CAPSTONE PORTFOLIO

TIFFANY BARKER COOK

DEMONSTRATION OF PUBLIC ADMINSTRATION COMPETENCIES

Master of Public Administration

Portfolio submitted 05 MAY 2020

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Biography

Tiffany Barker Cook was born and raised in Collegeville, Pennsylvania. She attended the University of Vermont, School of Business Administration for her Bachelors of Science degree with a minor in Parks and Recreation Management. Post-graduation she moved back to Pennsylvania where she was the Parks and Recreation Director and Treasurer for Skippack Township. During her time in this position, she was responsible for creating and maintaining the parks and recreation as well as the open space budget. She also was responsible for programing events and activities within the municipality such as the annual 4th of July Celebration, a Summer Concert Series, league sports, Halloween festivities, annual fishing derby, and a joint commission of surrounding municipalities hosting a variety of bus trips. Tiffany also spent time as the Treasurer for Skippack Township where she was responsible for the municipal sewer fund billing and accounts receivable, contractor escrow accounts, assisted with the preparation of the municipal budget, and prepared monthly financial reports to be presented at the Board of Supervisor meetings.

Ultimately, Tiffany was driven to relocate back to Vermont. Currently, Tiffany is the Accounting Professional of Travel & Expense at the University of Vermont. In this roles she has be responsible for the supervision of three to four travel and expense specialists. Additionally, she has assisted in the creation of several policies and is responsible for the compliance with these policies as well as state and federal policies pertaining to travel and expense management. Tiffany works closely with all members of the university community to assist with policy compliance pre and post travel.

While living in Vermont Tiffany has taken advantage of many of the volunteer opportunities, especially in first response. Tiffany was a volunteer for the National Ski Patrol at Smugglers' Notch and Bolton Valley. Tiffany also joined Cambridge Rescue as a volunteer EMT, ultimately becoming a member of the board of directors and the Treasurer. Tiffany has spent her time on the board of Cambridge Rescue working with the Town of Cambridge on the budget and appropriation of funds from the town including the equipment fund and capital planning. During her time with these organizations, she found that the recruitment and retention of volunteers, especially in EMS is extremely difficult. This is what had motivated her to pursue a Masters of Public Administration. Her hope is with her experience and education in Public Administration she can assist in combating the continuing decline of volunteers in EMS.

Resume - Tiffany Barker Cook

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Education

MASTERS OF PUBLIC ADMINISTRATION
University of Vermont | Expected completion 2020

Bachelor of Science in Business administration
University of Vermont | 2007

Experience

ACCOUNTING PROFESSIONAL | UNIVERSITY OF VERMONT | 2015-PRESENT
- Supervise staff of three Business Support Generalists
- Oversee travel and expense reimbursement process for university faculty and staff
- Monitor and collection of delinquent travel cash advances
- Account reconciliations
- Recommend and implement process improvements for processing of travel and expense
- Provide technical assistance to end users
- Propose and test upgrades and improvements in PeopleSoft

BUSINESS/ACCOUNTING SPECIALIST | UNIVERSITY OF VERMONT | 2013-2015
- Audited and approved travel and expense reports and advances
- Collected delinquent travel advances
- Processed drawdowns of Federal Aid funding
- Reconciled accounts
- Provide technical assistance to end users
- Test upgrades and improvements in PeopleSoft

ACCOUNTS PAYABLE COORDINATOR | GMCR | 2011-2013
- Managed vendor invoices and reconciled vendor accounts
- Assisted with verifying the accuracy of general ledger accounts and assisted with audit
- Aided with implementation of a new travel and expense policy and corporate credit card program
- Reconciled all employee corporate credit card accounts
- Test upgrades and improvements in PeopleSoft, specifically the implementation of My Wallet

ACCOUNTS PAYABLE SPECIALIST | SMUGGLERS' NOTCH MANAGEMENT CO. | 2008-2011
- Oversaw the accounts payable process
- Created amortization schedules and manage payments of loans and leases
- Assisted with the management of asset accounts and depreciation schedules
- Reconciled key balance sheet accounts
- Prepared financial reports such as: state lease, inventory cost of sales, standard journal entries, sales/use and room/meals tax reporting, and construction reports
- Maintained W-9 forms for the accurate processing of 1099's at year-end

PARKS & RECRTEATION DIRECTOR/TREASURER | SKIPPACK TOWNSHIP | 2006-2008
- Oversaw Parks and Recreation department and the Open Space budget
- Managed accounts receivable and payable for all municipal funds
- Assisted with municipal budget
- Managed contractor escrow accounts
- Administered municipal wide sewer billing

Skills

Microsoft Office Suite (Word, Excel, OneNote, Publisher, PowerPoint, Access, and Visio)
| PeopleSoft | PeopleAdmin | Quickbooks | Great Plains | Adobe | Camtasia

Master of Public Administration Learning Competencies

Public Governance	(1) Does not meet standard	(2) Approaches the standard	(3) Meets the standard	(4) Exceeds the standard
1a **Capacity to understand accountability and democratic theory.**	Does not demonstrate an understanding of the relationship between democracy and accountability.	Is able to explain in simple terms why accountability is important to democratic systems.	Can illustrate how accountability in a democratic society persists within particular cases and contexts.	Is able to critique the extent to which a robust democratic accountability framework is evident in particular cases and contexts and relate accountability failures and successes to effective public policy and public administrative practice.
1b **Capacity to manage the lines of authority for public, private and non-profit collaboration.**	Cannot distinguish public sector organizations from businesses or nonprofits or cannot explain the value of collaboration for orchestrating public administration across different sectors.	Can explain in basic terms differences in governance between sectors. Is able to provide a set of examples of where collaboration and conflict persist within single organizations and between organizations.	Can illustrate how effective collaboration between organizations of different scales and sectors plays a role in the execution of public policies.	Can illustrate the key drivers of quality interorganizational collaboration, and/or identify conflict management systems for optimal collaboration across organizations of different sectors, and can apply them to new or existing cases.
1c **Capacity to apply knowledge of system dynamics and network structures for sustainable development.**	Does not understand the basic operations of systems and networks and how they relate to sustainable development goals.	Can provide a basic overview of what system dynamics and/or network structures are, illustrate how they are evident in particular cases and contexts, and explain how they relate to sustainable development.	Is able to describe a complex public administration issue, problem or context using basic system dynamics and/or network frameworks, with an eye toward achieving sustainable development objectives.	Can apply system dynamics and/or network frameworks to existing cases and contexts to derive sustainable solutions or feasible alternatives to pressing administrative and policy problems.

Policy Process		(1) Does not meet the standard	(2) Approaches the standard	(3) Meets the standard	(4) Exceeds the standard
2a	Capacity to carry out effective policy implementation.	Possesses limited capacity to systematically evaluate the effectiveness of a specific policy.	Possesses a rudimentary understanding of policy implementation processes within specific contexts.	Can undertake a detailed assessment of policy implementation within specific contexts.	Is capable of describing direct or indirect experiences relating to specific policy implementation activities and is able to identify ways of improving upon past practices.
2b	Capacity to apply policy streams, cycles, and/or systems foci upon past, present and future policy issues, and to understand how problem identification impacts public administration.	Possesses limited capacity to utilize a policy streams and policy stage heuristics model to describe observed phenomena. Can isolate simple problems from solutions, but has difficultly separating ill structured problems from solutions.	Possesses some capacity to utilize a policy streams and to describe policy stage heuristics model observed phenomena. Possesses some capacity to define how problems are framed by different policy actors.	Employs a policy streams or policy stage heuristics model approach to the describe policy making . Can demonstrate how problem definition is defined within specific policy contexts and deconstruct the relationship between problem definitions and solutions.	Employs a policy streams or policy stage heuristics model approach to the diagnoses of a problem raised in real life policy dilemmas. Can articulate how conflicts over problem definition contribute to wicked policy problems.
2c	Capacity to conduct policy analysis/evaluation.	Possesses limited capacity to systematically evaluate the effectiveness of specific policies.	Can demonstrate some exposure to carrying out policy analysis/evaluation, employing simple evaluation methods and approaches.	Can conduct an independent piece of policy analysis, successfully rendering new insights and applicable findings for policy makers.	Can employ sophisticated analytical techniques to render a policy analysis or evaluation that provides new insights and actionable items for policy makers.

Analyze, synthesize, think critically, solve problems and make decisions	(1) Does not meet the standard	(2) Approaches the standard	(3) Meets the standard	(4) Exceeds the standard
3a **Capacity to employ quantitative and qualitative research methods for program evaluation and action research.**	Possesses a limited capacity to employ survey, interview or other social research methods to a focus area. Can explain why it is important to undertake program or project evaluation, but possesses limited capacity to actually carry it out.	Demonstrates a capacity to employ survey, interview or other social research methods to a focus area. Can provide a rationale for undertaking program/project evaluation and explain what the possible goals and outcomes of such an evaluation might be.	Can provide a piece of original analysis of an observed phenomena employing one qualitative or quantitative methodology effectively. Possesses capacity to commission a piece of original research. Can provide a detailed account of how a program or project evaluation should be structured within the context of a specific program or project.	Demonstrates the capacity to undertake an independent research agenda by employing one or more social research methods around a topic of study of importance to public administration. This research generates new knowledge about the topical area. Can demonstrate the successful execution of a program or project evaluation or the successful utilization of a program or project evaluation to improve administrative practice.
3b **Capacity to initiate strategic planning and apply organizational learning & development principles.**	Possesses a limited capacity to describe how strategic planning processes work and are used as a feature of administrative practice. Is cognizant that organizational cultures exist, but cannot employ analytical lens to describe and analyze how organizational culture impacts an organization's capacity to learn.	Can diagnose when a strategic planning process would be useful and begin to outline the rationale for doing so. Has been exposed to the concept of organizational learning and can explain why it is important to examine the relationship between organizational learning and developmental principles and practices.	Can demonstrate a knowledge of one or more strategic planning processes or techniques along with an explanation for how, where and why they should be used. Can conduct an analysis of an organization's culture and can identify opportunity for development and promotion of organizational learning.	Has experience in leading or contributing to a strategic planning process at the design and implementation phases. Can demonstrate how he/she has applied organizational learning and development concepts to real situations.
3c **Capacity to apply sound performance measurement & management practices.**	Can provide an explanation of why performance goals and measures are important in public administration, but cannot apply this reasoning to specific contexts.	Can identify the performance management considerations for a particular situation or context, but has limited capacity to evaluate the effectiveness of performance management systems.	Can identify and analyze performance management systems, needs and emerging opportunities within a specific organization or network.	Can provide new insights into the performance management challenges facing an organization or network, and suggest alternative design and measurement scenarios.
3d **Capacity to apply sound financial planning & fiscal responsibility.**	Can identify why budgeting and sound fiscal management practices are important, but cannot analyze how and/or if such practices are being used within specific contexts.	Can identify fiscal planning and budgeting practices for a particular situation or context, but has limited capacity to evaluate the effectiveness of a financial management system.	Can identify and analyze financial management systems, needs and emerging opportunities within a specific organization or network.	Can provide new insights into the financial management challenges facing an organization or network, and suggest alternative design and budgeting scenarios.

| 3e | Capacity to effectively manage projects. | Can identify when a project begins and ends, but possesses very little direct knowledge for how projects are effectively managed. | Can identify what factors lead to effective project management in a general sense, but lacks capacity to diagnose project management challenges. | Can evaluate and articulate effective project management practices, applied to specific cases and contexts. | Can demonstrate effective leadership and management of projects. |

Public Service Perspective		(1) Does not meet the standard	(2) Approaches the standard	(3) Meets the standard	(4) Exceeds the standard
4a	Capacity to understand the value of authentic citizen participation in PA practice.	Can explain why it is important for citizens to be involved in the governance of their society in a vague or abstract way, but cannot provide specific explanations or justifications applied to particular contexts.	Can distinguish between authentic and inauthentic citizen participation in field contexts, but cannot articulate how participation can either become more authentic or be sustained in an authentic way.	Possesses the capacity to describe how citizen participation can be undertaken in an authentic way that improves the democratic accountability of an organization or network.	Can demonstrate how she/he has played a role in facilitating citizen participation in public administration.
4b	Capacity to understand the value of social & economic equity in PA practices.	Can explain why it is important for social and economic equity to flourish in a vague or abstract way, but cannot provide specific explanations or justifications applied to particular contexts.	Can explain why social and economic equity is important to PA and can identify how social and economic equity or inequities persist within a given context, but cannot diagnose why the problem persists or how to address it.	Possesses the capacity to describe and analyze social and economic equity/inequity within specific contexts. Can offer suggestions for ways of improving inequitable situations.	Can demonstrate how she/he has facilitated the improvement of inequitable situations through action.
4c	Capacity to lead in an ethical and reflective manner.	Can explain why it is important for public administrators to act as effective leaders in a vague or abstract way, but cannot provide specific explanations or justifications applied to particular contexts.	Possesses a basic comprehension of leadership and leadership theory within PA contexts, but cannot apply concepts to specific cases with any level of depth or insight. Can express both orally and in writing why she/he is pursuing an MPA and describe how the degree will help him/her achieve goals. Possesses a basic comprehension of ethical behavior and decision-making within PA contexts.	Can apply leadership theories and frameworks to specific situations and contexts. Can apply ethical frameworks to specific situations and contexts. Is able to articulate how she/he views ethics as a professional competency.	Can demonstrate how she/he has lead in an effective, reflective and ethical manner in a PA context.
4d	Capacity to achieve cooperation through participatory practices.	Can explain why it is important for public administrators to be open and responsive practitioners in a vague or abstract way, but cannot provide specific explanations or justifications applied to particular contexts.	Can identify instances in specific cases or context where a public administrator demonstrated or failed to demonstrate collaborative practices.	Can demonstrate how inclusive practices and conflict management wins cooperation for forming coalitions and collaborative practices in specific cases or contexts.	Can demonstrate the ability to orchestrate any of the following: coalition building, effective teamwork, and/or conflict management.

Communicate and interact with a diverse and changing workforce and citizenry	(1) Does not meet the standard	(2) Approaches the standard	(3) Meets the standard	(4) Exceeds the standard
5a **Capacity to undertake high quality oral and written communication to convey messages to specific audiences.**	Demonstrates some ability to express ideas verbally and in writing. Lacks consistent capacity to present and write.	Possesses the capacity to write documents that are free of grammatical errors and are organized in a clear and efficient manner. Possesses the capacity to present ideas in a professional manner. Suffers from a lack of consistency in the presentation of material and expression of original ideas and concepts.	Is capable of consistently expressing ideas verbally and in writing in a professional manner that communicates messages to intended audiences.	Can demonstrate some instances in which verbal and written communication has persuaded others to take action. Can demonstrate evidence of leading or supporting public relations campaigns on behalf of a public or nonprofit sector organization.
5b **Capacity to appreciate the value of pluralism, multiculturalism & cultural diversity.**	Can explain why it is important for public administrators to be culturally competent in a vague or abstract way, but cannot provide specific explanations or justifications applied to particular contexts.	Is able to demonstrate knowledge of diverse cultures and groups. Can express the value of differences and different perceptions in the workplace. Demonstrates an ability to openly discuss cultural differences and issues.	Can explain how cultural awareness, cultural knowledge and cultural skills are employed, or not employed, within specific cases.	Demonstrates a capacity to be aware of own behavior and its impacts on others, a capacity to understand how discrimination impacts contemporary workplace environments, and a capacity to draw on diverse groups to solve complex problems.
5c **Capacity to carry out effective human resource management.**	Can explain why human resources are valuable to any undertaking. Possesses limited capacity in describing the critical feature of successful human resource management.	Can identify some of the major features of effective human resource management systems: staffing, performance evaluation, motivations and benefits. Possesses limited capacity to analyze the HR issues relative to specific situations and contexts.	Demonstrates a capacity to identify and manage the necessary human capital to carry out a task or function within very specific contexts or situations.	Can point to instances in which he/she has lead or initiated projects or systems designed to improve human resource management practices within a specific setting.
5d **Capacity to use and manage information technology with internal and external audiences to achieve public administration goals.**	Can explain why information technology (IT) is important to contemporary workplaces and public administration environments. Possesses direct experience with IT, but little understanding of how IT informs professional practice. Possesses little understanding of how IT is reshaping public administration.	Can identify instances in specific cases or contexts where organizations have demonstrated a capacity to use IT to foster innovation, improve services or deepen accountability.	Can identify how IT impacts workplaces, organizations and public policy. Can diagnose problems associated with IT tools, procedures and uses. Can articulate how IT application is reshaping PA practice.	Demonstrates a capacity to view IT in terms of systems design. Is capable of working with IT professionals in identifying areas of need for IT upgrades, IT procedures and IT uses in real settings.

Public Governance

Competency/Capacity Addressed:
1a - Capacity to understand accountability and democratic theory.

Title/Label of Evidence:
Express Transit Case Study
Seattle Community Association Case Study

Type of Evidence:
Course assignment for Foundations in Public Administration

Self-Assessment
Score: 3

Criteria Met:
Can illustrate how accountability in a democratic society persists within particular cases and contexts.

Instructor Assessment
Score: _____

Evidence is located under:
Appendix A - PA301: Foundations of Public Administration - Express Transit Case Stu
Appendix B - PA301: Foundations of Public Administration - Seattle Community Assoc.
Case Study

Public Governance: Competency 1a
Capacity to Understand Accountability and Democratic Theory

To demonstrate my capacity to understand accountability and democratic theory I have included two memorandums from the Foundations of Public Administration course. The first memorandum is the Express Transit Case Study (Appendix A) and the second is the Seattle Community Association Case Study (Appendix B). Each of these assignments challenged me to review specific issues within an organization and make recommendations on how the organization can address these issues while being accountable for their actions. The combination of these two pieces of evidence show that I can illustrate how accountability in a democratic society persists within particular cases and contexts.

The Express Transit Case Study focused on maintenance issues and one employee who was a whistleblower on the poor maintenance practices after several attempts to address the issues internally. The assignment was to review the information provided in the case and write a memorandum as James Hensley, an inspector, to Clayton Baker, the manager of Vehicle maintenance, summarizing the problems and making a recommendation for how to fix it. One of the issues within this case is the lack of accountability throughout the organization. One employee specifically stated, "A coach can come back for the same problem over and over, and no one holds the mechanic accountable for getting it fixed. It is the leader's responsibility to follow up on problems, but it is not done." In addition to accountability, my memorandum addresses several problems including a capped incentive program, lack of segregation of duties, and several impingements on communication including technology and reporting structure. To address these issues I made several recommendations including additional training on the software that employees are expected to use, the implementation of several meetings to obtain feedback from all levels of employees, revamping the reporting structure and update the software to ensure the proper segregation of duties. Creating a structure of accountability would ensure the safety of the passengers, as well as provide a proper incentive program for the employees of Express Transit.

The Seattle Community Association case was focused around the organization's Anti-Racism Initiative. The perspective I choose for this assignment was to write a memorandum to the Board of Directors from Cheryl Cobb, the Executive Director. The memorandum was to be a report to the board who were concerned about some of the backlash that was received from the staff. Additionally, some board members felt that the Anti-Racism Initiative is a positive and important program for the community. In the memorandum, I addressed the successes of the initiative such as a high voluntary attendance rate as well as an avenue for staff to provide their feedback regarding the initiative and the Seattle Community Association's management. Some of the challenges were that the hiring procedures that were put in place limited manager's decision-making ability. Additionally, some of the feedback that was received was that there was a moral issue within the organization. My recommendations going forward were to work in small groups to address the different levels of racism, revise the hiring policy to allow managers to have more control, implement a variety of recruiting options to provide opportunities to a wider variety of potential applicants. All of these recommendations were made to address areas where the initiative fell short, which shows the accountability to recognize when a program did not work as well as expected and making the necessary steps to correct them.

In both of these assignments, I demonstrated my ability to review an organization's practice and ensure they are accountable for their actions. Additionally, I was able to address the positive and negative aspects of the organizational initiatives and make solid recommendations for improvement.

Public Governance

Competency/Capacity Addressed:

1b - Capacity to manage the lines of authority for public, private and non-profit collaboration.

Title/Label of Evidence:

South Burlington City Center – Current Event Blog Final Compilation
Internship Final Write-up

Type of Evidence:

Course assignment for Foundations in Public Administration
Internship artifact for Cambridge Rescue

Self-Assessment

Score: 3

Criteria Met:

Can illustrate how effective collaboration between organizations of different scales and sectors plays a role in the execution of public policies.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix D - PA301: Foundations of Public Administration - Current Event Final
Appendix Q - Internship: Cambridge Rescue Internship Final Write-up

Public Governance: Competency 1b
Capacity to Manage the Lines of Authority for Public, Private and Non-Profit Collaboration

As evidence of my capacity to manage the lines of authority for public, private, and non-profit collaboration I provided the final compilation of my current event blog on the South Burlington City Center for Foundations of Public Administration (Appendix D). This assignment is a compilation of a semester-long review of a current local policy issue to illustrate how effective collaboration between organizations of different scales and sectors, public, private and nonprofit, plays a role in the execution of public policies. Specifically the 40 plus yearlong planning and development of the South Burlington City Center. In addition to this assignment, I am providing my final write-up from my internship with the Cambridge Rescue Squad (Appendix Q). This piece of evidence documents my experience in working with several different organizations to draft and implement policies for the Cambridge Rescue Squad.

The South Burlington City Center included significant collaboration between the public and private sectors. Several examples of this collaboration is a land swap between the city and a local real estate developer. There was also a land swap between the city and the school district. Additionally, the city was granted TIF district funding for this project from the state based on testimony from South Burlington Reality, a public company, that the municipal structure proposed for this project would be able to create economic benefit in the city. In addition to the public and private collaboration, there was also a collaboration between the public sector and the nonprofit sector. Specifically, an agreement between South Burlington Reality to sell some of the residential housing to the Champlain Housing Trust and Housing Vermont. This agreement is a significant piece of the project as it ensures that there is affordable housing in the city center, which is key to the economic success of this development. The collaboration between the three sectors in South Burlington is what has finally made this project become a reality. Without the three sectors working together the may have taken another 40 years.

My experience with the Cambridge Rescue Squad provided me the opportunity to work with several different organizations in different sectors including public, private, and nonprofit. As part of the policy implantation process, several policies required collaboration with other organizations. For instance in the Incident Reporting and Investigation Policy I had to work with the insurance provider for Cambridge Rescue to ensure that the information in the policy was accurate. Additionally, the Building Access & Use Policy required the collaboration with the Town of Cambridge as well as the Cambridge Fire Department. This collaboration was because the Town of Cambridge owns the buildings for all of these organizations and all policies pertaining to town owned building needed to consist of the same information. As a result of the collaboration with the Town of Cambridge and the Cambridge Fire Department, I was able to explain to the members that the policy was written to align with the other organization's policies to ensure consistency for all town buildings and properties. This ability to explain why many of the practices within the organization were now being changed so drastically assisted with the members understanding and willingness to approve the policies.

The assignment on the South Burlington City Center is an academic review of the how the collaboration of the public, private, and nonprofit sectors can result in a successful public policy,

whereas the final write-up from my internship documents how I was able to put this into practice. The combination of these two documents is evidence that I can illustrate how effective collaboration between organizations of different scales and sectors plays a role in the execution of public policies. In doing so I meet the capacity to manage the lines of authority for public, private and non-profit collaboration.

Public Governance

Competency/Capacity Addressed:

1c - Capacity to apply knowledge of system dynamics and network structures for sustainable development.

Title/Label of Evidence:

Policy Analysis Compilation

South Burlington City Center – Current Event Blog Final Compilation

Type of Evidence:

Course assignment for Policy Systems

Course assignment for Foundations of Public Administration

Self-Assessment

Score: 3

Criteria Met:

Is able to describe a complex public administration issue, problem or context using basic system dynamics and/or network frameworks, with an eye toward achieving sustainable development objectives.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix J - PA306: Policy Systems - Policy Analysis Compilation

Appendix D - PA301: Foundations of Public Administration - Current Event Final

Public Governance: Competency 1c
Capacity to Apply Knowledge of System Dynamics and Network Structures for Sustainable Development

As evidence of my capacity to apply knowledge of system dynamics and network structures for sustainable development, I have provided the Policy Analysis Compilation (Appendix J) that was completed as an assignment for Policy Systems. The objective of this assignment was to identify a real-world public policy problem, analyze the problem and solutions, then make a recommendation and conduct a political feasibility analysis on the recommendation. Additionally, I have included the final compilation of my current event blog on the South Burlington City Center for Foundations of Public Administration (Appendix D). In these two assignments I describe a complex public administration issue, problem or context using basic system dynamics and/or frameworks, with an eye toward achieving sustainable development objectives.

The policy problem that I selected for Policy Systems is the consolidation of public schools within the state of Vermont, specifically the recent implementation of Act 46. My analysis included looking at the history of the public school system in Vermont, where I determined that this policy problem follows the Policy Feedback Theory where each policy implementation new issues and challenges arose. For over 100 years, the state of Vermont alternated between voluntary and mandated mergers as well as education tax reform. Act 46 was the response to two previous policies for voluntary merger.

The problems that were being addressed via school consolidation are a declining enrollment of students in the state public education system, high education costs resulting in high taxes and an inequitable distribution of taxes to public schools, and inequitable education quality throughout the state. Act 46 intended to address these issues by consolidating local schools. I compared the implementation of Act 46 to a modification of the tax structure as well as rescinding Act 46 and determined that Act 46 was the most sustainable solution to the policy problems. Though there is citizen concern in regards to the impact of Act 46 most of the concerns such as loss of local control and school choice are all perceived. Overall Act 46 was the most sustainable solution as it addresses the concern of declining enrolment, equitable distribution of the education tax, and equitable education quality.

In the current event blog, I spent a semester reviewing the development process for the South Burlington City Center. This project was designed to address the issue that the City of South Burlington struggled with a lack of identity. The City Center Project has been in the planning phases for approximately 40 years and includes multiple systems including the citizens, private real-estate developers, the local school district, the local and state government, as well as local nonprofits. All of these groups have to collaborate to achieve the goal of completing such an expansive project. Throughout different phases of the project the real-estate company, the school district, and the City of South Burlington completed land swaps to achieve the goal of developing the City Center in a way that met the needs of the community. There was also a collaboration between the real-estate developer and the City of South Burlington to achieve TIF District funding to use future tax dollars towards the development of this project. Additionally, the real-estate developer worked with several nonprofits to ensure that affordable housing was available as part of

this project. All of these different groups had to work together to achieve a common goal, which is the development of the City Center that would be the identity of the City of South Burlington.

In the Policy Systems assignment, I was able to describe the complex administration issues of the Vermont public education system. I analyzed the issue and determined the systems framework that best fits the policy issue. These systems framework include Multiple Streams Theory, the Punctuated Equilibrium Theory, Policy Feedback Theory, Advocacy Coalition Framework, Narrative Policy Framework, Innovation, and Diffusion Models, and Complex Systems. Of these systems framework, I determined that the Policy Feedback Theory best fit this policy problem. Additionally, I reviewed the policy alternatives and made a recommendation with the most sustainable objective. The Foundations of Public Administration assignment looked at a current event from a systems approach to achieve sustainable development. These assignments together demonstrate that I am able to describe a complex public administration issue, problem or context using basic system dynamics and/or network frameworks, with an eye toward achieving sustainable development objectives, therefore meeting the standard capacity to apply knowledge of system dynamics and network structures for sustainable development.

Policy Proces

Competency/Capacity Addressed:

> 2a - Capacity to carry out effective policy implementation.

Title/Label of Evidence:

> Internship Assignment 1

Type of Evidence:

> Internship artifact for Cambridge Rescue

Self-Assessment

> Score: 4

Criteria Met:

> Is capable of describing direct or indirect experiences relating to specific policy implementation activities and is able to identify ways of improving upon past practices.

Instructor Assessment

> Score: _____

Evidence is located under:

> Appendix N - Internship: Cambridge Rescue Internship Assignment 1

Policy Process: Competency 2a
Capacity to Carry Out Effective Policy Implementation

To demonstrate the capacity to carry out effective policy implementation I have included my first assignment from my internship with Cambridge Rescue Squad (Appendix N). This documentation includes details of my efforts on a committee to write and implement several policies following the reorganization of the Board of Directors. The evidence provided includes the difficulties of working with volunteers, writing policies and procedures, and the process of disseminating the information to a larger group of volunteers for their input and the final implementation of the policy. The evidence also includes my reflection of experience and how the process could be improved upon for future policy implementation.

After the Cambridge Rescue, Squad Board of Directors was reorganized, a committee was formed to update and revise many of the organizational policies. As part of my internship, I was asked to lead this committee in this task. As part of the preliminary process, I asked the members of the committee to review the list of policies and decide which ones needed to be revised and determine what additional policies needed to be implemented. Once we had a complete list of policies that needed to be worked, we prioritized them. At this point, each of the members of the committee were asked to do research a compile information that is pertinent to each policy. Then the policies were drafted and put into a shared drive for each member of the committee to provide their feedback. Once all members of the committee were satisfied with the draft of the policies, the other members of the Board of Directors were invited to provide their feedback. The Board of Directors was given 30 days to provide feedback, then the comments were discussed at a board meeting. All the policies were then finalized and sent to all members of Cambridge Rescue for their feedback. Again, the members were allowed 30 days to provide their feedback on the policies before being discussed at the squad's annual meeting. After all of the policies were finalized after all of the feedback received the policies were voted on at a meeting of the Board of Directors.

Some of the challenges that were faced in this process was that the other volunteer members of the committee had other priories and were not able to participate in research and compiling information to include in the policies. Additionally, by the time the Board of Directors completed the review of the policies, there was not the allotted 30 days as originally planned for the membership of the organization to review the policies before the annual meeting. Lastly, though all the members of the board agreed to use a shared drive to keep all the policies and complete the review some members did not have the technical ability to use this shared drive.

My reflection in the evidence attached describes some of the changes I would make if I could do things differently. Some of these improvements in past practices include setting strict deadlines for the completion of tasks, ensuring all members involved with the process have the time capacity and have several alternative sources for individuals to access documentation. Overall, my capacity to carry out effective policy implementation is evident in the internship experience and my documentation and reflection on it.

Policy Process

Competency/Capacity Addressed:

2b - Capacity to apply policy streams, cycles, and/or systems foci upon past, present and future policy issues, and to understand how problem identification impacts public administration.

Title/Label of Evidence:

Policy Analysis Compilation

Team Project Part B - Corrections and Institutions (House Committee)

Type of Evidence:

Course assignment for Policy Analysis

Self-Assessment

Score: 3

Criteria Met:

Employs a policy streams or policy stage heuristics model approach to the describe policy making. Can demonstrate how problem definition is defined within specific policy contexts and deconstruct the relationship between problem definitions and solutions.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix J - PA306: Policy Systems - Policy Analysis Compilation

Appendix I - PA306: Policy Systems - Team Project Part B

Policy Process: Competency 2b
Capacity to Apply Policy Streams, Cycles, and/or Systems Foci Upon Past, Present and Future Policy Issues, and to Understand How Problem Identification Impacts Public Administration

Supporting evidence for my capacity to apply policy streams, cycles, and/or systems foci upon the present and future policy issues is the final compilation of the Policy Systems assignment (Appendix J) as well as the team project on the Corrections and Institutions House Committee for Policy Analysis (Appendix I). In these assignments I employ a policy streams approach to describe and analyze the policy making process. I also demonstrate how problem definition is defined within specific policy contexts and deconstruct the relationship between problem definitions and solutions.

In the final compilation assignment, I reviewed the history of the education policy in Vermont and the current implementation of Act 46, the consolidation of public schools. During my review of the policy of consolidating the education system in Vermont, I reviewed the history of the education structure, how the policy process has affected the education system over time as well as how the policy process has changed to respond to different issues affecting the education system such as declining enrollment and increasing costs. I completed an analysis of this policy and reviewed the different possible systems framework that applied. Some of the possible system's framework includes Multiple Streams Theory, the Punctuated Equilibrium Theory, Policy Feedback Theory, Advocacy Coalition Framework, Narrative Policy Framework, Innovation, and Diffusion Models, and Complex Systems. I determined that the Policy Feedback Theory most accurately represents the public education policy system in Vermont.

Taking into account stakeholder feedback as well as information obtained from public officials I reviewed the different policy alternatives including rescinding Act 46, continuing with Act 46, and a modification of the statewide school property tax. After comparing and contrasting these alternatives and looking at the future impact of each, I made the recommendation on one alternative, which is to pursue Act 46. The continuation with the implementation of Act 46 was the best policy alternative as it provided the best sustainable solution even though many citizens were upset with this policy. Public administrators, in this case, were responsible for providing information to citizens so they could accurately determine how this policy affected their concerns. For instance, one concern of many of the citizens was that they would no longer have school choice once their school was merged with a larger school. It was the responsibility of the school officials as well as the representatives from the Agency of Education to explain that school choice would remain and in some situations be expanded upon within the newly consolidated districts. The evidence I provided documenting my review of the bills that were currently being reviewed by the House Committee is a team project that includes the analysis of six different bills completed by myself and two of my cohorts, Beth McMurray and Romana Kurevija. As part of the analysis, I attended House Committee meetings and met with members of the Corrections and Institutions House Committee as well as other House Representatives. After gathering information on these bills we analyzed each bill determining what systems framework applied to the bill and what elements would affect the passing or failing of the bill.

When reviewing bills that were in the Corrections and Institutions committee we choose to review all of the bills through the Multiple Streams Framework. The Multiple Streams Framework consists of three "streams", the problem stream, the politics stream, and the policy stream. Each of these six bills had to have these three streams align to be proposed and to be passed by the House of Representatives. When speaking with Representative Curt Taylor it was noted that the Corrections and Institutions Committee, as well as most other members of the House of Representatives, were focused on the Congressional Bill at that time. Our analysis of these bills stated, "Until all three of the streams align the policy window will remain closed and there will be no resolution to the policy problem." Our conclusion of the analysis was that none of these bills was to pass that legislative session, as not all of the policy windows were open consecutively. In following up with the committee members that we had spoken with they agreed the bills would not be addressed until after the Congressional Bill was passed. Ultimately none of the bills were brought to the floor due to the higher priority of the Congressional Bill.

Overall the evidence provided demonstrates that I was able to deconstruct the policy problem of the public educations system in Vermont, review the history of the problem and how different solutions have impacted the policymaking process, and provide alternative solutions to the policy problem. As evidenced by the team assignment I was able to demonstrate how problem definition is defined within specific contexts. Additionally, I have reviewed the role of public administrators within the process and how they can negatively or positively impact the policy process.

Policy Process

Competency/Capacity Addressed:
> 2c - Capacity to conduct policy analysis/evaluation.

Title/Label of Evidence:
> Team Project Part B - Corrections and Institutions (House Committee)
> Policy Analysis Compilation

Type of Evidence:
> Course assignment for Policy Analysis

Self-Assessment
> Score: 3

Criteria Met:
> Can conduct an independent piece of policy analysis, successfully rendering new insights
> and applicable findings for policy makers.

Instructor Assessment
> Score: _____

Evidence is located under:
> Appendix I - PA306: Policy Systems - Team Project Part B
> Appendix J - PA306: Policy Systems - Policy Analysis Compilation

Policy Process: Competency 2c
Capacity to Conduct Policy Analysis/Evaluation

To document my capacity to conduct policy analysis and evaluation I have included two assignments evidence from Policy Systems. The first assignment was reviewing several bills that were being discussed by the Corrections and Institutions House Committee (Appendix I). The second assignment is the final compilation of the policy analysis I conducted on a current policy issue (Appendix J). Though I completed a significant amount of policy analysis throughout my time as an MPA student I choose these to pieces of evidence as they most accurately document my ability to analyze current policy issues.

The evidence I provided documenting my review of the bills that were currently being reviewed by the House Committee is a team project that includes the analysis of six different bills completed by myself and two of my cohorts, Beth McMurray and Romana Kurevija. As part of the analysis, I attended House Committee meetings and met with members of the Corrections and Institutions House Committee as well as other House Representatives. After gathering information on these bills we analyzed each bill determining what systems framework applied to the bill and what elements would affect the passing or failing of the bill.

When reviewing bills that were in the Corrections and Institutions committee we choose to review all of the bills through the Multiple Streams Framework. The Multiple Streams Framework consists of three "streams", the problem stream, the politics stream, and the policy stream. Each of these six bills had to have these three streams align to be proposed and to be passed by the House of Representatives. When speaking with Representative Curt Taylor it was noted that the Corrections and Institutions Committee, as well as most other members of the House of Representatives, were focused on the Congressional Bill at that time. Our analysis of these bills stated, "Until all three of the streams align the policy window will remain closed and there will be no resolution to the policy problem." Our conclusion of the analysis was that none of these bills was to pass that legislative session, as not all of the policy windows were open consecutively. In following up with the committee members that we had spoken with they agreed the bills would not be addressed until after the Congressional Bill was passed. Ultimately none of the bills were brought to the floor due to the higher priority of the Congressional Bill.

The second piece of evidence, the analysis of a current policy issue was conducted on Act 46 and the consolidation of the public school system in Vermont. This analysis includes a history of the Vermont education policies where I determined that the appropriate systems framework is the Policy Feedback Theory. I arrived at this conclusion because each policy that was enacted had positive and negative feedback, which resulted in a new policy as a response. The policy problems that Act 46 was intending to address was a declining enrollment and student population, high education cost and taxes, and equitable education quality. Act 46 was in response to two previous acts that attempted school consolidation based voluntarily. Act 46 mandated the school mergers.

During my analysis I compared several policy alternatives including modification of the statewide school property tax, repealing Act 46, and following through with the mandated school mergers of Act 46. I compared these policy alternatives based on the likelihood to address the current policy problems and concluded that the follow-through of Act 46 was the most likely to provide

resolution to most of the policy problems. I did note that some policy problems were perceived by the citizens that were no problems that could be addressed by any policy alternative. The responsibility to educate citizens of these policy problems and the potential for resolutions falls on the policymakers.

Both of these pieces of evidence document my ability to conduct policy analysis on different policy problems and potential resolutions. Through the review of historical events as well as meeting with citizens and policymakers, I was able to provide new insights on the policies being reviewed and provide policy alternatives and recommendations for policy problems. This evidences documents my ability to successfully conduct policy analysis and evaluation.

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions

Competency/Capacity Addressed:

3a - Capacity to employ quantitative and qualitative research methods for program evaluation and action research.

Title/Label of Evidence:

Research Methods Paper

Type of Evidence:

Course assignment for Research Methods

Self-Assessment

Score: 3

Criteria Met:

Can provide a piece of original analysis of an observed phenomena employing one qualitative or quantitative methodology effectively. Possesses capacity to commission a piece of original research. Can provide a detailed account of how a program or project evaluation should be structured within the context of a specific program or project.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix G - PA303: Research Methods - Research Paper

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions: Competency 3a
Capacity to Employ Quantitative and Qualitative Research Methods for Program Evaluation and Action Research

As evidence of my capacity to employ quantitative and qualitative research methods for program evaluation and action research, I have included four artifacts from Research Methods (Appendix G). The compilation of these four artifacts is a complete quantitative analysis of how households choose their shopping habits in Vermont. This evidence is a quantitative and qualitative analysis of the shopping habits of Vermonters based on the location of their primary residence.

The research paper provided as evidence is structured in such that it includes an introduction, which provides my hypotheses as well as the background information for how I developed these hypotheses, the method for the analysis, the results, and a discussion of the results. My hypotheses for this research were that there is no relationship between gender and shopping preference, there is no relationship between population density (rural, suburban, or urban) and shopping preference, and finally, that there is no relationship between age and shopping preference. This was based on previous research by DiSantis, Hillier, Holaday, and Kumanyika who found that "[t]he most frequented store was within a mile of home (57 %) or home *(sic)* or another place visited in the weekly routine for about 77 % of participants". This data shows that most shopping is conducted within a local community or proximity to locations as part of a routine. The data used in this assignment was from data collected from the UVM Center for Rural Studies annual state-wide polls (The Vermonter Poll). To analyze the data I used Microsoft Excel as well as IBM Statics. Microsoft Excel was used to organize the data, which was then imported into IBM Statics for analysis. Upon completion of the analysis, I failed to reject all three hypotheses. The rejection of all three hypotheses leads us to believe that demographics do play a role in personal shopping preference in Vermont. However there were limitations to this research, for instance, the data does not include when an individual does their shopping or what type of shopping they are doing. Therefore, we cannot rule out that individuals' shopping preferences are also determined by their commute or that their shopping preference does not change based on the needs. My recommendation going forward with this research would be to collect more data, specifically about shopping preferences. Additionally, it would be best to seek additional participants to ensure a broader sample of data.

The evidence I provided that analyzes the shopping preferences for Vermonters documents my capacity to complete a quantitative and qualitative analysis. This original piece of research goes through a complete detailed account of the processes for developing a hypothesis, testing the hypothesis, analyzing the results, and making recommendations for further research. This research and subsequent analysis is beneficial in public administration as it can assist public administrators in developing zoning plans, investments in infrastructure, and designing downtown areas.

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions

Competency/Capacity Addressed:

> 3b - Capacity to initiate strategic planning and apply organizational learning & development principles.

Title/Label of Evidence:

> Organizational Assessment
> Flow Chart - ABSC T&E Process
> Flow Chart - DC T&E Process
> Flow Chart - DC T&E Document Process
> Flow Chart - DC T&E Internal Process

Type of Evidence:

> Course assignment for Organizational Theory and Behavior
> Professional Experience

Self-Assessment

> Score: 3

Criteria Met:

> Can demonstrate a knowledge of one or more strategic planning processes or techniques along with an explanation for how, where and why they should be used. Can conduct an analysis of an organization's culture and can identify opportunity for development and promotion of organizational learning.

Instructor Assessment

> Score: _____

Evidence is located under:

> Appendix F - PA302: Organizational Theory & Behavior - Organizational Assessment
> Appendix R – Professional Experience: Flow Chart – ABSC T&E Process
> Appendix S – Professional Experience: Flow Chart – DC T&E Process
> Appendix T – Professional Experience: Flow Chart – DC T&E Document Process
> Appendix U – Professional Experience: Flow Chart – DC T&E Internal Process

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions: Competency 3b
Capacity to Initiate Strategic Planning and Apply Organizational Learning & Development Principles

To document my capacity to initiate strategic planning and apply organizational learning & development principles I have provided the organizational assessment for the Cambridge Rescue Squad completed as part of Organizational Theory and Behavior (Appendix F). This organizational assessment was completed while I was actively participating in the restructuring of the organization. In addition to the organizational assessment for Cambridge Rescue, I have provided four flow charts that I created as part of my professional experience working at the University of Vermont Disbursement Center (Appendix R – U).

During the organizational assessment of the Cambridge Rescue Squad, I reviewed several areas of the organization using the McKinsey Capacity Assessment Grid including aspirations, strategy, organizational skills, human resources, and systems and infrastructure. The results of my assessment were that the Cambridge Rescue Squad was successful in some areas but also had many challenges. The Cambridge Rescues Squad's strengths lay with the community presence and involvement as well as its ability to develop and nurture partnerships and alliances. The weaknesses, however, are internal and consist of the mission, vision, overarching goals, organizational planning, board composition and commitment, and more. During my research I found that the Cambridge Rescue Squad has had several leadership changes over the past few years, additionally, there is a lack of diversity on the Board of Directors, and the bylaws act as the primary source of policy and procedures however there is a lack of consistency and enforcement of the bylaws. I also noted in my observation that there was a lack of commitment amongst the volunteers, which I attributed to the absence of a mission statement, vision, and clear goals.

My recommendation to the Cambridge Rescue Squad was to undertake the strategic planning process to develop a clear and documented mission statement, vision, and goals for the short term and long term of the organization. I noted that this process should include open communication and involvement with all members of the organization and that is should be a five-phase process. The five phases I stated are internal assessment, external assessment, management and leadership planning sessions, implementation plan, and review. In the first two phases, internal and external assessment, I recommended completing as part of a SWOT analysis. Phase three of the strategic planning process, management, and leadership planning sessions should use the data collected in the first two phases to determine the mission, vision, and goals, then the leadership will determine the strategic plan based on this determination. The last two phases, implementation plan and review, and extremely important as a successful implementation plan will get buy-in from the members of the organization, and the organization has to continuously review to ensure that the goals are being met and continue to coincide with the mission of the organization. The last thing that I noted was that the Cambridge Rescue Squad was in the process of restructuring the Board of Directors to add diversity to its leadership. I believe that this was a step in the right direction, but that they needed to complete the strategic planning process to ensure the future success of the organization.

The second pieces of evidence are flow charts that I created as part of the University of Vermont Division of Finance realignment. In 2015, the University of Vermont Division of Finance made a strategic decision to realign its business practices to better fit the needs of their customers. As part of this process a new department, the Disbursement Center, was formed and I was promoted to the lead of the travel and expense team. With this promotion, it was my responsibility to develop and implement the process for the travel and expense submissions to the Disbursement Center and as well as the process once received. This included the merging of two teams and multiple different processes. The first task that I need to accomplish was to map out all of the processes that were currently in place which is documented by the flow chart titled ABSC T&E Process. To document this process I met with several members of the Administrative Business Services Center to discuss their process for receiving, creating, and submitting travel and expense documents. Once the process was documented, I created the flow chart to see all steps in the process. Upon reviewing the flow chart and the number of steps in the process, I decided to eliminate steps to streamline the process and to ensure that reimbursements were processed in a timely fashion. The result was is the flow chart titled DC T&E Process.

To ensure that my team was continuing to provide the best service in a timely fashion I completed the same process two years later. With the assistance of the four members of my team we documented our current processes, but for our customers as well as our internal processes. Together we then reviewed and analyzed each step in the process to verify that it was necessary and that there was not a more efficient way to process reimbursements. The result of the revised process in 2017 is the two flow charts title DC T&E Document Process and DC T&E Internal Process.

The recommendation I provided in the organization assessment of the Cambridge Rescue Squad demonstrates a knowledge of the strategic planning processes and techniques along with an explanation for how, where and why they should be used. It also shows my capacity to analyze an organization's culture. Additionally, my professional experience during the Division of Finance realignment and the continued process improvements demonstrate my ability to identify opportunities for development and promotion of organizational learning. This demonstration of skills is evidence that I meet the standard for a capacity to initiate strategic planning and apply organizational learning & development principles.

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions

Competency/Capacity Addressed:

3c - Capacity to apply sound performance measurement & management practices.

Title/Label of Evidence:

Grant Proposal

Budget Analysis – Cambridge Rescue Squad

Type of Evidence:

Course assignment for Community Economic Development

Course assignment for Public and Nonprofit Budgeting

Self-Assessment

Score: 3

Criteria Met:

Can identify and analyze performance management systems, needs and emerging opportunities within a specific organization or network.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix K - PA326: Community Economic Development - Grant Proposal

Appendix H - PA305: Public & Nonprofit Budgeting - Final Paper

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions: Competency 3c
Capacity to Apply Sound Performance Measurement & Management Practices

As evidence of my capacity to apply sound performance measurement and management practices, I have provided two assignments. The first assignment is a grant proposal written for Community Economic Development (Appendix K) and the second assignment is a budget analysis conducting during Public and Nonprofit Budgeting (Appendix H). In these two assignments I identify and analyze performance management systems, needs and emerging opportunities in specific organizations.

The grant proposal was written for the Town of Cambridge in collaboration with the Cambridge Rescue Squad to conduct a study within the community and surrounding community to determine if a co-working space would be a feasible investment. This proposal is in response to the lack of broadband internet access in this area. Throughout the grant proposal, I discuss the plan for the research project, which consists of sending out a round of surveys, followed by roundtable discussions, and a final round of surveys. To determine if the surveys were effective in reaching the citizens it is expected that there would be a 25% response rate. In regards to the round table discussion, it was determined that one-third of the 25% would be interested in attending and providing feedback. If these goals were met then the research project could continue to move forward and be deemed successful.

The second piece of evidence, the budget analysis for Cambridge Rescue Squad is an in-depth review of the organization's budget vs actual income and expenses. The largest expense that was identified for the Cambridge Rescue Squad is payroll, which includes volunteers and full-time staff. When reviewing the details of this expense I found that the reason the full-time staff were employed is due to the lack of ability to cover all shifts. In regards to Cambridge Rescue Squad's income, I noted that the income comes from two primary sources, service billing and an appropriation from the Town of Cambridge. I also noted that the appropriation from the Town of Cambridge had significantly increased over the past four years. The reason for this increase is in part because of the need for full-time staff, but also that the Town of Cambridge created a capital fund for Cambridge Rescue Squad to include the replacement costs of the two ambulances. My recommendation for the Cambridge Rescue Squad is the need to diversify the income it receives. One of the suggestions I made to create revenue is to offer a membership plan, similar to other organizations, where members pay an annual fee and receive a discount for the service that is provided. I also noted that there was an opportunity to increase membership via the funds budgeted for recruitment and retention that are not being used. Also, the cadet corps programs have funds available the would assist them in recruiting new cadets, who would eventually be full-time members. Lastly, I expressed the importance of establishing savings to cover costs during the periods of the year where service billing income is low.

In these assignments, I was able to identify two different types of performance management systems. During my analysis, I defined the needs and opportunities of the organizations and made recommendations for enhanced performance. With these two pieces of evidence, I can

demonstrate my ability to meet the standard for the capacity to apply sound performance measurement & management practices.

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions

Competency/Capacity Addressed:

3d - Capacity to apply sound financial planning & fiscal responsibility.

Title/Label of Evidence:

Budget Analysis – Cambridge Rescue Squad
Grant Proposal

Type of Evidence:

Course assignment for Public and Nonprofit Budgeting
Course assignment for Community Economic Development

Self-Assessment

Score: 3

Criteria Met:

Can identify and analyze financial management systems, needs and emerging opportunities within a specific organization or network.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix H - PA305: Public & Nonprofit Budgeting - Final Paper
Appendix K - PA326: Community Economic Development - Grant Proposal

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions: Competency 3d
Capacity to Apply Sound Financial Planning & Fiscal Responsibility

To demonstrate my capacity to apply sound financial planning & fiscal responsibility I am providing a budget analysis conducted as an assignment for Public and Nonprofit Budgeting (Appendix H). Additionally, I have included a grant proposal written as an assignment for Community Economic Development (Appendix K). Each of these assignments addressed financial planning from different perspectives. The budget analysis assignment was to complete a history of the organization, including its budgetary evolution, provide an overview of the organizational structure and functions, discuss any peer organizations, present the budget, provide an analysis of the budget issues, and finally make recommendations for addressing any challenges. On the other hand, the grant proposal was to develop a project and create a budget from scratch.

During the budget analysis, I conducted of the Cambridge Rescue Squads expenses revealed that the largest expense that was for payroll, which includes volunteers and full-time staff. When reviewing the details of this expense I found that the reason the full-time staff were employed is due to the lack of ability to cover all shifts. Payroll accounts for 60% of the Cambridge Rescue Squad expenses where the next largest expenses account for only 8%, each of which are capital expenses, insurance, and supplies. In regards to the Cambridge Rescue Squad's income, I noted that the income comes from two primary sources, service billing and an appropriation from the Town of Cambridge. I also noted that the appropriation from the Town of Cambridge had significantly increased over the past four years. The reason for this increase is in part because of the need for full-time staff, but also that the Town of Cambridge created a capital fund for Cambridge Rescue Squad to include the replacement costs of the two ambulances. Besides the income from the Town of Cambridge appropriation and service billing income, the Cambridge Rescue Squad receives an appropriation from the Town of Fletcher, donations, and fundraising income. However, all of these income categories only account for 2% of the Cambridge Rescue Squad's income.

The conclusion to my analysis was that the Cambridge Rescue Squad is using its funds appropriately as the top four expense types are all necessities to keep the organization in operations. The struggle that they are having in regards to expenses is that there are not enough volunteers to cover all shifts, therefore having to hire full-time and part-time employees to cover the majority of the shifts. The call volume for the Cambridge Rescue Squad is not significant enough to generate enough income from service billing income to cover this cost, therefore relying on the Town of Cambridge appropriation to cover expenses. My recommendation for the Cambridge Rescue Squad is the need to diversify the income it receives. One of the suggestions I made to create revenue is to offer a membership plan, similar to other organizations, where members pay an annual fee and receive a discount for the service that is provided. I also noted that there was an opportunity to increase membership via the funds budgeted for recruitment and retention that are not being used. Also, the cadet corps programs have funds available that would assist them in recruiting new cadets, who would eventually be full-time members. Lastly, I expressed the importance of establishing savings to cover costs during the periods of the year where service billing income is low.

My second piece of evidence, the grant proposal, was an assignment where I spent the semester looking at the different capitals of a particular community and then write a grant in response to a request for proposal (RFP) for a community economic development project. I elected to choose the community of Cambridge, Vermont. The project I choose to do was look at alternative solutions to the lack of broadband access in the community. This has been an ongoing topic of conversation amongst members and officials within the community. Additionally, the State of Vermont has been pushing to ensure that adequate broadband access is available to all communities, which is resulting in the local governments to take on the responsibility of providing internet access as a public utility. The RFP we were provided was for $5,000.00. The project that I proposed that would fit in the scope of this RFP was to conduct research in the community and surrounding communities to determine interest and the feasibility of creating co-working space. When developing the plan and budget for this project I had to determine what resources were already available, included personnel to manage the project. I then compiled a list of expenses that would be incurred and had to estimate how much each of these expenses would be throughout the project. To do this I obtained estimates on services such as large-scale printing and mailing services for surveys as well as software for submitting and analyzing survey results. In the end, I presented a completed grant proposal including budget and justification.

