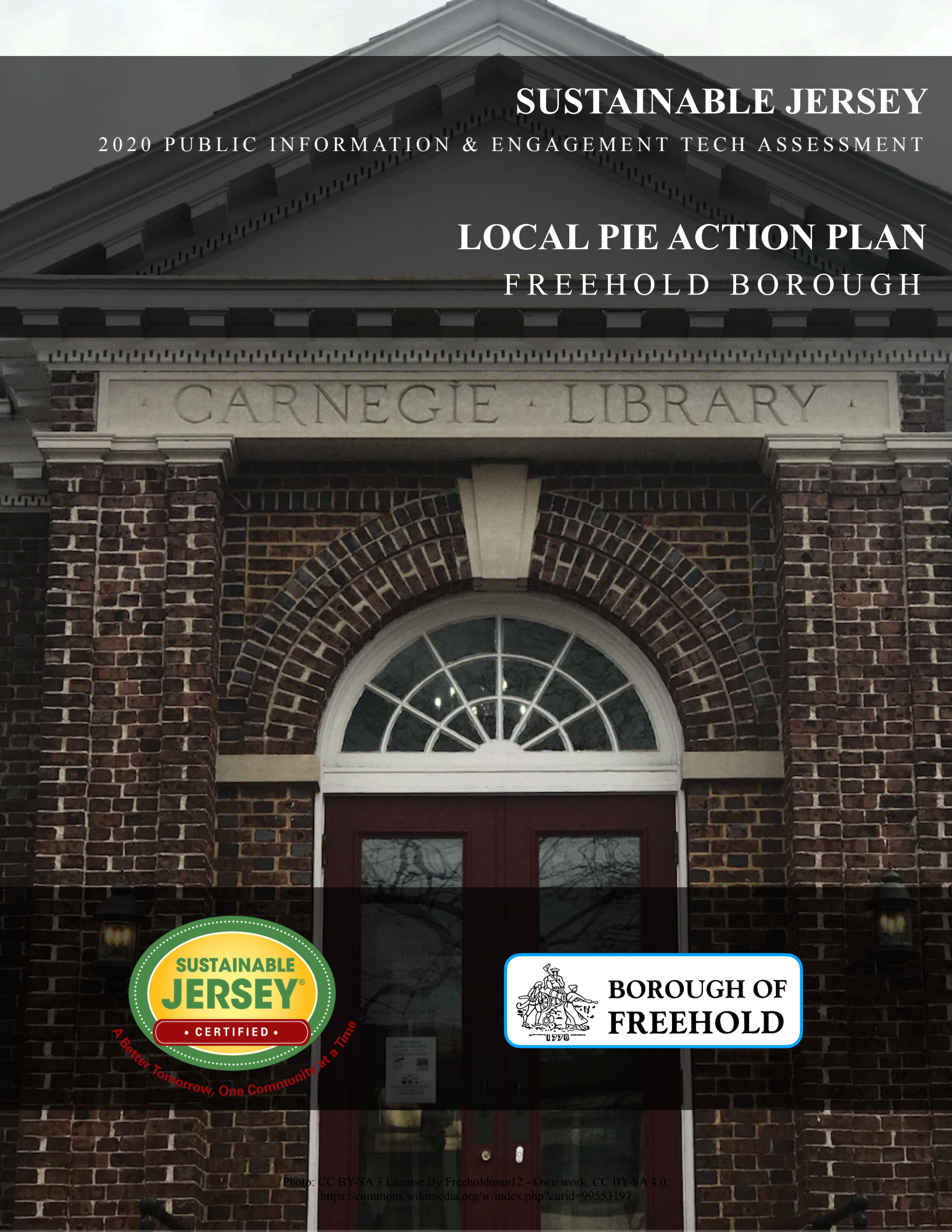
# SUSTAINABLE JERSEY

2020 PUBLIC INFORMATION & ENGAGEMENT TECH ASSESSMENT

# LOCAL PIE ACTION PLAN

FREEHOLD BOROUGH

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A Better Tomorrow, One Community at a Time

BOROUGH OF FREEHOLD

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# Table of Contents

1. Acknowledgements and Executive Summary
2. Goal-Driven Recommendations
3. Strategies and Tactics
4. Platforms and Tools
5. Appendix

# Acknowledgements

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Sustainable Jersey also thanks Alex Torpey who designed and facilitated the 2020 PIE Technology Assessment process and authored this report. In addition to the content contained in this report, the "Tips" are based on Alex's experience in elected, administrative and consulting capacities in New Jersey.

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# Executive Summary

Over the course of eight weeks, Freehold Borough stakeholders met with Sustainable Jersey's PIE Consultant to assess community needs and the municipality's technological, financial, and human resource capacity; and set goals for the kind of future they would like to move the community towards.

This Action Plan includes recommendations as to how Freehold Borough might address those needs, such as capacity building through volunteer engagement and local and regional collaboration building, incorporating technology to improve public communication and engagement in decision making, implementing short and long term planning processes to identify concrete steps to achieve larger goals, and the utilization of various policies, programs, and funding sources that may help towards those ends.

These recommendations can be found on page 5, with additional detail in the subsequent sections.

# PART ONE

## Goal-Driven Recommendations

Based on the vision laid out by your stakeholders, this section contains a number of goal-driven recommendations to assist your municipality in using technology to more effectively engage your community in improved local decision-making.

Photo: Alex Torpey

# Goal-Driven Recommendations

The following goal-driven recommendations are based on surveys and discussions between Freehold Borough stakeholders and Sustainable Jersey's PIE Consultant throughout the fall and winter of 2020. For more details on these processes, see the Appendix.

1. *Build local committee infrastructure* to assist the Borough in the consideration and implementation of new redevelopment related initiatives.
2. Identify and implement short and long term solutions to *improve public information and engagement* between the government, community, and other relevant local stakeholders.
3. Implement *311/Online Municipal Services* system and develop an initiative to promote the new interactive access to Borough services.
4. Facilitate a *Community Strategic and Financial Planning* effort to assist in determining the community's long-term goals. This effort would include a public, multi-year financial analysis based on those goals and evaluation of local infrastructure, municipal facilities and services, future estimates of commercial rateables, key community services, and affordability.
5. *Build local committee infrastructure* to promote businesses, art, and cultural development in Freehold that celebrates and supports the preservation of local history.
6. Implement a *volunteer engagement plan* to help drive membership for the Green Team, Environmental Commission, and other municipal boards and committees, which will provide the Borough with greater capacity to address local needs.
7. Leverage available funding opportunities to help minimize or eliminate the taxpayer impact of implementing new technology and shared service programs.

The following pages will delve into each recommendation in more detail. The needs addressed through each recommendation and goals identified by the Borough are included. A summary is provided on ways to potentially implement each recommendation, should your community choose to move forward. Specific "Strategies and tactics" and "platforms and tools' are referenced throughout this section, and correspond to the subsequent respective section that goes into more detail.

# Recommendation #1

Build local committee infrastructure and create a community advocacy initiative to assist the Borough in the consideration and implementation of new redevelopment related initiatives.

**Needs**: There is a need to create new rateables that will help offset the existing local tax burden as well as generate revenue to support greater economic development and municipal capital investment.

**Goals**: Although the Borough has identified exploring redevelopment opportunities as a goal, municipal stakeholders are also aware that building an initiative this large requires highly collaborative partnerships with the public and other stakeholders. Some opportunities have been identified within Liberty Street Park and County Park, as well as creating a more welcoming entrance that greets visitors at the "gateways" to the Borough (e.g. on the Rt. 33 corridor between South Street and the Freehold Township border, and Throckmorton Street between Broad Street and the Township border).

**Implementation:** This recommendation is not as much about economic development content itself, but rather guidelines and suggestions for process and building a constructive relationship with key stakeholders for that process.

**Create a steering committee**. One of the things that may want to be considered early-on is the creation of a sustained committee or board to work alongside the Borough officials (See Build Local Committee Infrastructure on pg 22). A “community development committee” would likely be an asset to the Borough by assisting with research and decision-making of future development activities (e.g. historic preservation, commercial development, Green/Blue Acres sales, municipal facility upgrades, and much more). Consider including members with relevant development or technical expertise for the kinds of projects of interest to the Borough. This group could play a key role in ensuring that input from the full community is heard by the Borough, as well as broadly communicating progress to the community and ensuring that appropriate engagement opportunities are available. Building trust early-on will be critical, and a group such as this will likely provide value in that regard.

**Allow the community to help.** There may come points in time as the Borough moves forward with potential future redevelopment plans where public enthusiasm and willingness to take actions could be valuable. For example, if the Borough is working on the State purchase of certain municipal land, or if applying for a competitive grant that would benefit from community letters of support, or trying to convince a popular retail business, office, or developer to invest locally. Having an informed and engaged community already in place, along with an existing plan that allows for quick mobilization of large groups of community members could help make the difference in those scenarios. These efforts typically only succeed if the community has been engaged from the beginning and feels motivated to help when called upon. There are strategies for designing this kind of framework in *community advocacy initiative* on page 28.

