

TOWN OF SOUTHBOROUGH



OFFICE OF THE TOWN ADMINISTRATOR

TOWN HOUSE 17 COMMON STREET SOUTHBOROUGH, MASSACHUSETTS 01772-1062
(508) 485 0710 selectboard@southboroughma.gov

TO: Select Board
FROM: Mark J. Purple, Town Administrator
DATE: August 6, 2026
SUBJECT: Recommendation for contract award – Government Structure Study

As you will recall, the Select Board has discussed a review of the Town's current organizational structure. After distributing a scope of services and meeting with the chosen consultant, I would recommend this project be awarded to Capital Strategic Solutions [CSS]. This engagement will include an objective assessment of the Town's governance framework, organizational relationships, and decision-making processes.

Previously CSS worked with the Town to complete the reporting of all ARPA and CARES funding from the federal government. Their approach emphasizes collaboration, broad stakeholder engagement, and practical recommendations that can be implemented to strengthen organizational effectiveness while respecting Southborough's unique culture and traditions. Project components will include:

- Research – The project team will review and report on the effectiveness and efficiency of the Town's current organizational structure and identify opportunities for potential increased effectiveness and efficiency.
- Review will also examine potential regional collaboration or privatized services
- The project team will also suggest appropriate examples from other municipalities with a similar town meeting form of government
- The project team will facilitate meetings of citizens, employees, and other key stakeholders to gather feedback and information about the Town

I recommend authorizing the Town Administrator to execute a contract with CSS in the amount of \$24,650, funded from the Consultant and Engineering warrant article.

Thank you.



CAPITAL STRATEGIC SOLUTIONS

Building Stronger Communities

PROPOSAL & QUOTATION

Town of Southborough
Governance Assessment &
Organizational Effectiveness Study



508-690-0046



INFO@CAPITAL-STRATEGIC-SOLUTIONS.COM



WWW.CAPITAL-STRATEGIC-SOLUTIONS.COM



43 BROAD STREET, SUITE B309A, HUDSON, MA 01749

WWW.CAPITAL-STRATEGIC-SOLUTIONS.COM



CAPITAL STRATEGIC SOLUTIONS

July 22, 2026

Mr. Mark Purple
Town Administrator
Town of Southborough
Southborough, MA

Re: Governance Assessment and Organizational Effectiveness Study

Dear Mr. Purple:

On behalf of Capital Strategic Solutions (CSS), I am pleased to submit our proposal to provide a Governance Assessment and Organizational Effectiveness Study for the Town of Southborough. Strong governance serves as the foundation for effective municipal operations, strategic decision-making, and public trust. As communities continue to navigate increasingly complex operational, financial, and regulatory challenges, periodically evaluating governance structures and organizational practices provides an important opportunity to ensure that municipal government remains responsive, transparent, and well-positioned to meet the needs of residents.

CSS understands that this engagement is intended to provide an objective assessment of the Town's governance framework, organizational relationships, and decision-making processes. Our approach emphasizes collaboration, broad stakeholder engagement, and practical recommendations that can be implemented to strengthen organizational effectiveness while respecting Southborough's unique culture and traditions.

We appreciate the opportunity to submit this proposal and would welcome the opportunity to partner with the Town of Southborough on this important initiative. We are confident that our experience, collaborative approach, and commitment to practical solutions will provide the Town with a thoughtful and valuable assessment that supports effective governance and long-term organizational success.

Thank you for your consideration. Should you have any questions or require additional information, please do not hesitate to contact me. We look forward to discussing our proposal with you.

Respectfully Submitted,

Jennifer Thompson

Jennifer Thompson
Chief Development Officer/Partner



COMPANY PROFILE AND QUALIFICATIONS

Capital Strategic Solutions (CSS) is a certified Women-Owned Business that specializes in strategic planning, municipal finance, public administration, human resources in the public sector, grant writing and administration, community engagement, public safety, project management, public works and infrastructure, and management consulting. At CSS, we offer professional consulting services through an authentic exchange with our clients and by building meaningful relationships. CSS provides support services to assist our clients in developing the tools that they need for success. Founded in 2014 and based out of Hudson, Massachusetts, CSS is made up primarily of employees that have spent decades working in local, county and state government.