The analysis I conducted of the Cambridge Rescue Squad's budget and financial management includes the needs and opportunities of the organization. I also provide sound recommendations for the organization moving forward. Additionally, the grant proposal written for the research to determine the interest and feasibility of a co-working space in Cambridge, Vermont required the skills to develop a reasonable budget and write a justification for the proposed budget. Both the analysis and grant proposal is evidence that I meet the standard capacity to apply sound financial planning and fiscal responsibility.

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions

Competency/Capacity Addressed:

3e - Capacity to effectively manage projects.

Title/Label of Evidence:

Grant Proposal

Cambridge Rescue Internship Final Write-up

Type of Evidence:

Course assignment for Community Economic Development

Internship artifact for Cambridge Rescue

Self-Assessment

Score: 4

Criteria Met:

Can demonstrate effective leadership and management of projects.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix K - PA326: Community Economic Development - Grant Proposal

Appendix Q - Internship: Cambridge Rescue Internship Final Write-up

Analyze, Synthesize, Think Critically, Solve Problems and Make Decisions: Competency 3e
Capacity to Effectively Manage Projects

To demonstrate my capacity to effectively manage projects I have provided two pieces of evidence. The first piece of evidence is a grant proposal written for Community Economic Development (Appendix K). This assignment documents my ability to plan, coordinate, and structure a project. The second piece of evidence is my internship artifact documenting my experience with Cambridge Rescue Squad (Appendix Q). This artifact is documentation of my ability to manage a significant long-term project for a small organization.

The grant proposal that I wrote for Community Economic Development outlines a project that I developed for this assignment. The project I propose is a research study on the need/interest of the citizens of the Town of Cambridge and surrounding communities for a co-working space. When outlining this project I provide a detailed explanation of the need for such a project. The need that I document is that only 30% of households in the communities being researched meet the minimum benchmark for home broadband access. This lack of service has downstream effects including limiting the number of businesses willing and able to operate in the area, providing a disparity in opportunities including education and access to job markets, and increased wear and tear on the infrastructure due to commuter traffic. Once the need for the project is defined I explain the objective of the project which is to determine if a co-working space would meet the needs and interests of the community and if so then a proposal for implementation would be drafted. If a co-working space would not be feasible then we would seek alternative solutions. As I detail how the project will take place I provide a timeline for the activities. Each activity will take approximately one to two months, and the entire project will take place in ten months, to be completed and presented to the Select Board before the next town meeting. The specific activities that I outlined are the establishment of a task force, develop and mail the first round of surveys, analyze the surveys, host open table discussions, analyze discussion results, narrow down focus, and develop a focused survey, analyze the results of the focused survey, and finally develop a feasibility plan. As part of the grant proposal, I also include a detailed budget of expenses and a justification for such expenses. Most of the expenses for this project are focused on the creation and mailing of the surveys.

The internship that I completed at Cambridge Rescue Squad consisted of leading a committee in the initiative to update, create, and implement a large number of policies and procedures. As part of the preliminary process, I asked the members of the committee to review the list of policies and decide which ones needed to be revised and determine what additional policies needed to be implemented. Once we had a complete list of policies that needed to be worked, we prioritized them. At this point, each of the members of the committee were asked to do research a compile information that is pertinent to each policy. Then the policies were drafted and put into a shared drive for each member of the committee to provide their feedback. Once all members of the committee were satisfied with the draft of the policies, the other members of the Board of Directors were invited to provide their feedback. The Board of Directors was given 30 days to provide feedback, then the comments were discussed at a board meeting. All the policies were then finalized and sent to all members of Cambridge Rescue for their feedback. Again, the members were allowed 30 days to provide their feedback on the policies before being discussed at

the squad's annual meeting. After all of the policies were finalized after all of the feedback received the policies were voted on at a meeting of the Board of Directors.

Some of the challenges that were faced in this process was that the other volunteer members of the committee had other priories and were not able to participate in research and compiling information to include in the policies. Additionally, by the time the Board of Directors completed the review of the policies, there was not the allotted 30 days as originally planned for the membership of the organization to review the policies before the annual meeting. Lastly, though all the members of the board agreed to use a shared drive to keep all the policies and complete the review some members did not have the technical ability to use this shared drive.

My reflection in the evidence attached describes some of the changes I would make if I could do things differently. Some of these improvements in past practices include setting strict deadlines for the completion of tasks, ensuring all members involved with the process have the time capacity and have several alternative sources for individuals to access documentation. Despite facing some challenges, I was able to reflect on those challenges and make recommendations on how the project could have been managed more effectively.

Overall, the project that I described and planned as part of the grant proposal shows my ability to articulate effective project management practices. Additionally, the internship artifact for the Cambridge Rescue Squad is evidence of my ability to be evaluated and demonstrate effective leadership and management of projects. The combination of these two pieces of evidence shows that I exceed the standard in my capacity to effectively manage projects.

Public Service Perspective

Competency/Capacity Addressed:
4a - Capacity to understand the value of authentic citizen participation in PA practice.

Title/Label of Evidence:
South Burlington City Center – Current Event Blog Final Compilation
Cambridge Rescue Internship Final Write-up

Type of Evidence:
Course assignment for Foundations of Public Administration
Internship artifact for Cambridge Rescue

Self-Assessment
Score: 3

Criteria Met:
Possesses the capacity to describe how citizen participation can be undertaken in an authentic way that improves the democratic accountability of an organization or network.

Instructor Assessment
Score: _____

Evidence is located under:
Appendix D - PA301: Foundations of Public Administration - Current Event Final
Appendix Q - Internship: Cambridge Rescue Internship Final Write-up

Public Service Perspective: Competency 4a
Capacity to Understand the Value of Authentic Citizen Participation in PA Practice

To demonstrate my capacity to understand the value of authentic citizen participation in public administration practice, I have provided two pieces of evidence. The first piece of evidence is the final compilation of a blog written throughout the semester in Foundations of Public Administration on the South Burlington City Center (Appendix D). This piece of evidence exhibits my ability to describe how citizen participation can be undertaken in an authentic way that improves the democratic accountability of an organization or network. The second piece of evidence is the final write-up from my internship experience with the Cambridge Rescue Squad (Appendix Q). My experience with the Cambridge Rescue Squad allowed me to have a role in facilitating citizen participation in public administration.

The assignment written on the South Burlington City Center discusses the importance of citizen participation specifically during the planning phase of the project. The City of South Burlington struggled with a lack of identity and the hope for the City Center project was that it would be the center of the community, the space where people would gather. To do this the public administrators facilitating this project held public hearings at each phase of the project. However, this type of participation is not considered authentic. According to Innes and Booher, "Legally required methods of public participation in government decision making in the US—public hearings, review and comment procedures in particular—do not work" (2004, p.420). In the more recent phases of the project, the City of South Burlington has done more to solicit citizen participation in this project. For instance, public information hearings were being held regarding the different potential designs of the community center, town offices, library, and senior center within the city center project. Leading up to the bond vote on the project these meetings were held weekly. Unfortunately, these meetings did not have a large attendance. Innes and Booher also noted, that "Public hearings typically are attended primarily, if not uniquely, by avid proponents and opponents of a measure affecting them personally, by representatives of organized interest groups, and by a handful of diehard board watchers" (2004, p.424). Though the City of South Burlington expressed a desire to receive citizen participation the methods for obtaining participation did not facilitate a high level of authentic participation.

In learning from the City of South Burlington City Center project, I hoped to elicit more participation during the policy implementation I worked on during my internship. In the final write-up of my internship, I discuss how I solicited thoughts, ideas, and feedback from all levels of the organization during every phase of the project. At the beginning of the project when I was researching the organization I meet with the Chief to obtain her input on the policies and procedures that she felt were important. I also worked with members of the Board of Directors throughout the entire project in a working group to draft the policies and procedures. Once the policies and procedures were drafted they were then sent to the Board of Directors for their review. Once the Board of Directors provided their feedback I then sent the policies and procedures to the entire membership for their review. Though this was not something that was required I felt that it was important to include the membership in the process. The Cambridge Rescue Squad also has a standard that all updated information is posted at the station for the members to review. I took it upon myself, with the approval of the Chief to send the draft policies

and procedures to all the members electronically in addition to posting them at the station. In doing so the members were able to spend time reviewing the documents at their leisure as opposed to having to make time to review them at the station. This resulted in a significant amount of feedback from the membership.

As evidenced by these documents I was able to use my capacity to describe how citizen participation can be undertaken in an authentic way that improves the democratic accountability of an organization or network learned in the classroom and apply it during my internship in a role where I facilitated citizen participation in public administration. The combination of both my classroom experience as well as my experience with the Cambridge Rescue Squad allowed me to meet the standard in my capacity to understand the value of authentic citizen participation in public administration practice.

Public Service Perspective

Competency/Capacity Addressed:

4b - Capacity to understand the value of social & economic equity in PA practices.

Title/Label of Evidence:

Team Project Part B - Corrections and Institutions (House Committee)

Youth Service Case Study

Type of Evidence:

Course assignment for Policy Analysis

Course assignment for Foundations in Public Administration

Self-Assessment

Score: 3

Criteria Met:

Possesses the capacity to describe and analyze social and economic equity/inequity within specific contexts. Can offer suggestions for ways of improving inequitable situations.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix I - PA306: Policy Systems - Team Project Part B

Appendix C - PA301: Foundations of Public Administration – Youth Services Case Study

Public Service Perspective: Competency 4b
Capacity to Understand the Value of Social & Economic Equity in PA Practices

As evidence of my capacity to understand the value of social and economic equity in public administration practices, I have provided two course assignments. The first one is a team project on the Corrections and Institutions House Committee (Appendix I) completed for Policy Analysis. The second piece of evidence is the Youth Service Case Study memorandum (Appendix C) completed for Foundations of Public Administration.

The team project on the Corrections and Institutions House Committee that I am presenting as evidence was completed by myself and two of my cohorts, Beth McMurray and Romana Kurevija. This project was to analyze the bills that were in the committee for review in regards to a specific policy framework. Since we were reviewing bills in the Corrections and Institutions House committee all of the bills we reviewed were related to inmates. Some of these bills included integrating the inmates into the state mental health system, securing the necessary documentation inmates need when released from detention, and ensuring that facilities that the inmates are housed in meet certain standards including remaining within the state of Vermont under the state's control. All of these bills take into consideration the needs of a specific population group and are written to improve access to these needs. For instance, providing inmates with basic documentation such as a state-issued photo id provides them the opportunity to obtain a job. Additionally, integrating inmates into the state mental health system ensures that those in need of mental health support have access to it. Furthermore, improvements to the infrastructure in which the inmates are housed and guaranteeing that the facilities are safe should be considered an essential part of operations for Corrections and Institutions.

The memorandum written as an assignment for Foundations of Public Administration was to address concerns regarding the "lack of integration of school district systems into the Youth Services Collaborative." The Youth Services Collaborative was a program to address social and economic problems in Savannah, by providing support to the at-risk youth, specifically in Savannah's poor black neighborhoods. I approached this assignment from the perspective of Cecil Carter, the Chatham-Savannah School District Superintendent. In this memorandum, I addressed the challenges that had occurred with the integration of the Youth Services Collaborative within the school district. The challenges that I noted ranged from a lack up support from leadership, limited time to plan and implement, a disassociation between board members and staff, and most importantly was the lack of cohesion which resulted in students not getting the referral they needed, interference with classes, and the deficiency in tracking when students transferred. To ensure that these students who are the most at risk in the district received the support that they needed I made several recommendations. The most significant of those recommendations was the collaboration between the school district and the Youth Services Authority to develop schedules that would not interfere with the school curriculum but would have time built into the schedule to allow the students to meet with their case managers. Additionally, the schools need to collaborate with the Youth Services Authority and case managers to ensure that student's records are transferred when the student transfers from one school to another. My recommendation for addressing transfer students is that the student will have an incoming transfer

meeting with the case manager at the new school as well as the team from the previous school to review all pertinent information and make changes as necessary.

In both these pieces of evidence, I was able to demonstrate my capacity to describe and analyze social and economic equity/inequity within specific contexts. Additionally in the memorandum for the Youth Services case study, I offered suggestions for ways of improving inequitable situations. With this evidence, I have demonstrated that I possess the capacity to describe and analyze social and economic equity/inequity within specific contexts and can offer suggestions for ways of improving inequitable situations, thereby meeting the standard for the capacity to understand the value of social & economic equity in public administration practices.

Public Service Perspective

Competency/Capacity Addressed:

4c - Capacity to lead in an ethical and reflective manner.

Title/Label of Evidence:

Reflective Essay

Personal Leadership Plan

Type of Evidence:

Course assignment for Foundations of Public Administration

Course assignment for Women in Leadership

Self-Assessment

Score: 4

Criteria Met:

Can demonstrate how she/he has lead in an effective, reflective and ethical manner in a PA context.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix E - PA301: Foundations of Public Administration – Reflective Essay

Appendix L - PA395: Women in Leadership – Personal Leadership Plan

Public Service Perspective: Competency 4c
Capacity to Lead in an Ethical and Reflective Manner

As evidence of my capacity to lead in an ethical and reflective manner, I have provided two documents to demonstrate this ability. The first piece of evidence is a reflective essay on my work experience from Foundations of Public Administration (Appendix E). The second piece of evidence is my Personal Leadership Plan from Women in Leadership (Appendix L).

The Reflective Essay was an assignment that I completed reflecting on my experience as a leader, both professionally and socially. This example of my capacity to lead in an ethical manner demonstrates the root of my leadership goals are my ethics and morals. In this assignment, I reflect on my experience as a student, street-level bureaucrat, as a volunteer, as well as my professional experience in the public, private, and nonprofit sectors. Additionally, this document provides examples of where I had to take the initiative in addressing a difficult situation that I felt was unethical. I also address how my leadership style has evolved throughout my career as a result of experience and reflecting on how I could have addressed situations differently.

Throughout this assignment, I reflect on my experience as a street-level bureaucrat as well as an administrator and the importance of ethics in all of these roles. In roles that do not necessarily hold a leadership position, the importance of leading by example still rings true in regards to acting ethically. One example I provide in my evidence is how the culture of an organization was set by the leadership, but that culture was not reflected in the rest of the organization. As a leader in the organization, it was my goal to emulate the culture that this organization was trying to instill and work with my team to ensure that they felt and believed in the culture as well. To do this I instilled in my team the importance of process improvements. Each year every member of my team was required to recommend and assist with the implementation of at least one process improvement. I also expressed to them the importance of professional development by requiring that they participate in at least three professional development opportunities a year. I did not just require this of them, I also demonstrated it by also participating in as many professional development opportunities that I could and implementing regular process improvements when I saw fit.

My Personal Leadership Plan written for Women in Leadership provides not only a reflection of my leadership as a woman but also my leadership style in general. This leadership plan summarizes a situation in my work experience where I was an effective and ethical leader. This particular example was of my skills in working with a member of my team who was struggling. I addressed this issue with encouragement and support. I also suggested professional development opportunities to foster the skills needed for the position that was lacking. Throughout this piece of evidence, I discuss how emotional intelligence is an important part of being an effective leader. Having emotional intelligence is important as it demonstrates the skills of being self-aware and self-reflecting. With the ability to be self-aware I ensure that I treat everyone equally and with respect. I also do not intentionally discriminate against anyone. If I recognized that I had a bias then I would keep that knowledge at the forefront of my thoughts to ensure that I did not act on that bias.

In both of these pieces of evidence, I document my ability to lead in an effective, reflective, and ethical manner. This includes my experience in the public, private, and nonprofit sectors. Also, my experience as a leader is not restricted to my professional experience, but also my experience

as a street-level bureaucrat. This evidence demonstrates that I exceed the standard in my capacity to lead in an ethical and reflective manner.

Public Service Perspective

Competency/Capacity Addressed:

4d - Capacity to achieve cooperation through participatory practices.

Title/Label of Evidence:

Seattle Community Association Case Study
Internship Assignment 3

Type of Evidence:

Course assignment for Foundations in Public Administration
Internship artifact for Cambridge Rescue

Self-Assessment

Score: 3

Criteria Met:

Can demonstrate how inclusive practices and conflict management wins cooperation for forming coalitions and collaborative practices in specific cases or contexts.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix B - PA301: Foundations of Public Administration - Seattle Community Assoc. Case Study
Appendix P - Internship: Cambridge Rescue Internship Assignment 3

Public Service Perspective: Competency 4d
Capacity to Achieve Cooperation Through Participatory Practices

As evidence of my capacity to achieve cooperation through participatory practices, I have provided an assignment completed for Foundations of Public Administration entitled Seattle Community Association Case Study (Appendix B) as well as the third artifact assignment from my internship with the Cambridge Rescue Squad (Appendix P). In one piece of evidence, I review the implementation of an anti-racism initiative and the other I document my experience in obtaining acceptance on a policy that contains contentious elements. These pieces of evidence show that I am able to demonstrate how inclusive practices and conflict management wins cooperation for forming coalitions and collaborative practices in specific cases or contexts.

The memorandum written as an assignment Foundations of Public Administration was a report from the Executive Director of the Seattle Community Association to the Board of Directors concerning the backlash that was received from the staff on an anti-racism initiative. One of the challenges that I had noted in this memorandum was that the Undoing Racism program was designed with the expectation that all participants had a strong commitment to undoing racism. This assumption did not create an environment for the participants that was safe, comfortable, and optimistic. There was also a struggle with communication and morale as well as a feeling of lack of control amongst many of the hiring managers. To address some of these issues my recommendations included the implementation of workshops to work with individuals at different levels of cultural competencies to create safe and comfortable environments for discussion, therefore creating inclusion through different practices. Additionally, the Anti-Racism Committee will hold biweekly small group sessions with staff from different areas of the organization to have an open discussion regarding racism as well as other challenges within the organization. The committee will solicit recommendations from the staff to address the challenges and incorporate them into the committee's action items, resulting in an increase in collaboration. The goal of these small group sessions would be that each staff member should have participated in a small group session twice over a year, each time with a different group of colleagues. Finally, the evaluation questionnaires from MEDC would be used on an annual basis as a performance measure of the internal success of the anti-racism initiative as well as an overall improvement in job satisfaction.

The second piece of evidence provided is the third artifact assignment completed for my internship with the Cambridge Rescue Squad. This artifact and subsequent rationale statement document my experience in achieving cooperation through participatory practices during the adoption of the Building Access and Use Policy. Several organizational norms had been occurring for many years that were not acceptable and were being addressed as part of this policy, which could have caused many members of the organization to be upset. To minimize some of the angst regarding the revised policy I spent time working with the Chief of the Cambridge Rescue Squad, the Chief of the Cambridge Fire Department, as well as the Town Administrator for the Town of Cambridge. In doing so I was able to ensure that all of the policies related to the use of buildings contained the same information and similar language. This was an important task as all of the buildings for these organizations are owned by the Town of Cambridge. Once the policy was drafted I ensured that there was an adequate comment period for the members of the Cambridge Rescue Squad to provide feedback and ask questions. This was necessary to ensure that they had

a part in the process of creating and implementing the policy. Additionally, they had were given accurate information regarding some of the changes that were occurring as a result of this policy.

As documented by both pieces of evidence provided, I can demonstrate how inclusive practices and conflict management wins cooperation for forming coalitions and collaborative practices in specific cases or contexts. This validates that I meet the standard of the capacity to achieve cooperation through participatory practices.

Communicate and Interact with a Diverse and Changing Workforce and Citizenry

Competency/Capacity Addressed:

5a - Capacity to undertake high quality oral and written communication to convey messages to specific audiences.

Title/Label of Evidence:

Internship Assignment 1

PowerPoint on PeopleSoft Travel and Expense Advanced Topics

Type of Evidence:

Internship with Cambridge Rescue Artifact

Professional Experience Artifact

Self-Assessment

Score: 3

Criteria Met:

Is capable of consistently expressing ideas verbally and in writing in a professional manner that communicates messages to intended audiences.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix N - Internship: Cambridge Rescue Internship Assignment 1

Appendix V – Professional Experience: PowerPoint – PeopleSoft T&E Advanced

Communicate and Interact with a Diverse and Changing Workforce and Citizenry: Competency 5a
Capacity to Undertake High Quality Oral and Written Communication to Convey Messages to Specific Audiences

As documentation of my capacity to undertake high quality oral and written communication to convey messages to specific audiences, I have provided two pieces of evidence. The first piece of evidence is the first artifact from my internship with the Cambridge Rescue Squad (Appendix N). The second piece of evidence is an artifact from my professional experience. This piece of evidence is a PowerPoint presentation created for training on PeopleSoft travel and expense advanced topics (Appendix V).

The first artifact form my internship with Cambridge Rescue is the membership policy that I wrote. This policy was the first of the policies and procedures that I wrote as part of my internship. When drafting this policy I had to research to ensure that the information that was being presented was accurate and pertained to the unique nature of the work that is performed by the Cambridge Rescue Squad. The language in the document had to be formal but also easily understood by the diverse membership of the Cambridge Rescue Squad. intended audiences. In addition to writing this policy I was my task as part of the internship to present this policy to the membership and explaining the intricacies that exist within the policy. Additionally it was my responsibility to address any questions that arose as part of this presentation. Ultimately this piece of evidence shows my capacity to express ideas verbally and in writing in a professional manner that communicates messages to intended audiences.

The second piece of evidence provided is a PowerPoint presentation that was created for a training I present in my current professional role. This training is entitled PeopleSoft Travel and Expense Advanced Topics. I provide this training two times a year to staff at the University of Vermont that are responsible for creating travel and expense related documents. This presentation is the second in a two-part series of travel and expense training. The prequel to this presentation is the Travel and Expense Basics which includes more policy and process-related topics with information on the basic use of the PeopleSoft module for travel and expense submission. When individuals register for this training it is noted that the Travel and Expense Basics is a prerequisite however there was oftentimes that the prerequisite was not verified. As the instructor, it was my responsibility to ensure that each individual was able to follow the course material. Professional Development and Training who organizes the professional development for the University of Vermont would solicit feedback from participants and I always received high remarks on my ability to convey the information in a way that was understanding. My experience as an instructor in this training series is evidence of my capacity to consistently express ideas verbally in a professional manner that communicates messages to intended audiences.

Each of the two pieces of evidence provided shows my capacity to either express ideas verbally or in writing in a professional manner that communicates messages to intended audiences. Together this evidence documents that I meet the standard capacity to undertake high quality oral and written communication to convey messages to specific audiences.

Communicate and Interact with a Diverse and Changing Workforce and Citizenry

Competency/Capacity Addressed:

5b - Capacity to appreciate the value of pluralism, multiculturalism & cultural diversity.

Title/Label of Evidence:

Seattle Community Association Case Study
Leadership Case Study

Type of Evidence:

Course assignment for Foundations of Public Administration
Course assignment for Women in Leadership

Self-Assessment

Score: 3

Criteria Met:

Can explain how cultural awareness, cultural knowledge and cultural skills are employed, or not employed, within specific cases

Instructor Assessment

Score: _____

Evidence is located under:

Appendix B - PA301: Foundations of Public Administration - Seattle Community Assoc. Case Study

Appendix M - PA395: Women in Leadership – Leadership Case Study

Communicate and Interact with a Diverse and Changing Workforce and Citizenry: Competency 5b
Capacity to Appreciate the Value of Pluralism, Multiculturalism & Cultural Diversity

To demonstrate my capacity to appreciate the value of pluralism, multiculturalism & cultural diversity I have provided two course assignments. The first assignment is the Seattle Community Association Case Study completed for Foundations of Public Administration (Appendix B). The second assignment is the Leadership Case Study completed for Women in Leadership (Appendix M). These two pieces of evidence demonstrate my ability to explain how cultural awareness, cultural knowledge and cultural skills are employed, or not employed, within specific cases.

The Seattle Community Case Study is an assignment that focused on the organization's Anti-Racism Initiative. I choose to approach this assignment from the perspective of Cheryl Cobb, the Executive Director, addressing the Board of Directors. The Board of Directors was concerned about some of the backlash that was received from the staff regarding the Anti-Racism Initiative and requested that Cheryl provide a report on the status of this Initiative. Some board members felt that the Anti-Racism Initiative is a positive and important program for the community and felt that it should continue. In the memorandum, I addressed the successes of the initiative such as a high voluntary attendance rate as well as an avenue for staff to provide their feedback regarding the initiative and the Seattle Community Association's management. One of the challenges that I had noted in this memorandum was that the Undoing Racism program was designed with the expectation that all participants had a strong commitment to undoing racism. This assumption did not create an environment for the participants that was safe, comfortable, and optimistic. Additionally, many of the hiring managers felt that they had a lack of control over the hiring process due to the implementation of initiatives to promote a more diverse candidate pool. These initiatives to create a more diverse candidate pool limited the number of minority applicants that managers could interview. To address some of these issues my recommendations included the implementation of workshops to work with individuals at different levels of cultural competencies to create safe and comfortable environments for discussion. Additionally, the Anti-Racism Committee will hold biweekly small group sessions with staff from different areas of the organization to have an open discussion regarding racism as well as other challenges within the organization. The committee will solicit recommendations from the staff to address the challenges and incorporate them into the committee's action items. The goal of these small group sessions would be that each staff member should have participated in a small group session twice over a year, each time with a different group of colleagues. Finally, there would be a revision to the hiring policy to allow managers to have more control, implement a variety of recruiting options to provide opportunities to a wider variety of potential applicants. These recommendations explain how cultural skills can be employed within specific cases.

The Leadership Case Study that I completed for Women in Leadership takes a different approach to diversity as it addresses gender diversity in leadership roles, specifically that of higher education. As part of this assignment, I interviewed Kerry Castano, the Assistant Provost and Chief of Staff at the University of Vermont. Women in leadership roles in higher education are more common than women in leadership roles in the private sector, but they are still the minority. This is

extremely relevant for me as I am a woman striving to be a leader in higher education. In my interview with Kerry, there were a few things in particular that she mentioned that struck out in the research that I did. Kerry was very humble about her role in the leadership structure several times in our discussion Kerry mentioned that she was in the position where she is because of hard work and being in right place at the right time. In my research, I found that women are more likely to be recruited whereas men are more likely to volunteer for positions of leadership. Kerry also mentioned that she never took a maternity leave, which often has a significant impact on a woman's career. In my research, I found that amongst university deans, "women are more likely than men to be single, and a larger percentage of women than men are parents, although fewer women than men have children under eighteen living at home" (Behr and Schneider, 2015).

These two pieces of evidence are verification that I can explain how cultural awareness, cultural knowledge, and cultural skills are employed, or not employed, within specific cases. In doing so I meet that standard capacity to appreciate the value of pluralism, multiculturalism & cultural diversity.

Communicate and Interact with a Diverse and Changing Workforce and Citizenry

Competency/Capacity Addressed:

5c - Capacity to carry out effective human resource management.

Title/Label of Evidence:

Express Transit Case Study
Reflective Essay

Type of Evidence:

Course assignment for Foundations of Public Administration

Self-Assessment

Score: 3

Criteria Met:

Demonstrates a capacity to identify and manage the necessary human capital to carry out a task or function within very specific contexts or situations.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix A - PA301: Foundations of Public Administration - Express Transit Case Study
Appendix E – PA301: Foundations of Public Administration – Reflective Essay

Communicate and Interact with a Diverse and Changing Workforce and Citizenry: Competency 5c
Capacity to Carry Out Effective Human Resource Management.

To document my capacity to carry out effective human resource management I have provided two pieces of evidence. The first piece of evidence is the Express Transit Case Study memorandum (Appendix A) completed for Foundations of Public Administration. The second piece of evidence is a reflective essay written for Foundations of Public Administration (Appendix E). These two assignments demonstrates my capacity to identify and manage the necessary human capital to carry out a task or function within very specific contexts or situations.

The Express Transit Case Study focused on maintenance issues and one employee who was a whistleblower on the poor maintenance practices after several attempts to address the issues internally. The assignment was to review the information provided in the case and write a memorandum as James Hensley, an inspector, to Clayton Baker, the manager of Vehicle maintenance, summarizing the problems and making recommendations for how to fix them. One of the issues I addressed in the memorandum was that the culture that Express Transit presented publicly did no align with the current business practices. Additionally, the focus on innovation created a reliance on technology that impeded communication with leadership throughout the leadership structure of the organization. Furthermore, several problems affected employee morale including a lack of training, a poor shift structure, which limited communication and cooperation amongst technicians, lead mechanics, and chiefs, and a poorly structured salary and incentive program. To address these issues I provided several recommendations including developing a multi-stream reporting structure, professional development opportunities, improved communication, and implementing an employee recognition program. My recommendation for the reporting structure provided alternative reporting options where an employee can report issues anonymously if they are uncomfortable reporting to their direct supervisor. Additionally, there would be a committee in place to ensure that any issues are reviewed and a response is provided. My recommendation also included additional training on software, professional development for supervisors, and regular meetings between shifts. Lastly, I recommended the implementation of an employee recognition program. All of these recommendations were made to address the issues that were negatively affecting employee morale.

The second piece of evidence, the reflective essay I wrote for Foundations of Public Administration reflects on my experience as a leader, both professionally and socially. This example of my capacity to identify and manage the necessary human capital to carry out a task or function within very specific contexts or situations documents and instance when one of my direct reports said to me "that is how we have always done it". In my reflective essay I explain how this statement struck a nerve, as I was taught that repetition does not make things right. I understood as a manager that this individual lacked knowledge on an issue; therefore, they were making assumptions based on previous guidance. However, there was no thought process on the individual circumstances surrounding this situation and what improvements could be implemented that might make this situation easier for the individual as well as others. I used this opportunity to instill the importance of professional development on my team by requiring them to attend a minimum of three professional development opportunities each year. I also demonstrated the importance of

professional development and job knowledge by also attending as many professional development opportunities as I was able.

The two documents I provided document how an institution or an individual leader can make improvements to assist its employees in their success. Together these two documents demonstrate my capacity to identify and manage the necessary human capital to carry out a task or function within very specific contexts or situations. In doing so this shows that, I meet the standard of the capacity to carry out effective human resource management.

Communicate and Interact with a Diverse and Changing Workforce and Citizenry

Competency/Capacity Addressed:

5d - Capacity to use and manage information technology with internal and external audiences to achieve public administration goals.

Title/Label of Evidence:

Internship Assignment 2

PowerPoint on PeopleSoft Travel and Expense Advanced Topics

Type of Evidence:

Internship artifact for Cambridge Rescue

Professional Experience Artifact

Self-Assessment

Score: 3

Criteria Met:

Can identify how IT impacts workplaces, organizations and public policy. Can diagnose problems associated with IT tools, procedures and uses. Can articulate how IT application is reshaping PA practice.

Instructor Assessment

Score: _____

Evidence is located under:

Appendix O - Internship: Cambridge Rescue Internship Assignment 2

Appendix V – Professional Experience: PowerPoint – PeopleSoft T&E Advanced

Communicate and Interact with a Diverse and Changing Workforce and Citizenry: Competency 5d
Capacity to Use and Manage Information Technology with Internal and External Audiences to Achieve Public Administration Goals

As evidence of my capacity to use and manage information technology with internal and external audiences to achieve public administration goals, I have provided to pieces of evidence that demonstrate how I can identify how IT impacts workplaces, organizations and public policy, how I can diagnose problems associated with IT tools, procedures and uses and how I can articulate how IT application is reshaping public administration practice. The first piece of evidence is the third artifact from my internship with the Cambridge Rescue Squad (Appendix O). The second piece of evidence is a PowerPoint presentation from my professional experience entitled PeopleSoft Travel and Expense Advanced Topics (Appendix V).

The artifact from my internship with Cambridge Rescue is a spreadsheet from Google Sheets that was used to keep track of the policies and procedures used throughout the internship on Google Drive. This spreadsheet was shared with members of the Board of Directors including the members of the working group whom I was working with on this project. This tool was very useful in the fact that the members of the working group could make notes on the policies and procedures, select which policies and procedures they were working on, and provide a status of the policy. In addition to the use of this tool by the working group, it was also available to all members of the board to review the status of the policies and procedures. In addition to this spreadsheet, all of the draft policies and procedures were located on Google Drive as well. This allowed all members of the working group to review make comments on each of the policies and procedures throughout the process. Once the policies and procedures were completed by the working group they were then made available to all the members of the Board of Directors to review and make comment. Furthermore, once the Board of Directors approved the final draft of the policies and procedures they were made available to all members of the Cambridge Rescue Squad for review and comment. The use of Google Drive was beneficial to this project as it allowed for those that can review the policies and procedures at their leisure and make comments for other members to see in real-time. The primary issue with the use of this technology is that some members were not comfortable with this level of technology and were not able to participate in the same manner as other members. I made sure that all policies and procedures were available at the station for members to review, however, those that did not have access or were not comfortable using Google Drive may not have felt that they had an equal part in the process or that their feedback was not as valuable.

The PowerPoint presentation that is included as evidence is a tool used during training that I teach twice a year to the staff at the University of Vermont. This training is entitled PeopleSoft Travel and Expense Advanced Topics and it is a hands-on for creating travel and expense related documents. This training is the second in a two-part series of travel and expense training. The prequel to this presentation is the Travel and Expense Basics which includes more policy and process-related topics with information on the basic use of the PeopleSoft module for travel and expense submission. PeopleSoft is the financial software used by the University of Vermont and allows users to submit for a travel authorization before their trip, request travel cash advances, and

submit an expense report for reimbursement. This training provides instruction on advanced tools to assist in making the submission process easier. One of the issues with PeopleSoft is that many users across campus find it difficult, especially those that do not use it very often. Many times I will have someone attend this training multiple times and still struggle with some of the tools presented. To assist with this I created short training videos that are embedded into the presentation as well as readily available to all users on the department website.

Both pieces of evidence show that technology is often limited by the users' level of ability to interact with the software. This can create a disadvantage to the citizens that do not have access or are limited in their ability to use technology. However, technology has also played a significant role in the recent COVID-19 pandemic as both the Cambridge Rescue Squad and the University of Vermont administrative offices were able to continue operations due to the technology they have in place.

My internship, as well as my professional experience, provides evidence that I can identify how IT impacts workplaces, organizations and public policy. Can diagnose problems associated with IT tools, procedures and uses. Can articulate how IT application is reshaping PA practice. This demonstrates that I meet the standard capacity to use and manage information technology with internal and external audiences to achieve public administration goals.

Summary

As I conclude my time in the Public Administration Master's Program and compile my work in the capstone portfolio, I can reflect on my work and see that though my professional experience has spanned all three sectors including nonprofit, public, and private, I have concentrated my interest in the nonprofit field, specifically in first response. Experience in all of these sectors has contributed to my ability to be a good public administrator as it has provided a solid foundation in leadership, cooperation, ethics, and knowledge. As I progress further in my professional career, I will utilize the tools I have learned in my experience and the public administration courses.

During the capstone course, I started a new position at the University of Vermont, Division of Finance. This position involves providing technical support and project management of technical upgrades, updates, and improvements for University Financial Services. Though this position was not one that I had ever expected to be offered I am very grateful for the opportunity provided to me. Since being offered this position it has changed the trajectory of my professional path. I had originally thought that upon my completion of the Masters of Public Administration I would pursue a career that more directly aligned with my public administration coursework. However, I have learned that this position will allow me to use the skills and knowledge I have acquired from my previous professional experience and the courses at the University of Vermont Public Administration program. The most significant being my capacity to use and manage information technology with internal and external audiences to achieve public administration goals. Though this position is not in the field of public administration I will be using the same set of skills to be able to assist different groups of people with the use of the university's financial software as well as being able to communicate with the more technical professionals the technology needs of the people I support. To be able to accomplish these tasks I will need to utilize my capacity to undertake high quality oral and written communication to convey messages to specific audiences. This skill will be imperative to articulate the needs of the functional users and end-users as well as communicating the limitations, upcoming improvements, or alternative functionality back to the functional users. A key task of this position is to ensure that projects are being prioritized correctly and that they are receiving the appropriate time commitment. To be successful at this task I will need to utilize my capacity to effectively manage projects as well as my capacity to apply sound performance measurement & management practices. Last but not least it will be imperative to use my capacity to achieve cooperation through participatory practices to ensure that projects both small and large are completed successfully. To do this I will use my capacity to lead in an ethical and reflective manner as I believe it is important to lead by example.

As I continue to look to the future of my professional career, I see myself continuing to work with the University of Vermont. The university has played a significant role in my life both professional as well as my education. As also expect to continue my involvement with nonprofit first response and I hope to expand my work with nonprofits or even become more involved in my local town organizations. I have found through the Masters of Public Administration program that I have a lot of knowledge and skills to share.

Tiffany Barker Cook
PA301 – Public Administration
15 October 2018

Memorandum

To: Clayton Baker, Manager of Vehicle Maintenance

From: James Hensley, Inspector

Date: 01 October 1986

Re: Maintenance of Express Transit's Bus Fleet

Per your request, I am following up regarding the issues surrounding the current maintenance practices at Express Transit and my recommendations on correcting these issues.

Problems

- Express Transit publicly emphasis a culture that prioritizes safety, innovation, and accountability, in reality the current business practice prioritizes efficiency and cost savings. This is evident by the current Management by Objectives (**MBO**), which evaluates
    - miles between trouble calls;
    - expenditures within approved budget;
    - yard delays;
    - parts delays due to unavailability;
    - adequate stock quantities in the Unit Rebuild Division; and
    - Maintenance costs per coach operating hour.
- The drive for innovation and efficiency has created a reliance on **MIRS**, which has impeded communication with leadership at every level. The implantation of **MIRS** did not provide adequate training and the default employee has created a lack of accountability.
- The current shift structure limits communication and cooperation amongst the technicians, lead mechanics, and chiefs on alternating shifts.
- The current salary and incentive program creates complacency amongst maintenance technicians after three years of service.
- The lack of incentives and employee recognition for maintenance technicians has created a deficiency it the camaraderie between maintenance technicians and drivers which has effected employee morale.

Recommendations

- Demonstrate an emphasis on safety, change targets of the Management by Objectives (MBO) approach, and do not use the same reports for annual performance evaluations.
- Division of accountability, inspectors should report to someone different from who oversees the maintenance technicians, such has a company safety officer.
- Develop a reporting structure or best practices for reporting issues when the individual does not feel comfortable reporting to their direct supervisor, or has reported to their direct supervisor but has not received a response or resolution. Such reporting could be an anonymous form that submitted through MIRS or similar program and is reviewed by senior leaders including the CEO, VP of Human Resources, Transit Director, and the Safety Officer.
- If MIRS is going to be the primary reporting tool for maintenance issues, additional training should be provided to all maintenance staff. In addition, the default employee needs to be removed. All new employees should work through the trainer until they have their own username and password.
- Implement quarterly meetings with senior leaders to discuss accomplishments and areas of improvements. It would be helpful to use this information for an annual SWOT analysis to track changes over time.
- Incorporate shift changeover meetings for Chiefs and Base Supervisors to discuss priorities and maintenance schedules.
- Create professional development for managers and supervisors, including Chiefs, beyond the two four-hour training courses for the Positive Performance Counseling (PPC) program.
- Revamp the Positive Performance Counseling (PPC) program with the input of the Local 231 to ensure that it is feasible to follow and that it meets the fairness and objectivity standards of the Union.
- Implement an employee recognition program for the vehicle maintenance staff as well as cross department or companywide employee appreciation activities to encourage camaraderie.

I would happy to discuss any of these items with you in further detail as well as take part in any implementation team or committee that is created to address these issues.

Tiffany Barker Cook
PA301 – Foundations
11 December 2018

Memorandum

To: Seattle Community Association Board of Directors

From: Cheryl Cobb, Seattle Community Association Executive Director

Date: 1 August 2004

Re: Seattle Community Association Anti-Racism Initiative

The implantation of any new initiative at an organization will create a level of backlash amongst a percentage of employees, just as this initiative has done. Though there has been some negative feedback regarding this initiative, is does not mean that there is a level of resistance that cannot be overcome. I strongly feel as an organization we can move past this and create an environment of anti-racism that reflects into the work we do and the community.

At your request, I have solicited feedback regarding the Seattle Community Association (SCA) Anti-Racism Initiative. Upon reviewing the information and the performance measurements that have been set into place, I would like to present that areas of the initiative that have successes as well as those that need improvement. Additionally, I am providing a plan for the initiative as we move forward.

Successes:

- The first Anti-Racism Committee meeting had the highest attendance of any voluntary, non-job specific meeting at the agency, which shows a level of commitment by the employees to this initiative.
- The Minority Executive Directors Coalition (MEDC) provided an alternative approach to Undoing Racism, which provided significant feedback to the current cultural competencies of the staff as well as their feedback on the anti-racism initiative and SCA management.

Challenges:

- Undoing Racism designed its program for groups that already had a strong commitment to undoing racism and showed little concern for making participants feel safe, comfortable, and optimistic.

- The new hiring policy gave hiring managers less decision making flexibility and actually limited the number of minority applicants hiring managers could interview.
- The MEDC feedback showed that staff felt communication and morale were a major issue at SCA. It also showed that though staff were aware of the Anti-Racism Committee, few knew or understood its function and goals.

Future Initiatives:

- Implement workshops to work with individuals at different levels of cultural competencies to create safe and comfortable environments for discussion. However, racism is not a comfortable topic for many people; there are degrees of comfort. We most slowly move people outside of their comfort zone towards progress to implement change effectively. To eat an elephant you can only do so, one bite at a time.
- Revise the hiring policy to allow flexibility for hiring managers as well as increase the number of minority applicants that meet the minimum requirements through alternative measurements.
  - Create internship, volunteer, and recruitment opportunities for individuals interested in working with SCA to gain experience in different areas of the organization. This will give individuals experience to use to meet the minimum qualifications of available positions.
  - Implement an outreach program to assist applicants with completing their resumes and applications.
  - Actively recruit in schools to make students aware of the qualifications SCA is looking for to give them the opportunity to get involved with SCA to develop these skills.
- Continue tracking the race of employees and hires, but include the race of applicants and those selected for interviews.
- The Anti-Racism Committee will hold biweekly small group sessions with staff from different areas of the organization to have open discussion regarding racism as well as other challenges within the organization. The committee will solicit recommendations from the staff to address the challenges and incorporate them into the committee's action items. Within a year, each staff member should have participated in a small group session twice, each time with a different group of colleagues.
- Use the evaluation questionnaires from MEDC on an annual basis as a performance measure of the internal success of the anti-racism initiative as well as overall improvement in job satisfaction.

I would be happy to discuss the future of this initiative with you in further detail.

Tiffany Barker Cook
PA301 – Foundations
12 November 2018

Memorandum

To: Chatham-Savannah School Board

From: Cecil Carter, Chatham-Savannah School District Superintendent

Date: 15 June 1990

Re: Savannah's Youth Futures Authority

As the first two years of the Youth Futures Authority (**YFA**) has come to a close, there is growing concern that the program has not been as effective as proposed. As the newly appointed superintendent at the time of implementation, I have had the opportunity of observing the successes and challenges of the initiative over the course of the implantation. In addition, I have compiled feedback from the administrative staff and teachers within the school district regarding their experience during the implementation. Please find below these challenges and my recommendations as we move forward.

Challenges:

- The YFA board requested data at the time of the bond proposal, which was part of the new desegregation plan required per federal court order. This put the school district in a precarious position, and created tensions amongst the members of the YFA board and school district.
- There was a lack of inclusion of the school district when implementing the initiative for improving school performance, which included reform to the school districts structure, policies, and curriculum.
- Limited time to plan and implement the case management system, as well as hire case managers. This resulted in a lack of job descriptions, training, or a clear direction for the case managers. Additionally, this created confusion and animosity amongst the Services to Assist You Teams (**STAY**) who already had a rapport with the at-risk students. This lack of cohesion created a loophole where many students were not referred to the services they needed.
- Some of the principles were more enthusiastic than others regarding the new programs, resulting inconsistent implementation.

- Case managers tried to meet with students during class time. Teachers felt this did not set a good example for the students regarding their responsibility to their schoolwork. This created tensions between teachers and case managers.
- As students within the program transferred to other schools, there was no means of tracking the students from one school to the other.
- School district leaders, including myself, delegated staff to implement the program and act as liaisons between the schools and the YFA, which lead to the assumption that there was a lack of support or enthusiasm amongst leaders.
- There was a disassociation between the YFA board and the staff. The board left the resolution of many of the service gaps and system issues to the staff to resolve.

Recommendations:

- School district leaders, including myself, should take a more active role in working with the executive director of the YFA to ensure the implementation of the programs as opposed to the executive director overseeing the work of school district personnel.
- Invest in the remedial programs that the school district was trying to implement prior to this implementation.
- Clarify the responsibilities of the YFA case managers as well as develop a clear plan for collaboration between the case managers, STAY teams, and outside agencies. In order to best serve the students, all agencies need to be able to communicate and have a clear picture of each student's individual situation.
- As part of the student plans and contracts, work with the STAY teams to have time built into the student's schedule to meet with their case managers.
- STAY teams amongst the different schools, in collaboration with the case managers, should communicate regarding transfer students to ensure the handover of case files. In addition, each transfer student will have an incoming transfer meeting with the STAY team and case manager at the new school to review the contract and make any changes necessary.
- The YFA board should address the issues where there are service gaps and work to resolve them as a collaborative, as there are representatives from each agency on the board. The responsibility should not be left to the case managers, STAY teams, or other staff to resolve organizational issues.

Upon accepting the appointment of superintendent, my attention has been concentrated on the new desegregation plan that was required per federal court order. Admittedly, this has been a disservice to the YFA initiative. As we move forward with the continued implementation of the YFA initiative, especially in the elementary schools, I make the commitment to take a more assertive leadership role in supporting the initiative with the administrative staff and teachers.

Tiffany Barker Cook
PA301 – Foundations of Public Administration
South Burlington City Center – Blog Final Compilation
11 December 2018

INTRODUCTION

For almost 40 years, the City of South Burlington has been discussing and planning a downtown "City Center". In June, there was a groundbreaking celebration on the "Market Street Reconstruction" project and in August, the City Center Park was completed. The community center is one more phase of the project that will include a library, senior center, and new city hall. The total project cost is $21.8 million and the amount sought for the bond to be voted on in November is $20.4 million. The difference is due in part to cash on hand, impact fees, donations and an additional funding source for the solar array. Part of the vote includes a land transfer between the school district and the city. If the voters approve the bond then the construction would begin next summer. This project has encompassed many important aspects of public administration, such as, Kingdon's agenda setting and policy windows, Rosenbloom's separation of powers, Radin's accountability, King's authentic participation, and many others. The City of South Burlington has been successful in some of these areas and less successful in others.

SUMMATIVE ASSESSEMENT ONE

The South Burlington City Center project has been in the planning phases for almost 40 years. The property in question includes several parcels of land, owned by the city, school district, or a private real estate company. The property is surrounded by residential and commercial properties and spans the distance from Dorset Street to Hinesburg Road on both sides of Market Street. Over the years, there has been a variety of plans for this property to address the needs of the local community. The original plan from the 1980s was described but John Jagger of South Burlington Realty as a "grandiose" 50-page proposal to build a city (Rieber, 2013). At the time this plan was not feasible for a single real estate development company and the owner at the time choose to hold out for a proposal that was mixed use, pedestrian friendly, and a focal point for the community (Rieber, 2013). In the early 90s, the city did a rezoning of the property that classified it as a city center, but by the late 90s, the federal regulations increased, making it more difficult to develop large-scale commercial properties (Rieber, 2013). In 2005, the federal government provided an approximately five million dollar grant to address the transportation issues on Market Street as well as a 1 million dollar grant to address the wetlands issues on the property (Rieber, 2013). The transportation grant could not be used to improve a private road, so the city took over the deed of Market Street and subsequently lead the environmental assessment that needed to take place prior to any development occurring (Rieber, 2013). This assessment was a public-private partnership as was most of the work that took place over the course of the next five to six years that occurred on the land of South Burlington Realty (Rieber, 2013). By the time this assessment was complete the municipal structure of the city government was changing as positions were turning

over and the city decided to reassess what should occur at this location and what was the best option for the community. This change in municipal structure from 2011 to 2013 was what the city needed in order for this program to gain momentum. As Kingdon (1984/2008) stated, "changes in the agenda may result from a change in party control or in intraparty ideological balances brought about by elections" (p.446). Having people in a public position that valued this particular project made it an agenda item and continued to push this agenda item forward, even while there were other barriers that slowed the progression of the City Center project. The City of South Burlington has had two very public issues recently that have changed the agenda, the F-35 fighter jets basing out of the local airport, as well as the petition to change the name of school mascot. Both items could have potentially closed the policy window for the City Center project but having elected officials and pubic administrators in place that valued this project, they have managed to keep the project moving forward.

The City Center project agenda from the 1970s to 2013 had many barriers in political policy. In 2013, the change in municipal structure created the opportunity for this project to move forward. At this point, South Burlington submitted a proposal to the state to create a Tax Increment Financing (TIF) District. This was a huge barrier for this project as the state only allowed six districts and there was one opening at the time the proposal was submitted. South Burlington submitted their proposal at the same time as Barre City, and the committee granted the award to Barre. South Burlington also included municipal structures as part of its proposal, which was not permitted at the time. The criteria for a TIF District required that the program provide economic development and the belief at the time was that municipal development could not stimulate economic development. South Burlington petitioned the committee and after several hearings, the TIF District was awarded. This was a significant reform for the TIF District programs because the South Burlington officials as well as John Jagger were able to convince the committee to change its policy and demonstrate the municipal structures can provide economic development to a community, opening another policy window for this project (Rieber, 2013).

The relationship between John Jagger and the officials of South Burlington has been a major benefit to the community. Rosenbloom (1983/2008) states, "public administration faces a serious and seemingly irresolvable problem in continually seeking to maximize the attainment of mutually incompatible view" (p.434). Competing views could have been part of the delay in the development in this project as the public-private partnership played a significant role. South Burlington Realty as a private company wants to maximize its profits, and the elected officials of South Burlington need to look out for the best interests of citizens. Luckily, the leadership from South Burlington Realty was very conscious of the needs and wants of the community, which allowed their partnership to be functional. In addition, the City of South Burlington's citizens may not all see the need to create a City Center and find the project to be a poor use of tax dollars. It is the pubic administrators' responsibility to communicate the importance of this project to the citizens as well as take into consideration the citizen's concerns. The City of South Burlington accomplished this by the creation of the TIF District, which minimized the amount of potential tax increases because of this project, as well as limited the amount of debt that South Burlington would incur.

In reviewing the roles of the different entities that were involved in this project, the managerial role was co-lead by the Project Director of the City of South Burlington, Ilona Blanchard, and the leaders of South Burlington Realty, for a majority of the time it has been John Jagger. The federal government, specifically the US Department of Transportation, as well as the City of South Burlington Planning/Zoning Board, Parks and Recreation Board, and the City Council maintained a political function over the course of the planning of this project. On the other hand, the State of Vermont Legislature and the TIF District Committee had a legal function. These roles were important throughout the process of planning for this project as "public administration stresses the values of representativeness, political responsiveness, and accountability" (Rosenbloom, 1983/2008, p.436). Throughout each phase of the planning process South Burlington also involved the community. As part of the development and implementation of the TIF District, the citizens had to vote in support of forming the district to financially support that phase of the project. The citizens voted in favor of the TIF District in 2016, which allowed expenses to be incurred on the City Center Park, Market Street Reconstruction, and the planning and future development of the City Center. The current phase of the project, the construction of the Community Center, is what is currently up for vote, by the citizens in November. The citizens will vote to allow the city to issue a bond to build a library, senior center, and city hall. Along with the bond, the citizens will also need to agree to an exchange of land with the school district. Throughout the entire process, the citizens have been able to participate in town hall meetings and information sessions. The City of South Burlington has also provided a significant amount of information on their website to help the citizens make informed decisions about the project. Having the public's input on these projects ensures that accountability of the public administrators by making sure they are planning a project that aligns with the wants of the community. Additionally, having successful votes has demonstrated that the elected officials accurately represent the wants of the citizens.

Though this project is considered a public-private partnership, the City of South Burlington has taken on a significant role in the process. Ilona Blanchard was hired as the Project Manager for the city and oversees this project. Ilona reports directly to the City Manager which helps when trying to coordinate will all the departments throughout the municipality that are involved as well as the partners outside of the municipal government. According to Hummel (1991/2001) "In intersubjectivity, all agree to respect each other's definition of the problem and, by respecting this, puzzle out a synthesis that leads to a solution" (p.91). Having Ilona as a project manager separate from each of the departments, gives Ilona the opportunity act as an outsider to see the project and all its pieces, and what each group values. Ilona can facilitate the project in the best interest of all the parties involved. As a woman, she can organize the project and encourage collaboration amongst the groups, which is an inherently feminine quality. As noted by Strivers (1990/2008),

> Ultimately, working within such a perspective, we should be able to ground administrative legitimacy in accountability that not only is exercised in the privacy of the individual conscience or in the internal process of a particular agency, but also tangibly enacted in substantive collaboration with affected others, including members of the general public. (p.475)

Having Ilona to facilitate the project and encourage collaboration between all the stakeholders has helped this project move further along in the past eight years than it has in the 30 years prior. The final determination will be when the voters choose to approve or deny the issues up for vote in November.