**Integrate with a detailed budgeting process.** Perhaps one of the most important elements to ensuring that the Borough’s plans are developed based on community priorities and are able to move forward constructively is having a solid foundation of facts on which to base local discussions. This should be a clear and accessible understanding of what the needs and constraints are in the community. By performing Recommendation #4 and fleshing out important details of your community’s current and future financial health in an interactive way, you can create an evidence-driven, commonly understood starting point to the discussions about potential redevelopment. This can greatly improve the quality of local discourse and will help ensure the broader public is more engaged as you move forward.

**Leverage technical expertise.** Redevelopment is extremely complicated, even for those who have experience in the field. It is valuable to leverage technical expertise by engaging volunteers on your steering

committee. For example, someone who works for a development firm serving on the committee would likely disqualify the developer from pursuing local projects, but would provide the municipality a wealth of expertise as to the design of the project. It would also be critical to have a redevelopment attorney formally appointed on such a committee. This is someone serving in a scope that would be beyond that of the municipal attorney or a COAH attorney, who has specific expertise and purview to help guide the Borough effectively through the many careful steps needed to ensure ambitious projects can ultimately be successful. While including a redevelopment attorney may cost the Borough money, much of that professional's cost will be paid by developers in projects down the road, not the municipality.

# Recommendation #2

## Identify and implement short and long term solutions to improve public information and engagement between the government, community, and other relevant local stakeholders; including moving more Borough services online

**Need**: Freehold stakeholders identified that there are not strong enough ongoing activities in place for the entire community to stay actively informed and involved with Borough happenings, nor is there a similar way for the Borough to ensure it is soliciting representative feedback from the community on an ongoing basis. This is by no means uncommon, but may erode trust over time and limit the value of the local civic spaces, as stakeholders are not informed or positioned to participate as constructively as possible. Without a consistent and reliable place for people to find trusted information and participate in discussion, potential exists for the vacuum to be filled with misinformation that will likely lead to more fragmented civic discussions over time. Our local communities are by no means immune to the type of fragmentation of civic discourse happening at the national level in this country.

**Goals**: In the short term, the Borough would identify various technology and communication solutions that may be useful in closing the communication and engagement gap. In the longer term, the Borough would focus on developing a sustainable infrastructure to ensure that community members are informed and engaged about what the Borough is doing and opportunities to participate in decision making.

**Implementation**:

**Short-term goals:** Formation of a public information and engagement committee to assist municipal officials with research and make recommendations for technology and communication solutions. Such a committee might engage the community in an assessment of needs and gaps, and reliably inform the Borough of community concerns so all parties may continuously build more trusted and effective relationships to work on important local issues.

Several ideas that you might want to consider which can be implemented by officials or committee:

- Conduct a survey or focus group with community members to collect input on gaps in municipal communication and potential opportunities for engagement in decision making. This might be a good opportunity to find out what information sources residents use to learn about community happenings, and collect ideas on how they might feel more connected with the municipality overall. Develop a *communications and social media policy and plan* (pg 26) that is based on this feedback from the community.
- Implement some of the solutions covered under c*ommunications platforms and methods* (pg 29) and e*ngagement platforms and methods* (pg 30) that can be put in place quickly without much cost, such as setting up an email or text sign up function on the website and a social media account, creating a print and/or digital newsletter, etc.
- Run a *community action event* (pg 25) to urge people to sign up for Borough emails or emergency alerts.
- Create a *volunteer engagement plan* to recruit committee members.
- Assess opportunities to collaborate with other municipal efforts or committees. The findings from these community engagement efforts and research related to improvements to municipal communication and engagement can potentially inform the efforts of other committees.

- Consider whether Freehold Borough can meet any or all of Sustainable Jersey's Public Information and Engagement actions.

**Long-term goals:** In addition to accomplishing any one specific project, the long-term purpose of the committee is to be a sustainable mechanism providing ongoing feedback and support for improving public information and engagement activities within the Borough. Creating a committee with this scope has been successful in many communities in New Jersey, as it ensures that the Borough's activities on this issue are directly driven by the needs of the community, rather than on the Borough's *perception* of the needs of the community. Additionally, such a committee could help facilitate success in other areas listed in the Strategies & Tactics section of this plan.

Directly engaging members of the public in the process to determine how to better engage the public ensures that solutions really do match the needs, and will help build greater interest and trust among residents to constructively participate in the local governing process. Bringing people who might be seen as "oppositional" or disruptive into discussions can sometimes be valuable because it ensures that a broad perspective is being provided and gives that individual an opportunity to participate constructively in shaping the process.

Creating a *Community Advocacy Initiative* (pg 28) as part of strategic advocacy efforts to achieve Transit Village designation and position the Borough for future multi-stakeholder partnerships can be a good medium/long term project to engage your community. After achieving success here, you may be able to use that activity to help build interest in participating in other areas.

**Communicating with specific populations**. Freehold stakeholders have already been investigating ways to reach specific populations through technology. It is worth doing a thorough assessment which would include identifying stakeholders among the particular populations of interest, while ensuring that the municipality implements at least one or two communication platforms that can be used by each of the populations within the community..

**311 Systems.** More information about how 311/Online Municipal Service systems can serve as a way to collect resident feedback on municipal services and programming is found on page 37.

# Recommendation #3

## Implement 311/Online Municipal Service system and develop an initiative to promote the new interactive access to Borough services

**Needs**: There is an identified lack of efficiency for both Borough staff and community members in not being able to engage with more Borough services through online or mobile-based applications. Not having internal data on service requests also limits the kind of insight that can be gained and used for future performance tracking.

**Goals**: To implement programs and deploy technology platforms that start to bring Borough services fully online. This would be accomplished through a wide ranging public engagement program that would bring many members of the public into using the new platforms and participating more in local governance.

**Implementation**: There are two main parts to this, including the deployment of a ”311” style system, and the broader public engagement around use of that system.

Borough stakeholders have identified the priority of rolling out a “311” system that would begin to move various Borough services (e.g. online permits, licenses, and payments, and request for municipal services). This not only helps improve the efficiency and accessibility of municipal services (for all parties), but can begin to create trust within a more engaged public. **Note**: See 311/Online Municipal Services in the Tools section on page 38 for detailed information on the different options.

It is important to consider a broader public engagement initiative related to rolling out this program. This initiative might include various public events, the development of a mobile app for service requests, a dedicated webpage or microsite to serve as an information hub, and a marketing campaign to tie it all together. You might call it something catchy, like “My Freehold.”

In addition to creating a detailed communications plan (See *Communications Policy and Plan* on page 26) that allows you to build buy-in from the existing community to actually use the platforms as you roll them out, you may consider taking the opportunity to leverage this new tool in ways to help spark economic development and investment in the community. Below are a few ways you might consider broadening the scope of the public rollout to include not just existing community members, but better positioning the Borough to potential future businesses and residents.

**Encourage new businesses.** Creating an efficient process for businesses to interact with the Borough can help to encourage new businesses (and residents) to set up shop in town, and reduce associated municipal staff time. A fully deployed 311/Online Municipal Service system is a great way to do this, as it digitizes processes that otherwise would be conducted at Borough hall, while providing a direct line between department staff and the public. The Borough could also create a dedicated webpage with information pertinent to establishing a business in town, which may include some of the following:

1. A checklist of required documents or procedures. A sample from Lambertville can be found in the Appendix.
2. Pictures, bios, and contact information of all key staff.
3. An instructional video of municipal staff walking a potential business owner through the process of establishing their business in town, while introducing Borough staff. Creating such a video does not take much time and provides significant value.
4. A listing of available or vacant properties. This might be done in conjunction with the County or local commercial stakeholder groups.

**Welcome new residents (and businesses)**. Provide opportunities for new community members to connect with municipal staff and officials, and other new residents or business owners. See Recommendation #5 for more ideas such as a "Newcomer's Day" event.

**Create Marketing Materials**. There are many ways to recruit new residents and businesses. One example is to develop marketing materials that might showcase information of interest, relevant to the specific audience (businesses vs. resident). For example business materials might include the new online mechanisms in place to open a business, information about downtown support activities, vehicle and foot traffic figures, etc. Resident materials might include information about local schools, recreational and cultural activities, and ways to get involved and how easy it is to interact with the Borough. These materials can be placed online but also distributed to through real estate agents and other community partners.