As stated in our cover letter, Capital Strategic Solutions meets all capabilities and qualifications needed for this project and is fully versed and experienced in the services required. CSS possesses the technical expertise, bandwidth, and ability to conduct all the activities highlighted in this proposal. Staff assigned to this project reside locally in New England and CSS will be fully available to deploy in person, virtually, or through a hybrid schedule for this project. As former senior executive municipal employees with decades of experience managing and administering this type of work in the past, the project staff is qualified and prepared to deliver comprehensive professional services to the Town of Southborough.

CURRENT MUNICIPAL CLIENT LIST:

Acton Water District	Clinton	Hudson	Norfolk	Southborough
Acushnet	Cocoa Beach, FL	Longmeadow	Norfolk County	Southbridge
Attleboro	Concord	Lowell	North Attleborough	Stow
Avon	Concord Light & Power	Ludlow	North Brookfield	Sturbridge
Barnstable County	Conway	Lunenburg	Northborough	Sudbury Water District
Barre	Dedham-Westwood Water	Lunenburg Water District	Oakham	Swansea
Belmont	Dover	Lynn	Old Colony Planning	Townsend
Berlin	Dunstable	Malden	Palmer	Truro
Bernardston	Easton	Manchester, CT	Pawtucket, RI	Upton
Blackstone	Fairhaven	Manchester-by-the-Sea	Pepperell	Walpole
Boston	Fitchburg	Marion	Petersham	Ware
Boxford	Flagler Beach, FL	Marlborough	Plainville	Warren, RI
Bridgewater	Framingham	Maynard	Plymouth County	Watertown
Bristol County	Franklin	Medfield	Princeton	Wayland
Brockton	Gloucester	Middleborough	Putnam, CT	Wellesley
Brookline	Grafton Water District	Middleton	Randolph	West Bridgewater
Burrillville, RI	Greenfield	Millbury	Reading	Westborough
Cambridge	Groton	Milton	Rockport	Westford
Central MA Stormwater	Hanson	Miramar, FL	Shelburne	Westminster
Chatham	Holbrook	Monson	Sherborn	Westminster, VT
Chelmsford	Holden	Nantucket	Shrewsbury	Weston
Chelsea	Hopkinton	Natick	Smithfield, RI	Weymouth
Cherry Valley Water	Hubbardston	Needham	Somerville	Wrentham



CAPITAL STRATEGIC SOLUTIONS

COMPANY REFERENCES:

Jamie Hellen, Town Manager
Town of Franklin, MA

Tel. (508) 553-4887
Email: jhellen@franklinma.gov

Evan Brassard, Town Manager
Town of Grafton, MA

Tel. (508) 839-5335 ext. 1155
Email: brassarde@grafton-ma.gov

Jared Nicholson, Mayor
City of Lynn

Tel. (781) 586-6850
Email: Jared.Nicholson@lynnma.gov

Diane Stokes, City Engineer
City of Cambridge

Tel. (781) 696-7000
Email: dstoked@cambridgema.gov

Brian Noble, Town Administrator
Town of Plainville

Tel. (781) 424-8402
Email: bnoble@plainville.ma.us

Troy Clarkson, Chief Financial Officer
City of Brockton

Tel. (508) 580-7165
Email: tclarkson@cobma.us

PROJECT UNDERSTANDING:

The Town of Southborough seeks an independent, objective assessment of its governance structure and organizational effectiveness to ensure that its municipal government is well-positioned to meet current operational demands and future community needs. As municipalities continue to face increasing service expectations, evolving regulatory requirements, and growing organizational complexity, it is important to periodically evaluate whether governance practices, organizational relationships, and decision-making processes continue to support efficient, transparent, and accountable local government.

Capital Strategic Solutions understands that this engagement is intended to provide a comprehensive evaluation of how the Town's governance framework functions in practice. The assessment will examine the relationship between elected officials, appointed boards and committees, municipal leadership, and staff, with a focus on identifying opportunities to improve organizational effectiveness, clarify roles and responsibilities, strengthen communication, and enhance collaboration throughout the organization.