SUMMATIVE ASSESSEMENT TWO

One of the issues within the City of South Burlington is the city does not have a distinct identity. When asking individuals what they think of when you mention South Burlington, you could get many different answers, includes the University Mall, Blue Mall, Red Rocks Park, or the Airport. One thing that is consistent, there is not a city center for the community to gather. This idea was the root for the development of the South Burlington City Center. The town felt that there was a need and a want to have a space that would be deemed the center of the community where citizens could gather. To have a successful city center where the citizens feel connected, community input should be an integral part of the planning phases. Throughout the planning phases of the City Center project, there has been a lot of community involvement. At each phase, the City Council has held public hearings and sought voter approval. One could believe that over the 40 years of this planning phase the citizen participation may have delayed the process. As King et al (2001, p.305) noted, "administrators believe that greater citizen participation increases inefficiency because participation creates delays and increases red tape". In fact, when you look at the actual planning of this project you will see that the type of participation that occurred leans more towards unauthentic participation. Input from the citizens was solicited after the agenda had been set. In addition, the decisions that were made were done so by the administration, while relying mainly only on the citizen participation that is legally required. "Legally required methods of public participation in government decision making in the US—public hearings, review and comment procedures in particular—do not work" (Innes and Booher, 2004, p.420). Most of the participation that was solicited from the public was through public hearings and review and comment procedures. Recently, the City Council has been holding public information hearings regarding the four potential designs of the community center, town offices, library, and senior center. Additionally, there have been weekly public information hearings leading up to the November 6, 2018 bond vote, which have not had a large attendance. "Public hearings typically are attended primarily, if not uniquely, by avid proponents and opponents of a measure affecting them personally, by representatives of organized interest groups, and by a handful of diehard board watchers" (Innes and Booher, 2004, p.424). With a bond in excess of $20 million, there is an impact to all members of the community, regardless of the City Council's reinforcement that the bond will not have an impact on the citizen's taxes. During *Inside South Burlington: South Burlington City Center*, Paul Engels notes that less than 20% of voters attend the March Town Meeting, but there is a much larger turnout for the November elections. It will be interesting to see the voter turnout for the upcoming vote during the November midterm election.

In addition to the citizen participation, the City of South Burlington has involved several groups from the public, nonprofit, and private sector in the planning of the City Center. One private corporation that has significant involvement with this project is South Burlington Realty.

South Burlington Realty owns a large portion of the land in the area of the City Center project and has in fact, traded a small piece of land with the city where City Center Park currently sits. The collaborative efforts between South Burlington Realty and the City of South Burlington has played a significant role in the planning of South Burlington City Center, specifically during the creation of the TIF District. When the City of South Burlington petitioned the Vermont Economic Progress Council to allow the funds generated through the TIF District for municipal infrastructure, John Jaeger of South Burlington Realty was the one that testified that municipal infrastructure could create an economic benefit. The importance of this public-private collaboration has not only benefited South Burlington by being granted a TIF District, but with the creation of City Center, South Burlington Realty will have higher demand for the residential and commercial real estate in the area. Additionally, South Burlington Realty has agreed to sell some of its residential properties to the Champlain Housing Trust and Housing Vermont, two nonprofits, to keep the apartments at an affordable rate (Bendavid, 2018). Given South Burlington Realty's role in the collaboration, it appears they are not only driven by profit, but have a mission to be a conscientious contributor to the community. As stated by Nace (2005),

> The natural entity theory involved looking not at the shareholders but at the corporation itself as an upstanding, respectable participant in society. Given its central role in society, the corporation deserves the same rights as human beings, even if the Constitution doesn't actually say it does. (p. 163)

If all corporations could act with a conscience in the way that South Burlington Realty has done, I would agree with Nace that corporations deserves the same equal rights as humans. Unfortunately, South Burlington Realty is not in the majority of corporations, but we are seeing a rise in corporate consciences.

Counter to the private sector involvement in the planning of the South Burlington City Center is the involvement with the nonprofits and public agencies. Organizations and groups such as, the South Burlington School District, Friends of the South Burlington Library, the South Burlington Community Library, and the South Burlington Recreation and Parks Department, have had a substantial impact on the South Burlington City Center plan. The South Burlington School District owns property adjacent to the City Center, which is part of a land transfer agreement to be voted on in conjunction with bond. This land transfer would provide the space for the parking lot and utilities for the Community Center. Additionally, once the city administrative office moves out of their current location across from the high school, the school district will be able to lease the building for its administrative offices for three years and then purchase the building from the town for ten (10) dollars (Dorn, 2018). The South Burlington Community Library, which receives funding from the school and municipal taxes, as well as through donations to its nonprofit, Friends of the South Burlington Library, was recently moved from the South Burlington High School to the University Mall. The lack of space for the library is what brought to light the need to include space in the City Center project. Additionally, the South Burlington Community Library has an endowment of $428,000, earmarked for a new freestanding library; the funds will be used as part of the financing for the community center (Jonswald, 2017).

All of these organizations working together to achieve an independent and common goal is a good example of Salamon's "new governance"; who's "collaborative nature, its reliance on a wide array of third parties in addition to government to address public problems and pursue public purposes" (Salamon, 2002, p.8). "The "new governance," by contrast, shifts the focus of attention much more explicitly from the internal workings of public organizations to the networks of actors on which they increasingly depend" (Salamon, 2002, p.8). This symbiotic relationship is important to get citizen approval for large, financially burdensome projects such as this. Each organization has something they can contribute to the project, and show their support, ultimately obtaining the support of the citizens. As one can see, the "new governance" involves a significant amount of cross-sector collaboration. "We thus define cross-sector collaboration as the linking or sharing of information, resources, activities, and capabilities by organizations in two or more sectors to achieve jointly an outcome that could not be achieved by organizations in one sector separately" (Bryson et al, 2006, p44). Within the city of South Burlington, we have all three sectors collaborating and endorsing a plan that they believe will have a benefit to the citizens of South Burlington and specifically their constituents. Each organization within the sector benefiting individually and/or collectively from the plan at large.

SUMMATIVE ASSESSEMENT THREE

To emphasize the importance of an identity via a city center for the City of South Burlington, the development of a City Identity & City Center have been a part of the City of South Burlington's Comprehensive Plan (SBCP) for several renditions. To be specific it has been part of a comprehensive plan since 1985. As part of the 2011 City of South Burlington Comprehensive Plan, the City of South Burlington dedicated an entire section of the plan to the City Center. The 2011 plan included a goal statement for the City Center, which reads,

> It is a goal of this City to strive to establish a vital and dynamic focal point consisting of residential and commercial uses and public spaces in the Dorset Street area. This City Center will welcome travelers to the City and provide an exciting area for residents and visitors to live, work, shop and recreate. (p. 50)

With this goal statement there was only one objective, "To create through the blending and arranging of an appropriate mix of uses, a diverse, dynamic and people-oriented South Burlington" (SBCP, 2011, p. 51). This objective was specific, but there is nothing measurable, which was the same for most of the fourteen recommendations that were included as part of the City Center Comprehensive Plan. Lacking any performance measures the entire plan suffers, potentially causing the delay in the project. South Burlington's Comprehensive Plan aligns with the first two of the seven Government Performance and Results Act (GPRA) requirements as outlined by Beryl Radin (2006), "First, agencies are expected to define and get agreement on goals. Second, they are required to set objectives" (p. 131). South Burlington however, has not meet the remainder of the steps, such as,

> Third, they are expected to devise a management strategy for reaching those objectives. Fourth, performance measures will be established. Fifth, they will establish who is

responsible for achieving results. Sixth, they are expected to monitor and report on their achievements based on defined performance measures. And seventh, they will develop a reward system linked to the agreed-upon objectives. (Radin, 2006, p. 131–132)

Having not completed the majority of the steps of planning, and continuing to reference the South Burlington City Identity & City Center as part of the Comprehensive Plan for such an extended period, demonstrates how the lack of a clear plan and measurement standards may have imped the progress of this project. South Burlington may have been more successful had they defined a set of goals and criteria for measuring performance as part of their comprehensive plan.

Some of the recommendations as part of the 2011 SBCP was to provide affordable housing for the residence of South Burlington, to create and maintain green spaces, and ensure the walkability of the area as well as make use of the public transportation system that is already established. These recommendations take into consideration the residents of South Burlington and show the importance of inclusion. When considering this project and the possible linkage to gentrification it appears that South Burlington is doing its best to avoid gentrification as part of this project. The difference with this project compared to other projects that have resulted in gentrification is that this project is occurring in an undeveloped, primarily commercial use area. Given the information as published by the South Burlington City Council, it can be assumed that this is a project that officials and administrators can morally stand behind. It also can lead one to believe the relevance of Thompson's (1985) ethics of neutrality in that, "The ethics of neutrality does not deny that administrators often must use their own judgement in the formulation of policy. But their aim should always be to discover what policy other people (usually elected officials) intend or would intend" (p.452).

A project such as this involves many ethical issues such as the close partnership between the City of South Burlington and South Burlington Realty. At one point, the City of South Burlington swapped land with South Burlington Realty. The land that the City of South Burlington received in this land swap was wetlands that was deemed undevelopable and had no benefit. Additionally, the City of South Burlington received the dead to Market Street, which reclassified it from a private to a public road. This agreement may appear to be unethical as it benefited South Burlington Realty and not the City of South Burlington, but in the long run it enabled the project to move forward. With the acceptance of the land transfer and dead, the City of South Burlington was able to receive a federal grant to address the wetlands and transportation issues. These grants were not available to private organizations, therefore the City of South Burlington would have to rely on South Burlington Realty to address these issues, resulting in further delay of the project. In this situation it was the responsibility of the public administrators to look past the details of the single agreement and take into consideration the impact on the overall plan.

In this particular case, I believe that South Burlington is truly doing what its residents want and what is best for the community. What then can be said about the public-private partnership, in regards to South Burlington Reality committing to building affordable housing as opposed to developing the area for commercial gain? The real estate company prioritized the ethics above their profits. This is not to say that South Burlington Realty is not profiting from this project,

alternatively, they are acting socially responsible. South Burlington Realty took it upon themselves to include community development as part of being a socially responsible corporation. Including community development as part of a corporate social responsibility, as defined by the United States Government Accountability Office (2005) is "business actions addressing the CSR concern of community development involve business policies and practices intended to benefit the business and the community economically, particularly for low-income and underserved communities" (p. 8). Though South Burlington Realty is a privately own company and does not have a publicized corporate social responsibility plan, their actions speak for themselves.

In reviewing the proposed plans for the City Center there is devoted space for a senior center as well as a library with space specifically for children, teens, a technology center, as well as the municipal offices. With the amount of time, it has taken to plan and develop the project I believe South Burlington has devoted a lot of that time listening to the residents and incorporating all the needs and many of the wants into the building and development plan of the City Center. As Follet states,

> By helping administrators to hear neglected voices, engage in truly reciprocal communication with stakeholders, and remain open to emerging perspectives. Listening enables us to sense the dream of power behind our hope of a single, transparent voice, with its urge to eliminate diversity, and accept instead the public space as an "interweaving of willings". (as cited in Stivers, 2001, p.229)

Having listened to the residents of South Burlington the SBCP has incorporated the needs of the community and set recommendations to incorporate all of these needs into one public space. In the end the citizens let their voices be heard, on November 6, 2018, the residence of South Burlington voted yes to the bond vote, as well as the land transfer with the school district. Both items were required in order for South Burlington to proceed with this project.

CONCLUSION

The planning and development of the City Center project has been a very long, slow process. The cause of the slow progression has been due to many factors such as the need for the correct combination of policy windows to be open, including community support and financial viability, or the lack of clear performance measures for the goals that were set. The City of South Burlington also took steps to ensure they obtained the necessary amount of citizen participation. Though the type of citizen participation that was solicited would be considered unauthentic, it appears that South Burlington did listen to the citizens that participated. The strength of this project lies in the public-private partnership of the City of South Burlington and South Burlington Realty. This partnership helped open several policy windows for this project. Additionally, the hiring of a project manager to oversee the project from a perspective outside of the individual wants of each department within the City of South Burlington ensured that the project was kept on track. Lastly, the City of South Burlington and South Burlington Realty acted ethically by ensuring low-income housing was part of the South Burlington Comprehensive Plan and City Center development.

Each of the aspects of this project address areas of the public administration competencies. By reviewing how the policy windows opened and closed over time, as well as what effected the opening and closing of the policy window, the public administration competency of "policy process" was met. In reviewing how the City of South Burlington solicited citizen participation as well as what result came from the participation the public administration competency of "public service perspective" was met. Finally, South Burlington demonstrates the public administration competency of "public governance", through the ability to manage the public-private collaboration with South Burlington Realty over the course of several decades.

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Tiffany Barker Cook
PA301 – Foundation of Public Administration
Reflection Essay
10 December 2018

Over the course of my career I have spent time working in the public sector, private sector, and nonprofit sector. I have held and continue to hold a variety of positions in different sectors, each experience being unique and enjoyable. Through each experience, my leadership skills and style have grown and evolved. As my leadership skills and style have evolved, there remains a strong grip on the morals and values that my parents have instilled in me. These morals and values will remain the core of who I am as a leader as well as shaping the leader I want to be.

My time spent in college as an undergraduate business student molded me to think and act like a corporate manager. The values were based on lean business practices and efficiency. With a focus on accountancy, I spent most of my time analyzing financial reports, the incoming and outgoing flow of money, and how everything effected the bottom line. These studies though interesting were not the perfect fit for me and I decided to take classes in another area of study; parks and recreation management. This gave me the opportunity to take classes in a different area of study without having to change my major with less than a year to graduation. This change also provided me the opportunity to secure a position as the Parks and Recreation Director/Treasurer for a municipality in Pennsylvania.

This position and my dual focus as an undergraduate provided me the unique ability to merge the goals of a public organization with the efficiencies of the private sector. As discussed by Koliba (2018), the public, nonprofit, and private sectors have different missions. "Private sector

organizations are driven by market forces and the pursuit of profit as the dominant performance measure" (Koliba, 2018, ch.3, p.6). The public sector on the other hand, is driven to meet the needs of the public as well as making and enforcing laws and regulations (Koliba, 2018, ch.3). Merging the efficiencies of the privates sector into my work as a public administrator was what Rosenbloom (1983) refers to as the managerial aspect of public administration. The managerial aspect of public administration is treating public administration as a "field of business". "Thus, public administration was to be geared toward the maximization of effectiveness, efficiency, and economy" (Rosenbloom, 1983, p. 434).

Looking at the start of my career in public administration in this way I felt there was something missing. At the time, I thought that it was my longing to be back in Vermont. I was fortunate to receive a job opportunity, which resulted in a relocation back to Vermont. This position was with a midsize ski area in northern Vermont, where I spent a few years, but ultimately it was not the right fit for me. I enjoyed working with the many talented individuals, but there was still something that I felt was lacking. I subsequently was offered a position at Green Mountain Coffee Roasters (GMCR). I thought this was the change I was looking for. GMCR was known for their commitment to the environment, community; local and international, and employees.

Working at GMCR there was a sense of strong community and the drive to give back. As this company grew and evolved into a larger corporation the leadership of the organization changed, which resulted in a change in the organizational culture. Part of my motivation to work at GMCR was that they were such a great company to work for and all the things that they did to support the towns where they were located, as well as the communities they affected through the farmers from whom they purchased the raw product, coffee beans. After a while, there was a change in leadership and the original founder of GMCR had less involvement. This change in

leadership lead a change in the culture of GMCR from a focus on social and environmental values to a focus on profits. It was not until after this shift in the culture of the organization that I realized how important a company's culture was to me. Seeing where GMCR was going, and how quickly it was making the change I realized, this was not the path I wanted to be on. As I sought out a position with a company that I felt more aligned with my personal values and beliefs I thought about how my personal values and beliefs should and could affect the culture of any organization I work at. I felt a strong pull back to UVM as this was the organization that drew me to Vermont for my undergraduate degree and I knew the university's Common Ground aligned with my own personal beliefs.

After accepting my position at UVM, it was not long before one of my direct reports said to me "that is how we have always done it". For me this statement struck a nerve, as I was taught that repetition does not make things right. This individual lacked knowledge on an issue; therefore, they were making assumptions based on previous guidance. However, there was no thought process on the individual circumstances surrounding this situation and what improvements could be implemented that might make this situation easier for the individual as well as others. Simon (1946/2004)describes this concept as the limits to rationality,

> ... the individual is limited by those skills, habits, and reflexes which are no longer in the realm of the conscious... the individual is limited by his values and those conceptions of purpose which influence him in making his decisions... the individual is limited by the extent of his knowledge of things relevant to his job... (p.137).

This was my first experience with how the culture at UVM may have been set at the top of the organizational structure, but the importance of this culture was not reflected to the rest of the organization. For the culture of an organization to be strong there has to be a two dimensional approach, it must be defined and emulated by management, but the employees must also believe

and practice the same culture. In Gulick's (1989/2004) *Notes on the Theory of Organization,* "from an organizational culture perspective, the personal preferences of organizational members are not restrained by systems of formal rules, authority, and norms of rational behavior. Instead, they are controlled by cultural norms, values, beliefs, and assumptions" (p.488). That moment forward, I made it clear that I was banning any statements similar to "that is how we have always done it". This was not the culture of UVM nor the culture I wanted within my team. I did not want this type of thought process to be a reflection of my team, or my leadership. I made a choice that I would do everything I can to advance the ability of my team through training and professional development. We are supposed to be the experts in our field and it was my goal to make it so.

In a more recent situation, I had my ethics tested in my current role. A policy I have been enforcing for over 5 years regarding the purchase of gifts for employees is in conflict with a gift I am going to be the recipient of this year. When I was made aware of this, I brought it to the attention of my direct supervisor as well as the senior leader for our unit. They agreed that this gift did not meet certain criteria within the policy to constitute it being unallowable. I expressed my concern that we have not been enforcing the policy in the same manner as it is currently being interpreted when we are the benefactors. Additionally, I do not feel comfortable accepting said gift unless we change the practice in which we enforce the policy. I was appreciative when my direct supervisor as well as the senior leader for my unit agreed that if our division is going to benefit from an alternative interpretation of the policy then it is only fair to provide the same policy enforcement to the rest of the university.

As a leader, I struggle with the ethics of neutrality. I cannot stand by in a situation that I do not believe is ethical, no matter how small. The ethics of neutrality as described by Thompson (1985) are,

The use of discretion on this view can never be the occasion for applying any moral principles

other than those implicit in the orders and polices of the superiors to whom one is responsible

in the organization. The ethic of neutrality portrays the ideal administrator as a completely

reliable instrument of the goals of the organization, never injecting personal values into the

process of furthering these goals. The ethic thus reinforces the great virtue of organizations—its

capacity to serve any social end irrespective of the ends that individuals within it favor. (p.459)

For me to address this situation with my supervisors was not difficult, as I felt that I had the respect

and support of my supervisors as well as the university's Common Ground to support my actions.

If the situation was different where my beliefs did not align with that of the university the situation

may have been handled differently. This situation makes it clear to me the importance of aligning

one's personal beliefs with that of the organization they are going to represent.

I encounter many of the common supervisory hurdles in my position; I learned more

about the importance of being a good leader, beyond my ability to be a good manager. As part of

my pursuit to become a better leader, I took the class Women in Leadership. This course help

frame my entire outlook on the type of leader I want to be. We learned a lot about the

stereotypical feminine traits and how those traits are similar to what we believe to make good

leaders. Some of these traits include emotional intelligence, collaboration, and authenticity.

Stivers (1990/2004) states,

... leadership as facilitation rather than the giving of orders, and authority as accountable

expertise rather than as chain of command. Ultimately, working within such a perspective, we

should be able to ground administrative legitimacy in accountability that not only is exercised in

the privacy of the individual conscience or in the internal process of a particular agency, but

also tangibly enacted in substantive collaboration with affected others, including members of the general public. (p.486)

Through my continuing education and professional development, I explored the concepts of being a good leader rather than being a good manger. I learned to recognize many of my personality traits are considered more masculine than feminine, such as my confidence and strong personality. I learned how these traits effected my leadership style, and what skills I could use to make myself a better leader. One recommendation that Deb Markowitz made was practicing strategic graciousness. This along with emotional intelligence and authenticity are the building blocks for me to be a better leader.

Along with my work experience, I have also spent a considerable amount of time in different volunteer positions, such as serving meals at the local soup kitchen or food shelf, assisting on a few habitat for humanity projects, along with a combined 20 years of service as a first responder with the National Ski Patrol and local rescue organizations. As a volunteer or low to mid-level manager in all of my experience I have been the face of the organization to the customers, whether it be the citizens, community members, or the organizations employees. Lipsky (1980) refers to this as the street level bureaucrat. "... street-level bureaucrats have considerable impact on people's lives" (Lipsky, 1980, p.404).   I value this role as it gives me the opportunity to work directly with those individuals that are impacted by what I do on a daily basis. I recently had to step away from my volunteer role at our local rescue squad due to other commitments. Though I maintain an administrative role, I struggle not having the direct communication with individuals that we serve. Receiving direct feedback from the recipients of our service help determine if the decisions that we make as a board are effective.

Holding positions as both a street level bureaucrat as well as an administrative role, it has solidified the importance of ethical leadership to me. An ethical leader goes beyond just being a good manager. Bennis (2016) states, "the manger does things right, the leader does the right thing" (as quoted in Frederickson et al., 2016, p.117). Additionally, "...ethical leadership theory is based on the approach that good leaders build trust, demonstrate integrity, and base their leadership on service to others." (Fredrickson, et. al., 2016, p.117). As I continue to develop my leadership skills, ethical leadership is the core of what type for leader I want to be. I look to other leaders that I feel are good models of ethical leadership as examples and learn from them. As Van Wart (2003) stated, "... leadership cannot be taught, but it can be learned" (Van Wart, 2003, p. 222). By observing the leadership styles of individuals that I feel exemplify the same values as myself, I hope to learn from them and enhance my own leadership skills. I will also choose mentors and sponsors that exhibit the same values as me.

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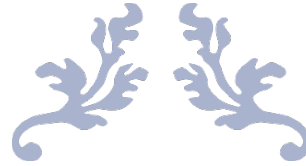
ORGANIZATIONAL CAPCITY ASSESSMENT

CAMBRIDGE RESCUE

TIFFANY BARKER COOK

MAY 2, 2019

PA302, Organizational Theory and Behavior

TABLE OF CONTENTS

ORGANIZATION BIOGRAPHY

NAME OF THE ORGANIZATION:

Cambridge Rescue Squad, Inc.

SECTOR OF THE ORGANIZATION:

Nonprofit

ORGANIZATIONAL MISSION:

N/A

Moto - Neighbors Helping Neighbors

WHAT DOES THE ORGANIZATION DO? PRODUCE? DIRECT? PROVIDE? SERVE? ORGANIZE?

The purpose of the organization as quoted in the bylaws is,

> This corporation shall be known as the Cambridge Rescue Squad, Inc. a public benefit corporation. The purpose of the Corporation may include but not be limited to the charitable promotion of the general welfare of the citizens of Cambridge and the surrounding areas. The Corporation shall provide emergency and non-emergency medical care for the Town of Cambridge and the surrounding areas. The Corporation may serve any other geographical areas as may be designated by the Corporation from time to time, as well as to provide mutual aid upon agreement or request. The Corporation may also serve the benevolent and social needs of its members, and the Corporation may perform any other function allowed under section 501 (C)(3) of the Internal Revenue Code or the corresponding section of any future tax code (Cambridge Rescue Squad, Inc. By-Laws, n.d.).

Cambridge Rescue Squad, Inc. (CRS) is a non-profit emergency response organization that primarily serves the Town of Cambridge, and a portion of the Town of Fletcher. CRS also provides mutual aid to Underhill, Jericho, Fairfax, Westford, Waterville, Bakersfield, Belvidere, Johnson, & Hyde Park. In addition to providing emergency service, CRS also does community outreach in the form of their Training Center and Cadet Corp.

DATE FOUNDED, INCLUDING A BRIEF OVERVIEW OF ITS EARLY HISTORY:

Cambridge Rescue Squad, Inc. was founded 1989, but was officially incorporated in 2006 as nonprofit, 501 (C)(3) in the State of Vermont. A small group of community members that wanted to assist the community originally founded CRS. Those members were the board of directors as well as the individuals that oversaw and performed the daily operations of the organization. CRS has grown and expanded the scope of the work that it does, however, the structure of the organization remains the same.

ANNUAL BUDGET:

$306,600.00

SOURCE(S) OF REVENUE:

Cambridge Rescue Squad has two main sources of revenue, the first is an appropriation from the Town of Cambridge, and the second is service billing income. In addition to these two sources of income, CRS has a small percentage of income that comes from an appropriation from the Town of Fletcher, donations, and fundraising.

APPROXIMATE NUMBER OF EMPLOYEES:

32

MCKINSEY GRID RATINGS AND DISCUSSION

I. ASPIRATIONS

MISSION

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
No written mission or limited expression of the organization's reason for existence; lacks clarity or specificity; either held by very few in organization or rarely referred to	Some expression of organization's reason for existence that reflects its values and purpose, but may lack clarity; held by only a few; lacks broad agreement or rarely referred to	Clear expression of organization's reason for existence which reflects its values and purpose; held by many within organization and often referred to	Clear expression of organization's reason for existence which describes an enduring reality that reflects its values and purpose; broadly held within organization and frequently referred to

DISCUSSION

When originally looking for the mission statement of Cambridge Rescue Squad I was unable to locate any information other than what was included in the bylaws. Additionally, when conducting my interview of Lisa Hill, she noted the Cambridge Rescue does have a mission statement but she was unaware of what it was. Given the lack of awareness and acknowledgement of a mission statement, Cambridge Rescue does not operate based on an expressed mission statement. However, the title and purpose expressed in the bylaws is what drives the actions of the organization. The title and purpose include the language "the charitable promotion of the general welfare of the citizens of Cambridge and the surrounding areas." This statement is what Cambridge Rescue currently structures its operations around. The importance of serving the community and ensuring the welfare of the citizens is what motivates the members of Cambridge Rescue. Lastly, the inherent nature of becoming a volunteer first responder to help people during what is possibly one of the worst times of their life also motivates the members of Cambridge Rescue.

SOURCES

Leadership Interview, Cambridge Rescue Squad Bylaws

I. ASPIRATIONS

VISION – CLARITY

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Little shared understanding of what organization aspires to become or achieve beyond the stated mission	Somewhat clear or specific understanding of what organization aspires to become or achieve; lacks specificity or clarity; held by only a few; or "on the wall," but rarely used to direct actions or set priorities	Clear and specific understanding of what organization aspires to become or achieve; held by many within the organization and often used to direct actions and set priorities	Clear, specific, and compelling understanding of what organization aspires to become or achieve; broadly held within organization and consistently used to direct actions and set priorities

DISCUSSION

As discussed previously, Cambridge Rescue Squad does not have an availably documented mission statement. Given that Cambridge Rescue does not have a documented mission statement, the vision of the organization is not clear to all members. However, during the board meeting observation there was a clear understanding of the board members to want to develop a clear vision for Cambridge Rescue. The board demonstrated their desire for this by revising the bylaws to lay the groundwork to better sustain the organization for the future. The proposed bylaws will be voted on by the membership at the annual meeting in May, which will be the first step in the process for developing a clear mission statement, vision, and goals for Cambridge Rescue.

SOURCES

Leadership Interview, Cambridge Rescue Squad Bylaws, Board Meeting Observation

I. ASPIRATIONS

OVERARCHING GOALS

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Vision (if it exists) not explicitly translated into small set of concrete goals, though there may be general (but inconsistent and imprecise) knowledge within organization of overarching goals and what it aims to achieve	Vision translated into a concrete set of goals; goals lack at least two of following four attributes: clarity, boldness, associated metrics, or time frame for measuring attainment; goals known by only a few, or only occasionally used to direct actions or set priorities	Vision translated into small set of concrete goals, but goals lack at most two of following four attributes: clarity, boldness, associated metrics, or time frame for measuring attainment; goals are known by many within organization and often used by them to direct actions and set priorities	Vision translated into clear, bold set of (up to three) goals that organization aims to achieve, specified by concrete to measure success for each criterion, and by well-defined time frames for attaining goals; goals are broadly known within organization and consistently used to direct actions and set priorities

DISCUSSION

The goals of Cambridge Rescue Squad are very short-term related goals. Currently, the goals of Cambridge Rescue are to meet the staffing needs in order to provide a minimum level of service to the community. Meeting the staffing requirements and maintaining a minimum level of service is imperative to the continued operations of the organization.

Given that there is no clear vision for Cambridge Rescue, there is no long-term goals beyond general operations. However, as noted previously the board of directors has demonstrated a desire to establish a mission, vision, and more clear goals by restructuring the organization and increasing the diversity of the board.

SOURCES

Leadership Interview, Cambridge Rescue Squad Bylaws, Board Meeting Observation

NEW PROGRAM DEVELOPMENT

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
No assessment of gaps in ability of current program to meet recipient needs; limited ability to create new programs; new programs created largely in response to funding availability	Limited assessment of gaps in ability of existing program to meet recipient needs, with little or limited action taken; some ability to modify existing programs and create new programs	Occasional assessment of gaps in ability of existing program to meet recipient needs, with some adjustments made; demonstrated ability to modify and fine-tune existing programs and create new programs	Continual assessment of gaps in ability of existing programs to meet recipient needs and adjustment always made; ability and tendency efficiently and effectively to create new, truly innovative programs to the needs of potential service recipients in local area or other geographies; continuous pipeline of new ideas

DISCUSSION

Cambridge Rescue Squad frequently discusses the need to build membership to meet the organization staffing needs. One of the programs that has been initiated is hosting an in house EMT class. Additionally, Cambridge Rescue Squad has a Cadet Corp. program that introduces students who are not eligible for an EMT certification to EMS and allows them to do ride-alongs. However, there has been limited discussion of program development in recent history; in fact, several programs have been eliminated or cut back on, including visiting local schools during EMS week.

SOURCES

Leadership Interview, Cambridge Rescue Squad Bylaws, Board Meeting Observation, Personal Experience

FUNDING MODEL

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Organization highly dependent on a few funders, largely of same type (e.g., government or foundations or private individuals)	Organization has access to multiple types of funding (e.g., government, foundations, corporations, private individuals) with only a few funders in each type, or has many funders within only one or two types of funders	Solid basis of funders in most types of funding source (e.g., government, foundations, corporations, private individuals); some activities to hedge against market instabilities (e.g., building of endowment); organization has developed some sustainable revenue-generating activity	Highly diversified funding across multiple source types; organization insulated from potential market instabilities (e.g., fully developed endowment) and/or has developed sustainable revenue- generating activities; other nonprofits try to imitate organization's fund-raising activities and strategies

DISCUSSION

Cambridge Rescue Squad currently funds operations from two primary sources, the Town of Cambridge and service billing income. The current fiscal year budget (FY19) is distributed $175,000.00 from the Town of Cambridge and $125,000.00 from service billing income. The total budgeted income for Cambridge Rescue is $306,600.00, therefore only $6,600.00 (2%) comes from alternative sources. The service billing income has remained relatively stagnant over the past five year, but in 2019 the budget for service billing income decreased by $25,000.00. This was attributed to the lack of volunteers, resulting in less calls, as well as in increased trend of no transport calls. A no transport is when a response is requested but for a variety of reasons, the patient chooses not to be transported to the hospital via ambulance. Contrary to service billing income, the funding from the Town of Cambridge had a significant increase from 2015 to 2016 and has remained level since that time. The contributing factor to the increase in funding from the town is in 2015 Cambridge Rescue Squad hired its first two full time employees. The funding from the Town of Cambridge is split into two categories, one is the appropriation, and the second is capital income. The capital income has remained the same for the past four years, while the capital income has fluctuated. Additionally, though Cambridge Rescue Squad budgeted for capital income in FY2018, no funds were actually received from the town.

SOURCES

Board Meeting Observation, FY19 Budget, Five-Year Budget Comparison, Personal Experience

OPERATIONAL PLANNING

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Organization runs operations purely on day-to-day basis with no short- or longer-term planning activities; no experience in operational planning	Some ability and tendency to develop high-level operational plan either internally or via external assistance; operational plan loosely or not linked to strategic planning activities and used roughly to guide operations	Ability and tendency to develop and refine concrete, realistic operational plan; some internal expertise in operational planning or access to relevant external assistance; operational planning carried out on a near- regular basis; operational plan linked to strategic planning activities and used to guide operations	Organization develops and refines concrete, realistic, and detailed operational plan; has critical mass of internal expertise in operational planning, or efficiently uses external, sustainable, highly qualified resources; operational planning exercise carried out regularly; operational plan tightly linked to strategic planning activities and systematically used to direct operations

DISCUSSION

Cambridge Rescue Squad currently focuses on the day-to-day operations of the organization as opposed to looking to short-term and long-term planning. One of the reasons for this focus is the low membership rate and the need to meet staffing requirements. However, if the leadership of Cambridge Rescue started focusing on strategic planning they would be able to better prepare themselves for periods of low staffing.

SOURCES

Leadership Interview, Board Meeting Observation, Personal Experience

HUMAN RESOURCES PLANNING

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Organization uncovers and/or addresses HR needs only when too large to ignore; lack of HR planning activities and expertise (either internal or accessible external); no experience in HR planning	Some ability and tendency to develop high-level HR plan either internally or via external assistance; HR plan loosely or not linked to strategic planning activities and roughly guides HR activities	Ability and tendency to develop and refine concrete, realistic HR plan; some internal expertise in HR planning or access to relevant external assistance; HR planning carried out on near-regular basis; HR plan linked to strategic planning activities and used to guide HR activities	Organization is able to develop and refine concrete, realistic, and detailed HR plan; has critical mass of internal expertise in HR planning (via trained, dedicated HR manager), or efficiently uses external, sustainable, highly qualified resources; HR planning exercise carried out regularly; HR plan tightly linked to strategic planning activities and systematically used to direct HR activities

DISCUSSION

Currently, all of the information related to Human Resources for Cambridge Rescue is documented within the bylaws. Anytime that updates need to be made it requires a vote of the entire membership, which has impeded any changes over the past few years. Given that the bylaws are out of date feeling from many of the members is that they are not followed.

The board of directors has proposed significant changes to the bylaws, including the implementation of standard operating procedures, which would significantly increase the policies and procedures in regards to membership for both volunteers and employees. These changes hinge on a vote of the membership at the annual meeting to approve the proposed bylaws and agree to a restructuring of the organization. The board of directors is relying heavily on the membership approving these changes, as there is currently no back up plan in place.

SOURCES

Leadership Interview, Cambridge Rescue Squad Bylaws, Board Meeting Observation, Personal Experience

FUND-RAISING

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Generally weak fund-raising skills and lack of expertise (either internal or access to external expertise)	Main fund- raising needs covered by some combination of internal skills and expertise, and access to some external fund-raising expertise	Regular fund- raising needs adequately covered by well developed internal fund-raising skills, occasional access to some external fund- raising expertise	Highly developed internal fundraising skills and expertise in all funding source types to cover all regular needs; access to external expertise for additional extraordinary needs

DISCUSSION

Cambridge Rescue Squad currently only organizes one fundraising event a year, which is the annual Lasagna Dinner at Winter Fest. This fundraiser accounted for only 1% of the fiscal year 2018 total income. Cambridge Rescue inherited this fundraiser four years ago Cambridge Fire Department Auxiliary when they disbanded. The individual that oversaw the fundraiser for the Cambridge Fire Department Auxiliary was also a member of Cambridge Rescue and choose to continue to oversee it. Unfortunately, two years ago that individual who has overseen this fundraiser for 10 years stepped down. To complicate things further, each year there has always been a struggle to get members to volunteer to help at the event or contribute items.

Last year the fundraiser only brought in approximately $1,200.00. This year the fundraiser was much more successful in that the total revenue was $3,300.00. The primary reason for the success of the fundraiser this year as that the individual who was overseeing it, secured a large number of donations, including one for $1,000.00. However, one of the issues that have come up surrounding the fundraiser is that thank you cards for the donations have yet to be sent as of April 4th, when the donations were received at the end of January. Additionally, this individual was unsure of how to document the donations to the donors for their personal taxes, and did not seek guidance. There has also been regular discussion that many members offered support and assistance, but it never accepted.

Overall, there is a lack of diversity and involvement in fundraising. Additionally, there is a lack of teamwork as support from the entire membership.

SOURCES

Board Meeting Observation, FY19 Budget, Personal Experience

REVENUE GENERATION

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
No internal revenue-generation activities; concepts such as cause-related marketing, fee-for- services and retailing are neither explored nor pursued	Some internal revenue-generation activities, however financial net contribution is marginal; revenue-generation activities distract from programmatic work and often tie up senior management team	Some proven internal revenue-generation activities and skills; these activities provide substantial additional funds for program delivery, but partially distract from programmatic work and require significant senior management attention	Significant internal revenue-generation; experienced and skilled in areas such as cause-related marketing, fee-for-services and retailing; revenue-generating activities support, but don't distract from focus on creating social impact

DISCUSSION

In 2018, Cambridge Rescue Squad received 50% of its income from service billing income. Other than funding from the Town of Cambridge service income is the primary source of revenue for Cambridge Rescue. The only other sources of income for Cambridge Rescue are from the training center and cadet corp. However, the primary income for the cadet corp. is through their bottle collection/drop off program, which ceased operation in 2017. The training center, which is a program where Cambridge Rescue provides CPR and basic first aid certification to the local teachers and other members of the community. The total income from the training center in 2018 was $230.55, less than 1% of income, and Cambridge Rescue has only budgeted $100 for 2019. One of the primary challenges with the training center is the limited number of members that are instructors and can provide this training. The duties fall primarily on the Chief and Assistant Chief in addition to their regular duties. Cambridge Rescue is in the planning process of an EMT class, which will generate revenue and bring new members to the organization. However, this program is going to be run primarily by the Chief and Assistant Chief.

SOURCES

FY19 Budget, Five-Year Budget Comparison, Board Meeting Observation, Leadership Interview, Personal Experience

PARTNERSHIPS AND ALLIANCES DEVELOPMENT AND NURTURING

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Limited use of partnerships and alliances with public sector, nonprofit, or for- profit entities	Early stages of building relationships and collaborating with other for-profit, nonprofit, or public sector entities	Effectively built and leveraged some key relationships with few types of relevant parties (for-profit, public, and nonprofit sector entities); some relations may be precarious or not fully "win-win"	Built, leveraged, and maintained strong, high-impact, relationships with variety of relevant parties (local, state, and federal government entities as well as for-profit, other nonprofit, and community agencies); relationships deeply anchored in stable, long- term, mutually beneficial collaboration

DISCUSSION

Cambridge Rescue Squad works regularly with several other first response organizations as part of the mutual aid system. Additionally, Cambridge Rescue collaborates with other first response organizations within the region through the paramedic intercept network. In recent months, some of the relationships within the mutual aid system have been challenged due to the amount of calls that have required coverage due to a lack of staffing. The board of directors from several of the organizations meet to discuss these issues and all recognize that many of them are suffering from the same problem in regards to staffing and that they need to all work together to continue to provide service to their communities and surrounding communities. Additionally, many of these organizations acknowledged that Cambridge Rescue has provided a significant level of mutual aid coverage when their own organizations struggled with staffing.

Though Cambridge Rescue resides in district four, which receives medical control from Copley Hospital in Morrisville, it is unique as it is almost centrally located to three hospitals, including UVMMC and Northwestern. Given this unique situation, Cambridge Rescue has to work closely with all of these hospitals and their medical directors.

In addition to the mutual aid organizations, Cambridge rescue works closely with the Town of Cambridge, Cambridge Fire Department, Cambridge Elementary School, and local businesses. The Town of Cambridge provides funding in return for service to the community. In addition, the public works department will often assist Cambridge Rescue during the winter months when roads or personal driveways are inaccessible. Cambridge Fire Department and Cambridge Rescue work very closely as they respond to many calls together. Additionally, both Cambridge Rescue and Cambridge Fire work closely with Smugglers' Notch Ski Resort in regards to accidents and injuries on the mountain.

SOURCES

Leadership Interview, Cambridge Rescue Squad Bylaws, Board Meeting Observation, Personal Experience

III. ORGANIZATIONAL SKILLS - EXTERNAL RELATIONSHIP BUILDING AND MANAGEMENT

LOCAL COMMUNITY PRESENCE AND INVOLVEMENT

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Organization's presence either not recognized or generally not regarded as positive; few members of local community (e.g., academics, other nonprofit leaders) constructively involved in the organization	Organization's presence somewhat recognized, and generally regarded as positive within the community; some members of larger community constructively engaged with organization	Organization reasonably well-known within community, and perceived as open and responsive to community needs; members of larger community (including a few prominent ones) constructively involved in organization	Organization widely known within larger community, and perceived as actively engaged with and extremely responsive to it; many members of the larger community (including many prominent members) actively and constructively involved in organization (e.g., board, fund-raising)

DISCUSSION

Cambridge Rescue Squad is very well recognized within the immediate community and surrounding community. Cambridge Rescue participates in all of the town parades and often sends representatives to other towns. Cambridge Rescue also has a presence at all of the town fairs, festivals, and town meetings. Additionally, Cambridge Rescue has always had a presence in the local school during EMS week as well as an open house for members of the community to come and visit, until recently. The lack of volunteers has decreased the presence in some of these areas, including visiting the schools for EMS week.

Cambridge Rescue has active involvement from many members of the community. The proposed restructuring of the organization is expected to bring additional individuals to the board of directors, which is currently limited to active members of the organization.

SOURCES

Leadership Interview, Board Meeting Observation, Proposed Bylaws, Personal Experience

STAFFING LEVELS

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Many positions within and peripheral to organization (e.g., staff, volunteers, board, senior management) are unfilled, inadequately filled, or experience high turnover and/or poor attendance	Most critical positions within and peripheral to organization (e.g., staff, volunteers, board, senior management) are staffed (no vacancies), and/or experience limited turnover or attendance problems	Positions within and peripheral to organization (e.g., staff, volunteers, board, senior management) are almost all staffed (no vacancies); few turnover or attendance problems	Positions within and peripheral to organization (e.g., staff, volunteers, board, senior management) are all fully staffed (no vacancies); no turnover or attendance problems

DISCUSSION

Cambridge Rescue Squad has struggled with meeting the staffing needs of the organization over the past two years. Volunteerism, especially within first response has been down which has created a need for additional staffing to cover shifts. Cambridge Rescue has been fortunate to receive additional funds from the Town of Cambridge to cover their staffing needs, but has had difficulty filling some of these positions. Though the positions have been posted publicly, there has been limited response. In addition, there has been a high level of turnover due to other organizations offering hire rates, benefits, alternative shifts, or full time hours versus part time hours. Currently, volunteers of the organization that had flexible working arrangements with their employer and were therefore able to cover the required shifts filled two of the staff positions. Moving volunteers to staff positions did not benefit Cambridge Rescue as it resulted in paying more for the same number of members.

At the director level, there has been a high level of turnover in part due to the positions being elected by the membership, but also given the membership requirements of the positions. The treasurer position in particular has turned over twice in less than six months. The previous treasurer had to resign from the position due to not being able to meet the membership requirements for personal reasons. When a new treasurer was elected that individual had no experience with accounting or the financials of an organization. After several months of struggling, she offered to step down from the active role and let the previous treasurer take on an operational role. With the proposed restructuring of the organization, the board of directors plan to implement requirements for many of these positions in order to prevent situations like this in the future.

SOURCES

Leadership Interview, Board Meeting Observation, Proposed Bylaws, April Schedule, Personal Experience

BOARD – COMPOSITION AND COMMITMENT

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Membership with limited diversity of fields of practice and expertise; drawn from a narrow spectrum of constituencies (from among nonprofit, academia, corporate, government, etc.); little or no relevant experience; low commitment to organization's success, vision and mission; meetings infrequent and/or poor attendance	Some diversity in fields of practice; membership represents a few different constituencies (from among nonprofit, academia, corporate, government, etc.); moderate commitment to organization's success, vision and mission; regular, purposeful meetings are well-planned and attendance is good overall	Good diversity in fields of practice and expertise; membership represents most constituencies (nonprofit, academia, corporate, government, etc.); good commitment to organization's success, vision and mission, and behavior to suit; regular, purposeful meetings are well-planned and attendance is consistently good, occasional subcommittee meetings	Membership with broad variety of fields of practice and expertise, and drawn from the full spectrum of constituencies (nonprofit, academia, corporate, government, etc.); includes functional and program content-related expertise, as well as high-profile names; high willingness and proven track record of investing in learning about the organization and addressing its issues; outstanding commitment to the organization's success, mission and vision; meet in person regularly, good attendance, frequent meetings of focused subcommittees

DISCUSSION

The current structure of the board of directors for Cambridge Rescue Squad is all women who are actively involved in EMS. However, many of these women have different backgrounds and experiences outside of EMS. One of the requirements to be a member of the board is that the individual must be an active member of Cambridge Rescue. Additionally, the structure of the board until recently included four paid employees and two volunteers. Most of the members of the board have been on the board and part of the organization for over five years. Recently however there has been a decline in attendance to some of the meetings due to other personal commitments.

As mentioned previously the board of directors has proposed changes to the bylaws and restructuring of the organization that would allow a more diverse group of individuals to join the board.

SOURCES

Cambridge Rescue Squad Bylaws, Proposed Bylaws, Board Meeting Observation, Personal Experience

VOLUNTEERS

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
Limited abilities; may be unreliable or have low commitment; volunteers are poorly managed	Good abilities; mostly reliable, loyal, and committed to organization's success; volunteers managed but without standards and little accountability	Very capable set of individuals, bring required skills to organization; reliable, loyal and highly committed to organization's success and to "making things happen"; work easily with most staff, but do not generally play core roles without substantial staff supervision; volunteers are managed and contribute to the overall success of the organization	Extremely capable set of individuals, bring complementary skills to organization; reliable, loyal, highly committed to organization's success and to "making things happen"; often go beyond call of duty; able to work in a way that serves organization well, including ability to work easily with wide range of staff and play core roles without special supervision; volunteers managed very well and significantly contribute to overall success of organization

DISCUSSION

Recruiting and maintaining volunteers has been a struggle for Cambridge Rescue Squad over the past few years. Cambridge Rescue has changed its incentive programs for volunteers several times and has one of the highest stipend rates in the area. However, Cambridge Rescue has not been able to recruit enough volunteers to cover all shifts. Many of the volunteers with Cambridge Rescue are newly certified and need in field experience, which requires additional staffing resources for each call.

As a result of the lack of volunteers, Cambridge Rescue does not strictly enforce all rules that apply to volunteers. For instance, training attendance is a requirement of membership and their certification; however, few members actually attend the required trainings. Instead of any form of repercussion for lack of attendance, the training officer has made the trainings available upon request any time of the month and will provide individualized training opportunities for those that need additional training to meet the requirements of their certification.

Lastly, during the discussion at the board meeting regarding the changes in the bylaws, several members noted that many of the volunteers just do not care, or do not have a vested interest in the operations of the organization.

SOURCES

Leadership Interview, Board Meeting Observation, Training Observation, April Schedule, Personal Experience

KNOWLEDGE MANAGEMENT

1 Clear need for increased capacity	2 Basic level of capacity in place	3 Moderate level of capacity in place	4 High level of capacity in place
No formal systems to capture and document internal knowledge	Systems exist in a few areas but either not user- friendly or not comprehensive enough to have an impact; systems known by only a few people, or only occasionally used	Well-designed, user-friendly systems in some areas; not fully comprehensive; systems are known by many people within the organization and often used	Well-designed, user-friendly, comprehensive systems to capture, document, and disseminate knowledge internally in all relevant areas; all staff is aware of systems, knowledgeable in their use, and make frequent use of them

DISCUSSION

Due to the numerous turnovers in key positions over the past few years, there has been some loss of knowledge in regards to the operations of the organization. The chief oversees most of the operations of Cambridge Rescue, but has been delegating tasks to other members of the organization in order to share knowledge with others. When the treasurer position turned over during this past year all of the procedures were documented to assist in training the new treasurer. However, many of the general operating procedures or not documented, but members are expected to know and comply with these procedures. This has been relatively successful given that many procedures throughout emergency services are similar.

Currently the Cambridge Rescue Squad Bylaws are the only documented policies and procedures of the organization. In speaking with members of the board and throughout the organization most have expressed concerns that the current bylaws are not followed until it benefits the individual that is trying to enforce them.

SOURCES

Leadership Interview, Board Meeting Observation, Training Observation, Cambridge Rescue Squad Bylaws, Personal Experience & Conversations with Volunteers.

OBSERVATION AND RECOMMENDATIONS

Cambridge Rescue Squad has undergone a serious of changes in leadership over the past few years, which has put the organization in a state of continuous flux. The current structure of the board of directors is lacking diversity as all board members are voted on by the organization's membership, and are required to be active members of the organization. Additionally, the positions are voted on every two years, which put the organization at risk of knowledge loss given that there is a lack of documentation for policies and procedures. The current bylaws are the primary source of policy and procedure definition and enforcement. However, there is a lack of consistency and enforcement of the bylaws. There has also been a lack of commitment by some of the board members as well as the volunteers. A lack of commitment from the volunteers has had significant effects on the operations of the organization.

One of the most significant effects is an insufficiency in staffing to cover shifts to maintain the minimum level of service to the community. Having insufficient staffing means a lack of response to emergency calls, which has significant impacts on the organization. Such results include, a decrease in service billing income, strained relationships with the other emergency services who have to respond to the additional calls via the mutual aid system, and dissatisfaction from the citizens of the community that expect a minimum level of service from Cambridge Rescue. As a result of this lack of this staffing, Cambridge Rescue has had to hire additional part time and full time staff members in order to cover the necessary shifts. The increase in staffing has resulted in additional costs, which has led to additional funding from the Town of Cambridge.

Staffing issues have monopolized the focus of the board and reduced the number of programs that Cambridge Rescue provides. There has been a steady decline in programing including a reduction in advertising and courses through the training center, declining enrollment in the cadet corp., and the decline in community outreach, including the cancelation of the annual visit to Cambridge Elementary during EMS week. This lack of programs has adverse effects on the organization, as it does not generate awareness and interest in Cambridge Rescue. Lack of awareness and interest has a two-prong effect, less volunteer recruitment and decreases in income through fundraising activities and donations.

This lack of commitment is most likely due to the organizations lack of mission, vision, and clear goals. Without a clearly stated mission, vision, and goals it can be difficult for members of the organization to find value in their place within the organization. However, the board of directors at Cambridge Rescue is initiating steps to change by proposing a restructuring of the organization through making significant changes to the bylaws. The goal of this change is the increase the diversity of the board to bring in new ideas for the organization to increase volunteers staffing, programing, and diversify income.

Cambridge Rescue Squad should undertake the strategic planning process to develop a clear and documented mission statement, vision, and goals for the short term and long term of the organization. This process should include open communication and involvement with all members of the organization. The strategic planning process should occur in five phases,

internal assessment, external assessment, management and leadership planning sessions, implementation plan, and review.

The first phase of the strategic planning process, internal assessment, should include identifying the strengths and weakness. Completion of this analysis should include consultation with the internal stakeholders, volunteers, staff, and board members. Specific items to consider during this phase is the lack of documentation and shared knowledge, absence of policies and procedures, staffing issues, decrease in programing, and absence of diversity in funding sources.

Phase two, external assessment, should identify the opportunities and threats, completing the SWOT analysis. Consultation with external stakeholders such as; members of the community, community leaders, partner organizations (Cambridge Fire, Fairfax Rescue, NEMS, Comply Hospital, Northwestern Medical Center, and UVMMC), is vital to the external assessment. In collaborating with these external organizations Cambridge Rescue can better understand what the members of the community expect, what role it should have in the community and with other organizations in the mutual aid system, as well as receiving advice from other similar organizations.

The management and leadership planning sessions of phase three should include a thorough review of all of the information collected through the first two phases. At this point, the leadership of Cambridge Rescue should use the data collected to determine the mission, vision, and goals for the organization. The leadership will determine the strategic plan for the organization based on the stated mission, vision, and goals. The strategic plan should include developing and documenting policies and procedures so all members of the organization receives clear and consistent guidance. Additionally, the leadership should address the staffing and funding issues. These matters can be address through additional programs such as the cadet corp., community outreach (EMS week), and new classes through the training center. Though Cambridge Rescue is offering an EMT class, the other courses offered through the training center provide a service to the community that both cultivates good relationships and potential volunteers for the organization.

Once the leadership team has set the foundation and developed a plan for the organization they would then move on to phase four, the implementation plan. During this phase, it is critical to consider and involve all members of the organization, as they are directly affected. It is also important to determine the period and pace of change to occur. Too much change over a short period can create uncertainty, and will not foster support of the strategic plan. Since Cambridge Rescue has been experiencing a lot of change over the past few years, it is especially important that the implementation plan not be applied too fast.

The final phase, review, is significant in the strategic planning process as it is imperative to review the plan to ensure that it follows the mission, vision, and goals of the organization. The Cambridge Rescue Squad must also review the progress of the plan throughout implementation to ensure that the goals are being met. Given the concern of many members that the current bylaws are not followed unless it is at the convenience of the individual trying to enforce them, it is imperative that the mission, vision, goals, and any policies and procedures that are put into place are adhered to and enforced.

Currently, Cambridge Rescue appears to be on the right path by restructuring to add diversity to the organization's leadership. Diversity in the leadership team will bring in new ideas and perspectives, but developing a clear mission, vision, and short term and long goals is also imperative to the future success of the organization.

LEADERSHIP INTERVIEW

LISA HILL, CHIEF

10 MARCH 2019

As part of my organization analysis of Cambridge Rescue Squad (CRS), I meet with Lisa Hill, who is the Chief of Service. She has been the Chief since being voted in by the membership in 2015 after the previous Chief resigned. Prior to being the Chief, Lisa was the first full-time paid employee of CRS. Lisa is still a full-time paid employee, but she has been reclassified as an exempt employee due to her added duties as Chief.