**Create a local history website/database**. An interesting and fun way to involve community members in activities that build local history and pride is to create an online local history database. You might recruit local students or volunteers to build out a massive database of video, photos, and text about Freehold Borough's history. It can be done at no cost, using free tools such as Media Wiki. This can be an ongoing or one-time project, housed in a volunteer group or committee, and scaled according to the capacity of the committee at the time.

**Tip.** South Orange's Library Board conducted a similar project which provided an opportunity for people to digitize local history and put it into a format accessible to everyone. This historical database included peoples' own historical photos and documents, as well as interviews with long-time residents or seniors in order to preserve their firsthand knowledge of the Village.

**Financially incentivize property upgrades.** Consider whether certain areas within the Borough are worth designating as an "area in need of rehabilitation." This designation enables the municipality to use tax incentives to encourage local business or homeowners to invest in upgrades or maintenance to their spaces. If worth exploring, make sure to discuss with your municipal attorney and relevant stakeholders.

All of these activities help build the kind of energy and local interest that may provide short-term value to the Borough. But perhaps more importantly, facilitating these kinds of activities could provide significant help when larger redevelopment plans begin to come into play down the road.

# Recommendation #4

Facilitate a community strategic and financial planning effort to assist in determining the community's long-term goals. This effort might include a public, multi-year financial analysis based on those goals and an evaluation of local infrastructure, municipal facilities and services, future estimates of commercial ratable, key community services, and affordability.

**Need**: The Borough would benefit from having a clearer understanding of how current decisions inform and impact future finances; and could also use more comprehensive financial planning with regards to municipally owned assets such as infrastructure and facilities. Creating high literacy in the community around finance and long-term budgeting will help to improve public discussion around these issues.

**Goal**: To implement a public process that will identify, to the best ability possible, the existing and potential financial realities for the community. Instead of budgeting for only the current year, consider a process that enables you to look least six years out. This provides significant insight which will help inform current decision-making and priorities. This process might encompass:

- The current and next round of affordable housing obligations;
- Existing and anticipated impact of COVID-19;
- All municipally owned public infrastructure, for example streets, traffic devices, curbs, sidewalks, lighting, signage, sewer, water, storm systems, environmental controls such as flood walls, and maintenance of open space or preserved land (including any needed environmental/pest mitigation);
- All municipally owned capital assets such as buildings, vehicles, hardware, computers, and other equipment;
- Existing debt service obligations and associated financial impacts, at current and different potential borrowing levels;
- Current and anticipated future trends of the local commercial ratable tax base, the residential real estate market, and potential changes in anticipated external or state aid;
- Anticipated trends in operating and capital budget spending, including but not limited to: non-local discretionary costs (health insurance, PERS/PFRS, etc.) and local fixed and discretionary costs, which also includes any new or anticipated policies or programs;
- A personnel plan that includes anticipated retirement dates and associated payout costs; and
- Anticipated legal fees for any ongoing or anticipated litigation.

**Implementation**: This type of strategic planning differs from other municipal planning processes (e.g., the Master Planning process), though the results of one may help inform the other. It can be challenging to bring all of the pieces together into a clear understanding of the financial future, but it is approachable with a solid plan. A recommended first step is to convene a team to conduct *project planning* (pg 23), so that stakeholders can be on the same page with regard to the scope of this project.

While there are various ways to approach performing an evaluation like this, below is one framework that you might find useful:

**Information Gathering**. Before bringing the public into the discussion, it is important to perform a certain amount of due diligence so that the conversation is as constructive and informative as possible. This step does not include the identification of solutions to areas of concern, because it will be critical to first gather feedback from the public in order to inform which solutions are chosen. During this information gathering step, you will want to understand the Borough's existing financial commitments as best as possible. This includes many of the areas outlined above.

**Tip**: There are many technology tools that can aid in making this process more efficient and potentially save you money and time when inventorying assets such as road conditions, curb and sidewalk conditions, street lighting, road markings (crosswalks, etc), and more. Instead of assessing these assets by hand, you can find tools (e.g. StreetScan) that will scan these assets with various technology mounted to vehicles and provide you detailed data organized into GIS systems that can help visualize priorities, plan budgets, and design maintenance schedules.

**Public Engagement.** Once the information gathering has been completed, be prepared to discuss the current state of affairs and collect feedback from your residents. Engaging the public in the process early on will serve to build trust between the community and its municipal leaders and the government itself. When inviting the public to participate, make it clear that this project is in the early stages and no decisions have been made yet. Before doing so, it is ideal to create an engagement plan which would include a schedule of each of the opportunities where you will invite the public to provide input, the specific in person or online processes you will use to collect that input, how you will promote these engagement opportunities, the process for when and how decisions will be made, the criteria for making those decisions, etc. You might consider aligning this process with the timing of an existing annual budgeting process to utilize your resources wisely, including staff and resident's time.

**Discussion and Options**. Over the subsequent months perform additional research, present findings, discuss and evaluate with your community, as you look into each of the areas important to the Borough's finances over the next decade. This process is likely to take 3-6 months, and should include a number of different types of engagement from the distribution of information, to the facilitation of small group conversations and presentations with the entire community.

**Tip**: One way to engage people in a more direct and potentially constructive fashion is through a "fair" style event rather than a formal presentation. This style of event allows people to come and go as they please, visit booths to have more direct conversations with municipal staff and key stakeholders to address their specific questions and concerns, and provides an opportunity to meet the municipal officials personally. This may be a useful supplement to a community-wide presentation, whether done virtually or in-person.

**Identifying a Plan.** At a certain point when you have fleshed out the needs and various options available to the Borough, you will want to develop a specific plan that includes goals on how to address those needs, accountability measures, and a timeline. Much like the project planning process itself, going through a process like this helps to ensure every stakeholder in the community is on the same page about what the municipality is doing and why. It allows for a cohesive vision which will connect to every other activity within the Borough. Having clarity on the ultimate goals of a particular program or plan, especially if they are new or challenging, is one of the most effective ways that you can build trust and support among the public and stakeholders within the municipal government itself.

**Tip**: Freehold may have some challenges with regard to the condition of its facilities, infrastructure and long-term capital projects. Furthermore, stakeholders identified the need for more thorough planning of the development of parks and recreation spaces, such as Liberty Street Park and the County Park. Being aware of these challenges is a great first step. Many communities fail to use a holistic approach and create plans that ultimately do not address the underlying causes of their issues because they were not aware of challenges they faced in certain areas. Creating a real multi-year budget and considering all factors impacting the financial condition of the Borough will maximize the effectiveness of this planning process to produce valuable information that will help inform more robust and evidence-based local discussion and decision making.

# Recommendation #5

Build local committee infrastructure to promote businesses, art, and cultural development in Freehold that celebrates and supports the preservation of local history.

**Need**: To identify opportunities for economic development which will assist in easing the existing tax burden on residential and business property taxpayers, while aligning new development with Freehold's values. There is the potential that development can happen in a way that is not consistent with Freehold's values based on the economic activity of the region.

**Goal**: To identify of team of local stakeholders that will not just help promote potential business or economic development opportunities to increase Freehold's commercial ratable base, but to create the framework under which that development might happen to ensure its consistency with the community's values of preserving the unique charm and historic character of Freehold.

**Implementation**: The Borough already has a number of initiatives in place to coordinate downtown development and activities. Here are a couple of suggestions that may help:

**Collect feedback from businesses and stakeholders.** It is an important first step to proactively gather feedback from those impacted by your plan the most. For example, getting feedback from your business community on what works and does not work for them can be a valuable opportunity not only to ensure that these business owners are included in future discussions, but to also provide you with valuable feedback which can be incorporated into your plans.

**Tip**: While I was mayor of South Orange, we had an ordinance that restricted the type of outdoor furniture within the historic district. It limited the type of furniture to cast iron or similar historic looking material. Additionally, an ordinance existed requiring that furniture be taken inside every night. Business owners expressed that it was impossible for closing staff to bring that heavy furniture in and out of the stores and restaurants every day. So the Village changed its code to allow different types of (lighter) furniture, and business owners could apply for a permit to leave the furniture outside as long as it did not block access. The Village also provided a reduced-fee period for new businesses to apply for outdoor dining permits. We saw the number of outdoor dining permits nearly double in one year. It also showed the business community that we were willing to listen and actually change the way we do things, which ultimately built trust.

**Give responsibility to one centrally organized (and funded) entity**. If the intention is to guide any development (or lack thereof) in a way that helps preserve certain important community characteristics, it will be critical to ensure that there is one entity to serve as the central point to streamline efforts and ensure the ultimate goal of economic development and preserving cultural and historic assets is achieved. If this is deemed a Borough priority, such an entity will have the necessary resources available (E.g., funding and/or staff) in order to appropriately work on this project, which in the end may include a significant amount of long-term information gathering and stakeholder communication. This may be the existing "Downtown Freehold" DMC, or it may be another entity created to help coordinate a specific program or policy or initiative.