The study will evaluate the Town's governance model, organizational structure, decision-making processes, lines of authority, and accountability systems to determine whether they effectively support policy development, operational management, strategic planning, and service delivery. The



review will also consider how boards and committees interact with Town administration, how responsibilities are assigned and communicated, and whether current practices promote efficient and consistent municipal operations.

Recognizing that effective governance depends on both organizational structure and community trust, the study will incorporate meaningful stakeholder and public engagement. Input from municipal officials, employees, board and committee members, and residents will provide valuable insight into the Town's strengths, challenges, and opportunities for improvement. This collaborative approach will ensure that recommendations are informed by both organizational best practices and the perspectives of those who work within and are served by Southborough's government.

Rather than focusing on individual positions or personalities, the Governance Assessment and Organizational Effectiveness Study will evaluate systems, processes, and organizational relationships. The final product will provide practical, actionable recommendations designed to strengthen governance, improve organizational performance, clarify responsibilities, and position the Town for continued success through a more effective, collaborative, and responsive municipal government.

SCOPE OF SERVICES:

Capital Strategic Solutions will employ a collaborative, objective, and data-informed approach to evaluate the Town's governance structure and organizational effectiveness. Our methodology is designed to provide a comprehensive understanding of how the Town's governance framework functions in practice by combining document review, stakeholder engagement, public input, comparative municipal research, and organizational analysis. Throughout the engagement, CSS will work closely with Town leadership, elected officials, appointed boards and committees, staff, and residents to identify organizational strengths, clarify roles and responsibilities, assess governance practices, and develop practical recommendations that support effective decision-making, accountability, transparency, and long-term organizational success. The study will be conducted in four sequential phases, each building upon the findings of the previous phase to produce a thoughtful, actionable roadmap for strengthening governance and enhancing organizational effectiveness.

Phase 1 – Project Initiation and Background Review

CSS will begin the engagement by meeting with Town leadership to confirm project objectives, establish communication protocols, refine the project schedule, and identify key stakeholders. During this phase, the project team will collect and review foundational documents, including the Town Charter, bylaws, organizational charts, committee charges, strategic planning documents, meeting minutes, and other relevant materials. This review will provide the context necessary to understand Southborough's current governance framework, organizational relationships, and decision-making processes before engaging stakeholders.

Phase 2 – Governance Assessment and Stakeholder Engagement

Building upon the background review, CSS will conduct a comprehensive assessment of the Town's governance structure through interviews with elected officials, municipal leadership, department heads, and representatives of boards and committees. These discussions will focus on how governance functions in practice, examining the effectiveness of existing organizational relationships, communication, decision-making authority, accountability, and the division of responsibilities between policy makers and administration. The assessment will identify organizational strengths as well as opportunities to improve coordination, efficiency, and overall effectiveness.

As part of this phase, CSS will also develop and administer a confidential online stakeholder survey designed to gather broad input from municipal officials, employees, board and committee members, and interested residents. Survey results will provide valuable insight into perceptions of the Town's governance structure and will help validate themes identified during interviews.

Phase 3 – Public Engagement and Comparative Analysis

Community engagement is an important component of the governance review process. CSS will facilitate a public listening session dedicated specifically to the Governance Study, providing residents with an opportunity to learn about the purpose of the review, share their perspectives, and identify priorities for improving municipal governance. Public feedback will be documented and incorporated into the overall analysis.

During this phase, CSS will also conduct a comparative review of governance models and organizational practices utilized by similarly situated Massachusetts municipalities. This benchmarking effort will help identify proven practices and organizational approaches that may be applicable to Southborough while recognizing the Town's unique history, culture, and governance needs.

Phase 4 – Findings, Recommendations, and Final Report

Following completion of the assessment, CSS will prepare a comprehensive Governance Study Report summarizing the review process, stakeholder input, survey findings, public engagement results, comparative research, and overall evaluation of the Town's governance structure. The report will identify organizational strengths, areas of concern, and practical recommendations designed to improve governance, clarify roles and responsibilities, strengthen communication, and enhance organizational effectiveness.

The engagement will conclude with a formal presentation of the findings and recommendations to the Select Board during a public meeting. CSS will facilitate discussion, answer questions, and provide guidance regarding implementation priorities and potential next steps.