When I met with Lisa on the morning of Sunday, March 10, 2019. She was working at the station with newly hired full-time employee Dakota. I asked her if she preferred to meet privately in her office, but she opted to meet at the large kitchen table on the main floor of the rescue building. The rescue building is an old three-bedroom house that is owned by the Town of Cambridge. Two of the bedrooms have been converted to offices, one for the Chief and the other for the Assistant Chief. The third bedroom remains a bedroom for members that stay at the station for night shifts. Though the house is at least 30 years old, the décor has been updated to make it feel homey and comfortable.

Dakota was in the living room watching television when I arrived and got up to greet me. I asked him if he would be interested in contributing to the interview as well. He expressed that he may not be able to contribute much, but would be willing to provide feedback from the first four weeks of his employment thus far.

The first question I asked them was what makes for effective leadership at CRS? Both Lisa and Dakota stated that good communication was the foundation effective leadership. Lisa added that comradery amongst the leadership team, the paid staff, and the volunteers. Dakota elaborated by stating that hi his experience in other organization there was often tension amongst the paid staff and volunteers, especially when the two groups are performing the same tasks. However, for some reason it works at CRS, everyone is really like a "family". Lisa also added that open-mindedness was important to the leadership. There are a lot of unique circumstances that CRS has to deal with, additionally the organization serves a variety of people and open-mindedness is important.

For my second question, I noted that I was not able to locate a specific mission statement, but wondered if there was one, to what extent it was used to align the practices of the organization. Lisa stated that she was sure there was one, but could not remember what it was, or where it was stated. Regardless, she said that the gist of the mission statement was to serve the community and neighboring communities. She stated that this is the core of what CRS does everyday and the sole purpose for all the members to be here, they all joined CRS to serve their community. Dakota added that it was important to him as this is a health care related field and it motivated him to stay healthy in order to ensure the health of the community.

I moved onto my third question, which was if CRS set and pursued performance goals, or tracked performance to guide their business practice. Both Lisa and Dakota stated no. To clarify they both state that their no response was related to employee performance. CRS does not set goals or do performance review for employees. However, Dakota added that the do due QA/QI (quality assurance/quality improvement) on all of their calls. To elaborate the chief and/or

assistant chief review all the run sheets from the calls to ensure the quality and completeness. Additionally, they review the calls with the members involved to discuss how it went and if they would have done anything differently. For calls that are more severe, they are used as training opportunities. Lisa added that there is several state assessments and certifications that review the organization as a whole.

As I moved on to my next question, I noted that this was going to be directly more toward Lisa. My fourth question was if CRS engaged in any strategic planning. Lisa noted that the only strategic planning that is done is financial planning, such as annual budget, budget forecasting, and the capital plan. When I asked who was responsible for these task she laughed and said you. To be clear here, I was the treasurer on the executive board for 5 years. I resigned last year due to time constraints, but after several issues with the new treasurer, they asked me to come back. I then asked her how effective these plans have been, she noted that the Town appreciates them and CRS have never had an issue with a budget request and CRS is in a much better financial situation than when she first started.

Next, I asked about the human resource responsibilities of CRS, specifically who handled them and how they were handled. Lisa stated that HR functions remained with her as the chief, but she often received assistance and guidance from the executive board. She stated that the larger issues such as ones that may need to involve the legal counsel go to the executive board, but day-to-day operations she handles. She added that for her the most important thing is keeping the issues quite. Being a small organization in a small town word gets around and it is important for some things to remain private. Dakota commented, "everything seems to just work". He added that the mix of volunteers and paid staff keeps it pretty laid back. He also noted that he has not had any major issues, but anything that has come up is easily resolved by a quick talk with the chief. At this point, the conversation was slightly derailed as we started to talk about how Lisa is always available. Anytime anyone needs something, she can always be reached.

Once we go back on task, I inquired about the extent of organization outreach, networking or partners, and external constituents. Lisa first pointed out that CRS has mutual aid agreements with other emergency service organizations. She then noted that EMS is a big family, "it takes a community to run a community". We laughed because this isn't the actual quote, but it works, especially in this small town. She also noted that we work a lot with the town and the local fire department. It is important to have good working relationships with the other organizations in the town. Dakota added that CRS also works a lot with the local hospitals. CRS is unique in that it is equal distant to three different hospitals. The conversation got a little off topic again here as Dakota mention that he has never transported to Copley Hospital, which is the primary hospital for CRS's district. This is a common problem for not only CRS, but also other rescue squads. Dakota asked if there was any discussion about changing districts. Lisa explained that the one positive thing about District Four and the medical director is that they are more lenient and give more leeway to the EMS responders.

My next question a two-part question about how members of the organization communicate with one another, and how is technology used. Both Lisa and Dakota noted the Crew App, which in a mobile app that the members use to communicate with one another. Lisa also added that they use the software Aladtec for scheduling and Active 911 to receive calls on mobile devices. CRS also has two iPads, one for each ambulance for completing run reports.

Additionally, CRS just upgraded to the statewide software, Siren, for completing the run reports. I also interjected that CRS purchased the latest Zoll device for both ambulance less than two years ago as well as an Autopulse. I then asked about the website, which had recently been redone. Both Lisa and Dakota expressed some discontent in the appearance of the new website. However, it was also noted that no one would ever comment about the website because the individual that updated it took a lot of time learning how to create a website, and spent even more time making the actual updates. Overall to them it was the commitment to the task that counts.

Then I asked what professional development opportunities were offered at CRS. Lisa state that CRS reimburse members for their certifications. Dakota was very excited to hear this as his is going to be completing his AEMT class very soon. Lisa explained that CRS reimburses 50% of the cost after six months, and then the balance after one year. This was there is some commitment time prior to reimbursement. Additionally, Lisa note that there are monthly trainings and if someone is unable to attend, they can come in while the training officer is available and make up the training. Furthermore, there are online trainings available through a program offered by the state.

Finally, I asked Lisa what major challenges are affecting the success of the organization. Lisa stated, "money and volunteers". This came as no surprise to me as I have been acutely aware of both of these issues during my time at CRS. I asked if Lisa had any thoughts on how to resolve these issues and she did not have anything. It is clear that this is a common problem with most volunteer ambulance services throughout the state and country. One thing that CRS is planning is to run its own EMT class, which they hope will help bring in volunteers. There was also a brief discussion about merging with another service but Lisa felt that it would be a logistical nightmare as the two services reside in different districts and counties.

OBSERVATION

On Wednesday, April 03, 2019, I attend and participated in the monthly board meeting for Cambridge Rescue Squad. I arrived at 6:30pm for the meeting that was scheduled to start at 7:00pm. This meeting was rescheduled from the previous week because there was not enough attendance. At 7:00pm there was only three of the six members in attendance. The Treasurer had recently resigned, the member at large was not able to attend, and the secretary was running late. The meeting eventually got started at 7:15pm and it was made clear that there was a lot to discuss.

The first agenda item was old business, which included the replacement of one of the ambulances by the town. Cambridge Rescue used to own all of its own vehicles, while Cambridge Fire Department's vehicles are all paid for by the Town of Cambridge. With the replacement of the last ambulance, A1, it was decided that the town would pay for all vehicles going forward. The Secretary, Martha Edwards-Manning, has been a long time member and questioned if there would be a truck committee to decide what ambulance to purchase. The Assistant Chief, Tracy Meyers, stated no, that the new ambulance would be identical to A1. It was also noted that the Select Board still had to have an official vote to approve the purchase of the ambulance on May 7, 2019. There was no concern about the vote as what the town had budgeted was $60,000 less than what the quote is.

Included with old business, was that the budget was approved, which includes $175,000.00 in town funding, $40,000.00 of which in capital funding. Chief, Lisa Hill, explained that going forward the capital funding from the town would not be included in Cambridge Rescue's budget as it is the responsibility of the town. For instance, the building needs improvements including the floors and the heating system. The building in owned by town and therefore they will be responsible for the maintenance.

The last item of old business was a discussion in regards to the EMT class that Cambridge Rescue is hoping to hold. Lisa noted that she sent the proposed syllabus to the lead instructor for approval approximately a week ago and is waiting for a reply. It was mentioned that the hope was to start the class in June, as there are already approximately 20 individuals that have expressed interest in the class. Tracy and Lisa both noted that a June start date would be a very tight timeframe.

The next item on the agenda was new business, specifically new members. Lisa could not remember what needed to be addressed in regards to new members, Martha asked how members are supposed to know who is driver certified. Tracy responded that if they are no longer in Member in Training (MIT) status then they are certified. If they are still an MIT but passed driver training then they will have a D next to their name in Aladtec (the software that is used for scheduling and keeping track of members). Martha noted that she does not reference Aladtec and that there used to be a list of individuals that are driver certified in the bay, but it has not been updated in years and most of the people are no longer on the squad. After further

discussion, Lisa asked Tracy to update the list in the bay for the individuals that do not reference Aladtec.

At this point Lisa decided it would be best to start the discussion surrounding the bylaws as that would help put other things on the agenda into perspective. A draft of the proposed bylaws were distributed and all the members were asked to review them and return their notes by Sunday so I could make any changes and they could be distributed to the membership to vote on for the next annual meeting. I was asked to explain the changes to the bylaws and what it meant for Cambridge Rescue. I explained that the bylaws were being set up to separate the board of directors from the officers of the squad. The officers each hold two-year terms and are elected by the members of the organization. The officer positions include Chief, Assistant Chief, Lieutenant, Secretary, Treasurer, and Member at Large. The new structure will have a board make up of a minimum of six members, only one of the positions to be voted on by the membership, which will be Member at Large. The other four positions will be appointed by the current members of the board. Additionally, the board will hire the Chief as operational leader of the organization. Several questions were asked about the bylaws to ensure that the organization structure would meet the current needs. All members seemed to be clear in regards to the reasons behind the change in the bylaws, but it was noted that issues with the Treasurer were one of the driving forces. Furthermore, the current bylaws act as the policies of the organization and each time a policy change needs to occur there has to be a vote of the membership. Changing the bylaws to eliminate any details related to the day-to-day operations will give greater control and flexibility to creating and updating policies.

Given the issue in regards to removing policy related information from the bylaws a set of policies was also presented to ensure that once the proposed bylaws were approved there would still be policies and procedures in place. One of the policies was in regards to membership and the different types of members that make up the organization. One area of specific concern is that the full time employees only receive 66 hours of paid time off (PTO) per year. Given the fact that a full time employee is defined as working 36 hours or more this is less than two weeks of PTO annually. It was proposed that full time employees with less than five years of service would receive two weeks PTO, those with five to ten years of service will receive three weeks, and those with greater than ten years of service will receive four weeks PTO. Part time employees will remain the same at one hour of PTO for every 52 hours worked. This lead into a lengthier discussion as three of the five individuals present at the meeting were paid employees. They all were trying to determine their hire dates and how much PTO time they are eligible. At this point, I thought it important to address the current pay structure of the Chief's position. When the board moved the Chief position to an exempt positon three years ago, the hourly rate was based on a 40-hour workweek and that is how we have been determining the annual raises. However, we base everyone else on a 36-hour workweek, which does no accurately represent the rates when comparing all full time employees. I proposed that we keep the annual rate the same, but just determine the hourly rate based on a 36-hour week going forward. Though it is a small change it makes it much easier to compare all the pay rates of the employees across the board, and everyone agreed.

At this point, there was a discussion that the next agenda item was the Treasurer Position Questions, but since the Treasurer has resigned, there was no need to discuss this topic. We also skipped Treasurer Updates and it was asked that I provide the Bookkeeper Updates. I provided

the current balances of the accounts and explained that we are currently operating at a deficit due to service billing income being $10,000.00 lower than expected and historically. It was explained that part of the problem was due to the number of no transport calls that have occurred as well as the number of calls where there has not been a crew and mutual aid had to be called. The last few items I noted were in regards to payroll. First, I will not be providing payroll information to anyone but the payee or the Chief without documented approval from the payee. Lastly, was that we only allow two person crews unless the third is a MIT, student, or EMR. If someone jumps a call and there is already a full crew, they will not be paid. We have radios for communication; make sure you are communicating with other members so you do not jump a call when you are not needed.

The final topic of the meeting were the updates from each of the other members. First was the Assistant Chief, Tracy. The only update Tracy had was the approval of the truck, which had already been discussed. Second, was the Lieutenant, Suzanne, who had nothing at the time. Third, was the Secretary, Martha, who's only comment was that the first in bag is very heavy and would like it to be condense, specifically have the O2 taken out. This lead to a rather lengthy discussion as Tracy started to become agitated that this is the first time she is hearing about the issue. Martha noted that she was asked if there was anything and this was what she thought of. Tracy insisted that Martha had to provide her recommendations for change, and Martha explained that she just did. The conversation was moved along by stating that the final agenda item was an update from the Member at Large, but since she was not present, we could adjourn. The meeting adjourned at approximately 9:30pm and most individuals left.

I remained behind and spoke to Lisa for a little while discussing that the meeting went well, and we were glad that the recently resigned Treasurer did not come with her significant other, who is a volunteer member of the organization. We also discussed what our expectations were for the annual meeting and how we though the members would take the changes to the bylaws. We both agreed that the majority of the members would not care as they have very little involvement other than their volunteer commitment now. Lisa stated her concern regarding one individual, who has expressed interest in running for Assistant Chief, and that it would make for a difficult working relationship. I noted that the individual that she was concerned about has not been with the organization very long and most people are not familiar with them, like they are Tracy. She stated that Tracy's biggest downfall was her attitude and that she takes everything personally, as evident by the conversation during the meeting about the first in bag. I expressed that I felt she was improving, and that my impression was that most people felt she did her job well. Lisa and I left that evening stating that we will just have to wait and see.

ANALYSIS

Overall, the meeting went smoothly, there were tasks that were accomplished, but there was also digression from the agenda and side conversations. The meeting was structured, but it was also very laid back. Everyone was respectful of each other, but there was one occasion at the end were two members disagreed and the conversation needed to be ended. Lisa had to balance letting the conversation occur but keeping to the agenda, which appeared to be difficult at times. It was hard to tell if it was due to her willingness to allow the conversation or a lack of control over the situation.

There was a clear commitment to the future of the organization by the desire to revise the bylaws to meet the changing needs. However, the approach is very reactive. Last year the bylaws were changed and no one provided any feedback, but voted to adopt them. Members have since complained about the bylaws and how no one follows them until it benefits them, which is part of the reason to eliminate items from the bylaws that should be in a policy. They are also being changed to prevent further issues in regards to qualifications of members holding certain positions. When I resigned from the Treasurer position last year it was because I could no longer meet the requirements needed to be a board member. When the new Treasurer was elected, there was a significant amount of training and paperwork that needed to be done in regards to banking, payroll, and finances in general. The individual who took over the Treasurer position was not open to training or assistance when I reached out to her. After a few months, members of the board started to notice that there were problems with her quality of work and she agreed that she was overwhelmed. It was mutually decided that she would be the Treasurer on the board but they would hire me as a bookkeeper. This only lasted a short while as I did not feel comfortable providing her information about other members wages without their permission. After the Chief refused to let her take back the bookkeeping, she decided to resign from her position. Each change in Treasurer has resulted in a significant amount of paperwork and the hope is that changing the bylaws will prevent this problem from occurring in the future.

METHODS/PROCESS

This observation was difficult as it was expected that I participate in the meeting. I did my best to not participate in the areas of the meeting that did not require my direct input. This was relatively successful and it was interesting to observe the group dynamics. Most of my observations solidified things that I felt I already recognized about the organization; including, the lack of diversity, the passion of only a few keeps the organization operating, the core beliefs of the organization is to serve the community, the lack of formal policies and procedures creates tensions, and that Cambridge Rescue is very limited by the state of its financials, but continues to operate at the best of its ability.

ORGANIZATION OBSERVATION

13 MARCH 2019

OBSERVATION

On March 13, 2019, I observed a squad training as it was an opportunity to have the most members present. The training was scheduled to being at 7pm. However, at 6:55pm, there was a call and the chief, one member, and a student left for the call. The only individuals that remained were the training officer, a trainer, and a cadet. The call ended up being a no transport and the group returned by 7:15pm. Additional members also started to show up so the training started shortly after 7:15pm. There was two trainers, five members, and two participants in attendance out of the approximately 26 members. It was noted that this is a relatively normal turnout.

The training took place in the basement of the rescue building. There were tables set up in a U shape with one table in the middle. The trainer set up the equipment on the middle table with one of the participants sitting in a chair and the members gathered around. The training this evening was how to do a 12 lead to analyze a patient's heart rhythm.

Once the training started, one trainer demonstrated the skills, while the other was preparing handouts. One of the participants who was there to volunteer as a test subject brought a bearded dragon, which caused some distractions amongst the members that were not actively participating in the training. Most of the time people were participating and were laughing, joking, and enjoying the experience. There were conversations that occurred that in many situations would be considered inappropriate. However, given the nature of the content most of the conversation was necessary. For instance, the training involved the appropriate placement of 12 leads, which included how to appropriate maneuver a woman's breast for appropriate placement. The conversation did derail at some points to less appropriate jokes. No one appeared to be bothered by these jokes, but I did take notice that as the conversation morphed into one pertaining to gender identity there was one or two individuals that seemed uncomfortable. Though this is a necessary conversation, some of the individuals were clearly just uninformed. I chimed in by stating the appropriate pronouns to use when referring to an individual's gender. This clearly pleased one of the individuals who was previously quite during the conversation and they gave me a high five.

Both trainers worked together to provide personal experience insights and assistance to members that were practicing. Other members also provided little pieces of insight as well from their own experience. There was also things that one trainer was able to demonstrate that were new to the other trainer. Most members were very involved, asked questions, and sought feedback. As the night went on and members who completed with the one part of training, there was downtime where most of the members were socializing. At this point, the training officer provided information to the squad regarding the annual meeting, which will take place in May. This information included positions on the executive board that are up for election. The training ended at 8:30pm when the group voted to do one of the planned trainings at another date.

ANALYSIS

The training experience was very laid back, which was by design. The training officer wants it to be an enjoyable experience. However, I felt that some of the conversation could have been brought back on topic as to not make other uncomfortable. Everyone was contributing in the training until completed with his or her own training. Additionally, it was surprising to see that there was a less than 50% turnout for essentially a required training.

Given the environment of the training it aligned with the discussion I had earlier with the chief that the organization was like a family. However, there was still this underlying concern regarding the lack of involvement, which I attribute to a lack of enforcement. I came to this conclusion in part through the observation that when the conversation became borderline inappropriate where people were starting to feel uncomfortable no one made the correction to bring the conversation back on task. The same goes for not making individuals work on different skills once they were completed with the primary training. There was no enforcement of the structure that was set up for the training.

METHODS/PROCESS

As I am a recently reappointed member of the board of this organization, I had to put my biases aside when attending this training. Once I arrived, I actually found it very easy to do as most of the members that were there were all new and I had not worked with them previously do to my leave. I found it enjoyable to be able to sit and observe the situation, as I am typically an active participant. I also was slightly discouraged due to the lack of people that attended, especially since there was only one veteran member in attendance that was not an officer or executive board member.

Cambridge Rescue Squad, Inc.
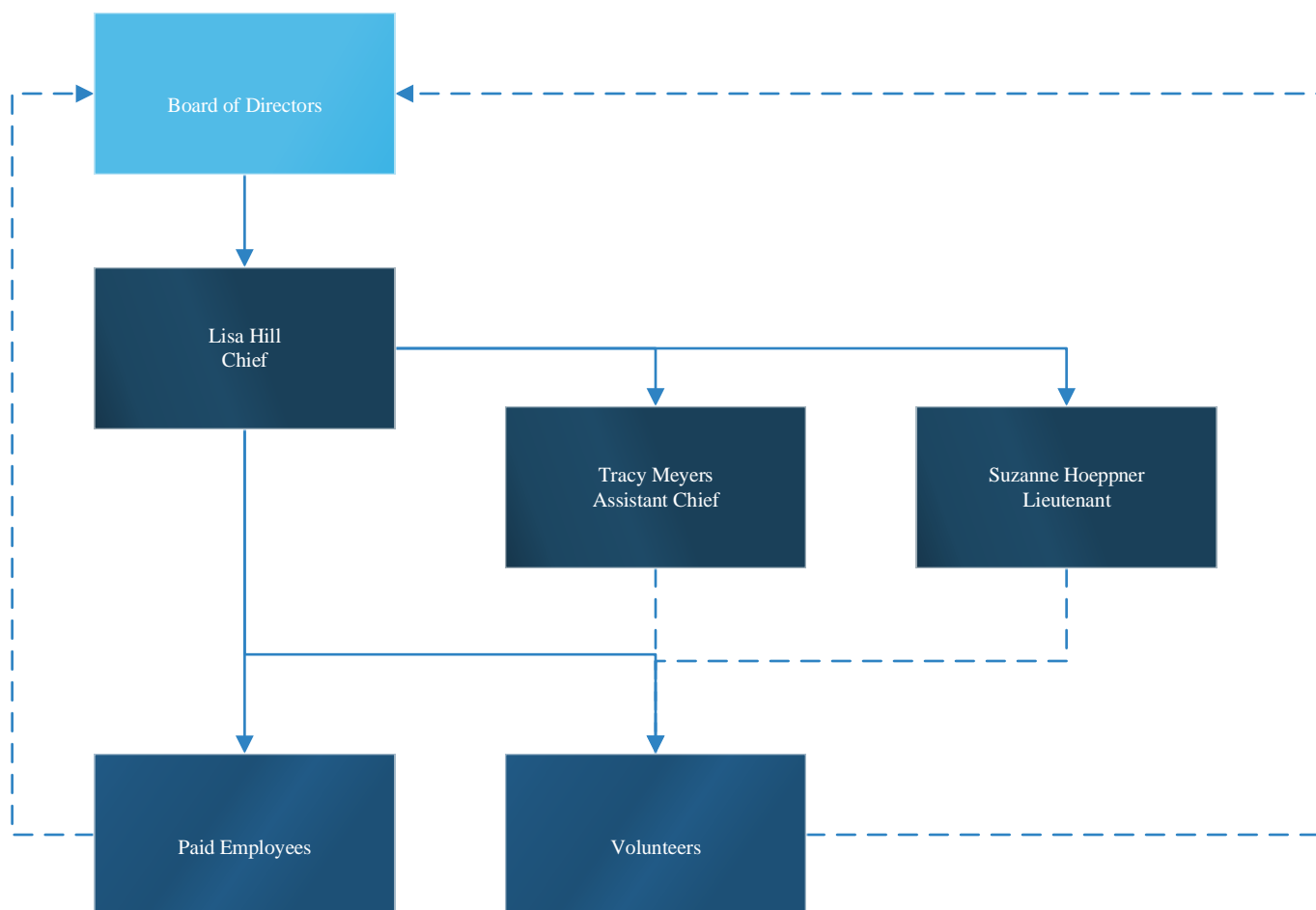
Cambridge Rescue Squad, Inc.
By-Laws

ARTICLE 1. TITLE AND PURPOSES

This corporation shall be known as the Cambridge Rescue Squad, Inc. a public benefit corporation. The purpose of the Corporation may include but not be limited to the charitable promotion of the general welfare of the citizens of Cambridge and the surrounding areas. The Corporation shall provide emergency and non-emergency medical care for the Town of Cambridge and the surrounding areas. The Corporation may serve any other geographical areas as may be designated by the Corporation from time to time, as well as to provide mutual aid upon agreement or request. The Corporation may also serve the benevolent and social needs of its members, and the Corporation may perform any other function allowed under section 501 (C)(3) of the Internal Revenue Code or the corresponding section of any future tax code.

ARTICLE 2. OFFICES AND REGISTERED AGENT

The registered office of the Corporation shall be located at 18 Williamson Court, Jeffersonville, Vt. 05464. The registered agent shall be the acting Chief.

ARTICLE 3. MEMBERS

Section 1: Membership
Eligibility for membership in the Corporation recognizes the unique function of an emergency squad, and consequently, the prospective members who uphold the purpose of the corporation are seriously considered. Any person between the ages of 15 and 18, may become eligible for consideration as a member of the Cadet Corp, by submitting an application to the Cadet Coordinator. Any person who has reached the age of 18 may become eligible for consideration as a member by completing an application and criminal record check and submitting them to the Chief.

Section 2: No rights created
Neither the membership process nor these bylaws shall create any right in any party to membership or continued membership, except for the right of fairness, reasonableness and good faith. Cambridge Rescue Squad, Inc. is an equal opportunity employer.

Section 3: Classes of membership
The Corporation may have six classes of membership: Salaried, Full-Time Volunteer, Part-Time Volunteer, Cadet, Member in Training, and Auxiliary. Candidates shall designate the class of membership for which they are applying at the time of application.

Section 3.1: Salaried
Someone over the age of 18 that is employed by the Corporation, certified at an AEMT level or higher, or is currently an EMT and has the ability to obtain an AEMT certification within one year. Salaried positions will be filled by the acting Chief, with the approval of the Board of Directors.

Section 3.2: Full-Time Volunteer
Someone over the age of 18 that commits 48 hours or more per month. They must be certified at the EMR level or higher.

Section 3.3: Part-Time Volunteer
Someone over the age of 18 that commits a minimum of 24 hours per month. They must be certified at the EMR level or higher.

Section 3.4: Cadet
Someone between the ages of 15 and 18 that is an active member of the Cadet Corp.

Section 3.5: Student
Someone over the age of 18 that is an actively pursuing licensure of EMR level or higher.

Section 3.6: Member In Training
Someone over the age of 18 who is certified at the EMR level or higher who is on a probationary period not to exceed 3 months.

Section 3.7: Auxiliary
Someone who provides regular support to the corporation.

Section 4: Voting Rights
Only Salaried, Full-time Volunteer, and Part-Time Volunteers meeting their membership class description shall have the right to vote. Members who are on a leave of absence, probation, or suspension will not have the right to vote.

ARTICLE 4. PROBATION, SUSPENSION, AND TERMINATION OF MEMBERSHIP

Section 1: Emergency Probation/Suspension
Recognizing that Cambridge Rescue Squad members provide emergency medical care under conditions that are unpredictable and uncontrollable, and that members may not be easily monitored, the Chief, or any officer under the direction of the Chief, in his absence may issue a verbal warning, written warning or immediately place on probation or suspend a member without prior notice under these bylaws for a period not to exceed 60 days. Immediate suspension shall be only available when the Chief, in good faith, believes that the member may have violated a law, rule, or policy or poses a threat to himself or others. The Chief shall investigate the matter and report to the Board of Directors. The provision does not compel the Board of Directors to take further action by the board under subsection 4.2.

Section 2: Probation, Suspension, Termination
Following an investigation by the Chief, any member may be placed on probation, suspended, or terminated, by majority vote of the Board of Directors present at any meeting for so long as the Board of Directors acts in good faith and the probation, suspension, or termination is fair and reasonable taking into consideration all of the relevant facts and circumstances.

No less than 15 days before the effective date of the probation, suspension, or termination, the affected member shall be provided written notice of the reasons for the proposed probation, suspension, and or termination by certified mail to the last address known for the member in the Corporation's records.

The affected member shall have an opportunity to submit reasons, in writing, why the probation, suspension, or termination should not take place, not less than five days before the effective date of the probation, suspension or termination. This submission shall be reviewed by the Chief and presented to the Board of Directors. The member shall not have the right to attend the meeting.

The Board of Directors may request that the Chief obtain further information prior to voting and may extend disciplinary action until that vote is taken.

Section 3: Inactivity
Any member may be considered inactive if they are not meeting the minimum requirements of their membership class for 60 consecutive days. The board shall review any member who becomes inactive or not meeting their training requirements by calling that member to appear. If the board fails

to find a valid reason for such absences or if the member fails to appear the board may decide to terminate membership.

Section 4: Challenges

Any proceeding challenging a probation, suspension or termination, including a proceeding in which defective notice is alleged, must be commenced within one year after the effective date of the expulsion, suspension or termination. Challenges to disciplinary action should be presented in writing to the acting chief or Board of Directors.

Section 5: Leave of Absence

If a member requires a leave of absence they may request a leave in writing to the acting Chief. The Chief may approve any requests up to two (2) months. Any leave of absence that exceeds two(2) months must be approved by the Board of Directors. An approved leave of absence does not constitute inactivity.

Section 6: Resignation

Any member may resign by filing a written resignation with the Chief, but such resignation shall not relieve the member so resigning of the obligation to pay any dues, assessments, other charges accrued and unpaid, and return all Corporation supplied radios, keys, equipment and uniforms. The resigning member may be held accountable for the cost of any unreturned equipment or equipment that was returned in poor condition. The failure to attend meetings, training, calls or maintain contact with the Chief for a period of six months may be considered to be a resignation and that resignation may be accepted by the majority of the board of directors.

ARTICLE 5. MEMBERSHIP MEETINGS

Section 1: Annual Meeting

The annual meeting of the membership shall be held on the second Wednesday of January at 7:00 P.M. The meeting shall include reports of the officers as well as election of the officers as provided in Article 6. Election of officers and members shall require a majority vote of members present for election. Any additional business may be conducted. If the day fixed for the annual meeting shall be a legal holiday in Vermont, such meeting shall be held on the next succeeding Wednesday. The meeting shall be held at the registered office. Notice shall be provided as designated in Section 5.

Section 2: Regular Meetings

Regular membership meetings of the Corporation shall be held monthly on a date and time to be determined by the board of directors with notice shall be provided as specified in Section 5. The annual meeting will serve as the regular meeting for the month of January. The meeting shall normally be held at the registered office. If it is not held or if it is held at a date or time other than that designated in this section, notice shall be provided as specified in Section 5.

Section 3: Special Meetings

Special meetings of the Corporation may be held at the request of the Chief, a majority of the board, or by a minimum of five active members. Notice as designated in Section 5 shall be provided for all special meetings.

Section 4: Quorum

Unless specified elsewhere in these bylaws, a quorum at any meeting shall be 50% of the members with voting rights. Other discussion may occur at a meeting where no quorum is present, but no votes may be taken.

Section 5: Notice

Where notice is required by law or by these bylaws, it may be provided either by hand delivery, first class mail, email to the member's address last supplied to the Corporation, by phone call for so long as it is received directly by the member, or added to the Corporation's scheduling system at least ten (10) days before the meeting for all meetings except for the Annual Meeting. Notice for the Annual Meeting and for meeting where bylaws are to be amended shall be 30 days before the meeting. Notice

shall include the place, date, time and purposes of the meeting.

Section 6: Proxies

Members may not vote by proxy.

Section 7: Rules

All meetings shall be conducted under Robert's Rules of Order. Order of business shall be:

1. Reading and approval of minutes.
2. Reading and approval of the Treasurer's Report
3. Old Business
4. New Business
5. Announcements
6. Adjournment

ARTICLE 6. BOARD OF DIRECTORS

Section 1: Powers

The policy of the Corporation shall be managed and directed by the Board of Directors. The day to day management of the Corporation shall be the responsibility of the Chief. The Chief is authorized to uphold the duties and responsibilities of the board, subject to policy direction of the board.

Section 2: Members

The Board of Directors of the Corporation shall consist of six (8) members, including the Chief, Assistant Chief, 1st Lieutenant, 2nd Lieutenant, Secretary, Treasurer, Training Officer, and Member "at large", and non-member community representative. The Chief shall not have the right to vote except in the event necessary to "break" a tie vote or when his or her vote may "create" a tie vote.

Section 3: Terms

Board members, with the exception of the member "at large" shall be elected to two year terms, by majority vote of members present at the Annual Meeting. The Chief, 1st Lieutenant, Secretary, and Training Officer, will be elected on even years, while the Assistant Chief, 2nd Lieutenant, and Treasurer will be elected on odd years. Member "at large shall be elected annually by majority vote at the annual meeting.

Section 4:   Duties of Directors

Section 4.1: Chief

The Chief shall be the principal executive director of the Corporation and shall preside at meetings. Unless otherwise limited by these bylaws, (s)he shall have the authority to sign all papers and act on behalf of the Corporation. (S)he shall be an ex-officio member of all committees. The Chief shall report to the Board of Directors.

Section 4.2: Assistant Chief

The Assistant Chief shall be responsible for the duties of the Chief in his/her absence. (S)he shall be responsible for duties as assigned by the Chief and/or the Board of Director.

Section 4.3: 1st Lieutenant

1st Lieutenant will be responsible for other duties as assigned by the Chief and/or the Board of Directors.

Section 4.4: 2nd Lieutenant

The 2nd Lieutenant shall be responsible for the duties as assigned by the Chief and/or the Board of Directors.

Section 4.5: Secretary
    The Secretary shall keep minutes of member and board meetings, shall see that all notices prescribed by these bylaws are given, and shall oversee the records of the Corporation. (S)he shall be responsible for any other duties as assigned by the Chief and/or the Board of Directors.

Section 4.6: Treasurer
    The Treasurer shall be responsible for the maintenance of the Corporation's financial records. The Treasurer shall report to the membership at each membership meeting. (S)he shall be responsible for any other duties as assigned by the Chief and/or the Board of Directors.

Section 4.7: Training Officer
    The Training Officer shall coordinate and establish training for the Corporation. (S)He shall track each member's training. (S)He shall be responsible for other duties as assigned by the Chief and/or the Board of Directors.

Section 4.8: Member "at large"
    The Member "at large" shall be responsible for duties as assigned by the general membership as to not conflict with other Directors. The Member "at large" will be the liaison between the membership and the Board of Directors.

ARTICLE 7. MEETINGS OF THE BOARD

Section 1: Regular Meetings
    The Board of Directors shall attempt to meet the fourth Wednesday of each month at 7:00 P.M. at the registered office. Notice to all board members shall be provided if a meeting is to be held at a different time, date, or location either by mail, email, or telephone no less than 2 days before the meeting or verbally to all members during the preceding board meeting. Regular meetings will also be included on the Corporation's scheduling system and are open to all members of the Corporation.

Section 2: Special Meetings
    Special meetings of the Board of Directors may be called by or at the request of the Chief or any two members of the Board of Directors, and shall be held at the registered office of the Corporation or at such other place as the directors may determine. Notice shall be provided to board members no less than 2 days before the meeting by mail, email, or telephone, said notice to include the purpose of the special meeting.

Section 3:   Waiver of Notice
    Any director may waive notice of any meeting. The attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Neither the business to be transacted at, not the purpose of any regular or special meeting of the Board of Directors need to be specified in the notice or waiver of notice of such meeting.

Section 4: Quorum
    A majority of the number of directors fixed in these bylaws shall constitute a quorum for the transaction of business. The act of a majority of the directors present at a meeting at which a quorum is present shall be the act of the Board of Directors. Any action consented to in writing by each and every director shall be as valid as if adopted by the Board of Directors at a duly warned and held meeting of the board, provided such written consent is inserted in the minute book.

Section 5: Vacancies
    Any vacancy occurring in the Board of Directors may be filled by the affirmative vote of a majority of the members present at a membership meeting. The Chief may cast a vote if an even

number of members remain and their vote is split evenly. A director elected to fill a vacancy shall be elected for the unexpired term of his predecessor in office.

ARTICLE 8. CONTRACTS, LOADS, CHECKS, AND DEPOSITS

Section 1 :   Contracts

The Chief shall be authorized to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Corporation up to a value of $5,000.00. Amounts in excess of $5,000 shall be approved by the Board of Directors. Amounts in excess of $10,000 shall be approved by the members and entered into the minutes of the meeting.

Section 2: Loans

No loans shall be contracted on behalf of the Corporation unless authorized by resolution of the Board of Directors.

Section 3: Payments

Checks, drafts, or other orders for the payment of money, notes, or other evidences of indebtedness up to a value of $1,000 shall be signed by the Treasurer. Values in excess 0f $1,000 up to $5,000 shall require the signature of the Treasurer and one individual of two appointed by the board. Values in excess of $5,000 shall be approved by the board and entered into the minutes of the meetings. The checks in excess of $5,000 shall be signed by the Treasurer and one individual of two appointed by the board.

Section 4: Deposits

All funds of the Corporation not otherwise employed shall be deposited at minimum weekly as funds arrive to the credit of the Corporation in such banks, trust companies, or other depositories as the designated by the board of directors.

ARTICLE 9. FISICAL YEAR.

The fiscal year of the Corporation shall be January 1 to December 31.

ARTICLE 10. AMENDEMNTS.

These bylaws may be altered, amended, or repealed, and new bylaws may be adopted by the membership at any regular or special meeting by 2/3 of members with voting privileges. Notice shall be provided of all bylaws changes to be voted upon at the meeting no less than 30 days in advance of the meeting in writing.

ARTICLE 11. FINANCIAL OVERSIGHT

Section 1 : Annual Financial Review

The membership shall elect a financial review committee annually at the Annual Meeting for the ensuring year. The purpose of the review is to help ensure that funds are not misappropriated, and shall not be expected to be a full accounting audit. The committee shall review the records maintained by the Treasurer quarterly. It shall be prepared to report to the membership at the Annual Meeting that it has examined the records maintained by the Treasurer for all accounts held in the name of the Corporation.

Section 2: Audits or Professional Review

A vote of the membership, the Board, or the Financial Review Committee may ask that the records of the Corporation t o undergo a professional review at the closing of the fiscal year.

ARTICLE 12. DISSOLUTION OR SALE OF ASSETS

A 2/3 vote of the membership shall be required to sell or mortgage assets of the Corporation not in the regular course of business or to dissolve the Corporation. Upon dissolution of the Corporation any assets remaining after payment of or provision for its debts and liabilities shall, consistent with the purposes of the Corporation, be paid over to charitable organizations except under the provisions of Section 501(C)(3) of the U.S. Internal Revenue Code or corresponding provisions of subsequently enacted federal law. No part of the net assets or net earnings of the Corporation shall inure to the benefit of or be paid or distributed to an officer, director, member, employee, or donor of the Corporation.

CAMBRIDGE RESCUE SQUAD, INC. BY LAWS

Date Approved:

ARTICLE 1. TITLE AND PURPOSES

This corporation shall be known as the Cambridge Rescue Squad, Inc. a public benefit corporation. The purpose of the corporation may include but not be limited to the charitable promotion of the general welfare of the citizens of Cambridge and the surrounding areas. The corporation shall provide emergency and non-emergency medical care for the Town of Cambridge and the surrounding areas. The corporation may serve any other geographical areas as may be designated by the corporation from time to time, as well as to provide mutual aid upon agreement or request. The corporation may also serve the benevolent and social needs of its members, and the corporation may perform any other function allowed under section 501 (C)(3) of the Internal Revenue Code or the corresponding section of any future tax code.

ARTICLE 2. OFFICES AND REGISTERED AGENT

The registered office of the corporation shall be located at 18 Williamson Court, Jeffersonville, Vt. 05464. The registered agent shall be the Chief as appointed by the Board of Directors. The Board of Directors is hereby granted full power and authority to change from time to time said principal executive office from one location to another. Any such change shall be noted on these Bylaws by the Secretary, or this section may be amended to state the new location.

ARTICLE 2. MEMBERS

Section 1: Membership

The corporation shall have no members who have any right to vote or title or interest in or to the corporation, its properties and franchises.

Section 2: Non-Voting Affiliates

The Board of Directors may approve classes of non-voting affiliates with rights, privileges, and obligations established by the board. Affiliates may be individuals, businesses, and other organizations that seek to support the mission of the corporation. The board, a designated committee of the board, or any duly elected officer in accordance with board policy, shall have authority to admit any individual or organization as an affiliate, to recognize representatives of affiliates, and to make determinations as to affiliates' rights, privileges, and obligations. At no time shall affiliate information be shared with or sold to other organizations or groups without the affiliate's consent. At the discretion of the Board of Directors, affiliates may be given endorsement, recognition and media coverage at fundraising activities, clinics, other events or at the corporation website. Affiliates have no voting rights, and are not members of the corporation.

ARTICLE 3. BOARD OF DIRECTORS

Section 1: Members

(a) Regular. The Board of Directors of the Corporation shall consist of at least four (4) and no more than ten (10) directors, excluding ex-officio directors. Within these limits, the board may increase or decrease the number of directors serving on the board, including for the purpose of staggering the terms of directors.

(b) Ex-Officio. The persons in the following two (2) positions shall serve as ex-officio directors without the need for further action to be taken and shall serve until their successors take office:

These two (2) ex-officio director shall have all rights, powers, and privileges of elected directors.

i.   Chief of Service

    ii.   Member "at large"

Section 2: Powers

The policy of the corporation shall be managed and directed by the Board of Directors. The day to day management of the corporation shall be the responsibility of the Chief. The Chief is authorized to uphold the duties and responsibilities of the board, subject to policy direction of the board.

Section 3: Terms

(a) Directors, with the exception of the Chief & Member "at large" shall be elected to two (2) year terms, however their term may be extended until a successor has been elected.

(b) Director terms shall be staggered so that approximately half the number of directors will end their terms in any given year.

(c) Directors may serve terms in succession.

(d) The term of office shall be considered to begin January 1 and end December 31 of the second year in office, unless the term is extended until such time as a successor has been elected.

Section 4: Qualifications and Election of Directors

(a) In order to be eligible to serve as a director on the Board of Directors, the individual must be 18 years of age and an affiliate within affiliate classifications created by the Board of Directors. Directors may be elected at any board meeting by the majority vote of the existing Board of Directors.

(b) The election of directors to replace those who have fulfilled their term of office shall take place in January of each year.

Section 5: Vacancies

The Board of Directors may fill vacancies due to the expiration of a director's term of office, resignation, death, or removal of a director or may appoint new directors to fill a previously unfilled board position, subject to the maximum number of directors under these Bylaws.

(a) Unexpected Vacancies. Vacancies in the Board of Directors due to resignation, death, or removal shall be filled by the board for the balance of the term of the director being replaced.

Section 6: Removal of Directors

A director may be removed by two-thirds vote of the Board of Directors then in office, if:

(a) the director is absent and unexcused from two or more meetings of the Board of Directors in a twelve month period. The board president is empowered to excuse directors from attendance for a reason deemed adequate by the board president. The president shall not have the power to excuse him/herself from the board meeting attendance and in that case, the board vice president shall excuse the president. Or:

(b) for cause or no cause, if before any meeting of the board at which a vote on removal will be made the director in question is given electronic or written notification of the board's intention to discuss her/his case and is given the opportunity to be heard at a meeting of the board.

ARTICLE 4. MEETINGS OF THE BOARD

Section 1: Regular Meetings

The Board of Directors shall have a minimum of four (4) regular meetings each calendar year at times and places fixed by the board. Board meetings shall be held upon four (4) days notice by first-class mail, electronic mail, or facsimile transmission or forty-eight (48) hours notice delivered personally or by telephone. If sent by mail, facsimile transmission, or electronic mail, the notice shall be deemed to be delivered upon its deposit in the mail or transmission system. Notice of meetings shall specify the place, day, and hour of meeting. The purpose of the meeting need not be specified.

(a) Regular meetings will also be included on the Corporation's scheduling system and are open to all members of the Corporation.

Section 2: Special Meetings

Special meetings of the Board of Directors may be called by or at the request of the Chief, President, Vice President, Secretary, Treasurer, or any two (2) members of the Board of Directors. Notice shall be provided to board members no less than two (2) days before the meeting by mail, email, or telephone, said notice to include the date, time, place, and purpose of the meeting.

Section 3: Waiver of Notice

Any director may waive notice of any meeting. The attendance of a director at a meeting shall constitute a waiver of notice of such meeting, except where a director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Neither the business to be transacted at, not the purpose of any regular or special meeting of the Board of Directors need to be specified in the notice or waiver of notice of such meeting.

Section 4: Manner of Acting

(a) Quorum. A majority of the number of directors in office immediately before a meeting shall constitute a quorum for the transaction of business. No business shall be considered by the board at any meeting at which a quorum is not present.

(b) Majority Vote.   Except as otherwise required by law or by the articles of incorporation, the act of the majority of the directors present at a meeting at which a quorum is present shall be the act of the board.

(c) Hung Board Decisions. On the occasion, that directors of the board are unable to make a decision based on a tied number of votes, the chief or president in the order of presence shall have the power to swing the vote based on his/her discretion.

(d) Participation. Except as required otherwise by law, the Articles of Incorporation, or these Bylaws, directors may participate in a regular or special meeting through the use of any means of communication by which all directors participating may simultaneously hear each other during the meeting, including in person, internet video meeting or by telephonic conference call.

Section 5: Compensation for Board Service

Directors shall receive no compensation for carrying out their duties as directors. The board may adopt policies providing for reasonable reimbursement of directors for expenses incurred in conjunction with carrying out board responsibilities, such as travel expenses to attend board meetings.

Section 6: Compensation for Professional Services by Directors

Directors are not restricted from being remunerated for professional services provided to the corporation. Such remuneration shall be reasonable and fair to the corporation and must be reviewed and approved in accordance with the board Conflict of Interest policy and state law.

ARTICLE 5. OFFICERS

Section 1: Board Officers

The officers of the corporation shall be a board president, vice-president, secretary, and treasurer, all of whom shall be chosen by, and serve at the pleasure of, the Board of Directors. Each board officer shall have the authority and shall perform the duties set forth in these Bylaws or by resolution of the board or by direction of an officer authorized by the board to prescribe the duties and authority of other officers. The board may also appoint additional vice-presidents and such other officers as it deems expedient for the proper conduct of the business of the corporation, each of whom shall have such authority and shall perform such duties as the Board of Directors may determine. One person may hold two or more board offices, but no board officer may act in more than one capacity where action of two or more officers is required.

Section 2: Terms of Office

Each officer shall serve a one-year term of office and may not serve more than three (3) consecutive terms of office. Unless unanimously elected by the board at the end of his/her three (3) year terms or to fill a vacancy in an officer position, each board officer's term of office shall begin upon the adjournment of the board meeting at which elected and shall end upon the adjournment of the board meeting during which a successor is elected.

Section 3: Board President

The board president shall be the chief volunteer officer of the corporation. The board president shall lead the Board of Directors in performing its duties and responsibilities, including, if present, presiding at all meetings of the Board of Directors, and shall perform all other duties incident to the office or properly required by the Board of Directors.

Section 4: Vice President

In the absence or disability of the board president, the ranking vice-president or vice-president designated by the Board of Directors shall perform the duties of the board president. When so acting, the vice-president shall have all the powers of and be subject to all the restrictions upon the board president. The vice-president shall have such other powers and perform such other duties prescribed for them by the Board of Directors or the board president. The vice-president shall normally accede to the office of board president upon the completion of the board president's term of office.

Section 5: Secretary

The secretary shall keep or cause to be kept a book of minutes of all meetings and actions of directors and committees of directors. The minutes of each meeting shall state the time and place that it was held and such other information as shall be necessary to determine the actions taken and whether the meeting was held in accordance with the law and these Bylaws. The secretary shall cause notice to be given of all meetings of directors and committees as required by the Bylaws. The secretary shall have such other powers and perform such other duties as may be prescribed by the Board of Directors or the board president. The secretary may appoint, with approval of the board, a director to assist in performance of all or part of the duties of the secretary.

Section 6: Treasurer

The treasurer shall be the lead director for oversight of the financial condition and affairs of the corporation. The treasurer shall oversee and keep the board informed of the financial condition of the corporation and of audit or financial review results. In conjunction with other directors or officers, the treasurer shall oversee budget preparation and shall ensure that appropriate financial reports, including an account of major transactions and the financial condition of the corporation, are made available to the Board of Directors on a timely basis or as may be required by the Board of Directors.

The treasurer shall perform all duties properly required by the Board of Directors or the board president. The treasurer may appoint, with approval of the board a qualified fiscal agent or member of the staff to assist in performance of all or part of the duties of the treasurer.

Section 7: Non-Director Officers

The Board of Directors may designate additional officer positions of the corporation and may appoint and assign duties to other non-director officers of the corporation.

ARTICLE 8. CONTRACTS, LOANS, CHECKS, AND DEPOSITS

Section 1: Contracts

Except as otherwise provided by resolution of the board or board policy, all contracts, deeds, leases, mortgages, grants, and other agreements of the corporation shall be executed on its behalf by the treasurer or other persons to whom the corporation has delegated authority to execute such documents in accordance with policies approved by the board.

Section 2: Loans

No loans shall be contracted on behalf of the corporation unless authorized by resolution of the Board of Directors.

Section 3: Payments

Checks, drafts, or other orders for the payment of money, notes, or other evidences of indebtedness issued in the name of the corporation, shall be signed by such officer or officers, agent or agents, of the corporation and in such manner as shall from time to time be determined by resolution of the board.

Section 4: Deposits

All funds of the corporation not otherwise employed shall be deposited from time to time to the credit of the corporation in such banks, trust companies, or other depository as the board or a designated committee of the board may select.

Section 5: Indemnification

(a) Mandatory Indemnification. The corporation shall indemnify a director or former director, who was wholly successful, on the merits or otherwise, in the defense of any proceeding to which he or she was a party because he or she is or was a director of the corporation against reasonable expenses incurred by him or her in connection with the proceedings.

(b) Permissible Indemnification. The corporation shall indemnify a director or former director made a party to a proceeding because he or she is or was a director of the corporation, against liability incurred in the proceeding, if the determination to indemnify him or her has been made in the manner prescribed by the law and payment has been authorized in the manner prescribed by law.

(c) Advance for Expenses. Expenses incurred in defending a civil or criminal action, suit or proceeding may be paid by the corporation in advance of the final disposition of such action, suit or proceeding, as authorized by the Board of Directors in the specific case, upon receipt of (I) a written affirmation from the director, officer, employee or agent of his or her good faith belief that he or she is entitled to indemnification as authorized in this article, and (II) an undertaking by or on behalf of the director, officer, employee or agent to repay such amount, unless it shall ultimately be determined that he or she is entitled to be indemnified by the corporation in these Bylaws.

(d) Indemnification of Officers, Agents and Employees. An officer of the corporation who is not a director is entitled to mandatory indemnification under this article to the same extent as a director. The corporation may also indemnify and advance expenses to an employee or agent of the corporation who is not a director, consistent with Montana Law and public policy, provided that such indemnification, and the scope of such indemnification, is set forth by the general or specific action of the board or by contract.

ARTICLE 9. MISCELLANEOUS.

Section 1: Books and Record

The corporation shall keep correct and complete books and records of account and shall keep minutes of the proceedings of all meetings of its Board of Directors, a record of all actions taken by Board of Directors without a meeting, and a record of all actions taken by committees of the board. In addition, the corporation shall keep a copy of the corporation's Articles of Incorporation and Bylaws as amended to date.

Section 2: Fiscal Year

The fiscal year of the Corporation shall be January 1 to December 31.

Section 3: Conflict of Interest

The board shall adopt and periodically review a conflict of interest policy to protect the corporation's interest when it is contemplating any transaction or arrangement which may benefit any director, officer, employee, affiliate, or member of a committee with board-delegated powers.

Section 4: Nondiscrimination Policy

The officers, directors, committee members, employees, and persons served by this corporation shall be selected entirely on a nondiscriminatory basis with respect to age, sex, race, religion, national origin, and sexual orientation. It is the policy of Transcontinental Humanitarian Corp. not to discriminate on the basis of race, creed, ancestry, marital status, gender, sexual orientation, age, physical disability, veteran's status, political service or affiliation, color, religion, or national origin.

Section 5: Bylaw Amendment

These Bylaws may be amended, altered, repealed, or restated by a vote of the majority of the Board of Directors then in office at a meeting of the Board, provided, however,

(a) that no amendment shall be made to these Bylaws which would cause the corporation to cease to qualify as an exempt corporation under Section 501 (c)(3) of the Internal Revenue Code of 1986, or the corresponding section of any future Federal tax code; and,

(b) that an amendment does not affect the voting rights of the directors. An amendment that does affect the voting rights of directors further requires ratification by a two-thirds vote of a quorum of directors at a Board meeting

(c) that all amendments be consistent with the Articles of Incorporation.

Section 6: Documentation Retention

The board shall adopt and periodically review a documentation retention policy in order to remain compliant with any laws pertaining to the matter of documentation retention.

Section 7: Transparency and Accountability

By making full and accurate information about its mission, activities, finances, and governance publicly available, Transcontinental Humanitarian Corp. practices and encourages transparency and accountability to the general public. The board shall adopt and periodically review a transparency and accountability policy that will:

(a) indicate which documents and materials produced by the corporation are presumptively open to staff and/or the public

(b) indicate which documents and materials produced by the corporation are presumptively closed to staff and/or the public

(c) specify the procedures whereby the open/closed status of documents and materials can be altered

Section 8: Codes of Ethics and Whistleblower Policy

The corporation requires and encourages directors, officers and employees to observe and practice high standards of business and personal ethics in the conduct of their duties and responsibilities. The employees and representatives of the corporation must practice honesty and integrity in fulfilling their responsibilities and comply with all applicable laws and regulations. It is the intent of the corporation to adhere to all laws and regulations that apply to the corporation. The support of all corporate staff is necessary to achieving compliance with various laws and regulations. Therefore, the board shall adopt and periodically review a code of ethics and whistleblower policy in order to remain meet the level of standards express and remain compliant with any laws pertaining to the matter.

ARTICLE 10. DISSOLUTION OR SALE OF ASSETS

A 2/3 vote of the Board of Directors shall be required to sell or mortgage assets of the corporation not in the regular course of business or to dissolve the corporation. Upon dissolution of the corporation any assets remaining after payment of or provision for its debts and liabilities shall, consistent with the purposes of the corporation, be paid over to charitable organizations except under the provisions of Section 501(C) (3) of the U.S. Internal Revenue Code or corresponding provisions of subsequently enacted federal law. No part of the net assets or net earnings of the corporation shall inure to the benefit of or be paid or distributed to an officer, director, member, employee, or donor of the Corporation.