**Business Amenities**. Because of the density of surrounding areas, Freehold has the opportunity to attract some creative business types. One way to do so could be through "coworking" or shared office spaces that could be part of residential development, or developed standalone. This type of set up is especially popular with small companies, entrepreneurs, or people who work remotely, which we're likely to see continue to grow. Coworking spaces can offer resources for small businesses beyond office space, including access to technology, mail, professional services, and a connection to a local business community. For example, Freehold could deploy an ultra high-speed internet service and attract potential businesses look-

ing for a coworking or shared office space with that amenity. Nearby transit options make this even more possible.

Keep in mind that any work done in regard to planning activities should be integrated or included in the Borough's next Master Plan Review.

# Recommendation #6

Implement a volunteer engagement plan to help drive membership for the Green Team, Environmental Commission, and other municipal boards and committees, which will provide the Borough with greater capacity to address local needs.

**Need**: For local committees to have greater internal capacity to tackle a wider range of issues on a more sustainable basis. Research suggests that volunteerism and local service opportunities are continuing to see a decline in interest and active membership, especially among younger generations who, while very interested in service, do not engage in the same way prior generations did. The creation of infrastructure to recruit volunteers and match them with local service or volunteer opportunities would benefit Freehold.

**Goals**: Create a number of mechanisms that help connect members of the community to local service opportunities, including serving on municipal boards and committees. In turn, this will help foster a continued culture of local community service.

**Implementation:**

**Recruitment and Informational Events.** One of the best ways to create sustained interest for membership of local committees/commissions is to have multiple events that introduce those volunteer opportunities and touch various populations throughout the year. Many common efforts to recruit volunteers often end up reaching the same audiences of people who are already involved or aware of the opportunities. It is worth identifying creative opportunities that will help you reach new people in different circles. A "Newcomer's Day" is a good example. This event could be held on an annual or semi-annual basis for new residents and/or business owners to learn about how to access various municipal services or community resources, and of course to hear about ways they can be directly involved in areas that interest them. It is a great community spirit building opportunity that provides real value to people who are new to the community.

**Tip**: Consider creating a welcome packet for new residential or business renters and owners, and provide it to the local real estate agents for dissemination. This packet might contain useful information on municipal programs and services, including dates of the "Newcomer's Day" and other key information on how to volunteer within the community (see below).

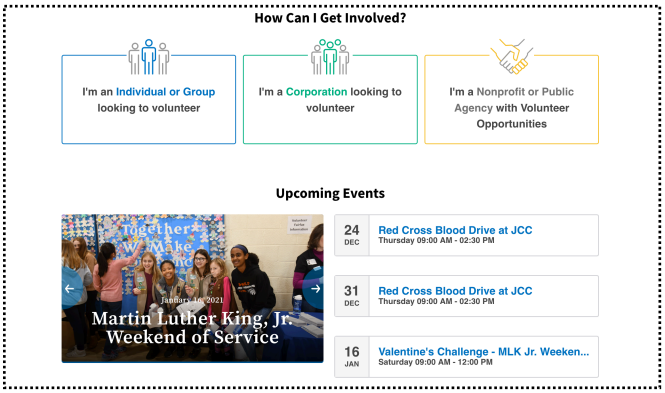
**Create a one-stop volunteer guide.** This online and/or print guide would be a central repository of the different ways that someone can volunteer in the community, including within the local government and community at-large. A guide like this might be done in collaboration with a local organization or produced in house by staff or a volunteer (e.g. high school intern).

This guide would be updated on an annual or semi-annual basis (another great task for a public information and engagement committee) and is a great way to ensure that interested people do not become discouraged because they cannot easily find available opportunities. This is especially true when attracting new volunteers who may not be connected to others already involved. Ideally, you might get some new people from parts of the community that were previously underrepresented, which is critical to ensure that all perspectives within the community are being represented on municipal committees.

A guide can come in many forms. Here is an example of a simple guide developed by a local nonprofit in South Orange. Additional information might include a date when the guide was last updated and contact information to submit corrections or new information.

You can take this guide to the next level and make it interactive or comprehensive. Create a website or digital application that dynamically houses volunteer opportunities and allows people to search, learn more, and directly apply. This might be too large for Freehold to do on its own, but a project like this

make a great county-wide collaborative program between various local governments and local nonprofits. Below is an example of a website hosted by a local nonprofit from Fairfax, Virgnia.




**Create a local calendar of service events**. This can range from simply aggregating existing information from organizations currently operating within the community, to creating a free calendar (e.g., Google) that is hosted on your website and allows people to see upcoming events in one place. A calendar can be set up to require minimal effort to maintain by staff or a volunteers and will yield great value to the community.

**Easy Volunteer Survey/Applications**. Consider accepting online applications through your existing website through the use of *Data and Information Collection* tools (pg 35). If Freehold has a *311/Online Municipal Services program* (pg 38) you may be able to create forms through that platform as well. One of the benefits of collecting applications online, beyond reducing paper and creating more efficient workflow and record management, is that you can collect insights (e.g., age, area of interest, and location of applicants). Many programs allow such insights to be downloaded into a spreadsheet or database. In doing so, you can easily run a quick evaluation and may learn something about the interests or demographics of those who are/are not interested in volunteering.

**Leveraging existing events.** Every time you meet with the public you have the opportunity to collect contact information and/or provide people with information on volunteer opportunities. Consider building a way to collect email addresses into existing events, such as town-wide events, fairs, governing body meetings. This way you can follow up with people, thank them for attending, and provide them opportunities to volunteer and become more involved.

Additionally, a development committee might be an asset to the Borough by assisting with research and decision-making of future development activities (E.g. historic preservation, commercial development, Green/Blue Acres sales, municipal facility upgrades, and much more). It is recommended to include members with relevant development or technical expertise for the kinds of projects of interest to the Borough. This group could play a key role in ensuring that input from the full community is heard and broadly communicating progress. Such a volunteer engagement plan would benefit the municipality by recruiting qualified volunteers to serve on this committee."

**Tip**: When mayor of South Orange, it became clear that targeted commercial development in our downtown was by far the best way to make a sizable impact on local taxes. So I immediately brought the idea to various community groups to collect feedback. We created a historic preservation committee in response to concerns from community groups and were able to move forward on a number of large-scale development projects. We garnered the community (and land use board)'s support because they were engaged in the decision-making process early on and we were transparent throughout the entire process. Watching members of the public give a thumbs up at a land use board meeting when a variance was granted is a sight to behold (and a good sign to those considering investment in your community).

# Recommendation #7

## Leverage available funding opportunities to help minimize or eliminate the taxpayer impact of implementing new technology and shared service programs

**Need**: Limited funds are available in Freehold's operating and capital budgets for new technology projects or programs.

**Goals**: To reduce the local taxpayer burden associated with implementing new technology within the Borough.

**Implementation:**

The Governing Body has expressed a priority to minimize the financial burden on local taxpayers generally, including the implementation of new solutions that may help improve services to community members. This Local PIE Action Plan includes a number of initiatives and accompanying strategies, which can increase the value of the Borough's current technology programs and provide significant savings or revenue opportunities. This recommendation is focused on finding direct financial assistance to minimize, or eliminate, the cost of a new programs.

Here are a few potential funding sources for projects of interest to Freehold Borough:

**NJDCA Shared Service LEAP Grants.** The Department of Community Affairs Local Efficiency and Achievement Program (LEAP) grants provides two funding opportunities available to local governments, as well as one that Freehold can potentially collaborate on with the County:

- **Challenge grants -** Find a full description of Challenge Grants here. These grants are aimed primarily at studying or doing activities around a potential share service, not the actual implementation of it.

  More specifically within this grant is the opportunity for funding to "build community engagement and consensus around the joint provision of services." The State may be able to provide financial assistance to implement a broad public information and engagement program that is aimed, for example, at soliciting feedback about a shared service. This might include holding various types of community meetings, performing professional surveying, hosting an online platform where residents can submit and discuss ideas, and using new communication tools to keep the public updated on the process.

- **Implementation Grant -** View the full description here. This larger pot of funding ($3.8m for 2021) is aimed primarily at helping a community implement a new shared service. According to NJDCA, eligible actives include: a) offsetting hard or soft start-up costs incurred as part of implementation of a shared service initiative; b) costs incurred as part of conducting a K-12 Regionalization and Countywide School District consolidation study. The application deadline is rolling.

- **County Coordinator Grant -** Each county has $50,000 earmarked in the state budget to pay for a shared service coordinator, who would serve a one-year contract to study and assist in the implementation of shared services.

**Implementing a 311/online municipal service program as a shared service with DCA funding**. Through the Department of Community Affairs Local Efficiency Achievement Program, Freehold might consider purchasing a *311/Online Municipal Services* program (pg 38) with another municipality. This could look like a shared service between multiple municipal construction departments, public works, or fire prevention officers.