CAPITAL STRATEGIC SOLUTIONS

Through this structured and collaborative process, Capital Strategic Solutions will provide the Town of Southborough with an objective evaluation of its governance framework and organizational effectiveness, along with practical recommendations that reflect municipal best practices and the Town's unique operational needs. Our goal is to deliver a clear roadmap for strengthening governance, improving organizational coordination and communication, clarifying roles and responsibilities, and enhancing the Town's ability to provide responsive, transparent, and effective municipal services. By engaging elected officials, staff, boards and committees, and residents throughout the process, the study will build consensus around opportunities for improvement while positioning the Town for continued organizational success and effective governance well into the future.

RECENT SIMILAR PROJECTS:

Capital Strategic Solutions has supported municipalities across Massachusetts in conducting governance and organizational assessments that align leadership, establish shared priorities, and create actionable frameworks for decision making. The following representative engagements reflect our approach and methodology in practice.

CSS recently worked with the Town of Wrentham, Massachusetts to design and implement a strategic planning process intended to guide municipal decision making and strengthen alignment among elected officials and staff. The Town sought to establish a clear set of priorities that reflected community values while also addressing operational and financial realities. CSS began with a comprehensive review of existing materials, including budget documents, capital planning information, and organizational structure. This was followed by structured engagement with the Select Board, Town Manager, and department heads. Through facilitated discussions, common themes and shared concerns were identified, allowing leadership to move toward consensus. CSS then guided the development of a unified vision and a defined set of core values that informed the Strategic Plan. The final plan organized priorities into key focus areas and included actionable steps, ensuring that the document could serve as a practical tool for decision making.

In the Town of Manchester by the Sea, Massachusetts, CSS supported municipal leadership in a strategic planning and governance focused engagement that emphasized alignment among boards and clarity of roles and priorities. This work required careful facilitation among stakeholders with differing perspectives and a need to build consensus around community direction. CSS worked with elected officials and staff to identify shared priorities and develop a framework that clarified decision making processes and reinforced common goals. A central component of this effort was helping leadership articulate guiding principles that could be consistently applied across policy discussions and operational decisions.



In the Town of Milton, Massachusetts, CSS conducted a comprehensive operational review of both municipal and school functions. While this engagement was not a traditional strategic plan, it required a similar methodology centered on data analysis, stakeholder engagement, and alignment of priorities across complex systems. CSS worked closely with Town and School leadership to evaluate organizational structure, service delivery, and resource allocation. Through this process, key themes and shared priorities emerged, including the need for improved coordination, clearer communication, and alignment between municipal and school operations. The findings and recommendations provided a foundation for future strategic planning by identifying areas where a common set of values and priorities could guide decision making.

Across each of these engagements, Capital Strategic Solutions has demonstrated the ability to guide organizations through a structured process that results in clearly defined values, principles, and shared priorities. Our approach emphasizes synthesis of existing information, meaningful stakeholder engagement, and facilitation of consensus among leadership. These core elements are directly aligned with the needs of the Town of Southborough and reflects community values and supports coordinated decision making across municipal leadership.

KEY PROJECT PERSONNEL:



William Keegan, Senior Project Manager

With over forty years of experience in municipal government, Bill is a Master of Strategic Planning and has the leadership and management experience to tackle any issue in any community. Bill understands that nothing in government is ever done alone, and that success is best when it is shared. That mindset allows him to develop thoughtful relationships with community members and stakeholders that are built on trust, transparency and communication. His eye for long term planning makes him especially adept at executing financially complex projects. He is skilled in the areas of Municipal Finance, Economic Development, HR and Labor Relations, Communications, Organizational Development and in developing Regional Cooperation and

initiatives. His greatest strengths are in community collaboration where he appreciates challenges and enjoys solving problems. He has successfully transformed several municipal organizations by improving performance, efficiency, and financial accountability.