Cambridge Rescue Squad, Inc.
FY2019 Proposed Budget

	2018 Budget	2018 Actual	2019 Budget
Income			
Appropriation from Cambridge	135,000.00	135,000.00	135,000.00
Capital Income	25,000.00		40,000.00
Total Appropriation from Cambridge	$ 160,000.00	$ 135,000.00	$ 175,000.00
Appropriation from Fletcher	3,000.00	3,000.00	3,000.00
Cadet Corp Income	1,000.00	-145.05	0.00
Donations	2,000.00	1,575.00	1,750.00
Fundraising Income	1,500.00	1,493.00	1,750.00
Service Billing Income	150,000.00	144,740.86	125,000.00
Training Income	1,000.00	230.55	100.00
Total Income	$ 318,500.00	$ 285,894.36	$ 306,600.00
Expenses			
Advertising and Promotion		355.60	250.00
Building Maintenance	2,500.00	5,863.00	2,500.00
Housekeeping	1,000.00	807.62	1,000.00
Total Building Maintenance	$ 3,500.00	$ 6,670.62	$ 3,500.00
Capital Expenses			
AutoPulse	10,000.00	3,000.00	0.00
Nitrous	3,000.00	8,368.57	0.00
Stryker		15,000.00	5,500.00
Zoll	12,000.00	13,522.41	6,000.00
Building			28,500.00
Total Capital Expenses	$ 25,000.00	$ 39,890.98	$ 40,000.00
Dues	5,000.00	100.00	5,000.00
Equipment	5,000.00	3,518.32	500.00
Repair Equipment	1,000.00	510.00	500.00
Total Equipment	$ 6,000.00	$ 4,028.32	$ 1,000.00
Fundraising Expense	750.00	422.43	500.00
Food	250.00	299.04	300.00
Total Fundraising Expense	$ 1,000.00	$ 721.47	$ 800.00
Information Technology	2,500.00	3,980.94	1,000.00
Insurance			0.00
Liability	3,000.00		0.00
Vehicle	7,500.00	9,808.00	12,000.00
Workmans Comp	15,000.00	10,182.86	14,800.00
Total Insurance	$ 25,500.00	$ 19,990.86	$ 26,800.00
Interest expense		108.95	0.00
Legal	5,000.00		0.00
Occupancy			0.00
Cable		416.16	500.00
Electricity	3,000.00	3,098.03	3,000.00
Fuel Oil & Propane	2,500.00	3,561.61	3,000.00
Telephone	3,250.00	3,355.62	3,000.00
Water & Sewer	1,000.00	826.21	1,000.00
Total Occupancy	$ 9,750.00	$ 11,257.63	$ 10,500.00

Cambridge Rescue Squad, Inc.
FY2019 Proposed Budget

Office & Miscellaneous	2,000.00	1,528.12	1,000.00
Paramedic Intercepts	1,000.00	2,250.00	1,000.00
Payroll Expenses	200,000.00		185,000.00
Taxes		12,402.15	0.00
Wages		155,484.71	0.00
Total Payroll Expenses	$ 200,000.00	$ 167,886.86	$ 185,000.00
Professional Fees	2,000.00	2,157.99	2,000.00
Recognition	400.00	704.45	400.00
Reconciliation Discrepancies		191.68	0.00
Recruitment and Retention	1,500.00	1,402.70	1,250.00
Reimbursements		54.32	0.00
Service Billing Expense	13,000.00	10,011.45	8,500.00
Supplies	7,500.00	7,050.22	7,500.00
Protective Supplies		14.43	1,000.00
Uniforms	350.00	1,407.24	350.00
Total Supplies	$ 7,850.00	$ 8,471.89	$ 8,850.00
Training			0.00
Certification Reimbursement	1,000.00	1,000.00	1,000.00
Training Materials	1,000.00	400.00	250.00
Total Training	$ 2,000.00	$ 1,400.00	$ 1,250.00
Vehicle Maintenance		57.50	0.00
A1	2,000.00	2,452.16	2,000.00
A2	2,000.00	9,597.73	5,000.00
Cell Phone	1,500.00	1,531.13	1,500.00
Total Vehicle Maintenance	$ 5,500.00	$ 13,638.52	$ 8,500.00
Total Expenses	$ 318,500.00	$ 296,803.35	$ 306,600.00
Net Operating Income	$ 0.00	-$ 10,908.99	$ 0.00

	2015 Expenses	2016 Budget	2017 Budget	2018 Budget	2019 Budget
Income					
Appropriation from Cambridge	80,000.00	135,000.00	135,000.00	135,000.00	135,000.00
Capital Income		30,000.00	15,000.00	25,000.00	40,000.00
Total Appropriation from Cambridge	$ 80,000.00	$ 165,000.00	$ 150,000.00	$ 160,000.00	$ 175,000.00
Appropriation from Fletcher	2,200.00	2,200.00	3,000.00	3,000.00	3,000.00
Cadet Corp Income	330.00	500.00	1,000.00	1,000.00	0.00
Donations	850.00	500.00	500.00	2,000.00	1,750.00
Fundraising Income			3,000.00	1,500.00	1,750.00
Reimbursement					
Service Billing Income	150,055.54	155,950.00	150,000.00	150,000.00	125,000.00
Training Income				1,000.00	100.00
Total Income	$ 233,435.54	$ 324,150.00	$ 307,500.00	$ 318,500.00	$ 306,600.00
Expenses					
Advertising and Promotion				0.00	250.00
Building Maintenance			3,000.00	2,500.00	2,500.00
Housekeeping		500.00	675.00	1,000.00	1,000.00
Total Building Maintenance	$ 0.00	$ 500.00	$ 3,675.00	$ 3,500.00	$ 3,500.00
Capital Expenses				0.00	0.00
AutoPulse				10,000.00	0.00
Nitrous				3,000.00	0.00
Stryker/Autoload					5,500.00
Zoll			$ 15,000.00	12,000.00	6,000.00
Building					28,500.00
Total Capital Expenses	$ 0.00	$ 0.00	$ 15,000.00	$ 25,000.00	$ 40,000.00
Dues	199.00	350.00	300.00	5,000.00	5,000.00
Equipment			5,000.00	5,000.00	500.00
Repair Equipment			5,000.00	1,000.00	500.00
Total Equipment	$ 0.00	$ 0.00	$ 10,000.00	$ 6,000.00	$ 1,000.00
Fundraising Expense			750.00	750.00	500.00
Food			250.00	250.00	300.00
Total Fundraising Expense	$ 0.00	$ 0.00	$ 1,000.00	$ 1,000.00	$ 800.00
Information Technology	2,808.02		3,000.00	2,500.00	1,000.00
Insurance				0.00	0.00
Liability			5,000.00	3,000.00	0.00
Vehicle			5,000.00	7,500.00	12,000.00
Workmans Comp			25,000.00	15,000.00	14,800.00
Total Insurance	$ 0.00	$ 0.00	$ 35,000.00	$ 25,500.00	$ 26,800.00
Interest expense				0.00	0.00
Legal	2,500.00	2,500.00		5,000.00	0.00
Occupancy				0.00	0.00
Cable				0.00	500.00
Electricity			2,625.00	3,000.00	3,000.00
Fuel Oil & Propane			1,749.96	2,500.00	3,000.00
Telephone			3,000.00	3,250.00	3,000.00
Water & Sewer		10,000.00	999.96	1,000.00	1,000.00
Total Occupancy	$ 0.00	$ 10,000.00	$ 8,374.92	$ 9,750.00	$ 10,500.00
Office & Miscellaneous	1,960.85	2,000.00	1,500.00	2,000.00	1,000.00
Paramedic Intercepts	1,375.00	1,500.00	1,500.00	1,000.00	1,000.00
Payroll Expenses			200,000.04	200,000.00	185,000.00
Taxes				0.00	0.00
Wages		200,000.00		0.00	0.00
Total Payroll Expenses	$ 0.00	$ 200,000.00	$ 200,000.04	$ 200,000.00	$ 185,000.00
Professional Fees			1,999.92	2,000.00	2,000.00
Recognition				400.00	400.00
Recruitment and Retention			999.96	1,500.00	1,250.00
Service Billing Expense	10,167.29	12,800.00	5,000.04	13,000.00	8,500.00
Supplies			5,000.04	7,500.00	7,500.00
Protective Supplies				0.00	1,000.00
Uniforms		5,000.00	999.96	350.00	350.00
Total Supplies	$ 0.00	$ 5,000.00	$ 6,000.00	$ 7,850.00	$ 8,850.00
Training			150.00	0.00	0.00
Certification Reimbursement			2,000.04	1,000.00	1,000.00
Training Materials				1,000.00	250.00
Total Training	$ 1,264.89	$ 4,000.00	$ 2,150.04	$ 2,000.00	$ 1,250.00
Vehicle Maintenance				0.00	0.00
A1			500.04	2,000.00	2,000.00
A2			9,999.96	2,000.00	5,000.00
Cell Phone			1,500.00	1,500.00	1,500.00
Total Vehicle Maintenance	$ 15,918.42	$ 15,000.00	$ 12,000.00	$ 5,500.00	$ 8,500.00
Total Expenses	$ 270,746.13	$ 320,150.00	$ 307,499.92	$ 286,100.00	$ 306,600.00

Apr 2019 - Cambridge Rescue Squad

Sun	Mon	Tue	Wed	Thur	Fri	Sat
	Apr 1 **Day Shift** Lisa M. Hill, AEMT/D 06-18 Autumn Tourangeau/EMT 06-18 MIT 06-18 **Night Shift** BLS/ALS 18-06 EMT & Higher 18-20 MIT 18-06 Student 18-06 Joseph Potvin/EMR/D 20-03 EMT & Higher ✱ 03-06	**2** **Day Shift** Lisa M. Hill, AEMT/D 06-18 Tracy Myers, AEMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** BLS/ALS 18-06 Alex Niez-Charest, EMT/D 18-00 MIT 18-06 Student 18-06 EMT & Higher ✱ 00-06	**3** **Day Shift** Emily Fisher, EMT/D 06-18 Tracy Myers, AEMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** BLS/ALS 18-20 EMT & Higher 18-06 MIT 18-06 Student 18-06 Martha Manning, EMT/D 20-04 BLS/ALS ✱ 04-06 **Events** CRS BOARD OF DIRECT 19:00 - 21:00 CRS	**4** **Day Shift** Lisa M. Hill, AEMT/D 06-18 Tracy Myers, AEMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Alicia Feraldi, EMT/D 18-00 EMT & Higher 18-22 MIT 18-06 Student 18-06 Joseph Potvin/EMR/D 22-06 BLS/ALS ✱ 00-06	**5** **Day Shift** BLS/ALS 06-18 Dakota Metayer. EMT 06-18 MIT 06-18 Student 06-18 **Night Shift** BLS/ALS 18-06 EMT & Higher 18-06 MIT 18-06 Student 18-06	**6** **Day Shift** Rob Holden, AEMT/D 06-18 EMT & Higher 06-18 Emily Fisher, EMT/D 06-18 Student 06-18 **Night Shift** Dakota Metayer. EMT 18-06 EMT & Higher 18-06 MIT 18-06 Student 18-06 BLS/ALS ✱ 06-18
7 **Day Shift** Dakota Metayer. EMT 06-18 Lisa M. Hill, AEMT/D 06-18 MIT 06-18 **Night Shift** BLS/ALS 18-06 EMT & Higher 18-06 MIT 18-06 Student 18-06	**8** **Day Shift** Lisa M. Hill, AEMT/D 06-18 Autumn Tourangeau/EMT/D 06-18 MIT 06-18 **Night Shift** BLS/ALS 18-20 EMT & Higher 18-06 Marcus Wadlington/MIT/EI 18-06 Student 18-06 Martha Manning, EMT/D 20-04 BLS/ALS ✱ 04-06	**9** **Day Shift** Tracy Myers, AEMT/D 06-18 Emily Fisher, EMT/D 06-18 MIT 06-18 **Night Shift** Rena Perkins, EMT/D 18-22 Alex Niez-Charest, EMT/D 18-00 MIT 18-06 Nathan Pickard, Paramedi 22-06 EMT & Higher ✱ 00-06	**10** **Day Shift** Tracy Myers, AEMT/D 06-18 Emily Fisher, EMT/D 06-18 MIT 06-18 **Night Shift** Christian Taylor, AEMT/D 18-06 Rena Perkins, EMT/D 18-20 MIT 18-06 Student 18-06 Martha Manning, EMT/D 20-04 Rena Perkins, EMT/D ✱ 04-06 **Events** Squad Training 18:00 - 20:00 HIPPA/Upcoming annua	**11** **Day Shift** Tracy Myers, AEMT/D 06-18 Sue Hoeppner, AEMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Alicia Feraldi, EMT/D 18-00 EMT & Higher 18-22 MIT 18-06 Student 18-06 Joseph Potvin/EMR/D 22-06 BLS/ALS ✱ 00-06	**12** **Day Shift** Sue Hoeppner, AEMT/D 06-18 Autumn Tourangeau/EMT/ 06-18 MIT 06-18 Student 06-18 **Night Shift** Alex Niez-Charest, EMT/D 18-06 Dakota Metayer. EMT 18-06 MIT 18-06 Student 18-06	**13** **Day Shift** Emily Fisher, EMT/D 06-18 Karen Cayton, EMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Kristy Orost/EMR/D 18-03 Dakota Metayer. EMT 18-06 MIT 18-06 Student 18-06 BLS/ALS ✱ 03-06
14 **Day Shift** Dakota Metayer. EMT 06-18 EMT & Higher 06-18 MIT 06-18 Student 06-18 **Night Shift** Kristy Orost/EMR/D 18-03 Autumn Tourangeau/EMT/ 18-06 MIT 18-06 Student 18-06 BLS/ALS ✱ 03-06	**15** **Day Shift** Tracy Myers, AEMT/D 06-18 Autumn Tourangeau/EMT/D 06-18 MIT 06-18 **Night Shift** BLS/ALS 18-06 Nathan Pickard, Paramedic... 18-06 Marcus Wadlington/MIT/EMT 18-06 Student 18-06	**16** **Day Shift** Tracy Myers, AEMT/D 06-18 Emily Fisher, EMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** BLS/ALS 18-06 EMT & Higher 18-06 MIT 18-06 Student 18-06	**17** **Day Shift** Tracy Myers, AEMT/D 06-18 Sue Hoeppner, AEMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** BLS/ALS 18-20 Rena Perkins, EMT/D 18-06 MIT 18-06 Student 18-06 Martha Manning, EMT/D 20-04 BLS/ALS ✱ 04-06	**18** **Day Shift** Lisa M. Hill, AEMT/D 06-18 Emily Fisher, EMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Alicia Feraldi, EMT/D 18-00 Brenden Blair, D/EMT 18-00 MIT 18-06 Student 18-06 BLS/ALS ✱ 00-06 EMT & Higher ✱ 00-06	**19** **Day Shift** Sue Hoeppner, AEMT/D 06-18 Dakota Metayer. EMT 06-18 MIT 06-18 Student 06-18 **Night Shift** Rena Perkins, EMT/D 18-06 EMT & Higher 18-06 MIT 18-06 Student 18-06	**20** **Day Shift** Emily Fisher, EMT/D 06-18 Dakota Metayer. EMT 06-18 MIT 06-18 Student 06-18 **Night Shift** BLS/ALS 18-06 Kristy Orost/EMR/D 18-03 MIT 18-06 Student 18-06 EMT & Higher ✱ 03-06
21 **Day Shift** Emily Fisher, EMT/D 06-18 Dakota Metayer. EMT 06-18 MIT 06-18 Student 06-18 **Night Shift** Christian Taylor, AEMT/D 18-06 Nathan Pickard, Paramedic... 18-06 MIT 18-20 Student 18-06 Marcus Wadlington/MIT/EMT 20-06	**22** **Day Shift** BLS/ALS 06-18 Tracy Myers, AEMT/D 06-18 MIT 06-18 **Night Shift** BLS/ALS 18-20 EMT & Higher 18-20 MIT 18-06 Student 18-06 Martha Manning, EMT/D 20-04 Joseph Potvin/EMR/D 20-03 EMT & Higher ✱ 03-06 BLS/ALS ✱ 04-06	**23** **Day Shift** Tracy Myers, AEMT/D 06-18 Emily Fisher, EMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Alex Niez-Charest, EMT/D 18-00 EMT & Higher 18-22 MIT 18-06 Student 18-06 Kristy Orost/EMR/D 22-06 BLS/ALS ✱ 00-06	**24** **Day Shift** Lisa M. Hill, AEMT/D 06-18 Tracy Myers, AEMT/D 06-18 MIT 06-18 **Night Shift** Rena Perkins, EMT/D 18-20 Brenden Blair, D/EMT 18-06 MIT 18-06 Student 18-06 Martha Manning, EMT/D 20-04 Rena Perkins, EMT/D ✱ 04-06 **Events** Exec Board 19:00 - 21:00	**25** **Day Shift** Lisa M. Hill, AEMT/D 06-18 Emily Fisher, EMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Alicia Feraldi, EMT/D 18-00 Brenden Blair, D/EMT 18-00 MIT 18-06 Student 18-06 BLS/ALS ✱ 00-06 EMT & Higher ✱ 00-06	**26** **Day Shift** Sue Hoeppner, AEMT/D 06-18 Dakota Metayer. EMT 06-18 MIT 06-18 Student 06-18 **Night Shift** EMT & Higher 18-06 Alex Niez-Charest, EMT/D 18-06 Brenden Blair, D/EMT 18-06 MIT 18-06 Student 18-06	**27** **Day Shift** Sue Hoeppner, AEMT/D 06-18 Karen Cayton, EMT/D 06-18 MIT 06-18 Student 06-18 **Night Shift** Kristy Orost/EMR/D 18-03 Dakota Metayer. EMT 18-06 MIT 18-06 Student 18-06 BLS/ALS ✱ 03-06

Sun	Mon	Tue	Wed	Thur	Fri	Sat
28	**29**	**30**				

28

Day Shift
Emily Fisher, EMT/D	06-18
Dakota Metayer. EMT	06-18
MIT	06-18
Student	06-18

Night Shift
Brenden Blair, D/EMT	18-06
EMT & Higher	18-06
MIT	18-06
Student	18-06

29

Day Shift
Lisa M. Hill, AEMT/D	06-18
Tracy Myers, AEMT/D	06-18
MIT	06-18

Night Shift
Rena Perkins, EMT/D	18-06
EMT & Higher	18-20
MIT	18-06
Student	18-06
Joseph Potvin/EMR/D	20-03
EMT & Higher ✱	03-06

30

Day Shift
Lisa M. Hill, AEMT/D	06-18
Emily Fisher, EMT/D	06-18
MIT	06-18
Student	06-18

Night Shift
Alex Niez-Charest, EMT/D	18-00
EMT & Higher	18-22
MIT	18-06
Student	18-06
Kristy Orost/EMR/D	22-06
BLS/ALS ✱	00-06

✱ **Indicates time starts on following calendar day**
* **Events and Time Off follow default Split Time of Day of 06:00**

Tiffany Barker Cook
PA303 – Research Methods
Research Paper
10 June 2019

Introduction

Households choose their shopping habits for a variety of reasons. In rural areas of Vermont, shopping patterns are based on the availability of local stores, including the affordability of the local stores. Vermonters are committed to their local communities, but this commitment can be challenged when affordable options are limited. Many rural communities rely on tourism, however; the economic benefit of tourism can lead to a decrease in affordable and diverse shopping opportunities within the community. As these shopping opportunities become more limited, local residents may seek alternative means to purchase their necessities including online shopping.

In a study conducted by DiSantis, Hillier, Holaday, and Kumanyika, they found that, "[t]he most frequented store was within a mile of home (57 %) or home *(sic)* or another place visited in the weekly routine for about 77 % of participants" (2016, Results section, para. 3). This data shows that most shopping is conducted within a local community or within close proximity to locations as part of a regular routine. Support of the local economy is an important aspect of the shopping experience, especially for many Vermonters. "Consumer interest has focused on using the quality and "localness" attributes of rural products as marketing assets (Morris and Buller, 2003), while Burnett and Danson (2004) linked this form of diversification with distinct and specific representations of local culture" (Paddison & Calderwood, 2007, p. 141). Despite the importance of "localness" there are limits to what consumers are willing and able to purchase. In a study conducted on the uses of a downtown shopping district in rural Bozeman, Montana, Snepenger, Murphy, O'Connell, & Gregg found that the local user had far less income than the tourists did. Additionally, the local users have different beliefs regarding the use of the Downtown area in comparison to the tourists, and even amongst themselves. The heavy-local user enjoyed the many aspect of the Downtown and see it as key place for entertainment, whereas the local-light users have more negative views of the Downtown. Both groups of local users believe that the prices are too high and agree that tourism is an important part of the local economy. However, the heavy-local user are less impacted by the tourism, only feeling inconvenienced in regards to parking, while the local-light user feel there are additional negative effects on the community (2003, p. 576-577). As quoted by Haugen, "it has also been suggested (Farrington & Farrington 2005) that residents of rural areas adapt their accessibility aspirations to what can be deemed a 'reasonable' level of expectation, which may be much lower compared to what might be expected in major cities. Also, for rural dwellers who live within 'an urban sphere' (Cullinane & Stokes 1998) the lack of local access may naturally be at least partially compensated for by regional access through, e.g., 'outshopping' in conjunction with commuting (Paddison & Calderwood 2007; Möller 2009)" (2012, p.11). When the local shopping opportunities are limited, residents are forced to seek alternative sources. As noted by Lennon, et al., "[g]iven these [the] advantages of online shopping over catalog shopping and the lack of shopping opportunities in rural communities, rural consumers are poised to adopt the Internet for product purchasing" (2007, p. 376).

Given the information presented, we can assume that all residents prefer to shop locally until the local shopping opportunities become too limited due to cost with a driving factor of tourism. First, we must rule out that an individual's shopping preference is effected by their demographic. To determine this we will look at age, gender, and population density (rural, suburban, or urban) in comparison to shopping preference. The first hypothesis, there is no relationship between gender and shopping preference. The second hypothesis, there is no relationship between population density (rural, suburban, or urban) and shopping preference. Finally, the third hypothesis, there is no relationship between age and shopping preference.

Method

The data used in this study was sourced from the University of Vermont (UVM), Center for Rural Studies, based out of UVM's Morrill Hall. The UVM Center for Rural Studies has conducted annual state-wide polls of Vermont residents since 1990. These polls, referred to as The Vermonter Poll is a unique opportunity for researchers, policy makers, social advocates, and citizens to examine public awareness, knowledge, attitudes and behaviors regarding contemporary, and often controversial, issues in the public arena. The 2007 poll was conducted via telephone survey between the hours of 4:00 PM and 9:00 PM beginning on February 20, 2007 and ending on February 28, 2007. Data collection was done via a simple random sampling from a telephone list of Vermont and used computer-aided telephone interviewing (CATI). All the data was collected from Vermont residents over the age of eighteen who agreed to participate in the interviews. There was a total of 599 respondents. Based on a group of this size the results have a margin of error of plus or minus four (4) percent at a confidence interval of 95 percent.

In preparation of analysis, the data was compiled and stored in a Microsoft Excel spreadsheet. The data was then imported into IBM Statics to conduct the analysis. Once imported into IBM Statics labels were assigned based on the poll questions within the codebook. The data values were assigned based on the response options within the codebook. Any responses that included "don't know" or "refused" were marked as missing values. All measurements were nominal except age, which was based on a scale measurement.

One question of particular interest in the Vermonter Poll is the participants' preferred shopping location. This question is worded, "of the following choices, where would you prefer to shop?" As this question left open ended would have limitless possible answers the survey creators limited the responses to five (5) possible responses. The responses in order are, "at a store in your neighborhood", "at a store located in a nearby downtown or village center", "at a store in a shopping mall", "at a big box retail store", and "at a store along a major highway". If a participant was unable or not willing to answer the question, the individual conduction the poll could chose the option of "don't know" or "refused" as possible responses.

Results

To test the hypotheses, SPSS was used to conduct a bivariate analysis for each hypothesis. The Pearson Chi-Square value was determined and compared to a 0.050 alpha. In regards to the first hypothesis, we failed to reject the null hypothesis that there is no relationship between gender (Y_1)

and shopping preference (X_1) (p-value = 0.189). For the second hypotheses, we failed to reject the null hypothesis that there is no relationship between population density (rural, suburban, or urban) (Y_1) and shopping preference (X_2) (p-value = 0.673). Finally, we also failed to reject the null hypothesis that there is no relationship between age (Y_3) and shopping preference (X_3) (p-value = .327).

Discussion

The results of the analysis lead us to reject all three null hypotheses. Rejecting the null hypotheses that there is no relationship between gender, population density, or age and shopping preference leads us to believe that there are many demographic factors that influence shopping preference. Each of these demographics influences shopping preferences in different ways. For instance, depending on an individual's age group the types of items being sought after may be different. Additionally, individuals that reside in higher density areas may be more likely to have a variety of shopping options that influence their shopping preference.

Limitations

The analysis that was conducted did not include information such as when individuals primarily do their shopping. For instance, do individuals that live in more rural areas do their shopping during their daily commute to and from work or other activities. Additionally, the data does not specify what type of shopping the individuals are doing. There is the potential to have different results for grocery and necessity items than for luxury items. Furthermore, the study that was conducted was a very general study of the populous of Vermont. Limiting the study to only Vermont residents and not asking more specific questions regarding shopping preferences limits the data available to conduct a thorough analysis.

Next Steps

As we move forward with further research, it would be best to collect more data specifically on shopping preferences. Questions should seek information regarding type of shopping, motivation, opportunistic shopping, online vs brick and mortar shopping habits. Additionally, researchers should seek additional participants for data collection to include rural, suburban, and urban shoppers.

References

DiSantis, K. I., Hillier, A., Holaday, R., & Kumanyika, S. (2016). Why do you shop there? A mixed methods study mapping household food shopping patterns onto weekly routines of black women. *The International Journal of Behavioral Nutrition and Physical Activity, 13(1).* Retrieved from https://doi.org/10.1186/s12966-016-0333-6

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Paddison, A., & Calderwood, E. (2007). Rural retailing: A sector in decline? *International Journal of Retail & Distribution Management, 35*(2), 136-155. Retrieved from https://doi.org/10.1108/09590550710728093

Snepenger, D. J., Murphy, L., O'Connell, R., & Gregg, E. (2003). Tourists and residents use of a shopping space. *Annals of Tourism Research, 30*(3), 567-580. Retrieved from https://doi.org/10.1016/S0160-7383(03)00026-4

Tiffany Barker Cook
PA305 – Public Budgeting and Finance
Final – Cambridge Rescue Squad
11 December 2018

       Cambridge Rescue Squad, Inc. has been operating since 1989, but was officially incorporated in 2006 as nonprofit in the State of Vermont. Cambridge Rescue Squad is an ambulance service that provides emergency response and transport in Cambridge, Vermont under the direction of the board of directors, who also are the officers of the organization. These officers currently consist of a Chief, Assistant Chief, First Lieutenant, Second Lieutenant, Secretary, Treasurer, and the Member at Large. This leadership structure has evolved over time due to the changing needs of the organization. Cambridge Rescue operations under the medical direction of Dr. Gannon at Copley Hospital as part of Vermont EMS District Four. Vermont is divided into thirteen districts each under the medical direction of a doctor from their primary hospital. District Four encompasses Lamoille and Western Caledonia Counties, and as mentioned has primary medical direction from Copley Hospital. Additionally, emergency responders and organizations are licensed and must follow the protocols of the State of Vermont, National, as well as their local district.

       Like many organizations Cambridge Rescue experienced a few challenging years when the Chief, all of the administrators, and a few founding members, left the organization in 2013. The reason for this separation is not completely know, but all of the members that left were part of an extended family that choose to leave because one of the family members was not happy with the direction of the organization. This caused a void in the organization as several of the members

that left, contributed a large portion of the volunteer hours to cover 911 responses. Additionally, there was some difficulty in obtaining information, especially financial information prior to late 2013. Coupled with the decline in volunteerism, especially in first response throughout the state and country, it has resulted in it being difficult to maintain shift coverage. Many volunteer organizations have experienced the same issues, which has increased the need to have a strong mutual aid system. Mutual aid is the agreement between EMS services from adjacent communities to cover a call or calls while the primary response agency is unable to do so. This may be because they do not have a crew to cover the call, they are already at capacity on the amount of calls they can cover at a given time, or they have put the organization temporarily out of service. Cambridge Rescue currently has primary mutual aid agreements with Fairfax Rescue as well as Newport Ambulance Service, also known as Northern Emergency Medical Service (NEMS). Fairfax Rescue is very similar to Cambridge Rescue in that it is a nonprofit that receives funding from the towns that it services. The main difference is, is that Fairfax Rescue operates in District One, which encompasses Franklin and Northern Grand Isle Counties, and has primary medical direction from Northwestern Medical Center. With districts having different medical directors, they can have slightly different medical protocols, which can lead to a difference in patient care. With that being said, however, the State of Vermont is a small community where the doctors communicate with each other on a regular basis. This helps to minimize the differences in local protocols.

The number of volunteers at Cambridge Rescue fluctuates from 20 to 30 members at any given time. To build membership Cambridge Rescue has provided more incentives to members, by increasing volunteer stipends as well as working with local businesses to provide additional benefits. For instance, each member of Cambridge Rescue receives a discounted ski pass at Smugglers' Notch Ski Resort, called a Bash Badge. Additionally, Cambridge Rescue reimburses

all members for certification expenses, with the exception of paramedics. This reimbursement is included as part of training expenses and accounts for less than a percent (0.3%) of the total expenses (Figure 1). Currently volunteers receive reimbursement for half of the cost of their certification after six months of active membership, then they receive the remaining half after they complete one year of active membership. This practice incentivizes members to join, but also to remain members for at least the one-year period, increasing retention. Unfortunately, like many other organizations, Cambridge Rescue has found that once volunteers have received reimbursement for their certifications they leave to take a full time paid position at a private organization.

The volunteer stipends have changed many times over the course of the years to help incentivize membership as well as remain compliant with federal and state laws. The current structure of the volunteer stipends is $5/ hour while on call, or $5/hour to jump a call. Jumping a call is when a volunteer responds to a 911 call outside of their scheduled shift. Additionally, volunteers can receive a monthly bonus by attending the monthly training and volunteering for twelve hours of weekend shift coverage. The value of the bonus ranges from $25.00 to $75.00 and is based on the number of hours volunteered for. In addition to the standard stipends, the officers receive an administrative stipend for the additional work that is required of them. The current administrative stipends ranges from $250.00 for the chief to $25.00 for the member at large. Currently, Cambridge Rescue has the highest volunteer stipends in the area.

In addition to actively trying to increase the number of volunteer members, Cambridge Rescue has had to hire two full time employees as well as two part time employees. The current fulltime employees are also the Chief and Assistant Chief who make $22.00 and $17.65 per hour respectively. This rate includes a rate based on the officer positions that they hold within the

organization, which would be deducted if the squad were to vote them out of their respective positons. Additionally, due to the time commitment and administrative responsibilities of the Chief's position, it is classified as exempt, which means that this individual is not eligible for overtime earnings. Alternatively, the current part time employees, one being an AEMT and the other being a Paramedic make an hourly rate of $12.00 and $16.75 respectively. Cambridge Rescue requires all paid employees to hold a certification of an AEMT or higher. In a few instances, Cambridge Rescue has hired EMTs with the stipulation that they obtain their AEMT certification within six months, which Cambridge Rescue would reimburse. Cambridge Rescue does not provide health benefits to its employees, but they do receive 66 hours of comprehensive time off annually. Staffing is the first priority of Cambridge Rescue, which is why, payroll currently, makes up 60% of the total budget for the organization (Figure 1).

The increase in payroll expenses in addition to the deferred maintenance of vehicles, equipment, and the building over the course of several years accounts for funding from the Town of Cambridge doubling in 2016 (Figure 2). Prior to 2016, Cambridge Rescue was responsible for all of its assets except the land and building, which are owned and maintained by the Town of Cambridge. In 2016, the town provided Cambridge Rescue with the funds to replace one of the two ambulances. As part of this increase in funding the town required Cambridge Rescue to develop a capital budget, which resulted in there appropriation from the town being split into two budget items, general fund and capital fund (Figure 2). In 2018, the town informed Cambridge Rescue that they were also now responsible for the maintenance of the building, which included a neglected heating system that is going to need to be replaced or upgraded. This anticipated expense is one of the reasons for the increased request in the capital budget for 2019 (Figure 2). Receiving such a large amount of funding from the Town of Cambridge requires a close and

cooperative working relationship. Cambridge Rescue aligns its fiscal year, January 1st to December 31st, with that of the town to streamline the reporting for the residents of Cambridge. Cambridge Rescue must submit its proposed budget including its request for funding to the Town of Cambridge in October, therefore estimating expenses for the remainder of the year. Towards the end of November or early December, the Town of Cambridge Finance Committee meets with each organization requesting funding, including Cambridge Rescue to review their budget and request. Additionally, the town auditors perform an annual audit of Cambridge Rescue's finances.

The issue of the decline in volunteerism is one that many emergency service agencies suffer from. Some organizations have been able to get creative to maintain membership such as Cambridge Rescue and Fairfax Rescue; others have eliminated volunteers all together and now operate as corporations with only paid staff like NEMS. For-profit organizations such as NEMS and AMCARE hire or contract paid employees on an hourly or per diem bases. These organizations contract with local municipalities in similar ways as the nonprofit organizations, but they also contract with local hospitals to provide transport services between hospitals. Cambridge Rescue has often considered working with area hospitals such as the University of Vermont Medical Center, Copley Hospital, and Northwestern Medical Center to provide transport services, but this is beyond the level of service Cambridge Rescue and its volunteers are willing to provide. Cambridge Rescue and its members believe that committing to transport service takes away from their ability to provide 911 response to the community, and that the community is their primary responsibility. This is evident by the mutual aid calls that Cambridge Rescue has provided to NEMS while they are on transport calls and is unable to arrange for an additional crew for their 911 response calls. Additionally, the benefit of having a nonprofit local rescue organization such as Cambridge Rescue is that it does not send residents to collections. The billing department works

out payment plans to assist residence with paying their medical bills. Another way nonprofit local rescue organizations benefit their community is through subscription services. This is an annual payment that the resident can pay to the organization; in return, the organization will waive any cost not covered by the resident's insurance carrier. This practice was recently started at Fairfax Rescue and provided an additional $19,530.00 in income in 2017 (Figure 3). Cambridge Rescue had discussed this as an option as well, but they are continuing to do more research on what the expected write off amount would be annually. Determining an estimated cost will provide a more accurate representation of the total benefit. Fairfax Rescue has currently not reported what amount of its service billing has been written off to the subscription service, but there was a $10,628.00 deficit in the income that was budgeted versus the actual income from ambulance service (Figure 3). One complication with this subscription service is that it has an impact on mutual aid agreements. If a resident has paid for a subscription service, but their primary response agency is unavailable so a secondary agency responds there can be disputes with the subscribers regarding their bills. In other areas of the country, where subscription services are more prevalent, the mutual aid agreements include honoring other agencies' subscribers. Currently, none of the local for-profit agencies have a subscription service, and it is not expected that they will implement one. Subscription services are typically only a practice of the pubic or nonprofit agencies. One of Cambridge Rescue's initiatives this year is to review the option of a subscription and modify the mutual aid agreements accordingly. Lastly, many individuals do not realize that most of the nonprofit ambulance services do not bill residents or their insurance unless they provide transportation. This creates a deficit for Cambridge Rescue as they are providing a service to the residents and incurring expenses, but for whatever reason the resident chooses not to be transported, or to be transported in their own personal vehicle.

Service income has been the primary source of income for Cambridge Rescue until 2016 when the request for additional support from the town was approved as noted above (Figure 4). As of 2019 the total appropriation from the Town of Cambridge, including the capital budget makes up 57% of income and the service billing will make up 41% (Figure 5). The next largest piece of income is an appropriation from the Town of Fletcher. The Town of Fletcher does not have its own EMS provider; therefore, Fairfax and Cambridge share the coverage of Fletcher for both Fire and Rescue. Fairfax Rescue's appropriation from Fletcher is $12,694.00 (Figure 3), whereas Cambridge Rescue's appropriation is $3,000.00 (Figure 6). These amounts are based on the coverage area for each organization. In addition to the town appropriation, Cambridge Rescue receives income from the Cadet Corp, Donations, Fundraising, and the Training Center (Figure 5 & 6). Unfortunately, Cambridge Rescue had to eliminate the projected income for the Cadet Corp and Training Center for 2019 (Figure 6). Both the Training Center and Cadet Corp operations have decreased in 2018 due to the lack of volunteers to fill shifts for 911 response, to allow the paid staff to attend to these operations. It has also been very difficult to recruit volunteers to take on these additional responsibilities due to the additional time commitment that is required with very little or no incentives. The Training Center also requires members to hold additional certifications, while the Cadet Corp requires participation from high school students that have not reached the age of 18, which would allow them to be full time members. Cambridge Rescue has been working with the Lamoille County Technical Center to recruit students for the Cadet Corp, but there has been little interest from students in the last year. Lastly, the remaining income accounts are fundraising and donations. Cambridge Rescue receives donations from several local business as well as individuals. Cambridge Rescue organizes two fundraisers each year. The first being a lasagna dinner at the town Winter Carnival, that they took over when the Fire Department Auxiliary disbanded three years ago. This fundraiser generates approximately $2,000.00 in net

revenue each year. Local restaurants, markets, retailers, and some large grocery stores donate most of the food for the event. Total fundraising expenses for 2018 is $764.47 (Figure 8), of which less than half was food for this event. The second fundraiser is the sale of t-shirts during the EMS Week Open House, the cost of these t-shirts makes up the balance of the fundraising expenses. These two fundraisers do not bring in a significant amount of revenue, but they are good events to get face time with the community outside of an emergency.

The income and expenses for Cambridge Rescue are similar in that the majority of each is for a single source. As mentioned above, payroll expenses account for 60% of Cambridge Rescue's entire expenses (Figure 1). After payroll, the next largest expenses are capital expenses (8%), insurance (8%), and supplies (8%) (Figure 1). All of the remaining expenses make up the remaining 18% of the Cambridge Rescue's budget, each individually only accounts for 3% or less of the budget (Figure 1).

Capital expenses, as mentioned previously is a new expense category for Cambridge Rescue. Capital income for the 2019 budget consists of building (56%), Zoll (23%), Stryker (21%), and Nitrous and Autopulse (0%) (Figure 7). The Nitrous and Autopulse have such a small percentage as they were just purchase in 2018 and it is expected that they will not need to be replaced or in need of significant maintenance for at least four years. The Nitrous system is a system that was installed on the ambulance to administer Nitrous Oxide. Nitrous Oxide is an alternative to opioids for pain management that can be administered by an AEMT instead of a Paramedic as required for opioids. The installation of the nitrous oxide system also resulted in a decrease in paramedic intercepts. There are typically at least two volunteer paramedic members on the squad at any given time, but like all volunteers, they have limited availability to commit and cannot cover all shifts. Prior to the installation of the nitrous oxide system Cambridge Rescue had

to request paramedic intercepts from other emergency response agencies when pain management was needed. The agency that provided the paramedic would then bill Cambridge Rescue for the service.

Stryker, is the company that makes the autoload system, with is a special stretcher and onboard system that allows the stretchers to automatically be loaded into the ambulance. This system was installed as part of the purchase of the new ambulance in 2016. In 2019, Cambridge Rescue is planning to install the same system into the other ambulance. Having two different stretcher systems in the ambulances has caused issues for Cambridge Rescue, as the stretchers are not compatible with each other. In addition, having the autoload system decreases workman's compensation and liability insurance rates as it lowers the risk of workman's compensation claims due to back injuries from having to lift a patient and the stretcher into the back of the ambulance, as well as potentially putting patients at risk.

The Zolls are the portable devices that monitor a patient's vital signs in addition to being an AED. These devices can transmit pertinent information regarding a patient's status to the hospital to allow doctors to have advanced detailed knowledge of the incoming patients. In 2017, Cambridge Rescue along with several other emergency response agencies within the district purchased the most up to date Zoll devices at a bulk rate. Cambridge Rescue received capital income from the Town of Cambridge to pay for the one device in full. The second device was financed directly through the supplier. The remaining balance owed on this devices as well as any maintenance or software upgrades is what makes up the 2019 capital expense for these items.

The Autopulse system that was purchased in 2018 provides customized automated resuscitation to patients who have experienced sudden cardiac arrest. This unit provides 33% higher levels of perfusion pressure than that of manual CPR, which results in at least 10% higher

return of spontaneous circulation. This system is designed for transport which reduces the interruption to CPR by 85%. Since the Autopulse was just purchased in 2018 and still maintains its warranty there is no money budgeted in capital expenses for this item in 2019 (Figure 7).

Building as a capital expense is a new expense category for Cambridge Rescue. As mentioned previously, the Town of Cambridge owns the property and building where Cambridge Rescue operates. Up until 2018, the Town of Cambridge has also maintained the property and the building. Cambridge Rescue was only responsible for day-to-day maintenance such as cleaning or replacing light bulbs, which is expensed under building maintenance and accounts for 1% of total expenses (Figure 1). The Town of Cambridge still cuts the grass and does snow removal, but Cambridge Rescue is now responsible for all other aspects of the building and property. This issue was brought to light when Cambridge Rescue asked the town about updating or replacing the current heating system. The current system has been there since Cambridge Rescue took over the building and needs regular repair. In 2017, Cambridge Rescue received a quote to have the system updated or replaced and presented it to the town. It was at this point that the Town of Cambridge informed Cambridge Rescue that they were now responsible for this expense, but could include it as part of the capital funds request to the Town of Cambridge. What the Town of Cambridge has been trying to do over the past several years is develop a more accurate representation of their own expenses. Part of this plan includes having both Cambridge Rescue and Cambridge Fire separate the capital expenses from the town appropriation. Additionally, the Town of Cambridge is requiring fire and rescue to pay for all expenses directly, account for them accurately on their own books, and then seek funding reimbursement from the town. Changing the accounting to this method provides a more accurate representation of what funds are allocated to support both fire and rescue as opposed to the town paying for the items as part of their own

capital projects. When comparing the 2018 budgeted appropriations from the Town of Cambridge, Cambridge Fire Department is receiving less than that of Cambridge Rescue. Cambridge Fire's 2018 appropriation was $121,500.00 (Figure 9), which is $13,500.00 less than Cambridge Rescue's appropriation. The current structure of the appropriations does not show that the Town of Cambridge is also budgeting for an additional $251,014.39 in capital expenses for Cambridge Fire, as well as $6,477.00 for Cambridge Fire's workman's compensation (Figure 9), compared to $25,000.00 in capital expenses for Cambridge Rescue (Figure 10), a difference of $232,491.39. Therefore, in actuality, Cambridge Fire is budgeted to receive $218,991.39 more funding than Cambridge Rescue from the Town of Cambridge. The majority of the capital funding for Cambridge Fire department is the principle and interest on the fire station (Figure 10), in all hopes the town will be renovating, building an addition, or a completely new building for Cambridge Rescue once the fire station is paid off. This change does not come without issues, however, as there are several grants that both organizations have been interested in applying for, but the grants can only be applied for and granted to the municipalities. When applying for such grants the board members on both fire and rescue have to work closely with the town administrators to put together the grant-funding request.

The next largest expense categories for Cambridge Rescue is insurance and supplies. Insurance accounts for 8% of Cambridge Rescue's expenses and includes liability, workman's compensation, and vehicle insurance, whereas supplies are 7% of Cambridge Rescue's expenses and account for all the supplies that are kept on the ambulance including medications, IV solutions, band aids, and personal protective equipment. One issue regarding the vehicle insurance is that only one of the ambulances is owned by Cambridge Rescue, the other is owned by the Town of Cambridge. Currently, Cambridge Rescue pays for the insurance on both vehicles.

In 2020, the Town of Cambridge anticipates purchasing a replacement ambulance for Cambridge Rescue; therefore, the Town of Cambridge would own both ambulances. At that time, it is anticipated that the Town of Cambridge would include both ambulances into their insurance policy along with the town maintenance vehicles and the fire department vehicles, which are all owned by the town.

Like insurance, the supplies that Cambridge Rescue purchases protect the members as well as the patients. Personal protective equipment is important due to the variety of situations the first responders find themselves. Several times a year the fire department has to transport a first responder through Smugglers' Notch via all-terrain vehicle or snow machine to access a patient who was injured from hiking, rock climbing, or skiing in the backcountry. These conditions can be dangerous at best, which is why Cambridge Rescue keeps helmets as part of the protective equipment on the ambulances. In addition to helmets Cambridge Rescue keeps a set of bunker gear should the need come up for a member of rescue to have to provide emergency assistance during an active fire. Additionally, bunker gear is useful during motor vehicle accidents as it can protect the responder and the patient from any debris. All of this equipment along with the medical supplies have an expiration date and must be replaced regularly.

As mention previously, the remaining expense categories make up a total of 18% of Cambridge Rescue's budget. These expenses includes service-billing expenses, which is a percentage of billing income paid to the company that processes all of Cambridge Rescue's billing. Vehicle maintenance also makes up this percentage, which is the regular repairs of the ambulances, including oil changes and the semiannual change of tires. One thing that is noteworthy regarding the vehicle maintenance is the significant different between the actual expenses of the two ambulances as well as the difference between the actual expenses and what has

been budgeted (Figure 11). This difference is due to the age of the second ambulance. At this point, the second ambulance is not up for replacement until 2020, but there is concern that it is costing more to maintain it than the cost would be to replace it. The remaining 18% also includes occupancy expenses, all the utilities such as fuel oil and electricity. Lastly, equipment expenses encompass this small percentage of expenses, none of which individually exceeds 3% of the entire expense budget. Given these percentages, it appears that Cambridge Rescue is operating a very lean budget.

One thing that is not visible in the budget reports, but are publically available, that the current Treasurer provided me, is that Cambridge Rescue maintains a monthly balance in its operating account of approximately $30,000.00 and $20,000.00 in its fundraising account. This is important information because the budgeted monthly expenses are $25,525.00 and the only guaranteed budgeted income, is from the town appropriations, which is $14,833.33. If Cambridge Rescue were to cease operations, they could only continue paying expenses for approximately four and half months. They could actually probably extend this length of time out as they would not need to continue paying volunteers or incur additional expenses for supplies if they are not operating.

My recommendations for the future of Cambridge Rescue is to find alternative means of revenue as well as seeking out creative methods of recruitment and retention. The Town of Cambridge continues to put its full support into both Cambridge Rescue and Cambridge Fire, however, if there is not enough volunteers to respond to calls then there may be push back from the community regarding the response time. Cambridge Rescue should also build its savings in order to cover six months of operating expenses if there was no revenue coming in.

Cambridge Rescue could choose to go the path of other organizations such as Fairfax rescue and solicit membership fees for their service. This option raises concerns, especially in regards to liability, and would need to be thoroughly reviewed by Cambridge Rescue's legal counsel. Additionally, given the current volume of calls that require mutual aid I am concerned that the residents who have paid for the subscription service will want to be ensured that Cambridge Rescue honors it, even if they were not the organization that responded to the call. This would require revised mutual aid agreements with the other local rescue agencies.

One recommendation is to merge Cambridge Fire and Cambridge Rescue into one organization. This would merge the volunteer membership, which would double the amount of volunteers that are trained for both fire and emergency response. Additionally, it would mean that there are more local members in the community, therefore more volunteers to jump calls when there is short staffing. One issue with this recommendation is the amount of time that is required for certifications. The minimum requirement of the Firefighter 1 course is 80 hours and the EMT course is a minimum of 120 hours. Requiring both certifications would be a total of 200 hours for basic certification levels. This is a significant time requirement for volunteers. It would mean that there would mostly be less volunteers, but the volunteers that did make the commitment, have a stronger level of commitment.

Another recommendation would be to hire more fulltime staff, or move to a completely paid staff of responders. For Cambridge Rescue to fill the schedule with all paid employees it would be an additional $157,248.00 annually, not including employer paid payroll taxes. In a current week, there are 28 shifts that need to be filled, two people each for two 12 hour shifts per day. Cambridge Rescue currently fills 10 shifts per week with paid employees; this leaves 18 shifts per week vacant. Since each shift is 12 hours that is a total of 216 hours per week. The current

going rate for an EMT on a paid rescue squad is $14.00 per hour, which equals $3,024.00 per week. If Cambridge Rescue were to fill all these open shifts with volunteers at the current $5.00 per hour rate, it would cost $56,160.00 annually, which is $101,088.00 less annually than paid personnel would be. Without additional funding, it would be impossible to staff every shift with paid employees. However, it may be feasible to add an additional full time or a few part time employees. One note that the Chief of Cambridge Rescue made was that they prefer not to higher paid staff for night shifts has there is not enough call volume, and Cambridge Rescue would essentially be paying someone to sleep. Overall, Cambridge Rescue's total call volume does not warrant having a fully paid staff, but they should be able to employ a few additional people to ensure adequate shift coverage.

Lastly, it would be important to continue the cadet corps program. This program is important for volunteerism in general as it teaches people the importance of volunteerism and involvement in the community at a young age. Studies have shown that children and young adults who have parents or family that volunteer or are involved in the community have a higher commitment to volunteerism and community involvement. Cadet corps and other similar outreach programs are important for the future of volunteer organizations and our society in general. I have a personal affinity for these programs, as that was how I started volunteering.   My parents have always demonstrated and instilled in me the importance of community involvement and volunteerism. When I was in high school, I joined the student program as it was called then, for the National Ski Patrol. I continued my involvement with the National Ski Patrol through and post college. When I reached the age of eighteen, I also became an EMT where I continue to volunteer to this day.

Overall, Cambridge Rescue is not doing poorly, but they are also not doing exceptionally well. It appears they are on track with most other nonprofit ambulance and first response services. It is important that Cambridge Rescue continue to have strong community support to ensure financial support from the Town of Cambridge and the Town of Fletcher. Without this financial support, Cambridge Rescue will not be able to continue operations. Part of ensuring community support is having adequate staffing to make sure shifts are covered to ensure a crew is available for 911 call response. Nothing upsets residents more than not having someone there when you really need them. Additionally, providing outreach to the community to inform them of the services that Cambridge Rescue provides and the complexities of operating an ambulance and emergency response service is important. It provides positive community interaction; in addition, it can be a positive recruitment tool.