**Tip**: Lambertville was awarded a grant from the NJDCA to conduct a study and pilot program creating a regional Office of Community and Economic Development that included construction, building, code enforcement, zoning, fire prevention, planning, and economic development, and more. This regional entity (housed out of one municipality) would then provide those services to other similarly-sized municipalities nearby. A similar example on a smaller scale might include two towns sharing a construction official. The use of a new permitting software could be a means to create a culture of collaboration between municipalities and attract outside financial assistance. The grant application from Lambertville is included in the Appendix to provide inspiration for your own applications.

**Competitive Pricing and CARES Act for technology through ESCNJ**. Congratulations, Freehold Borough is already part of the New Jersey Educational Services Commission pricing cooperative, which means you have access to pre-approved vendors, bid specs, and other helpful purchasing resources, and the "Digital Divide" program. Some elements of the program include helping municipalities apply for CARES Act funding, as well as easing the purchase of products or services that can increase bandwidth in schools or at home with certain internet service providers. If you have not looked into these programs, check out the information on the ESCNJ website to learn more.

**Grant funding for road infrastructure.** Beyond the widespread Local Aid Program from the Department of Transportation, you may want to consider finding grant programs through other means. The North Jersey Transportation Planning Authority is the primary transportation organization in Freehold's region. NJTPA provides significant grant funding opportunities, including at least several programs that might be relevant for Freehold Borough: "Transportation Alternatives Program," and "Safe Routes To School." Each of these programs differs, and if you aren't familiar with NJTPA, it may be worth setting up an introductory meeting with their local representatives.

**Funding opportunities available from Sustainable Jersey in 2021.** Utilize Sustainable Jersey's Funding Database for a comprehensive listing of grant announcements, incentives and other resource opportunities open to municipalities from government agencies, foundations, corporations, and non-profit organizations. Sign up for email updates on the SJ website (sustainablejersey.com) to receive updates on funding opportunities. A current funding cycle for municipalities will be announced on February 22, 2021 to support projects related to the implementation of SJ actions. For more information on the current grant opportunity, visit the Funding Database. For ideas, review municipal projects funded in the past here.

**Reducing taxpayer burden beyond the municipal budget**. There are a number of costs beyond local taxes that are within the control or influence of the local government. Here are a few examples of such opportunities for local government to help reduce the financial burden on residents or business owners:

- **Energy aggregation**. Freehold Borough is already part of SWAEC, so the bigger hurdle is complete. Does the Borough track the number of signups to the program and implement outreach programs to ensure that those not signed up have the information? Using some of the methods discussed throughout this Action Plan can help bring more people into a program which will likely be financially (and environmentally) advantageous to them.

- **Community Solar**. Consider applying to host a community solar site through New Jersey's Community Solar Energy Pilot Program. Unlike traditional solar, community solar panels can be installed at a "host site," which could be on a warehouse roof, above a neighborhood parking lot, on top of an apartment complex, or on a municipal landfill. Community members can subscribe to the energy created by the panels, and will see a credit on their electric bill, which can help them save money on their utility bills. This unique community solar program is expanding access to solar by eliminating cost and location barriers. .Applications for Year 3 will be announced later this year. Information can be found from NJ Clean Energy here. View Sustainable Jersey's Community Solar fact sheet here."

- **Alternative Transportation Options.** Transportation can be one of the most significant costs for any individual, family, or business. Anything that the Borough can do to help facilitate

greater access to more affordable transportation options, the better. This might look like: implementing Complete Streets policies to make biking or walking more accessible; ensuring that ride-share options exist, negotiating a specific deal with a particular ride-share company; ensuring that individuals understand how to access existing options (such as AccessARide); advocating for improved public transit options along main thoroughfares; or providing transportation services directly to seniors or other specific populations.

**Coordinating purchasing.** The downside to purchasing cooperatively or jointly with another local government are limited, especially when it comes to technology. The price for product and service licenses often go down in price the more you purchase. By joining with other towns into a contract, you may have better bargaining power and customer support. One-time or ongoing access to a local Qualified Purchasing Agent can give your municipality access to a higher bid threshold and a more professional, paperless, or transparent purchasing process.

**State contracts and co-ops**. While purchasing through co-op agreements or state contracts can have significant benefits like simplifying a bidding process, there are some circumstances where you may be able to negotiate a better deal than what is available in the state contract. It is important to follow purchasing processes carefully.

**Tip**: Leonia was awarded a grant from Sustainable Jersey that helped fund the purchase of a fully electric plug-in vehicle for the police department (the first in the state!). A slightly better price was negotiated with a local dealership than what was available by state contract by including the dealership in the ribbon cutting and promotion of the vehicle when it went into service - so make sure to choose wisely!

**Green Acres and Blue Acres**. Both of these NJ Department of Environmental Protection programs may help you meet the dual goals of preserving open/recreation space and financing such investments which will provide taxpayer relief. Green Acres transfers ownership of municipal land to the state, which in turn is preserved for open space or recreational facilities created. Through the Blue Acres program, the state purchases flood prone or storm damaged properties. Either program may be worth keeping in mind as you navigate future decisions about municipal property, redevelopment, facilities, and open space preservation. More on both programs here.

**Other potential funding sources.** There are a number of other funding opportunities available in New Jersey for local governments. You may want to consider the pros/cons of allocating staff time versus hiring a grant consultant to research funding opportunities. Finding the grants is not easy, and ensuring that your applications are competitive usually requires some experience and more time than originally anticipated.

# PART TWO

## Strategies and Tactics

This section provides detail on some important Strategies and Tactics for accomplishing particular recommendations listed in the prior section.

Some may rely upon one or more Platforms or Tools covered in the next section and others may apply to Borough goals not included in this Local PIE Action Plan.

Photo: Public Domain from: https://www.nps.gov/articles/npsnhameetin

# Local Committee Infrastructure

Local committees (boards, commissions, working groups, task forces, etc.) can be a major value to any local government and community at-large. Some of the benefits include assisting the Borough in accomplishing certain goal-driven recommendations included in this Plan, while also creating mechanisms to facilitate communication and trust-building between the local government and community. Creating an environment for these groups to succeed and maximize the value they add in their respective areas is not without some challenge. Below are a few general best practices worth considering:

1. **Committee Formation**. Formally created by the Mayor or Governing Body, such bodies would have specific responsibilities and accountability around a clear purpose outlined in an establishing resolution or order.

2. **Membership Solicitation**. A formal application process for prospective members would lead to a transparent review of applications. It is important to widely promote the application process throughout the community, taking extra care to solicit potential members from marginalized populations not already well represented within the local government, and using varied communication methods for promotion (e.g., email, social media, text, print media, newsletters, community organizations, etc.).

3. **Municipal Support.** It is important for committees to have sufficient support from the municipal government to achieve their goals. Depending on the project or scope, this may include access to facilities, video meeting services, funding, staff support, legal guidance, email account or document/file sharing access, etc.

4. **Work Expectations.** Appointed committees should be expected to meet on a regular basis to make observable progress towards their goals, and regularly report progress to the Governing Body and/or pubic. Such reporting might include presentations at Governing Body meetings, posting committee meeting minutes or other progress updates outline.

5. **Agency and Independence.** It is important that these committees remain independent to make unbiased recommendations to the government, even if such recommendations conflict with personal opinions of any particular official.

6. **Standards of Performance**. Such committees and their members should be held to the same standards of conduct and performance as the elected officials. As officials working on behalf of the municipality, these bodies and members should be treated as an integral part of the local government.

These appointed committees can have various purposes, including, but not limited to:

1. **Ongoing advice** on a specific issue or long-term project. A public information and engagement committee is an example of a permanent municipal body providing recommendations over the long-term.

2. **Acute or short-term issue**: In the event that a situation arises where the municipality needs a specific issue investigated or goal accomplished, an ad-hoc committee could serve such a purpose.

3. **Advisory group**: This type of committee would provide the Governing Body with recommendations on specific policies or programs on an ongoing or annual basis. Examples include committees providing public evaluation and recommendations on the annual budget, or organizing specific events. Consider whether this group is best served with 100% public membership or a mix of appointed and elected officials (who can also serve as non-voting members).

4. **Statutory/decision making group**: Under specific circumstances, certain groups may have authority over certain areas of policy, such as an environmental commission, public library board, or land use boards.

