Town Clerk	4 full-time	Retirement Eligibility: >5 years

### Overview

The stated mission of the Town Clerk’s Department is to promote public confidence, good will and no compromise excellence by providing the highest level of courteous, efficient service to ensure transparent governance, and to uphold the highest degree of integrity of the Town of Chelmsford’s election process through the fair, open and consistent administration of all federal, state, and local election laws.”<sup>10</sup>

The Department’s core services include the production of the Town’s annual reports, the retention of vital records and issuance of birth, death, and marriage certificates, various licensing and permitting, conducting the local census and creating annual street lists, handling voter registration, conducting elections, reviewing campaign finance, filing permanent records, posting meeting notices, maintaining meeting minutes, updating the Town webpage, conducting filings for town meetings, the Town Charter, and bylaws, handling oaths of office, enforcing open meeting laws, conflict of interests, and ethics training, and retaining, training, and scheduling election workers during local, state, and federal elections.

### Findings and Succession Assessment

The Department has four full-time employees: the Town Clerk, Assistant Town Clerk, Voter Registration Coordinator, and a Department Assistant.<sup>11</sup> In the next one to three years, the Department will likely rely on the current incumbent to lead operations. Over the longer term, the Department is well prepared for an internal candidate to assume leadership responsibilities. Based on the Project Team’s succession, the Department has been highlighted as being at a Priority 3 for continuity of operations in the event current departmental leadership cannot continue in the position. The Town Clerk has a high level of confidence in the Assistant Town Clerk and Voter Registration Coordinator that either would be well-versed in all departmental subject matter and core competencies and has suggested that the Department Assistant will help round out operations and add capacity where necessary.

### Recommendations

- Continuing education and cross-training so all personnel can continue to absorb department responsibilities.

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<sup>10</sup> *Town Clerk*. Town of Chelmsford, MA. Accessed March 11, 2022. <https://www.townofchelmsford.us/235/Town-Clerk>.

## General Recommendations for Succession Planning

As discussed above, Succession Planning is the process of identifying critical positions in an organization and developing action plans to fill those positions. It is important to remember it is not the development of a plan that sits on a shelf, yet a philosophy of continuous improvement and development for an organization and all employees. The following summarizes the actions the Town should take in approaching succession planning.

### **ASSESS**

- Identify significant business challenges in the next 1–5 years
- Identify critical positions that will be needed to support continuity
- Identify competencies, skills and institutional knowledge that are critical success factors

### **EVALUATE**

- Consider high potential employees
- Determine the competencies individuals will need to be successful in positions and to meet identified business challenges
- Categorize skill or competency gaps
- Predict the likelihood of attracting a robust and qualified candidate pool

### **DEVELOP**

- Capture the knowledge that individuals possess before departing the organization
- Create mentoring opportunities
- Cross train to share knowledge and provide for coverage if a vacancy occurs
- Create internships/volunteer opportunities, when possible
- Conduct supervisory and management training programs for those in midlevel professional or supervisory positions
- Target key positions for career development strategies

## Closing

The Project Team would like to thank the Town of Chelmsford for their cooperation and time in the review process, which included interviews to obtain relevant data on a departmental basis. Additionally, the Town's leadership deserves recognition for their willingness to be proactive in planning for succession on a departmental basis.