Appendix

Figure 1: 2019 Budgeted Expenses
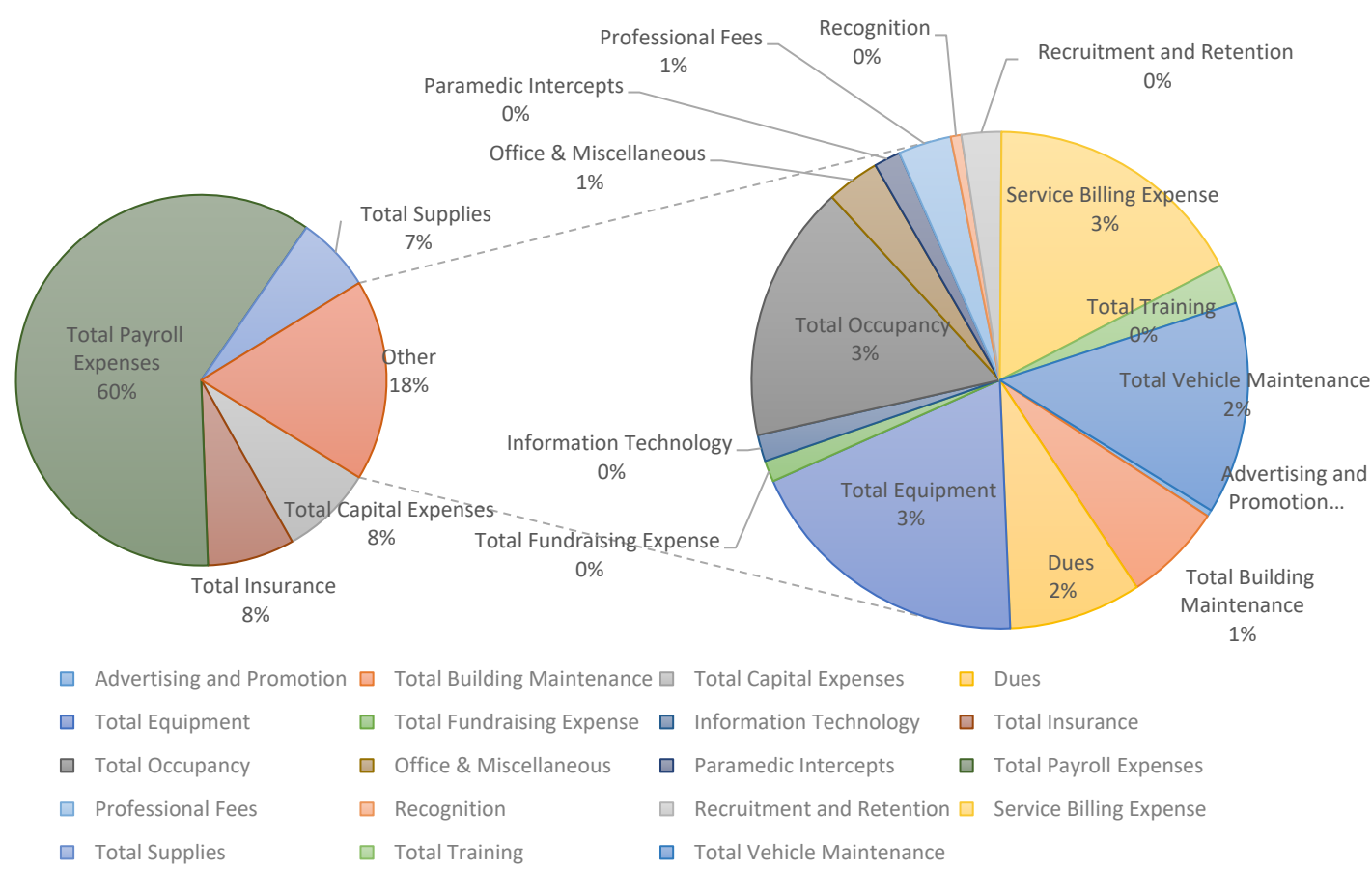
Figure 2: Appropriation from Cambridge

	2015 Expenses	2016 Budget	2017 Budget	2018 Budget	2019 Budget
Capital Income		30,000.00	15,000.00	25,000.00	40,000.00
Appropriation from Cambridge	80,000.00	135,000.00	135,000.00	135,000.00	135,000.00

Legend: ■ Appropriation from Cambridge   ■ Capital Income
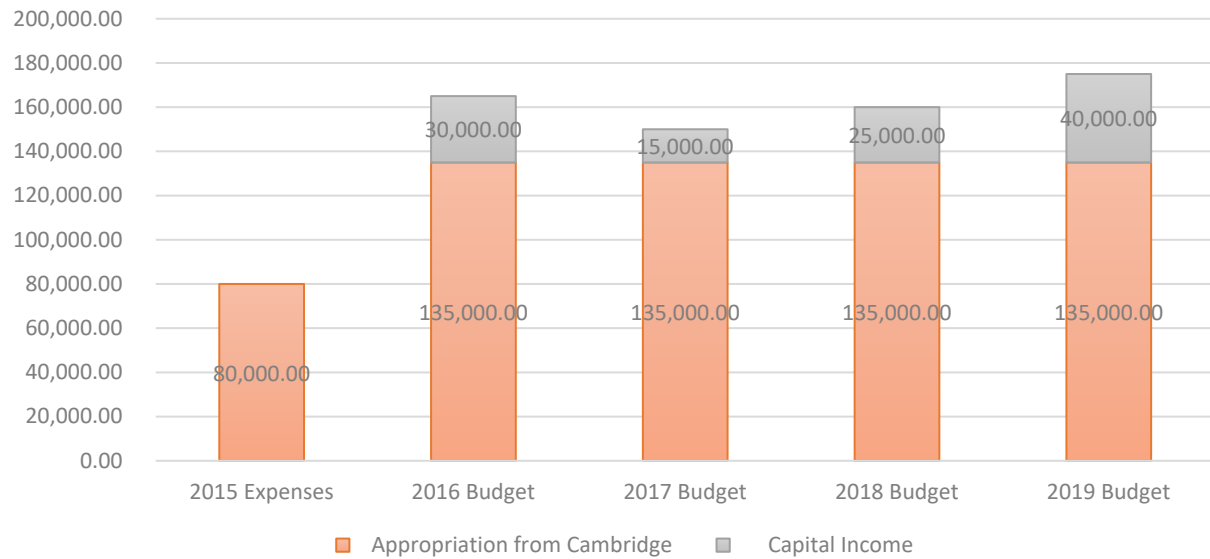
Figure 3:

Fairfax EMS Inc. 2018 Budget Report

Income	2017 Proposed	12/1/2017 Actual	Difference	1/01/2018 - 6/30/2018	2018 Proposed 7/2018-6/2019	18 Months Proposed
Ambulance Runs	$ 145,000.00	$ 134,372.00	$ (10,628.00)	$ 67,000.00	$ 137,000.00	$ 204,000.00
Contributions						$ 27,700.00
Subscription plan	$ 16,500.00	$ 19,530.00	$ 3,030.00	$ -	$ 19,000.00	
Memorials	$ 500.00	$ 920.00	$ 420.00	$ 50.00	$ 350.00	
Donations	$ 8,000.00	$ 9,851.00	$ 1,851.00	$ 100.00	$ 8,200.00	
Town Allocated Westford	$ 10,830.00	$ 10,830.00	$ -		$ 11,372.00	$ 11,372.00
Town Allocated Fairfax	$ 70,112.00	$ 70,112.00	$ -	$ 38,572.00	$ 84,134.00	$ 122,706.00
Town Allocated Fletcher	$ 12,694.00	$ 12,694.00	$ -		$ 14,598.00	$ 14,598.00
Grants	$ 4,000.00	$ 5,000.00	$ 1,000.00	$ -	$ 4,000.00	$ 4,000.00
Fundraising	$ 1,500.00	$ 223.00	$ (1,277.00)	$ -		$ -
Course Fee		$ 1,368.00	$ 1,368.00		$ 500.00	$ 500.00
Signs		$ 884.00	$ 884.00	$ 100.00	$ 839.00	$ 939.00
Total	$ 269,136.00	$ 265,784.00	$ (3,352.00)	$ 105,822.00	$ 279,993.00	$ 385,815.00

Figure 4: Appropriation vs Billing Income

Chart data:

	Total Appropriation from Cambridge	Service Billing Income
2015 Expenses	$80,000.00	150,055.54
2016 Budget	$165,000.00	155,950.00
2017 Budget	$150,000.00	150,000.00
2018 Budget	$160,000.00	150,000.00
2019 Budget	$175,000.00	125,000.00
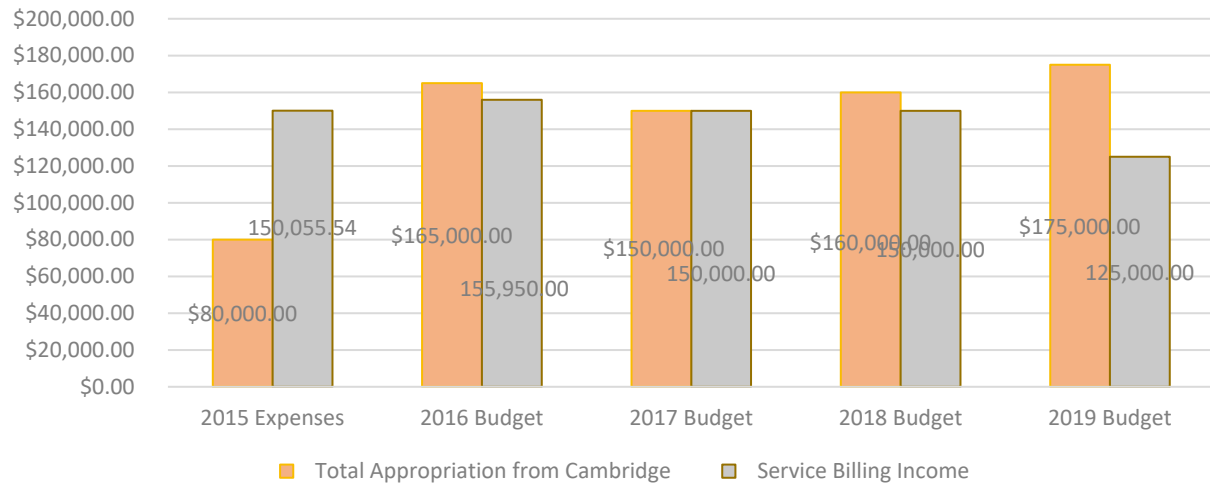
Figure 5: 2019 Budgeted Income

- Service Billing Income 41%
- Total Appropriation from Cambridge 57%
- Other 2%
- Donations 0%
- Fundraising Income 1%
- Appropriation from Fletcher 1%

Legend:
- Total Appropriation from Cambridge
- Appropriation from Fletcher
- Donations
- Fundraising Income
- Service Billing Income
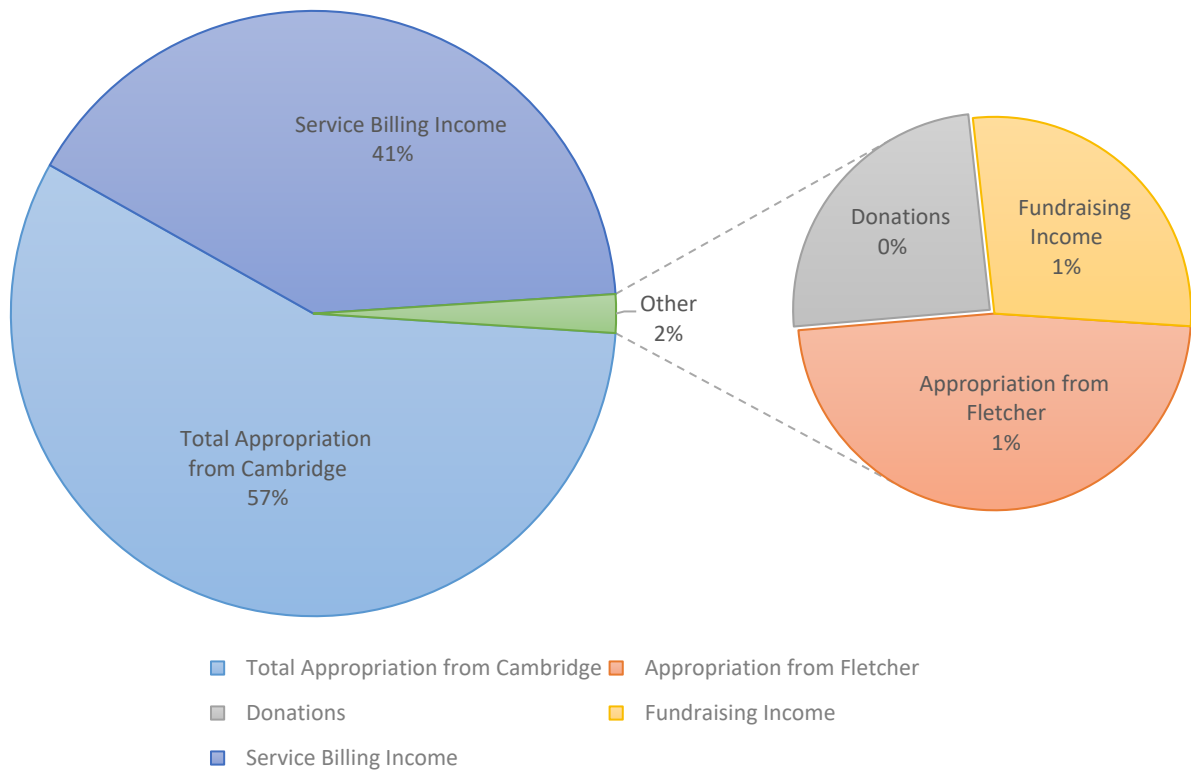
Figure 6: 2019 Budgeted Income

Income	2018 Budget	2018 Actual	2019 Budget
Appropriation from Cambridge	135,000.00	135,000.00	135,000.00
Capital Income	25,000.00	0.00	40,000.00
Total Appropriation from Cambridge	$ 160,000.00	$ 135,000.00	$ 175,000.00
Appropriation from Fletcher	3,000.00	3,000.00	3,000.00
Cadet Corp Income	1,000.00	-145.05	0.00
Donations	2,000.00	1,705.00	1,550.00
Fundraising Income	1,500.00	1,642.30	1,750.00
Service Billing Income	150,000.00	115,324.32	125,000.00
Training Income	1,000.00	33.61	0.00
Total Income	$ 318,500.00	$ 256,560.17	$ 306,300.00

Figure 7: 2019 Budgeted Capital Expenses

- Nitrous 0%
- AutoPulse 0%
- Stryker/Autoload 21%
- Zoll 23%
- Building 56%
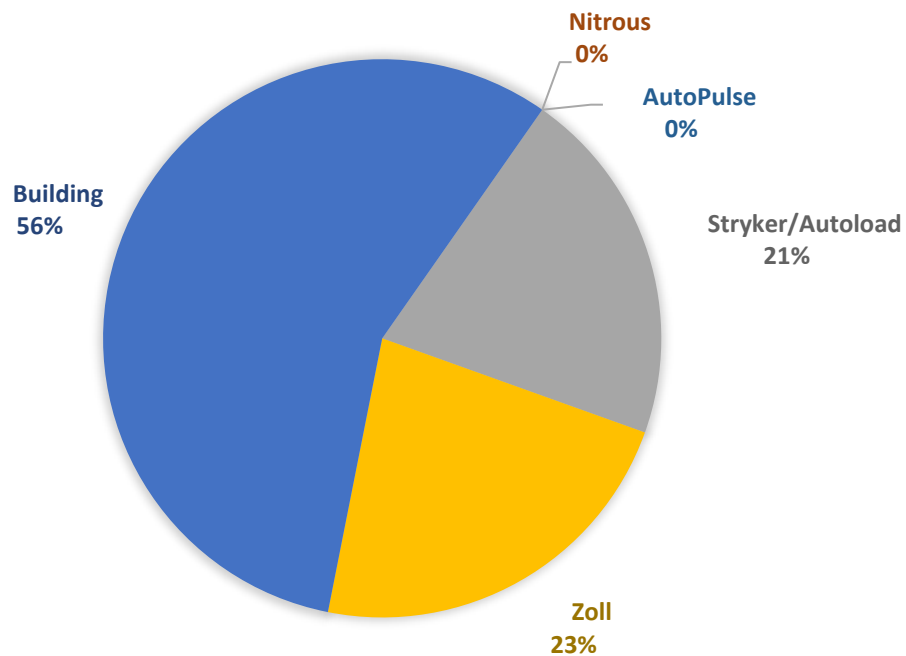
Figure 8: 2019 Budgeted Expenses

	2018 Budget	2018 Actual	2019 Budget
Expenses			
Advertising and Promotion	$ -	$ 291.60	$ 250.00
Total Building Maintenance	$ 3,500.00	$ 5,932.29	$ 3,750.00
Total Capital Expenses	$ 25,000.00	$ 33,361.82	$ 26,500.00
Dues	$ 5,000.00	$ 110.00	$ 5,000.00
Total Equipment	$ 11,000.00	$ 4,616.42	$ 11,000.00
Total Fundraising Expense	$ 1,000.00	$ 764.47	$ 800.00
Information Technology	$ 2,500.00	$ 1,053.34	$ 1,000.00
Total Insurance	$ 28,000.00	$ 23,043.28	$ 25,000.00
Interest expense	$ -	$ 1.80	$ -
Legal	$ 5,000.00	$ -	$ -
Total Occupancy	$ 14,750.00	$ 8,515.75	$ 9,700.00
Office & Miscellaneous	$ 2,000.00	$ 1,070.59	$ 2,000.00
Paramedic Intercepts	$ 1,000.00	$ 2,475.00	$ 1,000.00
Total Payroll Expenses	$ 203,000.00	$ 156,913.46	$ 198,300.00
Professional Fees	$ 2,000.00	$ 2,373.79	$ 2,000.00
Recognition	$ 400.00	$ 224.90	$ 400.00
Reconciliation Discrepancies	$ -	$ 210.85	$ -
Recruitment and Retention	$ 1,500.00	$ 2,204.72	$ 1,500.00
Reimbursements	$ -	$ 94.60	$ -
Service Billing Expense	$ 13,000.00	$ 8,562.87	$ 10,000.00
Total Supplies	$ 24,750.00	$ 21,318.84	$ 21,750.00
Total Training	$ 2,000.00	$ 1,386.00	$ 1,500.00
Total Vehicle Maintenance	$ 5,500.00	$ 7,061.01	$ 8,000.00
Total Expenses	$ 318,500.00	$ 262,913.34	$ 306,300.00

Figure 9: Town of Cambridge - 2017 Financial Report / 2018 Budget

Line	Category	2017 Voted Budget	2017 Y/E Actual	2018 Proposed Budget
166	**PUBLIC SAFETY**			
167	Cambridge Fire Department	120,193.00	120,193.16	121,500.00
168	Fire Company Workmans Comp		6,477.00	6,477.00
169	Cambridge Rescue	135,000.00	135,000.00	135,000.00
170	Emergency Management	0.00	1,298.00	1,300.00
171	Animal Control	0.00	0.00	0.00
172	-Officer Fees	0.00	1,734.96	1,700.00
173	-Animal Licenses	0.00	1,563.00	1,563.00
174	-Kennel Fees	0.00	656.00	656.00
175	-Tags	0.00	165.95	165.95
176	TOTAL Public Safety	255,193.00	267,088.07	268,361.95

Figure 10: Town of Cambridge - 2017 Financial Report / 2018 Budget

Line	Category	2017 Voted Budget	2017 Y/E Actual	2018 Proposed Budget
255	**CAPITAL EXPENDITURES**			
256	Fire Station - Principal	197,500.00	197,500.00	197,500.00
257	Fire Station - Interest	49,500.00	44,514.39	44,514.39
258	Capital Fund for Town Equipment	100,000.00	100,000.00	160,000.00
259	Capital Fund for Rescue Equipment	10,000.00	15,000.00	25,000.00
260	Capital Fund for Fire Equipment		9,000.00	9,000.00
261	Ambulance	22,289.48	22,289.48	
262	Equipment & Trailers		3,552.94	
263	Solar Project		575.00	575.00
264	Sidewalk Project	75,000.00	75,000.00	60,000.00
265	TOTAL Capital Expenditures	454,289.48	467,431.81	496,589.39

Figure 11: Vehicle Expense

	2018 Budget	2018 Actual	2019 Budget
Vehicle Maintenance	$ -	$ 63.25	$ -
A1	$ 2,000.00	$ 895.02	$ 2,000.00
A2	$ 2,000.00	$ 4,451.76	$ 4,500.00
Cell Phone	$ 1,500.00	$ 1,650.99	$ 1,500.00
Total Vehicle Maintenance	$ 5,500.00	$ 7,061.01	$ 8,000.00

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PA306 - Team Project Part B

Corrections and Institutions (House Committee)

H.71

The state of Vermont has had a large need to update its existing prison infrastructure in order to accommodate an aging prison population with mental health needs as well. In January of 2018, Governor Phil Scott proposed to contract with Core Civic, a private prison company, in order to build a 925-bed prison (Freese, 2018). The facility would cost around $140 million dollars to build over a ten year period. The facility would be privately run until the state would be able to take over its operation. Representative Nader Hashim and the House Committee on Commerce and Economic Development were moved by the proposal to created H.71 a bill that would "prohibit state contracts with for-profit correctional facilities"(Personal Interview, April 5, 2019). According to Hashim for-profit prisons have higher rates of recidivism because they focus on high-profit incentives rather than having healthy citizens (Personal Interview, April 5, 2019). The bill primarily focuses on the construction of these facilities and this jurisdiction falls under the House Committee on Corrections and Institutions. They manage policies that govern infrastructure because they manage capital bill access to fund capital projects.

Bill H.71 is currently being reviewed by the House Committee on Corrections and Institutions. The committee supports the idea behind the bill and is currently working to incorporate the bill within their budget (Hashim, Personal Interview, April 5, 2019). The bill will carry forward from its original committee, but it will now be "pasted" into a new bill that the House Committee on Corrections and Institutions will propose to the Vermont State Legislature. The most recent proposal for this bill would negate the proposal to privatize the Chittenden County Correctional facility for women. The facility would be privately owned, but state-run. According to Hashim the paradigm of how individuals are managed in the correctional system is changing for the better in the state. The state is looking to move towards creating more rehabilitative services for inmates that focus on mental health, employment, and transition into a successful life after incarceration. A bill that focuses on reducing the number of privately run correctional facilities will move to pass as lawmakers look to focus on reducing recidivism in the state.

Analysis

In looking at H.71 through the lens of the Multiple Streams Framework we can see the problem stream appeared due to a failing prison infrastructure causing Governor Phil Scott to move around 215 inmates out of the state. This move opened an opportunity for his proposal to

build a private prison and increased political interest in a bill such as H.71 to be created in response. The bill's creation mimics the importance of changing the paradigm of how correctional institutions manage inmates and provide rehabilitative services. The bill moves to focus on reducing rates of recidivism and provides itself a window for new policies to shape how the state of Vermont manages its correctional system. For-profit correctional facilities are known to cut corners, have less training with higher employee turnover, resulting in less security. Additionally, there is less medical attention provided to inmates with a "28 percent higher rate of inmate-on-inmate assaults and more than twice as many inmate-on-staff assaults, as well as twice as many illicit weapons than comparable federal facilities", all in the name of lowering the bottom line (Joy, 2018).

House representative Nader Hashim is hopeful the bill will pass as Vermont moves to reform its overall infrastructure. The shifting political stream was successful in shaping the response to the policy window and helped create a piece of legislation that would be effective in correcting the policy problem. However, the recent success of moving the Vermont prisoners housed out of state from Camp Hill State Correctional Institution, a public facility, to Tallahatchie County Correctional Facility (TCCF), a private facility may alter the problem stream, as there have been fewer complaints regarding the treatment of inmates in TCCF then Campy Hill. Additionally, TCCF is contracted to abide by all of Vermont's regulations on housing inmates.

A key component to the success of the bill will also be in the ability of other House bills to pass as representatives look to tackle several key aspects of the overall reform movement within the correctional system. For instance H.362, "prohibition on the transfer of Vermont inmates to an out-of-state correctional facility" would alter the policy stream for H.71 (H.362, 2020). If the approximately 215 inmates housed out of state had to be relocated back to Vermont, Vermont would be forced to address the lack of correctional institutions within the state.

H.362

House bill H.362 was introduced on February 22, 2019, by Barbara Rachelson, and is, "an act relating to prohibition on the transfer of Vermont inmates to an out-of-state correctional facility" (H.362, 2020). This bill would impact the approximately 215 inmates currently housed in out of state prisons as well as their families (Meyn & Keays, 2018). This number is down from 669 inmates in 2010, however, this policy issue was brought to light due to many public issues that occurred recently including the death of four inmates at Camp Hill State Correctional Institution in just over a year (Murray, 2018). In response to the concern of the conditions at Camp Hill, the Vermont Board of Corrections contracted with Tallahatchie County Correctional Facility (TCCF), located in Tutwiler, Mississippi, approximately 1374 miles from Southern State Correctional Facility in Springfield, VT (Meyn & Keays, 2018). The contract was signed in September 2018 and the transfer of inmates took place in October 2018 (Meyn & Keays, 2018). Since the move to TCCF the Board of Corrections has noted there have been fewer complaints from inmates and family members, and the degree of the complaints have been less severe (Meyn & Keays, 2018). One of the differences in Camp Hill versus TCCF is that Camp Hill is a higher level security prison than TCCF. Additionally, TCCF is a private facility, while Camp Hill is a state-run facility.

However, TCCF officials have agreed to comply with all Vermont policies in regards to housing inmates as part of their contract (Keays, 2018).

Analysis

Given the information surrounding H.362, we determined that the Multiple Streams Framework best applies to this policy issue. The issue was brought to the attention of the policymakers at a time when there was a problem that had the attention of the public and posed to be a significant issue. The problem stream was triggered by a focusing event, which was the four deaths of inmates in just over a year that were housed at Camp Hill State Correctional Institution in Pennsylvania.

At the time this bill was proposed there was a lot of attention to this problem and the politics stream aligned with the problem stream as the residents of Vermont felt that the inmates were not receiving adequate care while incarcerated out of state. Policy entrepreneurs were using framing to paint a picture of how horrible the out of state prisons are and that prisoners can only be protected if they are incarcerated in-state at facilities under the control of the Board of Corrections. Framing the policy in this way encouraged the proposition of another bill that is currently in the Corrections and Institutions Committee, H.71, which would prohibit the state to contract with for-profit correctional facilities. Both of these bills are part of the policy stream in regards to the safe housing of Vermont inmates. However, since moving the inmates to TCCF the Vermont Board of Corrections has noted there has been fewer complaints and the complaints that they have received have been far less severe than the complaints received while inmates were housed at Camp Hill.

Since H.362 was originally presented there have been several other issues that have also been presented. In speaking with Representative Curt Taylor he noted that the Corrections and Institutions Committee is currently focused on the Congressional Bill, therefore, they have not had the time to address many of the bills that are currently in their committee (personal communication, March 27, 2019). Until all three of the streams align the policy window will remain closed and there will be no resolution to the policy problem.

H. 182

H.182 is a bill that has been introduced on February 7th, 2019 by Progressive Representative Brian Cina of District 6-4 (Chittenden County). This bill is "an act relating to the creation of the Corrections and Mental Health Study Committee" which is a committee that will examine how to transition the corrections system into a mental health rehabilitation system. This committee concept has come to fruition out of the understanding that the General Assembly in Vermont is viewing crime as a public health problem, and thus a reformation of the system should aim to foster rehabilitative nature. This committee will also allow for those incarcerated to participate in creating a long term physical and mental health plan for their future, as well as for general recovery. This reformed system will also ensure that the state shifts its limited focus from offenders to victim impact and public safety. This bill is composed of three components: the

creation of the committee, membership, and powers and duties. Creation of the committee is identified to be focused on a general beginning to this committee and for its focus to be the transformation of the criminal justice system to a mental health rehabilitation system. Membership details all of those who must be part of this committee: these include the Commissioners of several state agencies such as the Department of Corrections, the Department for Children and Families, and the Department of Mental Health. As previously mentioned, in speaking with Representative Curt Taylor he noted that the Corrections and Institutions Committee is currently focused on the Congressional Bill, therefore, they have not had the time to address many of the bills that are currently in their committee (personal communication, March 27, 2019) thus it is unlikely to pass this session.

Analysis

As we reviewed the several different frameworks, we determined that the Multiple Streams Framework is the best fit for an analysis of H.182. The problem stream and politics stream have lined up well to create a policy window; the problem is that there is a lack of mental health care and rehabilitation in the criminal justice system, Vermont is spending a significant amount of money on incarcerating individuals, especially low to no-risk people, that would benefit from a rehabilitative system that would prevent them from re-entering the system. This is accompanied by the political stream, as the national mood is currently engaged significantly in progressive politics, saving our country money, and creating equal rights for all, even those in incarceration. Different ideas have been brought to this policy stream before, such as the proposals through Vermonters for Criminal Justice Reform such as Bail Reform, Compassionate Release, and "For the Sake of Children" (Vermonters for Criminal Justice Reform, 2019) though none of these have become active yet (Compassionate Release is proposed in S.167 this session, though Vermonters for Criminal Justice Reform originally proposed it in 2017) (S.167, 2020). As previously mentioned, in speaking with Representative Curt Taylor he noted that the Corrections and Institutions Committee is currently focused on the Congressional Bill, therefore, they have not had the time to address many of the bills that are currently in their committee (personal communication, March 27, 2019) thus it is unlikely to pass this session.

H.282

H.282 is a bill that was introduced to the House on February 20th, 2019. This bill, proposed by Barbara Rachelson (sponsored by Brian Cina, Selene Colburn, Diana Gonzalez, George Till, and James McCullough) is "an act relating to the integration of Vermont's inmate population into the State's health care reform initiatives"(H.282, 2020). This bill proposes to establish a working group in the Agency of Human Services that would explore opportunities to integrate the inmate population into new and existing health care payment and delivery system reform initiatives in order to promote inmate health and constrain State spending by managing chronic conditions, focusing on wellness and preventive care, and making appropriate use of existing programs and resources (H.282, 2020). This bill has been introduced for several different reasons. Firstly, the Vermont Department of Corrections spent $21 million on inmate health care

in the fiscal year 2018 alone, 20.2 million of this was the state's contract with a vendor to administer health services in Vermont correctional facilities. According to a recent study of the healthcare system costs in Vermont's Department of Corrections, the small size of Vermont's facilities and comparatively low average inmate daily populations inhibit the delivery of cost-effective health care in a correctional facility setting. High-quality health care services are currently being delivered by health care providers throughout the State in a variety of inpatient, outpatient, and community settings. Vermont has a history of implementing innovative health care reform initiatives designed to improve health outcomes and bend the cost curve, including the Blueprint for Health, accountable care organizations, and the All-Payer Model. Finally, The Agency of Human Services and other stakeholders should explore opportunities to integrate the inmate population into new and existing health care payment and delivery system reform initiatives in order to promote inmate health and constrain State spending by managing chronic conditions, focusing on wellness and preventive care, and making efficient and appropriate use of existing programs and resources (H.282, 2020).

Analysis

An analysis of this bill is best done through the Multiple Streams Framework. As we look at the issue of inadequately expensive health care throughout the correctional facilities in the state of Vermont, we must look through the lens of actionable policy windows. The problem stream is open: the healthcare being paid for is not cost-effective, and the Department of Corrections is spending a significant amount of money on contracting a vendor. Another issue publicly being brought up, which has opened the politics stream, is that inmates are entitled to receive medication-assisted opioid withdrawal treatments such as methadone and buprenorphine, and this contractor isn't supplying these adequately. This entitlement comes from Act 176, put into place on July 1, 2018; all inmates who request medication-assisted treatment must be able to be screened for substance use disorders within 24 hours of arrival at the facility (Faher, 2018). As previously mentioned, in speaking with Representative Curt Taylor he noted that the Corrections and Institutions Committee is currently focused on the Congressional Bill, therefore, they have not had the time to address many of the bills that are currently in their committee (personal communication, March 27, 2019) thus it is unlikely to pass this session.

H.300

According to Jean O'Sullivan, the implementation of H.300 also focused on addressing barriers to employment for various populations. The bill focuses on the interaction of Probation and Parole with their employees. Such as scheduling spot drug tests that take employees off-site during their shifts and other practices. The goal of the bill would be to expand the focus in the department's training to facilitating the re-entering person's successful employment along with the department's concerns around controlling that person's behavior in society. According to O'Sullivan, the bill is being met with Department of Corrections and Vermont State Employees' Association (VSEA) union resistance. According to those groups, everyone is too overworked to get any more training.

Analysis

The Multiple Streams Framework best addresses the analysis of H.300 as a problem stream arose when probation and paroles were struggling to acquire and maintain jobs due to the requirements from the probation and parole officers. Though the politics stream has faced opposition from the interest groups, such as VSEA, there was enough data showing that recidivism increases when inmates do not have stable jobs, which was of interest to those in the political position to propose the bill. Finally, the policy stream for this particular bill is the proposal of H.533 "acting relating to workforce development" which created an opportunity to include H.300 as an amendment (H.533, 2020). With all three streams aligning, the policy window opened and allowed the bill pass in the House and move to the Senate.

H.494

House bill H.494 "an act relating to ensuring inmates have the documentation necessary to secure employment upon release from a correctional facility" will be included in H.533 (H.494, 2020). Per our conversation with Representative Curt Taylor, many inmates who are released from prison do not have any other form of identification, other than their identification issued from the Department of Corrections(DOC) (personal interview, March 27, 2019). DOC identification does not comply with the identification requirements for banks and many employers, therefore it makes it difficult for the inmates to obtain a personal bank account and/or job. H. 494 would help inmates with issues of identification and how to obtain needed documents. The bill focuses on getting inmates into the workforce by making sure they have the proper identification. This bill would ensure the State assists individuals by providing documentation support for state id cards, social security numbers, and licenses. In addition, the bill would cut down on programming for inmates the intercedes with their workday. The bill aims to merge the efforts of the department of labor and corrections in order to improve the transition into the workforce for individuals who have been incarcerated.

Analysis

Similar to H.300, H.494 is being incorporated as an amendment into H.533. House representative Curt Taylor and the House Committee on Corrections and Institutions (Personal Interview, March 27, 2019) added an amendment to House bill H.553 which is "an act relating to workforce development" (H.533, 2020). H.553 originally came out of the House Committee on Commerce and Economic Development. H.533 again created an opening in the policy stream to allow H.494 to move through the House to the Senate. Language from House Bill H.300 "an act relating to education and training for probation and parole officers" was used to change the language for H.494 according to House Committee on Corrections and Institutions assistant Danielle Bean (Personal Interview, March 27, 2019). A challenge moving this bill forward was the congressional bill which will establish the operating budgets of all state departments, however, H.533 successfully passed the House with both amendments.

The problem stream affecting H.494 is that inmates are being released without proper identification needed to secure a job or even a bank account. Without proper identification to secure a job, inmates are more likely to re-offend. The importance of reducing recidivism is the driving factor of the politics stream. Probation and parolees that have stable jobs, are less like to re-offend and having the appropriate documentation is necessary to secure a job. As you can see Multiple Streams Framework was also best suited in the analysis of H.494.

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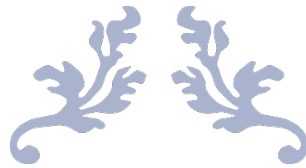
POLICY ANALYSIS

ACT 46

ACT 46, SCHOOL MERGER IN VERMONT

      Public education in Vermont, the United States, and the world is always an important topic of conversation and policy. Vermont public schools have a long history of being closely tied to the local community. The local control of schools and the issues that arise from the lack of consistency has been an ongoing conversation in Vermont for well over 200 year. There have been many policy changes that have tried to resolve the perceived problems, the most recent being Act 46. Act 46, was proposed to consolidate the just under 300 districts into approximately 58 consolidated districts. This policy was enacted to address the inconsistency in education and funding, as well as address the declining population of school-aged children in the public school system. Almost all efforts to consolidate schools in Vermont have been contested amongst the people that have strong beliefs in the importance of local democracy, and Act 46 is no exception. Though Act 46 was enacted in 2015, the implementation has been slow and many towns are challenging the forced mergers.

HISTORY OF VERMONT EDUCATION SYSTEM

According to Sautter (2008):

> Prior to 1890 each school district provided funding for its own schools. A 1782 statute provided that towns should either create single school districts or divide the township into several districts to "enable [Vermonters] to instruct youth at low prices." (p. 3).

Sautter also notes, by 1864, many schools were struggling financially, which resulted in the Vermont legislature making payments to the local schools on behalf of tax payers, regardless of student enrollment (Sautter, 2008, p. 3). Sautter explains, the schools were not only struggling financially, but there were issues with inefficiency and the declining population (Sautter, 2008, p. 3). Sautter (2008) states,

> In 1860 Vermont had 239 incorporated towns, but contained 2,591 school districts. These numbers average out to over ten school districts per town. Furthermore, between 1850 and 1860 Vermont school enrollment fell from 99,110 to 75,691 students. The drop in students amounted to a decrease in the statewide average from 38 to 29 students per school. By 1884, rural parts of the state supported 103 school districts with six or fewer students and 420 districts that enrolled between six and eleven. (p.3)

Sautter continues to explain, each of these districts had their own property tax assessment, which often created significant disparities not only between rural and urban areas, but also within towns themselves (Sautter, 2008, p. 3). Additionally, Sautter notes, the rural areas suffered in the sense that they had a limited tax base, which acted as a cap resulting in the hiring of subpar teachers (Sautter, 2008, p. 3).

      In 1870, the Vermont legislature made its first attempt at school consolidation. This was done through a law passed requesting schools to consolidate into town districts. This request was unsuccessful and resulted in no consolidations. In 1890, the legislature instituted the first statewide property tax. This tax was proposed to help more evenly distribute funds amongst the school within the state, addressing the financial disparities within the rural areas. Sautter explains, that this tax did not take into account the number students enrolled in the schools, therefore it "rewarded rural towns with small schools that had low numbers of students but a high number of schools"

(Sautter, 2008, p.5). During this time there was also a push for education reform. According to Sautter, the motives were varied from immigration control to increasing the educational standards (Sautter, 2008, p.5).

In 1892, the state passed an act, known as the "vicious Act of 1892". According to Sautters this act forced each town to consolidate the schools into one district (Sautter, 2008, p. 11). Sautter states, "The act reduced the number of school districts from over 2,000 in 1891 to 251 in 1892. Hundreds of school districts that had existed for over 100 years were wiped out and usurped by town government" (Sautter, 2008, p.11).

In 1997 the Vermont state legislature passed Act 60, what is now the current property tax law for "the equalization of educational spending" (Sautter, 2008, p.12). Sautter explains that Act 60 was passed to create equality amongst all the schools in the state (Sautter, 2008, p.12). Sautter (2008) states,

> Using statistical analysis, the Vermont Department of Education came to the conclusion that spending per pupil in schools was highest in wealthy areas where residents paid lower taxes, and that in poorer areas of the state less money was spent per pupil with higher property taxes for residents. (p. 13)

This study showed a disparity in the funding of schools based on the property value and density throughout the state.

In 2010, Act 153 was past as a means of voluntary consolidation. It was expected that, "that consolidation will increase educational opportunities, increase economies of scale, and enhance cost efficiencies" (Rogers, 2011, p.1). Unfortunately, only one merger successfully obtained the vote of all supervisory unions to form a regional education district (RED) as a result of Act 153 (Mathis, 2015). After an exit poll Rogers (2011) notes, that the residents felt the primary benefits of a merger were to save money, enhance the quality of education, and increase educational opportunities (Rogers, 2011, p.2). In addition, the exit poll conducted by Rogers (2011) found that the primary concerns for the residents were school closure and loss of control, but loss of control was more significant of a concern than school closure (Rogers, 2011, p.3).

In response to the failed attempt of Act 153, the Vermont legislature passed Act 156, which was another voluntary consolidation. The difference between Act 153 and 156 is that Act 153 required all supervisory unions have to votes yes to form a RED, whereas Act 156 permitted only the supervisory unions that voted yes to form a modified unified union school district (MUD) (Mathis, 2015). Unfortunately, Act 156 had the same end result as Act 153, only one MUD was formed as a result (Mathis, 2015).

These were not the only laws there were passed over the years to address education disparities throughout the state, but these were the most impactful or gained the most attention. An "1885 law allowing towns to vote on the issue of whether to consolidate resulted in only sixteen towns adopting the town system" (Sautter, 2008, p.12). Of these 16 towns, the majority where from the cities. Sautter notes that essentially the same thing motivated legislatures involved in all of these discussions, "equal opportunity for all students, overall quality of education throughout Vermont, providing for the state's future generations, and inequities in funding the state education system" (Sautter, 2008, p.14).

DECLINING ENROLLMENT

In a commentary submitted to the VT digger by William Mathis, Mathis (2015) states, "the current system is antiquated, inefficient and unresponsive to population changes and financial limitations." In the 2006 report by Richard Cate he states,

> Today, there are 311 schools (buildings) in Vermont and 280 school districts led by school boards that vary in size from three to 14 members, totaling over 1,300 elected school board members operating a school system that serves about 95,000 students. (Cate, 2006, p.5)

Education Commissioner Armando Vilaseca noted that student enrollment is down to 89,000 from a high of 106,000, "one of its lowest points in decades". Vilaseca noted, "We have 277 district and school boards, many of whom operate schools with fewer than 100 students. (as cited in Rogers, 2011, p.1)"

In discussing the issue of declining enrollment with a source from the Agency of Education (AOE), who wished to remain anonymous they explained that many of the small schools are at risk of closing due to the decreasing enrollment (personal communication, February 15, 2019). R.H. Cate reiterated this concern by noting a time when he was Commissioner where he attended the last day for a small school where there was only three students in the entire district (personal communication, February 13, 2019).

To compound the issue with declining population, school choice has affected many of the small schools as they are finding kids from the community are choosing to go elsewhere and no students are choosing to come to the school from outside the community (anonymous, personal communication, February 15, 2019). One thing that some of the small schools have done is compensate for the declining enrollment is combining age groups in the classroom (anonymous, personal communication, February 15, 2019). Having multiple age classrooms can be effective if it is the philosophy of the school, but not when it is done to keep taxes down (anonymous, personal communication, February 15, 2019).

HIGH TAXES/COST

As of 2011, Vermont has the third highest cost per student, with student to teacher ratio that is substantially lower than the national average (Rogers, 2011, p.1). In speaking with citizens that have been or are going to be affected by school consolidation, the one thing that they all felt was an issue leading up to Act 46 was the high taxes (personal communication, February 13, 2019). As the student enrollment continues to decline, the cost per student will continue to increase, even if taxes do not increase.

The Act of 1890 and Act 60 both have attempted to create financial equality for all schools by distributing funds from the towns with a larger tax base to the more rural towns. With the implementation of Act 153, 156, and 46 the state legislature offered tax incentives to the schools that choose to merge voluntarily. Unfortunately, the state cease the construction grate program around the time of the recession (2008), which has caused many schools to defer maintenance on their buildings (AOE anonymous, personal communication, February 15, 2019). The construction grant program has not been reinstated causing the cost of the deferred maintenance to become the responsibility of the schools.

The town schools that are operating independently have a high cost to continue to provide the standard level of education to its students, as required by the state, as they cannot share the cost with multiple downs within the district. With the need to limited operating costs, many of the rural schools are unable to attract the highest quality of teachers (Cate, personal communication, February 13, 2019). In addition, there is a higher turnover for qualified teachers and administrators who move to the more affluent schools.

EDUCATION QUALITY

Having a high turnover of administrators and teachers puts the schools at risk of providing a lower quality of education to the students. Education quality is the primary goal of the AOE (Cate, personal communication, February 13, 2019). Consolidating schools could provide more opportunity to students. For example, schools who have limited budgets often cut the arts programs, or only can hire part time arts teachers. Schools that merge also merge the human resource responsibility of the schools, which means they could hire full time "circuit teachers" to provide instruction at multiple schools (Cate, personal communication, February 13, 2019).

To the contrary however, the dramatic changes in administrative structure has a profound effect on the teachers. According to McHugh and Kyle, when researching the effects of school mergers on teachers in Northern Ireland there is an increased stress on the teachers which has an adverse effect on their job performance (McHugh & Kyle, 1993, p.14). The increased level of stress does not just affect the teachers of school that have experienced mergers, but also those schools that are being threatened with merger (McHugh & Kyle, 1993, p.14). "Additionally, the results of this study suggest that their levels of stress soar to a level which must prevent them from providing an efficient and effective service" (McHugh & Kyle, 1993, p.14). Therefore, the stress of the threat of merger and added stress of a merger on the teachers results in a lower quality of education for those students.

When speaking with a resident who preferred to remain anonymous, they expressed great pride in their school and that they believed their child was receiving an excellent education (personal communication, February 13, 2019). Additionally, this same resident expressed concern over losing control of their school which could result in a lower quality of education that than they are currently receiving (personal communication, February 13, 2019). This issue of local control was addressed by Cate in his 2006 report during his time as the Commissioner of the Department of Education. In speaking with Cate, he indicated that the control that many of the schools believe they have is lost once the students are sent to middle school and high school (personal communication, February 13, 2019).

POLICY ALTERNATIVES

Over the course of time in Vermont, there has been several policy changes and implementations to address the issue of education inequality in Vermont. The two major types of policies that have been put into place are a statewide education tax and voluntary school mergers. Neither of these policy changes have made the drastic improvements that policy makers hoped that they would. The lack of changes that resulted from the voluntary school mergers is what led to the mandated school mergers of Act 46. As the student population is decreasing and the cost of operations for local schools increases the need to find a policy that works is becoming ever more important.

As many schools choose not to merge as part of the voluntary merger process, the Vermont State Board of Education ordered them into mergers. The merger decisions based on similarities within the structure of the school, proximity, and already established supervisory unions. Despite the best efforts of the State Board of Education, many residents were not happy with the decisions made and several districts filed lawsuits against the state in an attempt to stop the mergers. One thing that may have contributed discontent of the towns is that the mandate along with several other section of Act 46 was that it was purposely published in November when the legislature was not in session (AOE anonymous, personal communication, February 15, 2019). This action prohibited from the public being able to present their concerns to the legislature.

Give the current dissatisfaction with the mandated mergers there are several policy alternatives that could be implemented, including a combination of the policy alternatives. For instance, many of the residents of Vermont affected by the mandated mergers would prefer to have Act 46 rescinded. This would mean that any of the school mergers mandated by the State Board of Education to be finalized for the 2019/2020 school year would not occur. Each of the schools would be able continue operating under their current structure. If the State Board of Education choose to let the schools continue operating under their current structure then the Board should review the current statewide education property tax. The statewide education property tax has not been modified since 1997 other than adjustments to the rates. Finally, the other alternative would be for the State Board of Education to follow through with Act 46 and the mandated mergers. Each alternative has its own incentives and downfalls; many have more significant impacts than many of the residents of Vermont care to recognize.

RESCIND ACT 46

Given the option, many of the residents impacted by the mandated mergers of Act 46 would rather continue to operate their schools under the current structure. This alternative is appealing to the residents as it allows them to keep decision-making power of the schools at the local level. What many of the residents do not recognize is that local control is assumed, that they already lost that control with the implementation of the union high schools (Cate, personal communication, February 13, 2019).

The loss of control extends beyond the control of the local school to the control of the individual child's education. With the mandate school mergers, many residents are concerned they will lose the option of school choice beyond their local school. Rescinding Act 46 would allow residents to keep school choice as is. However, when Richard Cate wrote the proposal for school consolidation he believes that school choice should and could be an option for the entire state (Cate, personal communication, February 13, 2019). Additionally, many residents do not realize that the state has a process where any student in the state can apply for high school choice (AOE anonymous, personal communication, February 15, 2019). Act 46 does not affect the Public High School Choice, Act 129 of 2012. Additionally, many of the districts formed through the voluntary school mergers have implemented school choice within the district to allow students to attend the school that best fits their needs (AOE anonymous, personal communication, February 15, 2019).

The alternative to leave the school structure in its current state does not address the primary problem at hand, which is the inequality of education across the state. The rural school continue to struggle with an ever-increasing operating budget, and not enough funds to meet the

expenses, which results in regularly increasing local taxes. Additionally, the urban districts are increasingly discontent with a higher percentage of their property taxes distributed to the rural communities to support their schools. As it becomes increasingly more difficult to fund operations of the schools, education and programs start to suffer. For instance, art and music programs are always the first to go (Cate, personal communication, February 13, 2019). Special education programs suffer and some schools have even reduced the number of hours the school nurses are on site. Some schools have resorted to multiple age classrooms to keep taxes down (AOE anonymous, personal communication, February 15, 2019). The rising cost only creating an educational inequality for the rural schools, but it is putting the school at risk of closing. The Statewide School Property Tax provides some assistance, but ultimately many of the rural schools will close.

MODIFICATION TO THE STATEWIDE SCHOOL PROPERTY TAX

The Vermont Statewide School Property Tax was originally implemented in 1890 and was revised in 1997. Since that time, it has not undergone any significant changes. With the implementation of Act 153 and Act 156, both voluntary merger alternatives the State Board of Education offered tax incentives for the schools to merge. The results of the voluntary mergers were relatively unsuccessful; each act resulted in only one merger. Given that the tax incentive was not a success, then the state could choose to modify the current School Property Tax to make the merger incentives more appealing. This would potentially mean decreasing the amount of appropriation the rural schools receive from the tax. Though this policy alternative does not directly address the education inequality for the rural schools, it does address the concerns many of the residents of the urban areas have regarding their tax dollars distributed to the rural areas. Decreasing the allocation to the rural areas will ultimately force them to merge to maintain operations and take advantage of the tax incentives in place for merged districts or close.

Contrary to decreasing the allocation of the School Property Tax, the alternative is to increase the allocation to the rural communities. This alternative would be to redistribute the funds from the urban communities to the rural communities. Residents in the urban communities will find this alternative problematic, as they will still be paying a high tax, but there will not be as much funding going to their local schools. Additional funding from the state will help the rural schools to continue operations under their current structure and will not incentivize them to merge voluntarily. Thus, this alternative does not address the decreasing population and many of the rural school will be at risk of closing.

FOLLOW-THROUGH WITH ACT 46

The Vermont State Superior Court can deny the school districts claims against the State Board of Education and continue to force the mergers. Though this will disappoint many residents and schools affected by the mandated mergers, it will provide the schools unique opportunities, and the ability to thrive. The mandated mergers will not be easy for the schools as there will be a lot of work in merging the operations as well as the cultures of each school into one larger organization. There is a lot of change that will occur and "with any large change people will have angst" (Cate, personal communication, February 13, 2019). The concerns residents have regarding loss of control will remain. The voting power will ultimately change as the voting rights are redistributed amongst at the school within the newly merged district. School choice could

potentially change from the way it is currently recognized. However, there are alternatives, and several of the merged districts have implemented more school choice options.

	Policy Alternatives			
	Rescind Act 46	Modification to Tax Structure		Act 46
		Decrease Allocation	Increase Allocation	
Local Control	3 *perceived*	3 *perceived*	3 *perceived*	1
Supervisory Union Control	5	5	5	3
K-6 School Choice	1	1	1	4 *has been implemented in many of the mergers*
Middle School Choice	4 *if currently in place*	4 *if currently in place*	4 *if currently in place*	4 *has been implemented in many of the mergers*
High School Choice	5	5	5	5
Education Equality	1	1	3	4
Economy of Scale	1	1	1	5
Decrease Taxes/Costs	1	1	1	4
Provide alternatives to decreasing population	1	1	2	5
Prevent School Closures	1	1	3	4

Scale of 1-5, 1 being the least likely, 5 being the most likely.

Though the mandated school mergers have created a significant amount of angst amongst many residents, it address more of the problems with the education system than the problems it is perceived to create. For instance, creating large districts creates educational equality by consistency in educational opportunities. The schools within the district will be able to share teachers for programs such as art and music, where they may not have been offered at the smaller individual school. This also draws higher quality teachers as the district will be able to offer full time opportunities for teachers as opposed to part time.

The large district will also be able to redistribute students amongst to the school to have similar class sizes within each of the schools. One concern with school mergers is that students may experience longer commute times, however with the merged districts many student may actually experience shorter commute times. Currently, students are restricted to going to a school by the town boundaries. However, they may be closer to a school in an adjacent town. A new merged district may give those students the opportunity to go to a closer school.

Additionally, having an increased student body by merging and redistributing students can prevent many schools for closing. In one of the mergers that occurred, several schools that were at risk of closing due to the decrease in student population were able to remain open by redistributing the student body. This particular district had several schools with multiple age classrooms, as there were not enough students to fill a class. Once the schools merged, they were able to create full classes by merging the students into one class (AOE anonymous, personal communication, February 15, 2019).

Finally, mandated school mergers will be able to take advantage of the economies of scale. The merged district will have more buying power than the individual schools. One example that is that there were 280 school districts arguing over what size tire to buy for the buses (Cate, personal communication, February 13, 2019). The merged districts will be able to share resources and save money. The goal of the potential solution to education inequality should not be save money, but it can be an added benefit. In fact, several of the merged districts are already seeing a cost savings (AOE anonymous, personal communication, February 15, 2019). This cost saving could ultimately result in lower taxes for all residents.

RECOMMENDATION

Ultimately, the policy alternative that address most of the policy problems related to public education in Vermont is Act 46. It has proven on several occasions that voluntary mergers will not work. School or residents are not taking the initiative on their own to merge to form cooperative groups. Mandating mergers will force the schools to make the changes needed. However, there will be apprehension and challenges, the positive changes will far out way the negatives. One observation to note from the schools that have already merged is that the districts with strong leaders are more successful and are able to overcome challenges more easily (AOE anonymous, personal communication, February 15, 2019).

In following through with Act 46, there would be a perceived decrease in local control. With the formation of the supervisory union in the 1900's most of the local towns lost the control of their schools to the supervisory unions. However, the supervisory unions would lose some control as they merge with other supervisory unions to form larger unions. Though this is a concern for many of the residents, they will continue to vote on board members and each town will have representation on the board.

School choice has also been a concern for many citizens, as they fear the mergers will limit the school choice options. Conversely, Act 46 has actually created additional opportunities for school choice. In K-6, there is currently no school choice options. However, some of the districts that have already merger have implemented school choice at the K-6 level within the district. Additionally, middle school and high school choice will not change as high school choice is a statewide program and middle school choice has remained an option in many of the merged districts.

Overall, merging many of the small local schools will be beneficial as they will be able to take advantage of the economies of scale that they would not have been able to do otherwise. One of the primary benefits of economies of scale include the potential for decrease in taxes. The Vermont tax rates are regularly a concern for many residents, and are at risk of continuously increasing without policy implementation. School mergers also provide the best solutions for the

decreasing student population, which in turn prevents school closures, without the added tax burden.

POLICY ANALYSIS

Education equality in Vermont has been a policy issue for almost 250 years. Looking at the policy problem through the lens of the Policy Feedback Theory (PFT) we can see that each change in policy surfaced new issues and challenges. In 1777, towns were required to build and pay for at least one school (Mathis, 2015). By 1870, many of the schools were falling into disrepair and the Vermont State Legislature passed a law requesting the school districts merge into town districts. As the policy was elective, no mergers resulted from the law. In 1890, the legislature passed the first education tax to address the disparities in education in the rural areas. This tax had some inadequacies, as the tax did not take into consideration the number of students enrolled in the schools, only the number of schools within a town. This tax did not encourage mergers; in fact, it dismayed towns from merging their schools to receive tax benefit. In response to the 1890 tax law, the legislature responded with a mandated merger in 1892, which required the towns to consolidate the schools within a town into one district. The 1892 mandated merger was the most successful legislation to that date, decreasing the number of districts from over 2,000 to under 300. After this policy, there would be no significant changes in the Vermont education structure for another 100 years.

In 1997, the legislature enacted Act 60, the modern statewide education property tax. This vastly changed the way Vermonters paid for schools. Instead of keeping the funds "local", within the town, the funds are disbursed amongst all the schools, so the rural and property poor towns can still provide adequate education for their children (Public Assets Inst., 2017). Act 60, was the legislatures response to the positive feedback of the school consolidation in 1892 and the negative feedback of the 1890 act of the implementation of the first school tax. Since the state had successfully consolidated a large number of the schools they needed to address the issue of the property tax distribution. Act 60 seemed to address the issues except the population of Vermonters in K-12 continued to decline.