# Project Planning

When considering a new policy, program or recommendation, project planning is more a commitment to a process rather than a product. As Dwight Eisenhower said, “In preparing for battle, I find plans useless, but planning indispensable.” By using a more intentional project planning process, the Borough may see benefits such as:

- The opportunity to bring in the right stakeholders for planning and decision-making on a particular topic.
- Less stakeholder confusion about expectations due to early involvement in the process.
- Tracked progress will help inform decisions on future programs.
- Improved institutional memory which can be useful in the training of new employees or volunteers and support the long-term sustainability of projects.
- An end result (project plan) will provide value by memorializing the ultimate decision, which will help frame future discussions. This plan might also serve as a model to assist other municipalities in similar goals.
- A clear project scope which is especially effective in controlling budget spending; and
- Clear guidance for achieving goals and a process to communicate progress in order to ensure that project participants stay focused and informed.

The project planning process will scale to the size of the project in question – some more simple than others. In fact, not every project plan will require a formal process. For example, some project plans might be achieved through a one-hour conversation where notes are distributed to participants afterwards with a small team focused on a small-medium sized project (e.g, setting up a hiring process or organizing a public presentation on a new policy idea). Or it might be a more involved process focused on a large project (e.g., a redevelopment project or major technology purchase) with various departmental staff providing input, discussed over the course of several meetings, and ultimately memorialized by resolution. You will determine the “formality” of the planning process based on the size of the need.

**Tip**: While many various methods for project planning exist, the most important criteria is finding a format that you can consistently adhere to. We recommend that any project planning process be transparent, involve stakeholders directly impacted by the issue/project, and allow participants to freely discuss and come to consensus around decisions.

What follows is a framework, not a set of hard and fast rules, to ensure that you ask the right questions when approaching any project focused on more than just a simple, short-term task:

1. “**Landscape Survey”** - an account of the present state of affairs. This includes clearly identifying needs, stakeholders, existing knowledge, and potential biases or blind spots in your understanding of the problems/needs.
2. **Visioning and Goals** - An exercise(s) to develop a clear vision of the future, project mission, and goals that will conceptually frame the proposed project. These key elements should be agreed upon by participating stakeholders early on.
3. **Project Details** - a description of key project elements (e.g., budget, timeline, tasks and responsibilities of participants)developed once the goals have been identified.

This process was followed by Freehold municipal stakeholders in Sustainable Jersey's PIE Tech Assessment and informed the recommendations in this Local PIE Action Plan. Freehold's related documents can be found in the Appendix.

Remember, creating a project plan does not have to be a complicated process. In fact, many people who follow formal project planning for the first time report that the process fleshed out important details that their team may not otherwise have discussed, and gave team members a sense of clarity and confidence moving forward.

# Community Action Event

A "community action" event engages the public in research and information gathering. This type of event can be valuable when there is a specific goal to accomplish, particularly when staffing or funding resources are limited or do not exist.

Below are recommendations to make this type of event more useful, specifically as it relates to particular Freehold goals:

1. Organize the event with a greater level of public participation in mind, perhaps led by a third party or committee, with municipal officials or staff involved in a supporting capacity.
2. Clearly communicate the event goals to the Governing Body or staff overseeing the event.
3. The group responsible for organizing the event may want to create a *project plan* (pg 23) or *communications or social media pla*n (pg 26) for the event so that stakeholder expectations are identified and goals agreed upon.
4. Take the opportunity to discuss successes and lessons learned once the event is complete.

An example of a projects that might be best accomplished through this type of event in Freehold is:

- Cataloging the condition of various physical assets (streets, sidewalks, storm drains, streetlamps, curbs, etc.) will be used to help budgeting and prioritization of short and long term repairs. This will help ensure that various infrastructure is properly evaluated and ultimately addressed. It will also provide the Borough with the means to gather important data to aide in decision-making without having to expend taxpayer funds.

**Tip**: South Orange has a history of  frequently using events like this to involve residents in accomplishing valuable community work. For example, many of the Village's streetlamps are still gas powered. Restoring power to these lamps during an outage is often stalled due to the service provider's lack of capacity. The Village hosted a one-day event, recruiting community members and Seton Hall students to use smartphones and free mobile applications to catalog the status of several hundred gas lamps across town. GPS readings, photographs and pole numbers were provided to the utility providers in a data format that allowed them to see the queue of lamps needing service and begin to triage the repairs more effectively.

Keep in mind that any event hosted by the municipality should involve community members in the planning and facilitation of the event, be open to the public, and widely promoted to the full community.

# Communications and Social Media Policy and Plan

A communications/social media plan can be one of the most valuable ways to improve communication and engagement with your community. Consistency in carrying out this plan will create a level of trust within the public as they will reliably know when to expect and how to access trusted information from the municipality during times of emergency or otherwise. Creating the policies and plans for communications and social media should ideally be done in a collaborative format with members of the community. This is a good opportunity to form a public information and engagement committee (See Local Committee Infrastructure on page 22) which could include municipal officials and members of the public.

**Step One: Creating policies**

It is important to first have the appropriate policies in place to guide the development or implementation of such a plan, or the purchase of necessary technology or systems. Having the proper policies in place will not only ensure that the Borough is protected from a legal standpoint, but it will set clear internal and external expectations as to management procedures, responsible parties, protocols for engagement, etc.

**Tip**: There has been limited legal guidance from the state regarding transparency and public engagement practices for local government using social media platforms. Therefore, a patchwork of policy exists across New Jersey, creating various expectations among the public on how they can or cannot engage with their government online or through social media. This inconsistency makes it all the more important to be intentionally clear with your own policies.

Make sure to have the municipal attorney available to work with a committee developing this sort of policy, so any recommendations coming to the Governing Body have already gone through the appropriate legal review.

There is no one-size fits all model policy. We recommend the following elements be covered in any social media or communication policy:

- The specific titles or positions of who can speak on behalf of the municipality and under what, if any, conditions volunteers or individual departments can post information publicly;
- Guidelines that ensure compliance with the Open Public Records Act and Open Public Meetings Act, reducing unnecessary legal exposure;
- Specific management responsibilities of each appropriate department or individual;
- Clear procedures on how the municipality will manage administration of these platforms (e.g., the moderating of comments on a social media page)

**Tip**: Although you should consult with your municipal attorney on the development of any policy or ordinance, you may consider seeking ideas or best practices from other sources too. This might include the policies from neighboring municipalities, the county government, the New Jersey Department of Community Affairs, the League of Municipalities, the New Jersey Municipal Manager's Association, Sustainable Jersey, and others. The Appendix includes sample social media/communications policies from three municipalities to use as a starting point. Contact Sustainable Jersey for updates on new best practices.

**Step Two: Creating the plan**

It will be important to ensure that the work plan matches the current budget and staffing or volunteer capacity. Once the policies are in place, you will want to clearly identify the following:

- Which platforms are being used by the municipality, on what schedule, for what purpose, and by whom?

- Who is responsible for responding to requests for information received over social media platforms and ensuring OPMA compliance?
- What are the additional staff requirements that may be required to manage each of these platforms?
- What are the associated costs, if any?
- Who will have access to use these platforms?
- How will the municipality source content to share on these communication platforms?

**Tip**: A common problem with municipalities trying to expand their communication is a lack of follow through on the set schedule, or setting too ambitious of a schedule, which ultimately ends up creating distrust with the community. Starting small and meeting a desired schedule with 100% consistency will set the stage for success. Remember that it may take six months to a year to start seeing meaningful changes in engagement with your community through these platforms, which is perfectly normal! Before you begin using any communications tool, make sure to have a framework for how to measure success, and be patient and disciplined for the long-haul.

A sample template to identify the platforms you plan to use, a schedule, and purpose is provided in the Appendix.

# Community Advocacy Initiative

The goal of a community advocacy initiative is to energize and tap into your community to help you accomplish goals that are beyond the municipality's ability to accomplish on its own. Some examples might include identifying financial support from an outside source to address the lack of funding for a specific project or program, or involving neighboring towns to address a lack of jurisdiction to act on an issue.

**Tip**: In South Orange, New Jersey Transit announced new train schedules on the very morning these changes were going into effect, causing a major impact to many of the 4,000 commuters using our train station each day. Support from residents within the community, officials from neighboring municipalities, and county, state and federal legislators were coordinated. This added significant public pressure and varying perspectives for the conversations with the state agency. After significant discussion, NJT modified the schedule to address some of the issues, and committed to a specific proactive communications policy for future changes. That would not have been possible without focused public pressure.

A community advocacy initiative is the organizing of a large group of people to more effectively find a solution to an issue, something that would not be possible if each person tried to approach the issue separately. Such an initiative may involve efforts like community members attending meetings of other governments, signing petitions, writing letters to other officials, coordinating purchasing power of a private product or service, communicating with local or regional media, and many more.