Momina Haidri, Project Manager

Momina Haidri brings experience in government relations, stakeholder engagement, and strategic communications. Prior to joining Capital Strategic Solutions, she served as District Liaison for Senate President Karen E. Spilka, where she managed constituent services, coordinated public outreach, supported legislative initiatives, and organized large-scale community engagement events. Her background also includes leadership roles on local, state, and federal political campaigns, as well as legislative experience with the offices of U.S. Senator Elizabeth Warren and State Representative Carolyn Dykema. Momina holds a Bachelor of Arts in Political Science from Merrimack College, a Paralegal Certification from Boston University, and is a graduate of the MetroWest Leadership Academy's Class of 2025.

PRICING:

CSS proposes to complete all services outlined in this proposal for a not to exceed amount of Twenty-Four Thousand Six Hundred Fifty Dollars (\$24,650.00). CSS will not exceed this amount without prior authorization from the Town. The Town of Southborough will be billed on a monthly basis. The project will commence upon the signed acceptance of the proposed services as described above.

Authorized by: *Jennifer Thompson*
Jennifer Thompson
Chief Development Officer/Partner
Capital Strategic Solutions, LLC.
July 23, 2026

Authorized by _____

Proposed Project Timeline (Approximately 18 Weeks)

Week(s)	Task	Deliverable
Week 1	Project Kickoff Meeting with the Town Administrator and Assistant Town Administrator to review project objectives, confirm scope, establish communication protocols, identify key stakeholders, and finalize the project schedule.	Finalized Project Work Plan
Week 1	Leadership Coordination Meeting with the Town Administrator, Assistant Town Administrator, and Select Board Chair to discuss expectations, governance priorities, and known organizational challenges.	Confirmed Project Priorities
Weeks 1-2	Collect and review background materials including the previous Division of Local Services (DLS) Governance Study, bylaws, special acts, organizational charts, committee charges, Town Meeting actions, financial policies, personnel bylaws, organizational documents, and related reports.	Existing Conditions Assessment
Week 2	Attend a Select Board meeting to introduce the project, explain the study process and timeline, outline opportunities for public participation, and answer questions from Board members and the public.	Public Project Launch
Weeks 2-3	Develop stakeholder interview guides and prepare a governance survey for municipal officials, employees, board members, and residents.	Survey & Interview Materials
Week 3	Launch online governance survey.	Survey Released
Weeks 3-7	Conduct interviews with the Select Board, Town Administrator, Assistant Town Administrator, department heads, sampling of boards and committees Chairs (or their delegates), and other key stakeholders.	Interview Summaries
Weeks 4-7	Meet with various boards and committees to evaluate governance roles, decision-making processes, organizational relationships, committee responsibilities, vacancies, and operational challenges.	Governance Assessment Notes
Week 6	Public Listening Session #1 to introduce the governance study, gather community perspectives, identify concerns, and discuss opportunities for improving municipal governance.	Public Input Summary
Weeks 7-10	Analyze survey responses, interview findings, organizational documents, and governance practices. Conduct comparative research of peer municipalities and evaluate governance models, organizational structure, span of control, board and committee effectiveness, personnel administration, financial governance, and succession planning.	Preliminary Findings

Week(s)	Task	Deliverable
Weeks 10-11	Develop preliminary recommendations and identify potential organizational improvements, governance alternatives, implementation strategies, and opportunities for increased operational effectiveness.	Preliminary Recommendations
Week 12	Review preliminary findings and recommendations with the Town Administrator, Assistant Town Administrator, and Select Board Chair to validate factual information and discuss emerging themes.	Leadership Review
Week 13	Public Listening Session #2 to present preliminary observations and governance concepts, receive community feedback, and discuss potential recommendations.	Community Feedback Summary
Weeks 14-15	Prepare the Draft Governance Assessment and Organizational Effectiveness Report, including findings, supporting analysis, recommendations, and an implementation roadmap.	Draft Report
Week 16	Present the Draft Report to the Select Board during a public meeting and facilitate discussion regarding findings and recommendations.	Draft Report Presentation
Week 17	Revise the report based on feedback received from Town leadership, the Select Board, and the public. Finalize implementation priorities and recommendations.	Final Report
Week 18	Present the Final Governance Assessment and Organizational Effectiveness Report to the Select Board and provide guidance on implementation priorities, next steps, and project closeout.	Final Report & Project Closeout