To combat the continued decline in population the legislature responded by passing Act 153 in 2010, a voluntary merger. To learn from the failures of the 1870s voluntary merger, the legislature provided incentives to the schools that choose to merge, including, capital debt service, merger support grants, and consulting service reimbursements (H.153, 2012, p. 10). Additionally, the legislature structured the voluntary merger differently than the request of 1870. The mergers requires all the schools within the supervisory union to vote in favor of the merger in order for a RED to occur. When Act 153 only resulted in one merger, the legislature passed Act 156 in 2012, which was again a voluntary merger, but had different incentives and loosened the requirements. Act 156, allowed the supervisory unions who voted in favor of the mergers to form a MUD, which excluded the supervisory unions that did not vote in favor of the merger. Unfortunately, the changes to the voluntary merger acts were not enough and again resulted in only one MUD.

As a result of two failed voluntary mergers, the legislature passed Act 46 in 2016, which removed the incentives and voluntary aspect of the previous acts. Act 46 was driven by the positive

Policy	Positive Feedback	Negative Feedback	Response
1777 mandate for town schools	Citizens were all provided with the opportunity to receive education within their own community	By the 1870s towns struggled to maintain schools, school were falling into disrepair	1870 voluntary school merger
1870 **voluntary** school merger		No mergers occurred	
1890 first statewide education tax	"property poor" communities received additional funding to help maintain schools.	based on number of schools - discouraged mergers and was not an equitable tax solution	1892 mandated single town districts
1892 **mandated** single town districts	decreased districts from >2,000 to <300	many schools closed	
1997, Act 60, current statewide education tax structure	distributed funds to the rural, "property poor" towns	education funds were not kept local	
2010, Act 153, voluntary school merger	monetary incentives provided to support mergers	1 RED (Regional Education District)	2012, Act 156
2012, Act 156, voluntary school merger	monetary incentives provided to support mergers	1 MUD (Modified Unified union school District)	2016, Act 46
2016, Act 46, mandated school merger			

feedback from the 1892 mandatory merger that successfully consolidated over 2,000 districts into less than 300, as well as the negative feedback from the two failed voluntary mergers from 2010 to 2012. As noted by Suzanne Mettler and Mallory Sorelle in regards to Policy Feedback Theory, "policies, once established, may affect future governance: they may shape the policy alternatives that lawmakers select, the type of administrative arrangements assigned to new policies, and even the parameters - and limits - of government action" (2018, p. 109). Act 46 drastically extended the parameters of government action as it granted the Agency of Education the authority and responsibility of approving the mergers decided upon by the supervisory unions and determining the most appropriate mergers for the towns that did not merge on their own accord.

In the case of school mergers, the legislature took an incremental approach, adjusting the policy and incentives every few years until finally mandating the mergers via Act 46. The incentives that the legislature provide included grants for consulting services to assist with planning the mergers. These resources were provided to assist the supervisory unions with the costs of the potential mergers. "In addition to resources, the visibility of the costs and benefits flowing from the public policy can shape the likelihood that groups will coalesce around it" (Mettler & Sorelle, 2018, p. 112). Interest groups such as the Vermont School Board Association (VSBA), Vermont Superintendents Association (VSA), Vermont School Board Insurance Trust (VSBIT), and the Vermont-National Education Association (Vermont-NEA) recognized the cost associated with

potential merger and took active roles in the school merger process. Many of the school boards and administrators recognized that mergers was an inevitable process and felt that the incentives and resources provided in Act 153 and Act 156 offset the cost. However, there was not sufficient public support for the mergers. Once Act 46 was passed and the mergers were mandated the public opposing the mergers joined forces with the school boards forming larger interest groups. Suzanne Mettler and Mallory Sorelle state, "public policies are also known to affect what might be considered active citizenship, or people's degree of involvement in politics or other forms of civic engagement" (2018, p. 117). With the mandated school mergers, the engagement of citizens increased to resist the mergers, resulting in a joint lawsuit against the legislature. VSBA also made several requests to delay the mergers. However, the lawsuit and the requests for extensions have all been denied. The legislature continues to push the mandated mergers forward. Nevertheless, the Agency of Education as developed individualized plans for the proposed merged districts taking into consideration the feedback of the supervisory unions.

With the implementation of Act 46, the consolidation of the school districts throughout the state of Vermont, and poor expectations for the Vermont economy, one thing that may become a reality is that it may be more cost effective to close some of the smaller schools and merge the students into other schools. In closing the schools and integrating the students into other schools, one thing to take into consideration is the impact large school have on education. A 2005 study by Christopher Berry & Martin West states, "we find evidence that students from states with smaller schools obtained higher returns to education and completed more years of schooling" (p.29). Given the potential for a decrease in the quality of education as a result of school consolidation, future policy may include restrictions on class sizes or even more standardized requirement for schools.

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Introduction and Statement of Need

The Town of Cambridge, Vermont (Cambridge) is a rural community in north-central Vermont that has many of the same struggles as other rural communities. One of the issues that Cambridge struggles with is a lack of infrastructure, specifically broadband internet access. According to the 2017 report *Defining Broadband: Minimum Threshold Speeds and Broadband Policy* from the Congressional Research Service, the FCC increased the minimum benchmark for home broadband access speeds to 25 mbps/3 Mbps (download/upload) in 2015. As of the December 31, 2018 report *Broadband Availability* by the State of Vermont, Department of Public Service, only 34% of locations in Cambridge, meet this minimum standard. Additionally, 0% of locations in Cambridge are provided service with broadband access of 100 Mbps/100 Mbps or better. In comparison, 99% of locations in Burlington and 94% of locations in Chittenden County meet the minimum standard of broadband access.

Town	Buildings	100/100 or better	%	25/3 or better	%	Underserved	%
Cambridge	1,672	-	0%	577	35%	1,095	65%
Fletcher	628	-	0%	-	0%	628	100%
Fairfax	1,730	-	0%	732	42%	998	58%
Waterville	336	-	0%	-	0%	336	100%
Total	4,366	-	0%	1,309	30%	3,057	70%

	Buildings	100/100 or better	%	25/3 or better	%	Underserved	%
Burlington	11,615	10,574	91%	11,585	100%	30	0%
Chittenden County	56,836	11,672	21%	53,234	94%	3,602	6%
Vermont	303,835	41,631	14%	223,035	73%	80,800	27%

The limited accesses to minimum broadband internet service has several impacts on the community including limiting the number of business that are able to operate in the community, which results in many businesses leaving and no new businesses coming in. Additionally, the lack of access can create a disparity in opportunities including education and availability to job markets. Furthermore, residents of Cambridge are limited in their ability to work remotely which has a downstream effect on the carbon footprint, an increase in commuter traffic as most residents work outside the community, and more wear on the local infrastructure such as roads and bridges.

Cambridge Rescue has capacity within its building to provide space for local residents and businesses to operate a co-working space. Creating a co-working space would provide a short-term solution to the lack of access to broadband services within the community. Additionally, co-working spaces provide the opportunity for professionals to network, share ideas, and form collaborative groups. Furthermore, if Cambridge Rescue was able to charge a membership fee for the use of the space and services provided the income could offset other costs ultimately decreasing the funding needed from the town tax appropriation.

The focus for this phase of the project and the need for funds is to determine if the opening a co-working space at the Cambridge Rescue building is a feasible project. Volunteers from Cambridge Rescue will request the assistance of local business owners, professionals, and town officials to create a task force to conduct outreach and research. This task force will hold community meetings and conduct surveys within the local communities and potentially the surrounding communities. The task force will also purchase software to help analyze the data collected to determine the exact needs, wants, and habits of the community, and if this project would fit these needs. Upon the completion of the feasibility study, the task force will present a final recommendation to the Select Board including a proposed operating budget.

Objectives

The goal of Cambridge Rescue is to determine if a co-working space within the center of the community will be able to meet the needs of the community members, or determine if there are specific groups within the community that can be targeted through a more direct design and implementation. A co-working space will increase collaboration within the community and build relationships between local business owners and working professionals within the community. Additionally the co-working space can be used for local residents to have access to broadband internet that is not accessible in many other locations within the community.

The space that Cambridge Rescue currently has available has a maximum capacity of 46 occupants. However, dependent on the needs of the community and what equipment is required, Cambridge Rescue would like a membership commitment of 20 individuals using the space on a regular basis.

Throughout the process the task force will be using a variety of outreach methods, such as the postcard mailers, online surveys, social media (community Facebook pages and Front Porch Forum), as well as in person meetings, which will assist in reaching the majority of the residents.

The result of this space would have positive impacts on the environment, local infrastructure, and community interactions. Having a local space where community members can work remotely will ultimately decrease their carbon footprint and their effect on the local infrastructure by reducing the amount of commuting that is required. Additionally, a co-working space provides users the opportunity to network, share ideas, and form collaborative groups, which results in stronger community bonds.

The research is expected to be completed within nine months at which time the task force will be able to determine if there is enough residents that are willing to make a commitment to a regular membership. If the commitment goal has been reached then the task force will have a month to complete a feasibility plan and budget to present to the Select Board.

Background

The Town of Cambridge currently only has 34% of locations that meet the minimum threshold for broadband access as set by the FCC (State of Vermont, 2018). Additionally, when looking at the surrounding communities that Cambridge Rescue provides mutual aid support to, there is an even greater amount of need. The Town of Fairfax currently only has 42% of locations that meet the minimum threshold whereas Fletcher and Waterville have 0%. This leaves 3,057 of 4,366 locations in these four communities without access to the minimum threshold for residential broadband internet access.

According to Global Workplace Analytics, since 2005 the work-at-home population has grown by 159%. Currently 3.4% of the workforce, approximately 4.7 million employees work from home at least half the time (Global Workplace Analytics). More companies are offering flexible workplace options and 50% of the US workforce holds a job that is compatible with at least partial telework and 80%-90% of the US workforce says they would like to telework (Global Workplace Analytics). In addition to the growing workforce population willing and able to telework, the State of Vermont has also provided incentives to individuals who have the ability to telework to relocate to Vermont and continue to work for their current employers. This could potentially increase the population of remote workers in rural locations such as Cambridge.

Currently there are no co-working spaces in Lamoille or Franklin counties of Vermont. In looking at potential locations for a co-working space there are a few potential spaces that would accommodate a small group, but the space would have to be leased from the building owner whereas Cambridge Rescue's building is owned by the Town of Cambridge and has a large meeting space that is currently underutilized.

Nature of the project

Cambridge Rescue has two volunteers that will oversee the project. Tiffany Barker Cook, who has been a resident of Cambridge for eleven years. Additionally, Tiffany has been a member of Cambridge Rescue for six years and held several positions on the Board of Directors for five years. Lisa Hill is currently the Chief of Service for Cambridge Rescue and has held this position for 5 years. Though, Lisa is not a resident of Cambridge she has been a full-time member of Cambridge Rescue for 10 years and has developed many relationships within the community during this time. The positions that Tiffany and Lisa hold on Cambridge Rescue provides them the opportunity to meet and work with many local professionals and officials that will benefit this project.

Tiffany and Lisa will work with local business owners, working professionals, and town officials to comprise a task force of approximately 10 individuals to develop a survey to send out to the residents of Cambridge as well as surrounding communities based on their working habits and needs. Responses will be accepted via the postage paid post card provided in the mailing or through the online software program via the code provided on the mailing. Once the first round of surveys are completed, the task force will review the data and set up open table discussions for those that expressed interest in the program to provide more detailed information regarding their needs, habits, and interest. Upon completion of all of the open table discussions, the task force will compile the data to narrow down the focus of the project as needed. At this point, a second survey will be sent with more direct focus to those that expressed interest in the program to determine work habits, space requirements, price points for different rental or membership options, and general needs. Finally, all of the results will be compiled and analyzed to determine if the project is feasible and a plan will be developed for proposal to the Select Board.

Timeline of activities

	2020											
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Establish task force	■											
Develop and mail surveys	■	■										
Survey response period			■									
Analyze survey results				■								
Host open table discussions					■	■						
Analyze discussion results, narrow down focus, & develop focused survey						■	■					
Survey response period								■				
Analyze survey results									■			
Develop a feasibility plan										■		

The expectation is to gather the task force by the end of January, at which point they will immediately start developing the survey to have printed as well as purchasing the software to accept surveys electronically and to conduct the analysis. The surveys will be sent out by the end of February and will have a 30 day response window. The task force will be entering the survey results into the software to be included with any responses received electronically. After the 30 day response window the task force will analyze the data and start compiling a list if individuals to invite to the open table discussions. The open table discussions will be held at least once a week dependent on need, and there is five weeks currently allocated for the open table discussions. During the last few weeks of the open table discussions, the task force will start compiling the information obtained during the discussions. Once the discussions are completed, the information will be analyzed and the focus of the project will be narrowed as needed. By the end of July, the task force will send out a second round of surveys with more focused questions, which will also have a 30 day response window. After the 30 day response window the task force will analyze the data and develop a plan to present to Cambridge Rescue and the Town of Cambridge by the end of October to be included in the FY21 budget and Town Meeting presentation.

Evaluation

This project will be evaluated on the amount of community involvement that is received through the surveys and open table discussions. Of the initial 4,366 surveys that are being sent it is the goal to receive a 25% response rate which is 1,092 responses. Of those that responded it is expected that approximately a third (364) will express interest in the program, however only a quarter (273) will actually respond to attend a round table discussion.

Cambridge Rescue would like to get 20 individuals that are willing to commit to a membership to a co-working space. However, the ultimate goal of this phase of the project is to determine if a co-working space will truly meet the needs of the community as a short-term solution to the lack of broadband service access. If it is determined that a co-working space is not a feasible solution it is the hope of Cambridge Rescue that they have at least opened up the community to alternative or more creative solutions to the lack of broadband service access.

Impacts

This project will help shape the discussion surrounding the limitations of broadband access in rural communities. It will set an example for how local communities can collaborate and formulate creative alternative solutions to infrastructure problems such as broadband internet access. Within the local community, it will establish and strengthen relationships with local business owners, working professionals, and town officials throughout the process.

If the results of the project determine that it is feasible to for Cambridge Rescue to create a co-working space within its building, this space will serve as a location where individuals can network and collaborate, ultimately strengthening the ties within the community. Cambridge Rescue will also be able to offset some of its operating cost through membership fees, which will decrease the amount of need from the Town of Cambridge tax appropriation.

Budget and budget justification

The budget for this project is mainly allocated to the cost of printing and mailing surveys. Given the number of surveys that will be sent within Cambridge and the surrounding communities it is estimated that the total cost of printing, mailing, and return postage will be $4,000.00. This project budget also includes the cost of online survey software, which has an annual fee of $500.00. The balance of the budget of $500.00 is allocated to indirect costs.

Printing & Postage		
First Round Survey	$	2,750.00
Second Round Survey	$	1,250.00
Information Tech		
Online Survey Software (annual fee)	$	500.00
Indirect Cost	$	500.00
	$	**5,000.00**

Cambridge Rescue will be opening up its building for meeting space for the task force as well as for the open table discussions. Not only is Cambridge Rescue allowing the use of this space for the benefit of the project, but it is also the same space that would be converted to the co-working space if it were determined feasible. All members of the task force will be volunteers and donate their time as needed. This will be made clear during the intial phase of recruiting volunteers for the task force on this project.

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Tiffany Barker Cook
PA395 – Women in Leadership
Personal Leadership Plan
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Leadership Vision

On the first day of our in person class I defined leadership as the ability to empower and influence others, to foster ideas for a common goal, and to provide guidance and encouragement to promote positive change. This definition continues to hold true and will be my inspiration on my leadership journey. Throughout all of our readings, videos, and podcasts, many different women inspired me. There was one woman in particular that really spoke to me, and that was Brene Breen. Brene Breen spoke a lot about qualities and skills that related to emotional intelligence. Emotional intelligence is an important skill in being a leader as it allows you to embrace vulnerability, build shame resilience, and to be empathetic. All of these skills are important to being a good leader and I believe that this concept correlates with what Tina Opie discussed in *Lead with Authenticity*. Tina spoke about being the best you, bringing your whole self, along with the need to have empathy. These emotional skills are important to being a good leader, as a leader needs to be the best person they can be to bring out the best in others and expect the best of others. All of these skills are part of an individual's ability to be authentic. If you are self-aware and able to self-reflect, you can develop good emotional intelligence, ultimately bringing your whole self to your leadership position, which shows through in your authenticity.

Emotional intelligence and authenticity have been important in my current role with a team member who has been struggling as some of her task have changed. I recently had a conversation with her and we are working on a plan to determine what areas are her weakness and which ones are her strengths. We are also going to determine how she learns best and I will seek out professional development opportunities that will benefit her. I know this conversation was hard for her and though she was upset, she was comforted by knowing that I am willing to do everything I can to help her succeed as long as she is willing to put in the work as well.

Another emotion related skill that Brene Breen noted was to practice gratitude. This skill aligns with Deb Markowitz's recommendation of strategic graciousness. I recently had the opportunity to practice this in my current position. I had a team member make a recommendation for a change in process. When we had the team meeting to discuss the

change and plan to implement it, I made sure so say Team Member A had a great idea... The team member that made the recommendation was very pleased with this and received kudos from the other team members.

Three other traits that go hand in hand are to show up, be willing to take risks, and do not have any regrets. These traits are important because you have to show up and be willing to lead if you want to be a leader. Sometimes just showing up can mean taking a risk, and if you are not willing to take the risk making the calculated decision based on if you will regret not taking the risk.

Lindsey Donovan, whom I look up to as a mentor and who has been a great sponsor since coming to work at UVM, recently recommended me for a position that would be a significant step up from the role that I currently have. This position is different from what I have done in the past and different from where I saw myself going. It also comes with great opportunity to broaden my experience, knowledge, and professional relationships. After my conversation interviewing Kerry Castano, and hearing so many other interviewees' advice to take risks, I knew I had to step up to the plate.

This was the first time I ever felt nervous in an interview. I know and have worked with the entire hiring committee in one capacity or another, so it was the fear of what I did not know that made me nervous. As I think back, applying and interviewing for this position was not a risk, but it took me out of my comfort zone. The real risk for me was what was what could have be asked of me that I possibly did not know, as I felt I did not have all the qualification and/or experience that the hiring manager was looking for.

This leads to another set of advice from Brene Breen, let go of perfectionism. This was also addressed by Rebecca Shambaugh. Rebecca discussed the need to let go of perfectionism, if you make a mistake, forgive yourself, and move on. This is important to remember as leader, not only for yourself, but also for those you lead. As someone who sets very high expectations for myself I have a tendency to set high expectations for others, which if outside the individual's capacity it can lead to frustration for both myself and the other individual who feels they are not meeting, or cannot meet my expectation.

The alternative to taking risks is to set boundaries. This is a very important quality in leaders, as there has to be a line drawn of how risky you are willing to be and how far out of your comfort zone, you are willing to go. Setting boundaries also prepares you for challenges in the future, such as your moral or ethical boundaries. For instance if you are a leader in a large corporation where you have to make a decision on profits versus potentially harming the environment, you have to know what your boundaries are. You have to set yourself up as a leader who is worthy of leading. At this point in my career, the only boundary issue that I have faced is potentially taking a position working for an

individual that I do not particularly like. One of my colleagues expressed concerns that I was not being true to who I was by potentially working for this individual. During my interview with Kerry Castano, Kerry pointed out that you do not always have to like whom you work with, to have a good working relationship. Part of being a good leader is being able to put your differences aside to reach a common objective.

Leadership Strengths, Barriers and Opportunities

According to the Strength Finder, my top four strengths are perseverance, appreciation of beauty & excellence, fairness, and love. On the other hand, my bottom four strengths are humility, love of learning, self-regulation, and spirituality. I do feel that these strengths adequately describe part of whom I am. I also feel that the results of the Harvard Business Review, What is Your Leadership Style? was accurate is many areas, though I feel I was a combination of the three types of leadership styles and did not fit solely into one style.

When I first received the results of the Strength Finder, I was not surprised to see perseverance high on my list of strengths. I am very committed to my work and I like to see tasks through to completion. I am very thorough with my work and set very high expectations. On the other hand, I was a little surprised that appreciation of beauty and excellence was so high, but I focused too much on the appreciation of beauty. I am not someone who pays close attention to fashion and I only started wearing makeup because my sister told me I had to with my new hairstyle. With that being said, I live in Vermont because I fell in love with natural beauty. I live high in the Green Mountains, a significant distance from my work because of this love of nature. The second part of this strength is the appreciation of excellence, which does make sense as I do have high standards and can be a bit of a perfectionist. This strength is also an opportunity for me. When I do make mistakes I have to forgive myself, learn from, and move past them. This is the same for the individuals that I lead. If they make a mistake or do not meet my expectations I have to be able to move past it, and not dwell on it.

Fairness and love were also not surprising to me. I try very hard to treat everyone equally and with respect. I do not intentionally discriminate against people, and if I recognize that a bias exists, I try to keep that knowledge at the forefront of my thoughts and make sure I do not act on that bias. I am also a very passionate person. I value my family and typically have a few close friendships versus a large number of casual friends. I do recognize that my passion can also be an opportunity by limiting my self-regulation. I often have to try much harder to take a few moments before reacting to a situation. For this reason, it was not an astonishment to see self- regulation low on my strength profile.

Self-regulation, along with humility and spirituality were not surprises for me. Spirituality has been a struggle for me recently as my husband and I have struggled to start a family, my brother in-law losing his battle with brain cancer, and my beloved K9 companion being diagnosed with bone cancer and leukemia. I grew up in a Christian family, and still believe in a higher power, but my relationship with that higher power has been challenged lately. I recently questioned God for giving me more than I can handle, which in turn made me question my abilities and how much I was able to handle. I reacted to this by putting more on my plate. I signed up to take continuing education classes and I applied for graduate school. I had to prove to myself that I was able to handle this. I believe that I will be able to regain my spirituality with some time and work.

I never considered myself as lacking humility, but I am confident in my abilities and have recently had to document all of my accomplishments through the recruiting process for a new position. Humility will be an important skill for me as I pursue a more significant leadership role. As I think about my struggle with leadership and people feeling that I am conceded or a know-it-all, it makes sense that humility being so low on my list of strengths. Therefore, I am working on improving this skill through strategic graciousness, by recognizing and praising others for their accomplishments.

Love of Learning was very shocking for me as I have been taking classes for the past five years in the pursuit of an advanced degree, and trying to determine what that advanced degree was going to be. I have always considered myself a lifelong learner, even if just to prevent Alzheimer's disease. I strive to try new things and learn how to do something for myself versus having to ask someone else to do it. This is evident in my husband and me building our own home and renovating an investment property twice. There was many things that we had to learn how to do, some of which we enjoyed and others we did not. There was also things that we were good at and things that we were not good at, but we have been able to learn from each other and what skills each other have that complement our own.

The Harvard Business Review, What is Your Leadership Style? provided very good insight into my personality and my leadership styles. The three leadership styles that I attributed to myself were composer, provider, and harmonizer, in that order. I feel each of these had aspects that apply to me. The awareness of what my potential blind spots, struggles, and areas where I can thrive will be beneficial on my path to leadership.

As a composer, I do recognize that I can be a bit controlling and take the lead more in team situations. I have had to learn how to let others take the lead and contribute. I am still working on soliciting feedback from others. One way I am doing this is by requiring each member of my team to come up with at least one process improvement each year. Another area of potential for me is communicating with patience and clarity. The exact description from the Harvard Business Review is;

"Because much of your thinking and reasoning is internal, what is obvious to you (because you've already worked it out) may be brand-new or confusing to others. So you may need to backtrack and guide others through your thought process as you convey your ideas. Try to be patient and openly field questions; being abrupt might convey to others that you doubt their intelligence if they don't immediately get what you're saying."

The above statement I can relate to as it is something that I struggle with regularly. People often feel that I am being condescending when I explain and re-explain myself. I have been working on changing the way I explain things or asking others to tell me how they understand something.

Being a composer is helpful in situations where there are many collaborators and no one commits to a plan. This is beneficial when there are time constraints and a project must be completed quickly. I also am a very good problem solver; I can analyze and respond quickly when necessary. I have been able to make this skill a team activity by going through my thought process with others that have stake in the project to make sure that I am addressing all the areas of impact. By doing this, I am also making the other members of the team feel included and that I value their feedback.

My first supplemental style of being a provider has many similarities to that of a composer. As a provider, I am confident in my abilities and I prefer leading from the front. Also similar to a composer I struggle with the emotional and interpersonal skills associated with being a good leader. Though I am "deeply loyal and committed to [my] colleagues", I struggle with personal relationships. One thing that is recommended, is to work on finding opportunities to share more about myself so my colleagues can get to know me better. This is a struggle for me, as I typically do not like to share personal details of my life in professional environments. Another important thing to note is that though my compassion and listening skills will allow my colleagues to feel heard, I need to follow through with action. One way I can do this is when my team members do make a process improvement recommendation I not only need to listen to their idea but work with them to implement the recommendation.

Many of my weaknesses are related to personal connections and being less of a collaborator than what women are expected to be. I struggle with the double bind because my leadership traits are more stereotypically masculine then feminine. As I strive to be a more successful or impactful leader I have to recognize my confidence and competence will decrease my likeability. I need to continue to work on my personal communication and emotional intelligence as well as practice strategic graciousness.

One thing that is not a skill or trait, but could be a barrier for me is family obligations. Though I currently do not have children of my own this is something that my spouse and I strive towards. My spouse is supportive and willing to take on any responsibility needed, but there is limitations to what he can do. For instance, his work is not as flexible as mine is, therefore, I will most likely be the one taking time off when necessary. Prior to and early on in this class I struggled with taking actions that would benefit my career such as applying for jobs because I was made to feel concerned about the difficulty of learning a new job and starting a family at the same time. This fear was exacerbated when I decided to start taking classes again in pursuit of my master's degree. However, since starting this class I have applied for two position and thus far have interviewed for one. As Sheryl Sandberg noted, this is not something I need to worry about until it is necessary.

Mission Statement

My core mission statement is; to be the best person I can be for family, friends, and myself so that I can inspire others towards positive change in themselves.

I felt there was two key parts to my mission statement, one being professional and the other being personal, so I defined a more specific mission statement for each.

My professional mission statement is; to complete my master's degree and advance my career to where I can be a more influential leader through my knowledge, strength, and self-awareness.

My personal mission statement is; to build and strengthen my family by being a stable and loving aunt and a supportive and compassionate daughter, sister, and wife.

Action Plan

Each day I will strive to achieve my mission by first being the best person I can be. I will be honest, authentic, and bring my whole self to the table. I will develop my self-awareness and self-regulation by spending more time in nature and through self-reflection. I will continue to learn, build, and enhance my knowledge and skillset, develop mutually beneficial connections, and act on opportunities that will assist me in accomplishing my

mission. I will not be afraid to take risks and to continuously challenge myself and my abilities. I will find ways to assist others in pursuit of their own missions.

As I strive to be a more influential leader, one thing that I have started to meet this goal is to obtain my master's degrees. Continued learning through formal education or through life experience is important. I plan to complete my master's degree within three years. During this time, I will also seek and pursue professional and personal development opportunities that are available. One of the many benefits to working in higher education is the availability of learning opportunities. In the Public Administration degree program there is an internship requirement. I will use my internship as an opportunity to learn more about an area of higher education administration that I am not familiar, or have little exposer to.

A second goal is to create, develop, and foster mutually beneficial relationships. My hope is to keep in communication with Kerry Castano as her advice was very inspiring to me. I also hope that I can work with her as part of my internship. My expectation is that my internship will assist me in meeting new people outside of my current role at UVM. Developing mutually beneficial professional relationships will be an important task. If I am able to show others my value in a professional relationship, I can develop more supporters, advocates, and sponsors. In addition to my internship, I plan to make more of an effort to attend work functions such as our division picnic and staff related events. I will also make more of an effort to socialize with people after meetings instead of rushing back to my office, or onto the next meeting.

Having support or sponsors is very beneficial in one's success. This has been a common theme from the advice provided by the leaders that were interviewed as well as the readings and videos that we had throughout our course. I have been very fortunate to have many people in my life that have supported and encouraged me. My parents have been consistent in their support and constructive feedback throughout my entire life. At a young age my parents were my primary support system, they encouraged me to do anything I wanted and to be anything I wanted to be. As I got older, I had several teachers, coaches, professors, and friends that had a significant impact on my life.

At this current point in my life, I am very fortunate to have a spouse that supports and encourages me endlessly. He has faith that I can do anything that I put my mind to, and do it well. He is willing to do his part to go above and beyond to help me achieve my goals. In addition to my spouse I am very lucky to have a senior level colleague who has been very supportive, encouraging, and an advocate for me throughout my career here at UVM. Lindsey Donovan, the Assistant Controller had helped me by writing letters of reference, providing feedback and support, and even putting my name in the hat for positions that I did not feel I had enough qualifications to pursue. He took the time to

encourage me to apply and help me see that I would be an asset to the department, division, and university in that position.

Having been lucky enough to receive the support and encouragement that I have, I want to also provide that support and encouragement to others. I have been working with each member of my team to find personal and professional development opportunities that will specifically meet a distinct need that that individual has. Prior to this, I was requiring them to seek out professional development and I did not specify what type of professional development it had to be. With this change I can help my team develop skills that they may be lacking or build knowledge in areas that they find interesting.

In addition to assisting my team with personal and professional development, I want to be more of a sponsor for them rather than just a supporter. I have been a reference for two of my prior team members, but I want to be able to do more for them. If I see or hear of any opportunities, I will be advocate for them by reaching out to the hiring manager and encouraging them to pursue said opportunity.

I recently told my team that I measure my success in my current positon by them being able to continue day-to-day operations as if I was not here. To me this means that they have the training and ability needed to do their jobs, therefore I have do my job. By assisting my team members to achieve their goals, I will be closer to achieving my goals of being a better person and leader.

It is important for me to fulfill my leadership aspirations at UVM because I have a lot of ideas that could help improve this organization not only from a fiscal standpoint but these ideas could also improve the work environment for many individuals as well. My unique experiences and background provide me the ability to look at things differently than many of the individuals that are currently in leadership positions. I am an intelligent, organized, committed, and caring employee therefore; I deserve a place at the table.

Tiffany Barker Cook
PA395 – Women in Leadership
Leadership Case Study
7 July 2018

Interview Summary

When thinking about whom I wanted to choose as a leader I wanted someone who worked in a similar field as me that I could relate. I choose to interview Kerry Castano, the Assistant Provost and Chief of Staff here at the University of Vermont. I choose Kerry because she is a graduate of UVM and has worked at UVM for over thirty years and has climbed through the ranks from a temporary employee, to the Assistant Dean of the College of Arts and Sciences, now to her current role as the Assistant Provost and Chief of Staff. Part of her responsibilities include executive support of the academic budget and policy and compliance. In my current position at UVM, I work with Kerry in regards to policy and compliance and appreciate her experience in finance and accounting.

Kerry is very modest about her position and does not consider herself a significant leader. She did not necessarily attribute her success to luck, but she did say she was in the right place at the right time. Her first job out of college was a temporary part time position here at UVM in an administrative role. When the individual she reported to suddenly left, she was asked to stay longer than her temporary assignment because she was the only one that knew what to do. Eventually the position turned into a full time position in the role she previously supported.

Kerry mentioned that she did experience a few barriers in her thirty years at UVM. First, she stated that when she started she was very young in a key financial role. She overcame this barrier by working hard and knowing more than others did. She also stated that she had to be prepared, competent, and helpful. The second thing that Kerry mentioned is that she has had the equivalent of a new supervisor every two years. Kerry mentioned that a new Dean or Provost might not like her for whatever reason; therefore, they could just replace her. This reminded me of many of the appointed positons in local, state, and federal government. Kerry feels that she has succeed because she has been a source of consistency and knowledge. She said that you have to be so competent and work to be irreplaceable. Kerry stated that she has had to learn to be able to work with anyone. Sometimes this can be hard, but you do not have to be friends with someone to have an effective working relationship.

Kerry showed her modesty again when talking about her authority. She said that she never really thought of it as being a position of authority, more as having a lot of responsibility. She has learned that people do view her and the position as a position of authority and she has to be sensitive to that. Kerry feels that she has a more collaborative method towards her authority and shows people that she knows what she is talking about and is willing to work just as hard as others to accomplish the objective.

As Kerry and I were talking about the advice she would give to me or other women who strive to be leaders, she brought up how she originally was not going to come back to work after her first child was born. Her supervisor at the time felt she was so invaluable that he was willing to do whatever was needed for her to stay. She became one of the first people here at UVM to have a flexible work schedule. She actually never took a true maternity leave as a courier service delivered and picked up a box of paperwork at her door every day.

Now that Kerry's children are older she thinks more about what she has done to get where she is and what she could have done to advance further. Her advice from her experience is "don't engineer your own glass ceiling". What she means by this is to make sure you are in an organization where you can succeed. For example if the organization you are requires executives to hold a PhD's and you do not have an interest in obtaining a PhD then that organization may not be the best fit for you. Along with this Kerry expressed that you have to be willing to take risks, you cannot be afraid to move around and diversify yourself.

Research

My conversation with Kerry made me interested in how many women were in a similar role as hers. I was not able to find data on assistant provosts, but was able to locate a very interesting study on the pathway to leadership in academia. In 2015 the Association of American Colleges and Universities (AACU) surveyed deans from the Council of Colleges of Arts and Sciences regarding their pathway to deanship, anticipated next career steps, and long-term career aspirations. This was in response to a 2009 article that stated the underrepresentation of women in academic administration was "no longer a pipeline issue" (Dominici, Fried, and Zeger, 2009). According to Bryan J. Cook from The American Council on Education, from 1986 to 2016 the number of women college and university presidents jumped from 10 percent to 30 percent, a 200 percent increase. Though this is a significant increase and is better than the 5 percent of women that make up Fortune 500 CEOs, it is still a large imbalance.

The results of the survey found that, "there was surprisingly little difference among the deans as a whole demographically: they are largely white and overwhelmingly live with a partner and with children under eighteen" (Behr and Schneider, 2015). "At the same time, women are more likely than men to be single, and a larger percentage of women than men are parents, although fewer women than men have children under eighteen living at home. Further, that women reported being more likely to have partners who made career accommodations in support of the woman's career and to have made accommodations themselves in support of a partner's career hints at women having to navigate more complex paths to administrative positions than their male counterparts" (Behr and Schneider, 2015).

The differences occurred when the deans were asked about their aspirations, 37 percent of female deans and 39 percent of male deans indicated there desire to be a provost as their next step in their career (Behr and Schneider, 2015). In terms of their long-term career goals, "The percentage of men and women articulating the desire to become a provost or chief academic officer over the long term was fairly similar: twenty-five percent of women and 22 percent of men. However,

women were much less likely to conceive of themselves as a president at some time in the future." Only 13 percent of women anticipated becoming a president, compared with 30 percent of men" (Behr and Schneider, 2015).

A few other key points from this survey is that. "They (women) were more likely than men to have been recruited rather than to have volunteered" (Behr and Schneider, 2015). In addition, "...women were much less likely than men to be willing to relocate geographically, with 59 percent of women and only 41 percent of men indicating agreement or strong agreement with the statement, "When thinking of my next career step, I am committed to staying in my current geographical location."" (Behr and Schneider, 2015).

I believe the results of this survey show how prevalent the leadership ambition gap is in academia, and how important it is for women to be represented in leadership. It also showed how women of color are extensively more underrepresented. The AACU concluded with, 'these findings reinforce the importance of mentorship and sponsorship for both identifying and supporting women who will assume leadership roles in the academy."

Overview

I really enjoyed my conversation with Kerry as her advice was very relative to what is currently going on in my professional life. Many of the items Kerry and I discussed were parallel to what we have learned throughout the course and to what other members of the class noted about their interviewees. Some of the common themes were not recognizing one's success and authority and not recognizing the barriers and resistance, or the barriers that were recognized. There was also commonalities with many of the recommendations that were provided, which also correlated with the coursework.

Kerry was what I considered very modest about her achievement and authority. Sheryl Sandberg noted that women are less likely to attribute their success to their own skills and more to hard work and getting lucky. This was evident in her comment that she was in the right place at the right time and her multiple comments about being a hard worker and having to prove that she could do things better and knew more than others know. Rebecca Shambaugh also touched on this as she talked about perfectionism being a sticky floor for many women.

As Kerry talked about having to be sensitive to the fact the others look at her as having authority, this related to the video by Rebecca Shambaugh where she noted that you have to make your words count, and to know your audience. This is very important in Kerry's role as she as to work with both administrators and academics.

There was not a lot of discussion regarding the double bind in Kerry's situation, but it was interesting to see how she made positive changes that impacted others by being one of, if not the first person to have a flexible schedule here at UVM. I also found when talking to other people they felt that she received special treatment because she was able to have the flexible schedule. This was important to Kerry as she had a new family and wanted to be involved. Like many women, she struggled with the balance between raising a family and her career.

A commonality between Kerry and many of the other interviewees was they expressed barriers or resistance more related to her age than her gender. I found it interesting that many of these women did not recognize their gender as a barrier, or recognize resistance to their leadership due to their gender. This was something I felt personally, as I am the youngest person in a female dominated department.

Family was also a common theme through many of the interviewees, as it was in our readings. As Kerry did, many women take the role of primary care giver. Kerry explained this as engineering her career around her family, which she was able to do via a flex schedule. How Kerry made parenting and her career work was very important, as many women do not have the ability to have a flexible schedule.

One piece of advice that was provided by almost all of the interviewees and the women in our readings was to take risks. Oprah Winfrey, Michelle Obama, and Brene Breen addressed taking risk or not being afraid to fail in the videos we watched. What Kerry did say that was different from many others and not part of the reading was "don't engineer your own glass ceiling". Though this was not mentioned I believe it encompasses many other pieces of advice such as "understanding the next right move" from Oprah Winfrey, "choose your own path" from Michelle Obama, and "show up" from Brene Breen.

Overall, my conversation with Kerry, the interviews that many of the others in class had, and our coursework has had many similarities. The pathways that many of these women described was related to hard work and being in the right place, which is parallel to what Sheryl Sandberg said in *Lean In*. There was very similar barriers and resistance, and many of these women did not think of themselves as authoritative, more as communal, which we read was a common trait amongst women leaders. Lastly, the research that I found on women leaders in academia solidifies the readings from Rhode and Kellerman on the importance of mentorship and sponsorship opportunities for women.

Sources

Behr, Michelle & Schneider, Jennifer. *Gender and the Ladder to the Deanship*. Association of American Colleges and Universities. https://www.aacu.org/diversitydemocracy/2015/spring/behr. 2015.

Cook, Bryan J., *The American College President Study: Key Findings and Takeaways*. American Council on Education. http://www.acenet.edu/the-presidency/columns-and-features/Pages/The-American-College-President-Study.aspx. 2012.

CAMBRIDGE **RESCUE**

MEMBERSHIP POLICY

Date Approved by Board of Directors:

POLICY STATEMENT

Eligibility for membership in Cambridge Rescue recognizes the unique function of an emergency squad, and consequently, the prospective members who uphold the purpose of the corporation are seriously considered. Any person between the ages of 15 and 18, may become eligible for consideration as a member of the Cadet Corp, by submitting an application to the Cadet Coordinator. Any person who has reached the age of 18 may become eligible for consideration as a member by completing an application and criminal record check and submitting them to the Chief.

Neither the membership process nor this policy shall create any right in any party to membership or continued membership, except for the right of fairness, reasonableness and good faith. Cambridge Rescue Squad, Inc. is an equal opportunity employer.

CLASSES OF MEMBERSHIP

Cambridge Rescue Squad has seven (7) classes of membership: Paid, Full-Time Volunteer, Part-Time Volunteer, Cadet, Student, Member in Training, and Auxiliary. Candidates shall designate the class of membership for which they are applying at the time of application.

Paid
Someone over the age of 18 that is employed by the Corporation, certified at an AEMT level or higher, or is currently an EMT and has the ability to obtain an AEMT certification within one year from date of hire. Paid positions will be filled by the Chief of Service.

Volunteer
Full-Time someone over the age of 18 that commits minimum of 48 hours per month. They must be certified at the EMR level or higher.

Part-Time someone over the age of 18 that commits minimum of 24 hours per month. They must be certified at the EMR level or higher.

Cadet
Someone between the ages of 15 and 18 that is an active member of the Cadet Corp.

Student
Someone over the age of 18 that is an actively pursuing licensure of EMR level or higher.

Member in Training
Someone over the age of 18 who is certified at the EMR level or higher who is on a probationary period not to exceed three (3) months.
1. The period of probation begins on the day of acceptance.

      a. The Chief shall evaluate and document any issues with the probationary member and a copy will be given to the probationary member and placed in their personal file.

      b. At the end of 3 months' probation, the Chief shall make a decision to:

           i. Take the member off probation

           ii. Keep said member on probation for another three (3) month period

           iii. Terminate the individual's membership.

Auxiliary

Someone who provides regular support to the corporation.

AMBULANCE CREW

To assure the safety of Cambridge Rescue Squad and the quality care of the community:

Cambridge Rescue Squad ambulance will be staffed with at least two licensed personnel. Crews will consist of driver, a crew chief, and when warranted a member in training, student, or observer. Approval must be received from Med control to use approved Cambridge Fire Department personnel as drivers in the event full crew is not available. All Cambridge Rescue Squad members will be Healthcare Provider CPR certified and not under the influence of any substances within the preceding 8 hours.

Drivers

a) Hold a current Healthcare Providers CPR card and

b) Have his/her motor vehicle recorded checked yearly and

c) Be at least 21 years of age

d) Have passed the driver training program

e) Approved by Cambridge Rescue Chief

Crew Chief

a) Hold at least an EMT certificate or higher and/or

b) Have completed the Crew Chief training program and/or

c) Been approved by the Chief

Observer

a) Have been approved by Chief

b) Only EMR certified or higher are allowed to do direct patient care.

LISENCURE

Cambridge Rescue Squad will provide monthly trainings to assist members with maintaining their license. One month each year will include a Healthcare Provider CPR recertification.

It is the responsibility of each member to ensure they attend the necessary training to maintain their National and Vermont State EMS license. The Cambridge Rescue Training Officer is available for assistance and guidance as needed.

Reimbursement

Cambridge Rescue Squad will provide tuition reimbursement for courses per the specifications below. The member shall successfully complete the course, and all of the required documentation to receive reimbursement.

1. Must have prior written authorization from the Chief
2. Half of the course fee will be reimbursed after six (6) months of service to Cambridge Rescue and the remainder will be reimbursed after 12 months of service to Cambridge Rescue.
3. To receive reimbursement a member must serve 1 year with Cambridge Rescue after completion of the course.

COMPENSATION

Paid Staff
a) Weeks begin on Sunday and end on Saturday.
b) Payroll is processed biweekly on Wednesday following the end of the pay period.
c) Payroll is processed via direct deposit.
d) Timesheets must be submitted as directed by bookkeeper by the by all full and part time staff by 7am every other Monday.
e) Pay rates are set by the Chief, with the exception of the Chief, whose rate is determine by the Board of Directors.
f) Paid Time Off (PTO)
    a. Full-time (36 hour work week)
        i. Less than five (5) years of service
            1. Accrue 72 hours/year at the beginning of the year (based on anniversary date)
        ii. Five (5) to fifteen (15) years of service
            1. Accrue 108 hours/year at the beginning of the year (based on anniversary date)
        iii. Greater than fifteen (15) years of service
            1. Accrue 144 hours/year at the beginning of the year (based on anniversary date)
        iv. Can cash out two (2) times per year (12 month period) at a max of 48 hours each time
            1. Must maintain a minimum amount of 36 hours
        v. Max accrual is two years
    b. Part-time (less than 36 hour work week)
        i. Accrue one (1) hour for every 52 hours works
        ii. Max accrual is two years
        iii. Can cash out two (2) times per year (12 month period) at a max of 48 hours each time
            1. Must maintain a minimum amount of 24 hours

Volunteers
a) Volunteer pay is Monthly on the third business day following the end of the pay period
b) Payroll is processed via direct deposit
c) Compensation rate
    a. $5.00 per hour for being on call
    b. $2.00 per hour shift differential for night shifts (1800 – 0600)
    c. Jumped calls $5.00 per hour as follows
        i. No transport – one (1) hour
        ii. Copley/Northwest – two (2) hours
        iii. UVM - three (3) hours
        iv. Fire Standby – one (1) hour for each two (2) hours of standby
    d. Bonuses

i. Must attend monthly training with Training Officer and complete 12 hours of a
                weekend shift (1800 Friday through 0600 Monday).
                1. 48 hours of scheduled shifts - $75.00
                2. 36 hours of scheduled shifts - $50.00
                3. 24 hours of scheduled shifts - $25.00

Elected Officers

Elected Officers receive compensation for additional responsibilities of the positon. Officers who are
volunteer members will receive a flat rate as indicated below per month. Officers who are paid members
will receive an increase in their hourly rate equivalent the monthly rate for the length of time they hold the
position. Job descriptions for all elected officers are defined by the chief and available at the station for
members to view.

a) Assistant Chief - $150.00
b) Training Officer - $50.00

DISIPLINARY ACTION, PROBATION, SUSPENSION, AND TERMINATION OF MEMBERSHIP

A member of Cambridge Rescue Squad must abide by the Policies and Procedures and By-Laws of
Cambridge Rescue Squad. Any failure to abide by, such, are grounds for a probation, suspension,
administrative leave, or termination. The Chief with consideration of the violation will determine the
disciplinary action.

1. Any member that does not abide by the Policies and Procedures of Cambridge Rescue
    Squad will receive one of the following in accordance with the action of preference.
    a. Receive 1 (one) verbal warning of the inappropriate action and or Policy
        infringed upon by the Chief
        i. This verbal warning will be recorded in the personnel file.
    b. Two (2) written warnings of the inappropriate action.
        i. These will be filed with an Cambridge Rescue Squad conduct report
            and be sealed and placed in the individual personal file.

Emergency Probation/Suspension

Recognizing that Cambridge Rescue Squad members provide emergency medical care under conditions
that are unpredictable and uncontrollable, and that members may not be easily monitored, the Chief, or any
officer under the direction of the Chief, in his/her absence may issue a verbal warning, written warning or
immediately place on probation or suspend a member without prior notice for a period not to exceed 60
days. Immediate suspension shall be only available when the Chief, in good faith, believes that the member
may have violated a law, rule, policy, or poses a threat to him/herself or others.

Probation, Suspension, Termination

Following an investigation by the Chief, any member may be placed on probation, suspended, or
terminated and the probation, suspension, or termination is fair and reasonable taking into consideration all
of the relevant facts and circumstances.

No less than 15 days before the effective date of the probation, suspension, or termination, the
affected member shall be provided written notice of the reasons for the proposed probation,
suspension, and or termination.

The affected member shall have an opportunity to submit reasons, in writing, why the probation,
suspension, or termination should not take place, not less than five days before the effective date

of the probation, suspension or termination. This submission shall be reviewed by the Chief and presented to the Board of Directors. The member shall have the right to attend the meeting.

The Board of Directors may request that the Chief obtain further information prior to voting and may extend disciplinary action until that vote is taken.

Inactivity

Any member may be considered inactive if they are not meeting the minimum requirements of their membership class for 60 consecutive days. The Chief shall review any member who becomes inactive or not meeting their training requirements by calling that member to appear. If the Chief fails to find a valid reason for such absences or if the member fails to appear, the Chief may decide to terminate membership.

Challenges

Any proceeding challenging a probation, suspension or termination, including a proceeding in which defective notice is alleged, must be commenced within one month after the effective date of the expulsion, suspension or termination. Challenges to disciplinary action should be presented in writing to the Chief.

Leave of Absence

If a member requires a leave of absence, they may request a leave in writing to the Chief. The Chief may approve any requests up to two (2) months. Any leave of absence that exceeds two (2) months must be approved by the Chief. An approved leave of absence does not constitute inactivity. If the leave of absence is due to a medical condition then a doctors written permission bust be obtained before the member can return to active duty.

Resignation

Any member may resign by filing a written resignation with the Chief, but such resignation shall not relieve the member so resigning of the obligation to pay any dues, assessments, other charges accrued and unpaid, and return all Cambridge Rescue supplied radios, keys, equipment, and uniforms. The resigning member may be held accountable for the cost of any unreturned equipment or equipment that was returned in poor condition. The failure to attend meetings, training, calls, or maintain contact with the Chief for a period of two months may be considered a resignation and that resignation may be accepted by the majority of the Chief.

Termination

Termination of membership shall not relieve the member so terminating of the obligation to pay any dues, assessments, other charges accrued and unpaid, and return all Cambridge Rescue supplied radios, keys, equipment, and uniforms. The resigning member may be held accountable for the cost of any unreturned equipment or equipment that was returned in poor condition.

INCONSISTENT POLICIES REPEALED

This Policy shall amend and replace any provisions of any Policy of Cambridge Rescue in effect at the time of enactment of this amended Policy governing any activity included in this amended Policy.

Severability

If any section, subsection, subdivision, paragraph, sentence, clause or phrase of this Policy, or any part thereof, is for any reason held to be unconstitutional, invalid, or ineffective by any court of competent jurisdiction, such decision shall not affect the validity or effectiveness of the remaining portions of the Policy or any thereof.

Rationale Statement

As evidence of my capacity to carry out effective policy implementation, I have provided the first policy that was completed as part of my internship. This policy was deemed to be the highest priority as the Cambridge Rescue Squad had recently updated its bylaws and a new policy needed to be written to replace a significant amount of information that was eliminated from the bylaws. The previous bylaws included detailed information on membership, compensation, disciplinary actions, and more human resource related items that caused the bylaws to be updated regularly.

When drafting the Membership Policy the first thing that was done was to pull all the information that had been in the bylaws to be included in the new policy. That information was also updated to ensure that it was in line with the current operations of the Cambridge Rescue Squad. I worked with two other volunteers on the Cambridge Rescue Squad Board of Directors in a committee/working group directly tasked with updating policies and procedures. I drafted this particular policy and then I sent it to the other members of the working group for review. Once their feedback was incorporated into the policy, it was sent to the entire Board of Directors for review. Upon updating the policy with the revisions provided by the Board of Directors, the Directors voted to approve the policy.

Overall the process of drafting, reviewing, and implementing the policy went well. The other members of the working group provided very little input into this policy which resulted in me completing the policy myself. Once the policy was sent to the Board of Directors for review there was more feedback that was received. One of the issues that we encountered with this process was that there was a gap in the amount of time that the policy was implemented and the approval of the bylaws. This gap created issues for the Chief as there were no regulations in regards to the membership for the Chief to enforce. Additionally, there was no documented course of action should a member need to be disciplined.

In the future, I would set up regular meetings with the workgroup to discuss the policy to ensure that they provided their feedback. I would also suggest that the Cambridge Rescue Squad should have waited for the policies to be completed before approving a new set of bylaws. Additionally, it would have been advantageous to allow the members of the Cambridge Rescue Squad to have a period of comment before the Board of Directors approved the policy. This would have allowed the membership to participate in the process resulting in buy-in from more members.

The Membership Policy was successfully implemented at the Cambridge Rescue Squad which was an essential undertaking given the lack of any policies surrounding the membership of the organization. My role and experience in this project demonstrate my capabilities in a specific policy implementation activity and ability to identify ways of improving upon past practices. This is evidence that I exceed the standard of the capacity to carry out effective policy implementation.