A community advocacy initiative, if designed and implemented effectively, will greatly increase your chances at positively influencing the appropriate stakeholders. Below is an overview of some of the things you may want to consider in designing this initiative:

1. The need and goal of the initiative.
2. A careful accounting of the stakeholders, their role in the ultimate decision, and any relevant groupings or interconnections that might provide useful information as to who may influence who, and why.
3. Clear messaging for the initiative so everyone has the same talking points, supporting materials, and goals. All involved parties should understand the tone of the advocacy effort so messaging is not compromised. This is especially relevant when working with third parties outside of the municipal government.
4. A clear understanding of who the decision maker is and the criteria they need to use to make their decision. Make sure that decision maker has the authority to take action, otherwise it could end up setting your effort back.
5. If a *project planning* process (pg 23) has not been performed at any level of formality at this point, consider doing so to ensure that everyone participating has a clear understanding of the goal and is on the same page.

# Communication Platform and Methods

Choosing the right platforms to assist in improving communication and engagement with your community is critical. Use the goals set forth in your communications and social media policy or plan as a guide to prioritize the very wide array of existing options to be achieved with each tool.

Below is a list of basic recommendations for Freehold Borough to broaden the reach of its public communication efforts and ensure that residents are receiving important updates:

- **Regularly scheduled email newsletters**. This is generally an update of ongoing projects, Borough-wide happenings, upcoming events, opportunities to get involved, etc. to your general "email list," which could be sent once or twice per month. Consider aligning the release of this newsletter with Governing Body meetings so critical information related to those meeting can be provided (e.g. a preview of proposed policies, a brief summary of action taken at the last meeting, changes in meeting time or location, etc.).
- **Emergency alerts**. Work to make sure as many individuals and businesses in the community have signed up to receive emergency alerts as possible, whether by email, text message, voice to cell phone, or voice to landline.
- **Local text messaging**. For those without internet access, or for purposes of local emergencies or important updates, consider a service that allows sending SMS (text) messages. This can be helpful for certain time sensitive issues, like a road closure in a particular area or public meeting cancellation. Most SMS platforms allow you to easily create lists or "tags" that allow you to organize your audience so people are signing up into a specific list and will receive communication based on their need.
- **Social media**. Depending on your audience, you might decide to start with Facebook and expand efforts to Twitter, Instagram, etc. Whichever social media platform is chosen, consider developing a posting schedule which might also include the identification of various topics to highlight or discuss, and a template for new content, etc. A shared spreadsheet in the Cloud (see *Municipal Email/Cloud Services* on page 34) would allow multiple individuals to suggest upcoming posts, review and/or approve the posts, and post them onto the site. Thinking about the workflow ahead of time will help ensure you stick to your schedule. You may consider rotating different topics, such as a historical photo asking people to guess the location, a spotlight on a local business, information about an ongoing or new Borough project, monthly spotlights of volunteer members of committees. Keep in mind that not everyone in your community is on social media, so it should not be the only source of communication between your municipality and the community.
- **Paper communication** in 2021 is still an effective means of engaging with your community, especially for certain demographics. A periodic newsletter that can be mailed (for example through USPS's EDDM program) providing quarterly updates and encouraging people to engage in specific community efforts can be very valuable. Environmental and financial costs can be minimized by using recycled paper and eventually converting recipients from the paper version to an electronic newsletter. While it is commendable that the Borough currently posts its newsletter on the website, it is important that the file be a text pdf, rather than an image, so that people can search inside and/or copy and paste from the newsletter. Also consider including the URL on the paper newsletter as to where it is posted online which will help to convert people to paperless delivery. You might say something like "Help us save paper and costs - visit freeholdboroughnj.gov/paperless to signup for electronic newsletter delivery."
- **Community networks.** Some residents rely on their own networks as the main source of news and important community updates. These networks might include a faith based institution (e.g. church, synagogue, mosque, etc.), a civic or neighborhood association, a foreign language community newspaper or newsletter, or even the local watering hole. Building a relationship with the appropriate leaders of these entities or platforms can help get the word out on important municipal updates as necessary.

# Engagement Platforms and Methods

As mentioned at various points throughout this Action Plan, involving community members in processes to create policy, develop programming, and provide input on issues of concern is a great way to build public trust and provide the Borough with diverse perspectives which can ultimately enhance the municipal decision-making.

Below is a list of basic recommendations for Freehold Borough to more effectively engage community members in decisions being made that affect their quality of life:

- **Online payment portal for property taxes and other services.** At minimum, we recommend that taxpayers have the ability to pay for their taxes online, which we applaud Freehold Borough for already having. This creates a more convenient process for both the public and Borough, and likely increase the collection rate of certain payments. Ideally, you can collect fees for other processes online as well, starting with ones that are simpler to implement, such as registration fees for an event or recreational programs, to more complex ones like fire prevention or construction permits. You can find more detailed information about this in the *311/Online Municipal Services* section on page 38.
- **Online platform as a virtual community suggestion/discussion board.** There are a number of platforms that allow you to create more interactive virtual spaces for people. This can be something more simple like a live chat or virtual office hours on Facebook or YouTube (both free to use); or a more complex platform that allows users to comment and vote on proposals, such as PlanetCivic, PublicInput, or CivicNotes. Freehold Borough already has taken a valuable initial step by including a participatory budgeting program within the community. Consider whether opportunities exist to make this initiative an interactive online process, where people can both engage by participating or observing progress.
- **Considering a new website platform**. The Borough's website somewhat outdated. Although it does contain a lot of useful information, it may be worthwhile to consider an upgrade to create a more professional-looking online presence by allowing staff to more easily post updates and timely information and community members to find information more easily. There is a detailed series of suggestions and tips about upgrading your municipal website that can be found on page 42.

# PART THREE

## Platforms and Tools

This section provides information on specific solutions to help you implement a number of the recommendations and strategies outlined in this Action Plan, as well as other projects being considered by your municipality not included in this plan.

You can find more in the Sustainable Jersey's PIE Solutions Catalog, which features details on hundreds of associated platforms and tools.

Note: Sustainable Jersey does not recommend any one specific product over another. Any tools mentioned within this report or in the Catalog are examples. An exhaustive search should be completed when considering any of these solutions.

# Mapping or GIS

Whether identifying parking spots or bicycle paths to post on your website, logging power outages for your OEM or utility, or locating vacant properties for redevelopment projects, having the ability to quickly and easily access software that allows you to visualize data on a map can be very valuable.

Some free examples include:

- My Maps by Google is one of the most robust free systems available. It allows users to easily import/export map data, contribute data into, and embed maps onto websites.
- Bing Maps by Microsoft
- Apple Maps has some more basic features available to build lists and collections of places in Maps that can be shared.

Larger municipalities  interested in creating more complex mapping projects (e.g. databases of infrastructure, assets, or other data points) will need the functionality of a Geographic Information System (GIS). Some of this functionality may be included with existing 311/Online Municipal Services (pg 38), or available separately through systems such as ESRI.

More mapping, visualization, and GIS tools can be found in the PIE Solutions Catalog.

# Project Management and Remote Work

Project management tools can improve the efficiency of your organization, providing staff with a centralized location to easily access files (from the office and remotely) and improving internal communication channels (between staff, departments, and with stakeholder committees).

Studies from the private sector have shown that up to 2.5 hours of staff time per day is spent searching for information relative to a task. For local government, this might look like staff searching emails or files for stakeholder contact information, budget documents, grant records, meeting agendas or minutes, permits issued, violation notices, meeting invitations, correspondence, etc.

Some of this can be addressed by using a platform that creates spaces to store and update projects/tasks, files, deadlines, and communication on individual or group tasks. *Municipal email/cloud service*s accounts (pg 34), *311/Online Municipal Services* programs (pg 38) or *municipal documents/records management* tools (pg 37) can provide some of these functionalities. Customized programs can be built for making project data organized and accessible (e.g. Edmunds or Munidex for certain budget data).

Note that while these types of programs can create efficiencies and improve productivity, they require all participants to use on a regular basis in order to be effective. If people are resistant to using new technology, it may not be worth implementing.

Products range from free limited plans to comprehensive paid solutions. Some examples of easy to use and generally user friendly platforms are: Asana, Basecamp, Slack, monday.com, Trello, Airtable, Wrike, Todoist.

Templates to create basic spreadsheet "dashboards" that may be compatible with Google Sheets or Microsoft 365 can be found online. These basic sheets can provide a similar centralized place where projects can be tracked. They are usually easier to implement, though offer less functionality.

**Tip:** Most of these tools share very similar core functionalities. Make sure that proper "onboarding" or training takes place. Having several key stakeholders who are committed to using the tool consistently will encourage others to do the same, which will make the biggest difference in whether the platform is a success or not.

More tools for project management and remote work can be found in the PIE Solutions Catalog.