Policy/Procedure	Notes	Assignee	Status
Membership	Complete a final review when all other policies are completed	Tiffany	Reviewed by Board
Board of Directors	Need to completed the Alcohol & Substance Use	Tiffany	Reviewed by Board
Confidentiality	Need to completed Social Media & Cell Phone Policy	Tiffany	Reviewed by Board
Sexual Harrassment		Tiffany	Reviewed by Board
Building Access & Use	Need to completed the Alcohol & Substance Use	Tiffany	Reviewed by Board
Ambulance Operations	Need to complete the Release of Liability (for passangers)	Tiffany	Reviewed by Board
Chain of Command	Need to complete Disciplinary Policy & Prohibited Conduct	Tiffany	Reviewed by Board
Finance	Need to incorporate town funds policy	Tiffany	Complete, for workgroup review
Whistleblower		Tiffany	Complete, for workgroup review
Code of Ethics	This should be done as part of the squad's mission statement, values, etc.		
Record Retention Policy	Do we need to create a seperate Privacy Policy	Tiffany	Complete, needs Board review
Prohibited Conduct	Conduct Report		
Disciplinary Policy			
Incident Report & Investigation	Need to update all supporting froms (Investigation, Employee Report, etc)	Tiffany	Complete, needs Board review
Alcohol & Substance Use		Tiffany	Complete, for workgroup review
Transparency & Accountability			
Infection Control	Have, Needs updating. Needs to have a position (to be appointed)		
Patient refusal of care	Need/update standard release of liability form		
Required Reporting & Procedures			
Cell phone	Use the iPads instead of personal device, Talk to Spencer, Social Media (include info for Chief)		
Crew Chief/Driver	Need defining, Highest cert or highest level of experience		
Driver Training	Have, needs formatting		
Mutual Aid Policy	Fire Dept, Other EMS Services, To get from Lisa (If we do not have a full crew Lisa needs to let others know (Dispatch, Brad, Bambi, Scott))		
Observer/Student/Cadet	Work with Tracy		
Radio Communications			
Red lights/siren use & permits			
On Duty	Hygiene/Uniform, Response, First Response		
Crew Chief Training	For future development		

Rationale Statement

As evidence of my capacity to use and manage information technology with internal and external audiences to achieve public administration goals, I have provid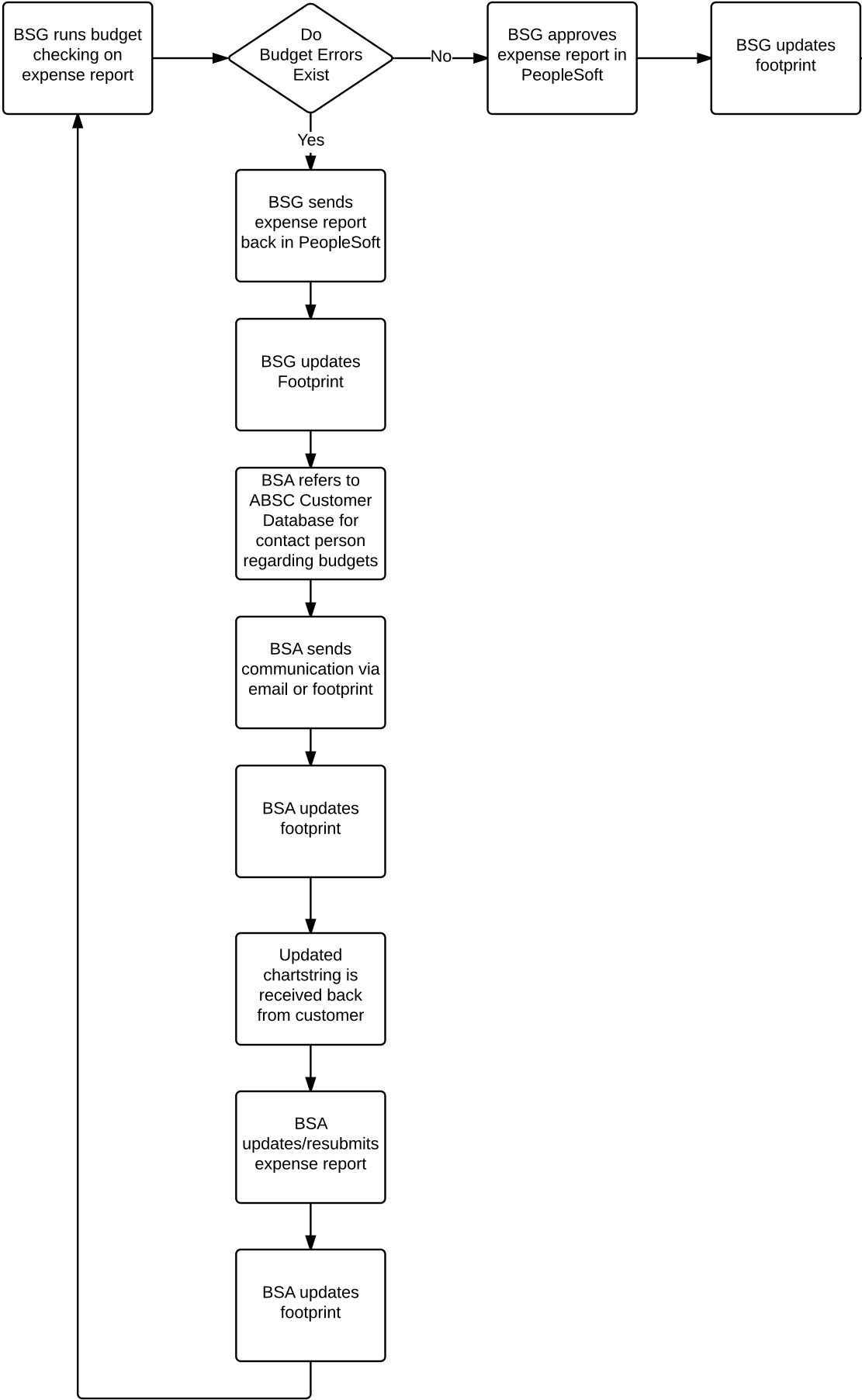ed a spreadsheet entitled Cambridge Rescue Policies and Procedures. This document was shared via Google Drive and was used to prioritize, assign, and track the policies and procedures that the Cambridge Rescue Squad intends to complete.

Throughout my internship with the Cambridge Rescue Squad, I was responsible for coordinating a working group of volunteers and keeping the Board of Director and Chief apprised of that status of the work that was being done. To assist with the coordination of the completion of the policies and ensure that all parties were aware of the status of this project and each policy, in particular, I created a spreadsheet and shared it via Google Drive. This spreadsheet includes each policy that is being reviewed or created, has notes on details of the policy, which member of the working group has elected to complete the policy and the current status of the policy. This tool was very useful in tracking all of the policies and making notes for other members of the working group as well as sharing the information with the Board of Directors.

Since Google Drive was successful in sharing this spreadsheet it was determined that all of the policies would be drafted and shared through Google Drive as well. This enabled all members of the working group to access any policy drafts to review, comment, and collaborate on. All the members of the working group felt that this was a successful use of technology as it enabled us to collaborate without having to meet in person regularly.

Since the Board of Directors only meets once a month the working group decided that we would share the Google Drive folder with all the policies to allow the board members to review and provide feedback on the policies before the meeting. This process saved time during the meeting to allow more pressing matters to be discussed in more detail. Additionally, when the COVID-19 pandemic occurred having all the files shared electronically enabled the Board of Directors to continue working on this project despite having to cancel in-person meetings.

One of the limitations I found with using Google Drive is that there was one member of the Board of Directors who was not comfortable with technology and therefore was unable to access the files. This individual was provided a hardcopy of the original draft of the policies but did not have access to the most up to date versions as they were regularly being modified by other members of the board. Additionally, the current bylaws and policies require that all documents be posted at the Cambridge Rescue Squad building. Therefore, despite having the files available for all members of the Cambridge Rescue Squad on Google Drive the organization was self-limiting by requiring hard copies to be available at the station for the membership to review.

The use of Google Drive for this project was overall very successful. The majority of the members of the Board of Directors were able to access and collaborate using this method. At the time of the COVID-19 pandemic, the use of this technology proved to be extremely helpful as it enabled everyone to continue collaborating remotely without having to have regular in-person meetings. One of the biggest issues with using this technology is that it is limited by the end-users ability. In this situation, there was one member of the Board of Directors that was not comfortable with using

technology and therefore was not able to collaborate in the same manner as the rest of the board. Additionally, the Cambridge Rescue Squad's policies prevented the use of technology by requiring that the documents be available via hardcopy at the station for the members to review.

Given the evidence and rationale provided I can document that I meet the standard capacity to use and manage information technology with internal and external audiences to achieve public administration goals. I can do this by identifying how IT impacts workplaces, organizations and public policy. I am also able to diagnose problems associated with IT tools, procedures and uses. Additionally, I am articulate how IT application is reshaping PA practice.

CAMBRIDGE RESCUE

BUILDING ACCESS AND USE POLICY

Date Approved by Board of Directors:

POLICY STATEMENT

To provide a safe environment to members

POLICY ELABORATION

All Cambridge Rescue Squad members will have access to and be able to use the building under the following guidelines:

1. Each on duty member shall be responsible for cleaning up after themselves including but not limited to:
   a. Washing dishes, putting dishes away
   b. Making beds
   c. Taking out trash
   d. Vacuuming
   e. Sweeping, mopping
   f. Cleaning and restocking bathrooms
   g. Keeping classroom neat and tidy
   h. Keeping the bay floors clean
   i. Keeping all outside areas picked up from any debris or garbage
   j. See Ambulance Operations Policy
2. Crewmembers not on duty shall not be permitted in the building overnight
   a. Exceptions will be made during weather events, or events which require an increase in staff
   b. In the case of needing to stay for your next shift, space will be given to night shift personnel first
   c. Non-members shall not be permitted in the building overnight.
   d. The washing machine and dryer is for Cambridge Rescue Squad work use only, if you are an overnight person and need uniforms washed it is appropriate. Personal Laundry is not allowed.
3. There shall be no unsupervised children in the building at any time.
4. Crewmembers are responsible for their guests to abide by all building policies.
   a. All guests will be accompanied by a crewmember at all times.
   b. If the crewmember is required to respond to a call, then the guest will be required to vacate the premise.
   c. The crewmember is responsible for cleaning up after their guest.
   d. The crewmember is responsible for their guest behavior.
5. Tobacco/smoking/vapor, will be allowed in a designated area in the rear of the building outside only at a minimum of 25 feet from the building.
6. No Alcohol or recreational drugs are permitted on the premises
   a. See Alcohol and Substance Use Policy
7. Each member will be given a code to access the building. The code is not to be shared with any other person.
8. When the building is unoccupied it should;
   a. Be locked

      b.   Have the lights off

      c.   Have the television off

      d.   Have the kitchen stove off

      e.   Have all the windows closed

      f.   Have the heat lowered

          i.   Living space heat at 62*

          ii.   Ambulance bay at 60*

      g.   Have the air conditioners turned off

9. Members or groups requesting to use the building must arrange it with the Chief.

      a.   Priority will be given to EMS related events.

10. Keep the door between the ambulance bay and the classroom closed due to;

      a.   Heat difference

      b.   Fumes from the exhaust entering the classroom.

11. No building equipment and or supplies i.e. tools should be removed from the facility without authorization by Chief.

12. No member may take up residency at the Cambridge Rescue facility

13. Pets/Animals will not be permitted in or at the Cambridge Rescue facility

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INCONSISTENT POLICIES REPEALED

This Policy shall amend and replace any provisions of any Policy of Cambridge Rescue in effect at the time of enactment of this amended Policy governing any activity included in this amended Policy.

Severability

If any section, subsection, subdivision, paragraph, sentence, clause or phrase of this Policy, or any part thereof, is for any reason held to be unconstitutional, invalid, or ineffective by any court of competent jurisdiction, such decision shall not affect the validity or effectiveness of the remaining portions of the Policy or any thereof.

Rationale Statement

As evidence of my **capacity to achieve cooperation through participatory practices**, I have provided the Building Access and Use Policy. This policy was one of the more challenging policies to draft as it required the involvement of the Town of Cambridge and resulted in the most significant changes for the members of the Cambridge Rescue Squad. Despite the challenges with this particular policy, I was able to successfully get buy-in from the members of the Cambridge Rescue Squad for this policy to be approved.

At the beginning of my internship, I had a meeting with the Chief where we discussed some of the policies and procedures that need to be updated as well as any policies she felt that the Cambridge Rescue Squad was lacking. One in a particular issue that kept coming up was that there is no policy on how members can use the building. This was an issue for several reasons including that the availability of narcotics, confidential information, and that the building is owned by the Town of Cambridge and we should be complying with all the same regulations that they have regarding their building use.

When determining the needs for this policy I first meet with the Town Administrator for the Town of Cambridge. She provided me information regarding the policies on the use of the different town buildings and facilities. I also meet with the Chief of the Cambridge Fire Department as their building is also own by the town, but operated independently. He provided me a copy of the Cambridge Fire Department building use policy as well as some guidance on the challenges of implementing such a policy in an unregulated environment.

Once all of this information was obtained, I presented the details to the other members of the working group via a shared document in Google Drive. The members of the working group and I used this information to draft a policy to be presented to the Board of Directors. For this project, I was responsible for keeping the project on track and ensuring that the policy was completed in a timely fashion. I built in approximately 30 days for the Board of Directors to suggest changes and comment on the policy before the next Board of Directors meeting. At the meeting, I had one hour blocked on the agenda to discuss any of the pending policies that were open for review. The time at the meeting was used to discuss specific questions or concerns regarding the policy. Any rewording suggestions or formatting changes were made before the meeting via the shared Google Drive document. This assisted in keeping the discussion on the topic to ensure that the policy was completed within one meeting.

After the Board of Directors approved the draft of the policy I then posted a copy in the station for the members to review and provide comments. Additionally, I made an electronic version available for all members in case they did not have the opportunity to go to the station. This public comment period for the membership was open for approximately 30 days, after which the Board of Directors reviewed the suggestions and updated the policy accordingly at the next meeting.

Though the process took additional time given the allotted comment periods I felt it was necessary to include the feedback from all members of the Cambridge Rescue Squad community. I also spent time speaking with the members to explain why certain aspects were written into the policy,

based on the Town of Cambridge Building Use Policy. This demonstrates how inclusive practices and conflict management wins cooperation for forming coalitions and collaborative practices in specific cases or contexts and is evidence of my capacity to achieve cooperation through participatory practices

Tiffany Barker Cook
MPA Internship Write-up

Summary of Internship

As part of the Cambridge Rescue Squad's reorganization, the Board of Directors formed several committees or "working groups" including a working group to update and write new policies and procedures. I was appointed the chair of this working group, which consisted of two other board members. The goal of this group was to have all the policies and procedures drafted and submitted to the Board by early to mid-January for the Board to provide feedback and the finalized documents be approved at the February Board of Directors Meeting. Once the Board of Directors approved the policies and procedures, they would be presented to the membership at the annual meeting in April.

My first objective was to gather all of the policies and procedures that Cambridge Rescue currently had in place. I then corresponded with the other two members of the working group to provide them the documentation I had obtained and asked them to provide feedback, comments on the documents that they felt needed to be updated.

My second objective was to compile a list of additional policies and procedures that Cambridge Rescue did not have and develop a priority list of what needed to be created. I had a meeting with the Chief of the Cambridge Rescue Squad to obtain her input on the policies and procedures she felt were needed. Once the list of policies and procedures were completed I sent this list to the other members of the working group to review and make their recommendations on priority as well as adding any additional notes that they felt were important. As a group, we compiled a list of 28 policies/procedures that needed to be updated and/or created. Since this was such a large volume we prioritized the list of the ones that needed to be completed this year and which policies could wait until a later time.

The primary tool used by the working group was Google Drive. The list of policies and procedures was entered onto a shared worksheet, which included notes, who was taking responsibility for the policy or procedure and a status column so the group knew the status of each policy or procedure. All of the policy and procedure drafts were uploaded to Google Drive and shared with the entire working group to review, edit, and comment on. As I started working on each policy I researched similar organization policies and worked with outside organizations such as the insurance company, mutual aid group, district board, OSHA, the Town of Cambridge, and Town Select Board to ensure all policies complied with local, state, and federal regulations. I also spent time collaborating with the Chief and other members of the organization that are highly involved in the specific areas that a particular policy or procedure pertained to.

Once the working group finalized the policies and procedures, they were then shared with the other members of the board to review and comment on. For the members of the board that do not use technology or are not comfortable with Google Docs hard copies of the policies and procedures

were provided to them. Time was blocked on the agenda at each of the Board of Directors meetings to discuss the pending policies. After the Board of Directors approved the draft policies and procedures they were posted at the station and made available electronically to all the members of the Cambridge Rescue Squad. The members were allotted 30 days to comment on the policies and then they went back to the Board of Directors for final revisions.

Throughout this project, one of the challenges for me was the lack of involvement from other volunteers in the working group. There were several instances where they did not respond to emails, other forms of communication, or set deadlines. After speaking with the Chief this is consistent with their involvement in other board activities. This resulted in me completing all of the policies and procedures that I was able to by myself by the January deadline with minimal feedback from the other working group members. Additionally, after no response from the members of the working group, I decided with agreement from the Chief to allow the entire squad to review all the policies and procedures as part of a comment session. The drafts were available at the station for 30 days for review per the squad standard. I also choose to make the drafts available to all of the members electronically to ensure that everyone had the opportunity to review them.

Another issue I ran into was that the Board of Directors elected to change the board meetings to quarterly meetings; therefore, no meetings were being held by the board from October until February. This made it difficult to elicit feedback from any of the members of the Board of Directors on the policies during this time. In January, a special meeting was held to discuss complaints one member of the board received about the chief. This issue became the number one priority for the Board of Directors as an investigation was started and the policies and procedures were put on the back burner. As part of this investigation, it was found that one of the members of the Board of Directors, who also was a member of the working group was using the drafts and representing them as completed and approved policies. This created confusion for some members of the Cambridge Rescue Squad, which had to be resolved through a series of meetings.

In March, the final board meeting to review the policies and procedures was canceled due to the COVID-19 outbreak. This required all work to be conducted electronically. I asked the board to have all of their reviews completed by the time the meeting was scheduled, but many directors were preoccupied with the epidemic due to the nature of the work that the Cambridge Rescue Squad does and did not have the time to provide feedback. The COVID-19 pandemic also resulted in a postponement of the annual membership meeting in April, which would have been the final review of the policies and procedures. The postponement of this meeting resulted in a delay in the final approval of the policies and procedures; therefore, I was not able to obtain final approval of the policies and procedures prior to the completion of my internship.

Reflection of Experience

Given the experience that I had with this project, there are a few things that I feel could have been done differently. Primarily, as an organization, the Cambridge Rescue Squad should not have implemented the new bylaws without having the policies and procedures in place to be implemented at the same time. The new bylaws did not include a large portion of the policy-related language that

resulted in a lack of enforcement ability for the Chief. This also created confusion for some members, especially new members as they were unaware of certain policy and procedural issues that pertained to them. Additionally, policy and procedure information was spread via word of mouth which caused some members to receive inaccurate information. This resulted in a large number of communications by the chief to clarify information.

In regards to the work I did on this project, what I would have done differently is to assign specific policies & procedures to individuals on the workgroup. This would have distributed the work more evenly and required some accountability for each of the members of the workgroup. I would set deadlines throughout the draft phase to ensure that progress was being made on each of the policies. This would allow me to gauge if I needed to provide more hands-on assistance with any of the working group members or on a specific policy.

This internship provided me the opportunity to have hands-on experience of many of the learning capacities of the UVM Public Administration program, the most significant of which is the capacity to carry out effective policy implementation. Policy implementation was the basis of this project and it allowed me to follow a policy from the initial formation through several revisions and final adoption.

The Chief of the Cambridge Rescue Squad who was my supervisor provided me guidance on what policies she was interested in as well as some specific procedural items. However, I was given the responsibility of leading and overseeing this project. I learned that I take different leadership roles in different situations. In my role at work, I am a very hands-off leader. I have full trust in my team's abilities to complete assigned tasks and to meet necessary deadlines. In this situation, I was not as familiar with the individuals that I was working with and therefore was more apprehensive in delegating tasks in the same way that I do for work. This resulted in me doing all of the work on all of the policies and procedures that were completed. The leadership role that I had on this project supported both the capacity to effectively managing projects and the capacity to lead in an ethical and reflective manner

In my role leading this project, I worked with many different individuals and organizations. Working with the members of the Cambridge Rescue Squad and ensuring that they each felt as though their voices were heard throughout this project met the capacity to achieve cooperation through participatory practices as well as the capacity to understand the value of authentic citizen participation in PA practice. Working with other organizations such as the Cambridge Fire Department, other emergency response organizations, the Town of Cambridge, insurance providers, and the State of Vermont allowed me the opportunity to manage the lines of authority for public, private and non-profit collaboration. To help facilitate collaboration one of the tools that I had to use with many individuals I interacted with was technology, specifically Google Drive. The focus on using Google Drive to share different files applies to the capacity to use and manage information technology with internal and external audiences to achieve public administration goals.

Upon the completion of this project, I had to present several final written policies. I was responsible for communicating the importance of these policies and explaining them in significant detail to the Board of Directors and members of the Cambridge Rescue Squad. This aspect of the project

fulfilled the capacity to undertake high quality oral and written communication to convey messages to specific audiences.

In addition to this project meeting many of the MPA learning capacities it provided me an excellent opportunity to participate in the management and oversight of a nonprofit organization. The time I spent with the Cambridge Rescue Squad gave me insight into the challenges of operating a nonprofit organization as well as being a board member overseeing the director of a nonprofit. The experience with the Board of Directors was especially intriguing because I was able to observe and partake in an experience managing an organization with multiple other individuals who have different ethics and management styles. As challenges arose throughout the internship, it was fascinating to observe how the Board of Directors addressed these issues. My participation in this internship provided me with a variety of experiences compatible with the UVM MPA program preparing me for my future in public and nonprofit administration.

Request for reimbursement is sent to the ABSC → Footprint is created and prioritized in work-list → **Is this request associated with a Cash Advance**

—No→ **Is full chartstring provided?** —Yes→ **Is all the required documentation provided?** —Yes→ BSA Enters Expense Report into PeopleSoft

Yes (from Cash Advance) → BSA closes original footprint from request for cash advance

No (from chartstring) → BSA refers to ABSC customer database for chartstring

No (from required documentation) → BSA refers to ABSC customer database for contact person → BSA sends communication via email or footprint system → BSA update the footprint → Communication is received back from the contact

```mermaid
flowchart

A[BSA Updates Footprint] --> B{Has the request been approved?}
B -->|Yes| C[Expense Report is submitted in PeopleSoft (if electronic then it is attached in PeopleSoft as well]
B -->|No| D[BSA refers to ABSC Customer database for approver and contact for approver]
D --> E[BSA sends communication via email or footprint system]
E --> F[BSA updates the footprint]
F --> G[Communication is received back from the contact]
G --> C
C --> H[BSA Updates Footprint]
H --> I{BSA determines if the expense report needs BSG review}
I -->|No| J[BSG runs budget checking on expense report]
I -->|Yes| K[BSA updates footprint]
K --> L[BSG reviews expense report as requested by BSA]
L --> M{Corrections needed?}
M -->|No| J
M -->|Yes| N[BSG sends expense report back in PeopleSoft]
N --> O[BSG updates footprint]
```

- BSA Updates Footprint
- Has the request been approved?
  - Yes → Expense Report is submitted in PeopleSoft (if electronic then it is attached in PeopleSoft as well
  - No → BSA refers to ABSC Customer database for approver and contact for approver
- BSA sends communication via email or footprint system
- BSA updates the footprint
- Communication is received back from the contact
- BSA Updates Footprint
- BSA determines if the expense report needs BSG review
  - No → BSG runs budget checking on expense report
  - Yes → BSA updates footprint
- BSG reviews expense report as requested by BSA
- Corrections needed?
  - No → BSG runs budget checking on expense report
  - Yes → BSG sends expense report back in PeopleSoft
- BSG updates footprint

```
┌──────────────┐      ◇                    ┌──────────────┐      ┌──────────────┐
│ BSG runs     │    Do                     │ BSG approves │      │ BSG updates  │
│ budget       │──▶ Budget Errors ──No──▶  │ expense      │──▶   │ footprint    │
│ checking on  │    Exist                  │ report in    │      │              │
│ expense      │      ◇                    │ PeopleSoft   │      │              │
│ report       │      │                    └──────────────┘      └──────────────┘
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      ▲               │
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      │        │ BSG sends    │
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      │        │ BSA refers to│
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      │        │ back from    │
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┌──────────────┐     ┌──────────────┐     ┌──────────────┐
│ Request for  │     │ Scan any     │     │ Save file to │
│ reimbursement│ ──▶ │ documents    │ ──▶ │ shared drive │ ──▶
│ is received  │     │ that were not│     │ by last name │
│ in DC        │     │ sent         │     │ first initial│
└──────────────┘     │ electronically│    └──────────────┘
                     └──────────────┘
```

Is full chartstring provided? — Yes ▶

No ▼

BSA refers to ABSC customer database for chartstring

Is all the required documentation provided? — No ▶

No ▼

BSA sends email to the original requester

▼

Communication is received back form requester

BSA enters the expense report into PeopleSoft ──▶

Does the request have the proper approval?

No ▼

BSA sends complete expense report for electronic approval (determined via PeopleSoft)

▼

Approval is returned

```
                                                                                                                          No
                      ┌──────────────┐   ┌──────────────┐   ┌──────────────┐      ╱╲              ┌──────────────┐   ┌──────────────┐      ╱╲              ┌──────────────┐
         ┌─Yes→       │All documentation│ │BSA moves file to│ │BSG reviews   │    ╱    ╲            │BSG Approves  │   │BSG moves file to│   ╱    ╲            │Expense Report is│
         │            │is attached in │   │the BSG's folder│  │expense report│  ╱Are there╲         │expense report│   │the Prepay Audit│  ╱Are there╲ ──No→   │approved for  │
         │            │PeopleSoft and │──→│for review    │──→│and runs budget│→╱any corrections or╲→│              │──→│folder for Audit│→╱any corrections╲    │payment       │
         │            │expense report is│ │              │   │checking      │ ╲budget errors?  ╱ No╲    ╲required?   ╱                    └──────────────┘
         │            │submitted.     │   │              │   │              │  ╲          ╱         └──────────────┘   └──────────────┘  ╲          ╱
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         │                                                              │BSG sends     │                                          │Prepay Auditor│
         │                                                              │expense report│                                          │sends expense │
         │                                                              │back for correction│                                     │report back for│
         │                                                              │              │                                          │correction    │
         │                                                              └──────┬───────┘                                          └──────┬───────┘
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         └─────────────────────────────────────────────────────────────────────────────────────────────────────────────────────────────┘
```

Disbursement Center Process for Travel & Expense Reimbursement

Reimbursement Request

Expense Report

Hard Copy

Email (Electronic)

Hard Copy

Email (Electronic)

Scan (save pdf by
expense report

Scan (save pdf by last name, first initial in date folder)

Scan (save pdf by expense report number in date folder, file hardcopy by expense report number)

Distribute in shared drive by alpha assignment

What is the status of the expense report

What is the status of the expense report

Expense Report pending pre/post pay audit

Expense report pending expense manager approval

Expense Report pending pre/post pay audit

Expense report pending expense manager approval

Move pdf (in date folder) to "3.Prepay Audit" folder

PeopleSoft

Does the department approve in PeopleSoft or via e-signature?

Move email to "2. Prepay Audit" folder

PeopleSoft

Does the department approve in PeopleSoft or via e-signature?

E-Signature

E-signature

Move pdf (in date folder) to "2. Expense Manger" folder

Move email to "1. Expense Manager" folder

Expense report entered into PeopleSoft by travel team

st (BSA)

Department approves via e-signature or in PeopleSoft

PeopleSoft

Send

Travel & Expense Specialist (BSA)

PeopleSoft → Add all attachments in PS & notify department that expense report is ready to be approved

E-signature → Send documentation to approver for e-signature. Once received back attach in PeopleSoft and submit

Move PDF to "2. Expense Manager" folder on the Shared Drive and update the pending spreadsheet to "Submitted"

Expense report is reviewed and approved in PeopleSoft by the department

Travel & Expense Processing Coordinator (BSG)

Move the PDF to the "3. Prepay Audit" folder on the shared drive and update the pending spreadsheet to "Audit"

Expense report is reviewed and approved in PeopleSoft by the Disbursement Center

Travel & Expense Team Lead

Expense Report is pre/post pay audited and approved for payment (PDF is moved to the FY expense report folder on the shared drive and the pending spreadsheet is updated to "Complete")

Expense Report is pre/post pay audited and approved for payment (PDF is saved to the FY expense report folder on the shared drive)

Disbursement Center Travel & Expense Internal Process

Distribution

Request for reimbursement is received in the Disbursement Center

↓

Scan any documents that were not sent electrnoically

↓

Save file to shared drive by last name first initial

↓

Distribute via alpha assignment to BSA

↓

Is the full chartstring provided? —No→ BSA refers to the ABSC Customer Database for chartstring

Yes

↓

Is all the required documentation provided? —No→ BSA sends email to the original requster → Communication is received back from requestor

Travel & Expense Specialist (BSA)

Is all the required documentation provided? → **No** → BSA sends email to the original requster → Communication is received back from requestor

Yes ↓

BSA enters the expense report into PeopleSoft

↓

Does this department approve in PeopleSoft? → **No** → Is the proper approval included with the request? → **No** → BSA sends completed expense report for electronic signature → Signed expense report is received back

Yes ↓ (left branch)

BSA attaches all documents and submits expense report in PeopleSoft

↓

BSA sends notification to approver that the expense report is ready for review & approval

Yes ↓ (middle branch)

BSA attaches all documents and submits expense report in PeopleSoft

↓

BSA updates the status of the expense report to "ABC" on the pending spreadsheet.

↓

Overnight budget checking process runs

BSA follows up with the requestor of any additional clarification on documentation

Overnight budget
checking process
runs

Did the expense
report pass
budget
checking?

No → BSA follows up with
department to
correct budget
errors.

The expense report
is sent back in
PeopleSoft and the
status is changed
to "Needs Review"
on the pending
spreadsheet.

Yes

BSA moves PDF file
to the "2. Expense
Manger" folder on
the shared drive &
updates the status
to "Submitted" on
the pending sheet

BSG reviews the
expense report in
PeopleSoft

Are there any
corrections? — Yes → Can the
adjustments be
made at the
approval level? — No

No

Yes

Processing Coordinator (BSG)

Travel & Expense Team Lead

Department approves expense report

BSG approves the expense report in PeopleSoft

BSG makes any necessary corrections.

No

The PDF is moved to the "3. PrePay Audit" folder on the shared drive and the status is changed to "Audit" on the pending spreadsheet

Are there any corrections?

Yes

Can the adjustments be made at the audit level?

No

Yes

The expense report is approved for payment in PeopleSoft.

All necessary corrections are made.

The PDF is moved to the FY Expense Reports folder and the status is changed to "Completed" on the pending spreadsheet

THE UNIVERSITY OF VERMONT

founded 1791

People Soft Travel and Expense Advanced Topics

Presented by:

Tiffany Barker Cook

Agenda

- User Defaults
- Public versus Private Templates
- Creating Documents from Templates
- Creating Documents from Previous Documents
- General Information Drop Down Menu
- Add New Expenses – Multiple Expenses
- Business Meal Attendees
- Hotel Wizard
- Accounting Defaults
- Moving Columns
- Adding Attachments
- Submit Electronically
- Where is the payment in process – view the payment

User Defaults

https://www.uvm.edu/sites/default/files/Division-of-Finance/UserGuides/User_Defaults.mp4

User Defaults

User Defaults – for me

User Defaults – a delegate

User Defaults – a delegate

Public versus Private Templates

- Two types of template available in Peoplesoft
    - Public – everyone can see and use

Create Expense Report

Select a Template

Report ID NEXT

	Template	Description	Template Type
Select	MILEAGE	testing mileage	User Template
Select	EX-DOM	Domestic Expense Report	Public Template
Select	EXMILE	EXP Travel Mileage	Public Template
Select	EX_FOR	Foreign Expense Report	Public Template

Return to Expense Report Entry

Public versus Private Templates

- Public templates
    - Domestic Expense Report template has expense types for airfare, automobile rental, rental car gasoline, hotel/lodging, and meals.
    - Exp Travel Mileage template has an expense type for automobile mileage
    - Foreign Expense Report template has expense types for airfare, automobile rental, rental car gasoline, hotel/lodging, and meals.

- Private – only user can see them
    - Add any expense types you may frequently use

Creating a Template

Add a Template

User Template

Erin Fitzgerald

General Information	
User ID:	efitzger
Template:	ER
Template Type:	Expense Report
***Description:**	
Short Description:	

Expense Type

***Expense Type**

	▼

Air Travel Domestic
Air Travel Foreign
Amenities/Gifts/Hospitality
Automobile Mileage
Automobile Rental - Domestic
Automobile Rental - Foreign
Automobile Repair/Maintenance
Books and Reference Materials
Computer Supplies
Conference Reg. Fee - Domestic
Conference Reg. Fee - Foreign
Encumbrance - Domestic Trip
Encumbrance-Foreign Trip
Entrance Fees - Ed. Purposes
Equipment <$5000
Gratuity-Domestic
Gratuity-Foreign
Ground Transportation - Dom
Ground Transportation - Foreig

Update/Display

Add a description
Add the expense types

Add a Template

User Template
Erin Fitzgerald

General Information	
User ID:	efitzger
Template:	ER
Template Type:	Expense Report
*Description:	Overnight Trip
Short Description:	Overnight

Expense Type		
*Expense Type		
Automobile Mileage	▾	[+...] [−]
Meals- Domestic Travel Daily	▾	[+...] [−]
Hotel/Lodging Domestic	▾	[+...] [−]

Save

Creating documents from templates

Enter the date range and select the expense types

The new expense report contains all the lines with dates

Review/Edit Profile

https://www.uvm.edu/sites/default/files/Division-of-Finance/UserGuides/Review_Edit_Profile.mp4

Change User Defaults – Default Creation Method

- Expense Report: Copy From a Template
- Employee Self-Service, Travel and Expenses, Review/Edit Profile

Employee Data	Organizational Data	User Defaults	Bank Accounts	Corporate Card Information

Erin Fitzgerald

Default Creation Method

*Expense Report	Copy From a Template / Copy From a Travel Auth. / Copy an Existing Report / **Open a Blank Report**
*Time Report	Open a Blank Report
*Travel Authorization	Open a Blank Authorization

Expense Defaults

Report Description	Mileage to campus for meetings	Per Diem Range	
Business Purpose	Administration/Operation	Billing Type	UVM Internal
Originating Location	CHITT	Payment Type	CSH Cash
Expense Location	CHITT	Credit Card	
Transportation ID		Number of Nights	
Accounting Detail Default View	Collapsed		
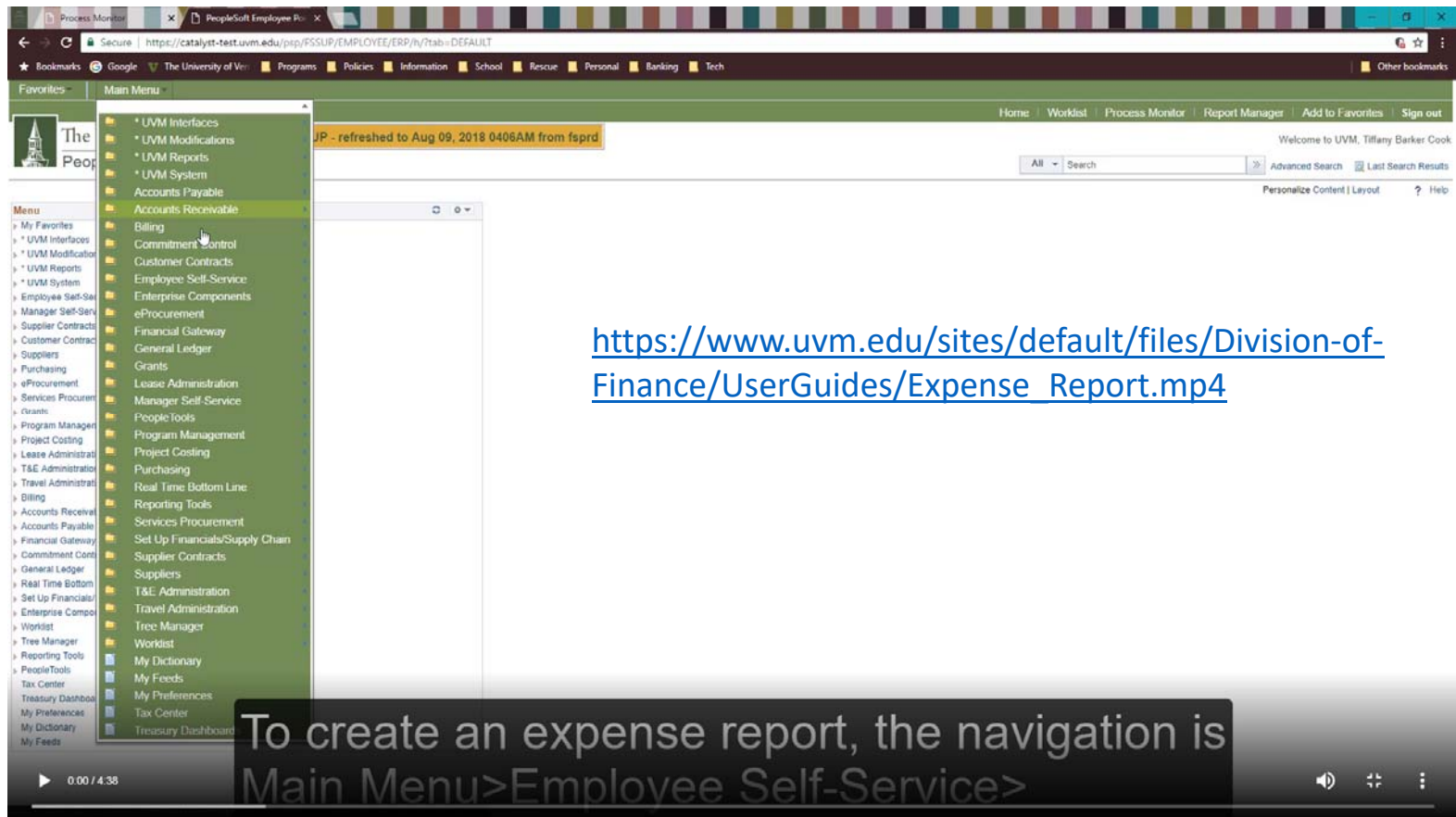
Create an Expense Report

https://www.uvm.edu/sites/default/files/Division-of-Finance/UserGuides/Expense_Report.mp4

Creating documents from previous documents

Change the dates and dollars,
delete any unnecessary lines

Create Expense Report

Save for Later | Summary and Submit

Erin Fitzgerald ?

Actions [...Choose an Action ▾] [GO]

*Business Purpose [Administration/Operation ▾]

*US State/Country [Nevada] 🔍

*Report Description [2017 HEUG Las Vegas]

📎 Attachments

*Trip Description/Dates/Comments

[2017 PeopleSoft HEUG conference, 2/27/2017 -3/2/2017]

Expenses ?

Expand All | Collapse All   Add: | 🗐 My Wallet (0) | ⚡ Quick-Fill

Total   56.94   USD

	*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency		
▶	02/26/2017 📅	Air Travel Domestic ▾	*baggage fee 243 characters remaining	Personal Credit Card ▾	25.00	USD 🔍	➕	➖
▶	02/27/2017 📅	Meals- Domestic Travel Daily ▾	*breakfast and lunch 235 characters remaining	Cash ▾	12.80	USD 🔍	➕	➖
▶	03/02/2017 📅	Meals- Domestic Travel Daily ▾	*airport lunch 241 characters remaining	Cash ▾	6.14	USD 🔍	➕	➖
▶	03/02/2017 📅	Gratuity-Domestic ▾	*hotel room gratuity 235 characters remaining	Cash ▾	10.00	USD 🔍	➕	➖
▶	03/02/2017 📅	Gratuity-Domestic ▾	*shuttle driver gratuities, 2/26 and 3/2	Cash ▾	3.00	USD 🔍	➕	➖

Expense Report Actions Drop Down Menu
- Apply or Adjust Cash Advance
- Attach a TA after the ER is started

Add New Expenses – Quick Fill

Enter the date range

Select the expense types

The expense report lines are added, based on the selection made.

Expenses ⑦

Expand All | Collapse All   Add: | ⊞ My Wallet (0) | ⚡ Quick-Fill   Total   0.00   USD

	*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency		
▶	03/02/2019 📅	Ground Transportation - Foreig ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖
▶	03/02/2019 📅	Meals - Business ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖
▶	03/02/2019 📅	Meals- Domestic Travel Daily ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖
▶	03/03/2019 📅	Meals- Domestic Travel Daily ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖
▶	03/04/2019 📅	Meals- Domestic Travel Daily ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖
▶	03/05/2019 📅	Meals- Domestic Travel Daily ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖
▶	03/06/2019 📅	Meals- Domestic Travel Daily ▾	* ↗ 254 characters remaining	Cash ▾	0.00	USD 🔍	➕	➖

Business Meal Attendees

PeopleSoft contains functionality to easily add additional attendees at a business meal, which fulfills the requirements of the IRS Accountable Plan Rules. The following example illustrates the Add Additional Attendees functionality.

Business Meal Attendees

| 11/20/2013 📅 | Meals - Business ▾ | *Meeting of the temperance League ↗ | Cash ▾ | 150.00 × | USD 🔍 ➕ ➖ |

222 characters remaining

*Billing Type	UVM Internal ▾	🔳 Receipt Split	☑ Default Rate	*Exchange Rate	1.00000000 🔄 📑
*Location	Nevada 🔍	👥 **Attendees**	☐ Non-Reimbursable	Base Currency Amount	50.00 USD
*Merchant ○ Preferred ⦿ Non-Preferred			☐ No Receipt		
	Dog Team Tavern				

▶ Accounting Details ⑦

Attendees ✕

Help

Expense Report

Attendees

Erin Fitzgerald   Report ID 0000116422

Attendees are required for the Meals - Business expense on line 8. Please list the attendees associated with this expense.

Name	Company	Title		
Fitzgerald,Erin Mary	University of Vermont		➕ ➖

OK

Business Meal Attendees

Hotel Wizard

❖ PeopleSoft facilitates the itemization of a hotel bill: room, parking, room services, etc.

❖ Stepping through the Hotel Wizard will create the correct lines on the Expense Report, using the correct accounts.

❖ Works for domestic hotels only – due to restriction of account

Expenses ?

Expand All | Collapse All   Add: | 🖾 My Wallet (0) | ⚡ Quick-Fill   Total   750.00   USD

	*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency

▼   10/01/2019 📅   Hotel/Lodging Domestic ▾   * Las Vegas Flamingo 🖾   Cash ▾   750.00   USD 🔍

236 characters remaining

*Billing Type UVM Internal ▾

🖾 Receipt Split

☑ Default Rate   *Exchange Rate   1.00000000   🔄 🖾

*Number of Nights ____

🖾 Itemize Hotel Bill

☐ Non-Reimbursable   Base Currency Amount   750.00   USD

*Merchant ○ Preferred   ⦿ Non-Preferred

☐ No Receipt

▸ Accounting Details ?

Click on the **Detail** link to fill in the required fields for this expense.

Create Expense Report

Itemize Hotel Bill

Report ID NEXT

General Hotel Bill Information (?)		Your Hotel Bill (?)	
*Transaction Date 10/01/2019 📅		Total Bill	750.00 USD
☐ Checkout Date			
*Payment Type Personal Credit Card ▾		Remaining	750.00 USD
*Billing Type UVM Internal ▾			
*Number of Nights 2 ←			

*Merchant (Choose One)

Non-preferred Las Vegas Flamingo

Location Nevada 🔍

*Description Las Vegas Flamingo 🔗

236 characters remaining

*Amount Spent 750.00

*Currency USD 🔍

*Exchange Rate 1.00000000 🔄 📇

☑ Default Rate

Base Currency Amount 750.00 📇 USD

[Calculate Amounts]

☐ Non-Reimbursable

☐ No Receipt

Charges Incurred on This Bill (?)

☑ Room Charge   ☑ Parking
☑ Room Service   ☐ Laundry
☐ Telephone/Internet ☐ Misc Charges

[Continue]

Return To Expense Report

Which fields must be completed for each transaction varies by expense type. For example, **Hotel** expense must include the number of nights.

If you have a **Hotel Bill** that includes room charges, room service (meals), parking, or other services, you can choose types of charges which were incurred on your hotel bill. Simply check the appropriate expense types from your bill, then click **Continue**.

Create Expense Report

Itemize Hotel Bill

Report ID NEXT

Room Charge							
Details							
Transaction Date	Number of Nights	Room Rate	Currency		Non-Reimbursable		
10/01/2019 🗓	2	275.00	USD		☐		⊟

Add Room Charge

Your Hotel Bill ⑦	
Total Bill	750.00 USD
Room Charge	0.00
Room Service	0.00
Parking	0.00
Remaining	750.00 USD

Number of Nights	2
Room Charge Total	0.00 USD
Total Room Expense	0.00 USD

Previous   Continue

Return To Expense Report

PeopleSoft will ask for the amounts that make up each of the lines you have selected:

    Room Charge
    Room Service (meals)
    Parking

Once you've entered an amount for the **Room Charge**, click **Continue**. This will bring you to the next item: **Room Service**.

Create Expense Report

Itemize Hotel Bill

Report ID NEXT

Room Service

Date	Meal Type	Amount	Currency	Non-Reimbursable		
10/01/2019 📅	Trv.Meal ▾	50.00	USD	☐		−
10/02/2019 📅	Trv.Meal ▾	50.00	USD	☐		−

Add Room Service Charge

Room Service Total   100.00 USD

Your Hotel Bill ?

Total Bill	750.00 USD
Room Charge	550.00
Room Service	100.00
Parking	0.00
Remaining	100.00 USD

Previous   Continue

Under **Room Service**, enter a Date, Meal Type and Dollar Amount, then click **Continue**.

Create Expense Report

Itemize Hotel Bill

Report ID NEXT

Parking

Details

Date	Amount	Currency	Non-Reimbursable	
10/02/2019	100.00	USD	☐	−

Add Parking Charge

Parking Total   100.00 USD

Previous   Continue

Your Hotel Bill ?

Total Bill	750.00 USD
Room Charge	550.00
Room Service	100.00
Parking	100.00
Remaining	0.00 USD

Notice that the software keeps a running total of your hotel bill on the right hand side of the page.

Continue entering detail in this way until you have accounted for all hotel expenses. When you are finished, the system will congratulate you.

Create Expense Report

Itemize Hotel Bill

Report ID   NEXT

Hotel Itemization - Finish!	**Your Hotel Bill** ❓		
Congratulations! You are done. If you need to make any adjustments, you may use 'Receipt Split' function to reconcile your bill later.	Total Bill	750.00	USD
	Room Charge	550.00	
	Room Service	100.00	
	Parking	100.00	
	Remaining	0.00	USD

Previous   Done

Your Hotel Bill is in balance and you can return to the Expense Report by clicking the **Done** button.

Once the Hotel Bill is itemized, the expense lines will be populated in your Expense Report for you.

	*Date	*Expense Type	*Description	*Payment Type	*Amount	*Currency	
▶	10/01/2019	Hotel/Lodging Domestic	Hotel Wizard: Hotel/Lodging Domestic 218 characters remaining	Personal Credit Card	275.00	USD 🔍	+ −
▶	10/02/2019	Hotel/Lodging Domestic	Hotel Wizard: Hotel/Lodging Domestic 218 characters remaining	Personal Credit Card	275.00	USD 🔍	+ −
▶	10/01/2019	Meals- Domestic Travel Daily	Hotel Wizard: Meals- Domestic Travel Daily 212 characters remaining	Personal Credit Card	50.00	USD 🔍	+ −
▶	10/02/2019	Meals- Domestic Travel Daily	Hotel Wizard: Meals- Domestic Travel Daily 212 characters remaining	Personal Credit Card	50.00	USD 🔍	+ −
▶	10/02/2019	Parking & Toll Fees	Hotel Wizard: Parking & Toll Fees 221 characters remaining	Personal Credit Card	100.00	USD 🔍	+ −

To add more expense lines, click on the **+** button on the right or the **Add** button under **New Expense**.

Accounting Defaults

Accounting Defaults, continued

Create Expense Report
Accounting Defaults

Report ID 0000116423

Accounting Summary   Set Personalizations | Find | 📷 | 📋   First ◄ 1 of 1 ► Last

%	*GL Unit	Oper Unit	Dept	Fund	Fund Affil	Source	Function	PC Bus Unit	Project	Activity	Program	Purpose	Property	Affiliate	
100.00	UVM01 🔍	01 🔍	11220 🔍	100 🔍	🔍	100001 🔍	521 🔍	🔍	🔍	🔍	0000 🔍	0000 🔍	0000 🔍	🔍	➖

Add ChartField Line   Load Defaults   User Defaults

OK

Accounting Defaults, continued

Accounting Defaults, continued

Accounting Defaults, continued

Moving columns – Personalize link

Moving columns – Personalize link

Moving columns – Personalize link

Any time there is a Personalize link, the column order can be changed: travel and expenses, journals, requisitions….

Adding Attachments

There is an Attachments hyperlink on the expense report, General Information section:

Expense Report Attachments

Report ID NEXT

Details					Personalize | Find | View All | 📷 | 📊	First ◀ 1 of 1 ▶ Last
File Name	**Description**		**User**	**Name**	**Date/Time Stamp**	
View						➖

Adding large attachments can take some time to upload, therefore, it is advisable to save the
transaction before adding large attachments.

Add Attachment

OK   Cancel

File Attachment   ✕

                                                    Help

[   ] Browse...

Upload   Cancel

📁 Tech		
📁 Travel		
📁 Vehicle		
📁 Year End		
📁 DOCS		
📁 email_signature_GA_files		
📁 Erins computer		
📁 ERP		
📁 General Accounting		

📄 Flyamerica_UVM.pptx	3/16/2017 1:11 PM	Microsoft PowerP
📄 Flyamerica_UVM_033117.pptx	3/31/2017 8:38 AM	Microsoft PowerP
📄 Fly America Act plan_051717.docx	6/14/2017 11:38 AM	Microsoft Word D
📄 Best-Practices-for-International-Group-T...	6/28/2017 3:19 PM	Adobe Acrobat D
📄 A-Holistic-View-in-Travel-Risk-Manage...	6/28/2017 3:23 PM	Adobe Acrobat D
📄 Gonzaga Intl Trvl handbook.pdf	6/30/2017 10:35 AM	Adobe Acrobat D
📄 Gonzaga Emergency Communctn plan.pdf	6/30/2017 10:35 AM	Adobe Acrobat D
📄 Gonzaga Faculty led handbook.pdf	6/30/2017 10:36 AM	Adobe Acrobat D
📄 Concur Travel Risk Management in High...	7/31/2017 4:37 PM	Adobe Acrobat D

File name: [▽]   All Files (*.*)   ▽

Open ▼   Cancel

File Attachment

Help

H:\Disburse Center\Travel\intl travel\Flyamerica_UVM_| Browse...

Upload   Cancel

Details

File Name	Description	Us
Flyamerica_UVM_033117.pptx	additional description ☒	

Adding large attachments can take some time to upload, therefore, it is advisable to save the transaction before adding large attachments.

Add Attachment

OK   Cancel

Create Expense Report

Erin Fitzgerald ?

*Business Purpose Administration/Operation ▾

*Report Description Mileage to campus for meetings

*US State/Country Chittenden County, VT 🔍

✐ Attachments (1)

Submit Electronically

Electronic submission of expense reports that are submitted and approved:

A. Expense report entered by employee, no required receipts:
   - Use the notify button on the expense report screen, to travel@uvm.edu, telling the Travel team in the Disbursement Center that expense report xxxxxx is submitted and approved.

B. Expense report entered by employee, required receipts:
   - Email travel@uvm.edu with a copy of the expense report AND
   - Email scanned images of the required receipts; OR
   - Attach scanned images of the required receipts to the expense report in PeopleSoft.

Submit Electronically, continued

C. Expense report entered by delegate, printed expense report signed by traveler, no required receipts:
- Email travel@uvm.edu with a copy of the expense report, signed by the traveler.

D. Expense report entered by delegate, printed expense report signed by traveler, required receipts:
- Email travel@uvm.edu with a copy of the expense report, signed by the traveler, AND
- Email scanned images of the required receipts; OR
- Attach scanned images of the required receipts to the expense report in PeopleSoft.

E. Service previously provided by ABSC – submit request to travel@uvm.edu, or via hardcopy through campus mail.

Where is the expense report?

Report status =

- Pending – never submitted or sent back
- In process – Approvals in Process – in prepay auditor worklist
- Submitted – Submitted for Approval - in department approver worklist
- Staged – will be paid by Disbursement Center, the next time checks are produced
- Paid
- Denied – by either department approver or prepay auditor (cannot be resubmitted)

Ways to find payment information

- T&E Employee Expense Payments – by payment (check or direct deposit)

- T&E Employee Expense History – by expense report

- Accounts Payable

T&E Employee Expense Payments – by payment (check or direct deposit)

Navigation:
 - Employee Self Service, Travel and Expenses, Review Payments

 OR

 - T&E Administration, Travel and Expense Center, Review Payments, Review Payments

Drill to detail

...ormation

Payment Date 05/03/2019   Payment Amount   37.81 USD

...ment Status Paid   Payment Reference 0009091

...D	Description	Stat...
...000116415	2019 HEUG Orlando	Pai...

Return to Search   Previous in...

Payee Address Information   ✕

Help

Employee Payment History

Mailing Address

Country USA   United States

Address 1 Disbursement Center

Address 2 23 Mansfield Avenue

Address 3

City

County   Postal

State

OK   Cancel

To update the address:

Addresses are fed from Human Resources

- Only Home and Mail addresses can be updates via HR Self Services
- To update work address, contact your department HR administrator to submit an ePar, when an employee changes department. Otherwise, email payroll@uvm.edu

- Employees do not receive reimbursement for commute from home to campus.
- If an employee works from home, they should not have a campus address.

Employee Expense History – by report number

Navigation:

Employee Self Services, Travel and Expenses, Review Payments, Review Expense History

- Clicking on ID (ER #) brings you to the expense report
- Clicking on the Status brings you to the Review Payments page

View Payments through Accounts Payable

View Payments through Accounts Payable
- select vendor – alpha by first name

View Payments through Accounts Payable

Source - EXPN = T&E module

Payment Reference ID = check number

Reconciliation Status =
- Unreconciled – not cashed
- Reconciled – cashed

Reconcile Date = date UVM's bank processed cashed check

Other Travel Resources

- UVM Travel Policy
- Travel Web Site
- Travel FAQs
- International Travel FAQs
- Travel PeopleSoft User Guides, includes videos
- T&E Direct Deposit
- PeopleSoft Online User Guides
- Monthly Financial Processes
- travel@uvm.edu

- Business Meals & Amenity Policy
- Business Meals Policy FAQs

- Risk Management Web Site
- Risk Management's Travel Safety Guidelines
- Travel Accident Insurance

❖ Procedures regarding electronic submission
    https://www.uvm.edu/sites/default/files/Division-of-Finance/UserGuides/emplreimbursementdcfs.pdf

❖ Receipt requirements:
    https://www.uvm.edu/finance/employee-reimbursement

❖ Adding attachments to an expense report:
    https://www.uvm.edu/sites/default/files/Division-of-Finance/UserGuides/attachments.pdf

❖ The Travel web site has been updated. Please visit:
    https://www.uvm.edu/finance/travel

Questions?