Resources on setting up effective project management processes:

- Ten Reasons why Project Management is important
- The Value of Project Management from the Project Management Institute

# Municipal Email/Cloud Services

There are many benefits to ensuring that all staff, officials, committee members, etc. use an official municipal email account, such as: 1) compliance with the requirements of the Open Public Records Act, while making it easier for your Clerk to comply quickly with OPRA requests; 2) consistency in contact information for all municipal representatives; 3) separation between an individual's personal and work correspondence, which can lead to improved work/life balance; 4) privacy protection of individuals' personal accounts, while also protecting the organization from phishing attacks due to the use of outside email accounts; and 5) formalization of a commitment to appointed officials and certain stakeholders by providing them with an official email to communicate as a representative of the government.

Freehold's size would point to it be likely most effective to have email services hosted in the cloud, rather than on-site with local servers. You may want to consider using local servers, but only as a backup solution, not for on-demand access to any services. Although there are usually small costs associated with adding new email addresses, depending on the volume of OPRA requests received by the Borough, you may find these costs are justified by the savings from the reduction of staff time spent fulfilling those requests.

Archiving (or "backing up") emails is a critical piece of public record keeping and compliance with record retention requirements. All major cloud email services offer enterprise level backup plans, which your municipality should purchase to ensure that record are being retained pursuant to State regulations. For example, when set up properly, a user may delete an email from their inbox, but it remains on the server permanently, or according to the records retention schedule you set.

Two of the most popular email/cloud services are 1) Google Workspace with Gmail, and 2) Microsoft Office 365 with Outlook.

As in the case with these major platforms, you are paying for a license in their system, not simply an email address. This means you may have access to a number of other tools to which you have already paid. This includes calendar programs, document storage, document editing and sharing, instant messaging, online surveys, video meetings, and much more. Each of these other programs can provide significant value in how the organization functions, and in the end save the municipality money since there is no additional cost.

Before looking at any new technology purchase, it is always a good idea to have a municipal representative with IT expertise confirm whether you already have access to a similar tool provided as part of your existing contract. You may also have the IT expert review your accounts regularly to make sure you are only paying for services you need and are taking advantage of all services you are paying for.

# Data and Information Collection

Data and information gathering can be a great way to involve the public in decision making by collecting their input through surveys or polls. Fortunately, this is one of the solution areas where many free and paid solutions allow surveys to easily be distributed online or via mobile phones. A few options available:

- Google Forms through your Google Workspace account
- Microsoft Forms through your Office 365 account
- Surveymonkey.com - which offers simple free and paid solutions
- Formstack.com - which offers more advanced solutions, such as with HIPPA compliance
- Some existing 311/Online Municipal Services programs, such as GovPilot or Spatial Data Logic, allow limited collection of data within their systems

More survey and data collection tools can be found in the PIE Solutions Catalog. If you eventually do launch a poll or survey to collect input from your community, check out how you might qualify for points in Sustainable Jersey's Improving Public Engagement in Municipal Government and Planning & Zoning actions.

It is important to ensure that individuals responsible for collecting data or information have a basic understanding of statistics and best practices for collection, for example:

1. Know your audience. If you need to collect information from the entire community, your questions will be more general. If your audience is a specific group, like seniors or recreation program participants or residents of a particular neighborhood, you might tailor questions accordingly which will allow you go deeper into particular subject matter.
2. Automated data collection can help minimize the error rate and staff time required. However, certain respondents may require personal intake of survey responses (e.g. seniors, foreign language speakers, individuals with certain disabilities, etc.). This again, stresses the importance of knowing your target audience and the potential data collection needs.
3. When you are ready to publish the results, it is important that all data be provided in machine readable format, for example in a spreadsheet where the data is able to be manipulated. This will allow accurate analysis on the samples collected and any data trends presented.

# Municipally Provided Internet Access

More and more, municipalities are providing internet access to residents in order to combat access and service quality issues. As more and more services that people access have moved online over the past year, this idea may be worth considering. Below are two potential options:

**WiFi hotspots** are a relatively inexpensive and easy way to provide public access to WiFi in public buildings and facilities (e.g. library, municipal hall, recreation areas, parks, downtown districts). Extended range wireless access points can be a great way to provide support to community members who may not have sufficient access to internet, or may have bandwidth limitations on their home or mobile plans.

- Some Internet Service Providers (ISPs) have the ability to easily add a guest network to an existing internal network.
- Deploying this can be relatively inexpensive for smaller scale projects, as it requires only the existing internet service and your IT configuring a new router or access point.
- Network user sign-in pages can be an opportunity to push information to a captive audience, such as ads from local businesses, important local civic or emergency information, etc
- Work with your IT professionals, as it is critical to ensure network security and integrity when launching this type of project.

**Municipal ISP or Infrastructure**. The idea of laying the groundwork for, or directly becoming an ISP, is a much bigger endeavor, but worth considering. A local high-speed network can promote economic development by leveraging access as an amenity for remote work, coworking, or other internet-heavy businesses. This can take a number of different forms, such as:

- Build a fiber optic network. This would create the potential for community-wide access for high speed internet service, and potential revenue to pay for the infrastructure itself by renting a certain number of fiber strands (or percent of available bandwidth) to interested companies.
- Provide for the installation of wireless 4G or 5G equipment throughout the community by partnering with companies to install the infrastructure, creating a marketplace for new services, or directly providing internet service. While this is not a common scenario for smaller towns, it is a model implemented in various cities across the nation looking to provide better internet access than was currently available to their community.

  This could be part of a large capital plan that includes collaboration between multiple governments, the county, or other organizations, as other stakeholders might also benefit from operating or having a piece in an ultra-high speed network. You might be able to find funding from the NJDCA if you go this route.

Make sure to engage IT professionals specifically versed in this kind of technology implementation to assist in a project of this scale.

**Tip:** Leonia completed a fiber network installation that connected every municipal building, in a partnership with the local school district. It will reduce the cost of a number of technology services (e.g. the existing server and network infrastructure, BWC's at the police department, video surveillance, new data systems for the fire and construction department, and GIS tools in the future). The network was designed with plenty of room for renting out space, and we were considering bringing in an ISP to offer extremely high-speed internet services on top of the fiber network already built.

Further resources on municipal ISPs:

- Smart Cities: Municipal broadband internet: The next public utility?
- Smart Cities: McAllen, TX's community-wide Wi-Fi to bridge digital divide
- Medium: Wi-Fi Does Not Scale to Bridge the Digital Divide

# Document/Record Management

Creating a system for managing your digital records can be a simple process that enables staff and officials to easily store and access records, and collaborate in real-time on cloud-based documents. Going digital with your records will also assist the Borough in making highly requested information (e.g. OPRA requests) publicly available, and complying with State requirements for transitioning statutory record storage to digital-only.

Below are a few options for digital record management:

**In-house server.** Some municipalities choose to operate their own internal servers to run software, backup workstations, or provide remote access to files. The risk and expense associated with maintaining internal servers may not prove to be the best option, especially for smaller municipalities. However, if you already have internal servers, consider getting the most value from them by using those servers as centralized document storage, creating your own "cloud" document service. This means that users will have the same experience when accessing files from a desktop inside the network or on a laptop at home.

**Basic cloud drives**. There are many easy, secure and affordable cloud services that offer document storage and/or collaboration, such as Google Drive, Microsoft 365, Dropbox and Zoho. These services might be included with your existing email program, so it is worth researching those options first.

Depending on your specific needs, one of these services might fit the bill. These services allow users to create and share documents securely, collaborate on drafting documents in real-time, create folders that can be available publicly, and backup files. When used effectively, these services can improve workflow among staff. They also allow remote access to files without any additional hardware needed, as all the documents are accessible from almost any type of device.

**Enterprise records management**. Throughout municipalities in New Jersey, two of the more popular Records Management Systems (RMS) are Laserfiche and Foveonics. These systems often have a high cost, especially when digitizing older records, which is where a good piece of their value comes from. However, they can significantly reduce costs down the road, and provide comprehensive and secure document storage that create significant efficiencies. Not only do these systems allow storage of records in a digital-only format, they also provide many other features, such as tracked versions, permissioned public access, automatic backups, and quite a bit more.

If you are interested in a larger enterprise solution, it may be worth sharing the service with other nearby local governments to help spread out the initial startup cost. Some of these vendors offer discounts on multi-year contracts, but only commit if you will continue using the service beyond the contract life. Consult with your CFO and bond counsel about whether to use capital funds to purchase some of these tools.

**Tip**: It is critical to ensure that all scanning of documents is done so they can be electronically edited, searched, or displayed online. This not only will make searching for and through documents easier (because the entire text of the document is searchable, not just the filename), it may also reduce costs of larger digitization projects in the future. To do this, make sure to set your scanning equipment's default to scan documents with Optical Character Recognition ("OCR"). This function will enable your scanner to convert images of typed, handwritten or printed text into machine-encoded text. Most modern scanners can do OCR (as can many smartphone scanning applications). Modifying this setting as the default will keep people from having to remember to change the setting each time.

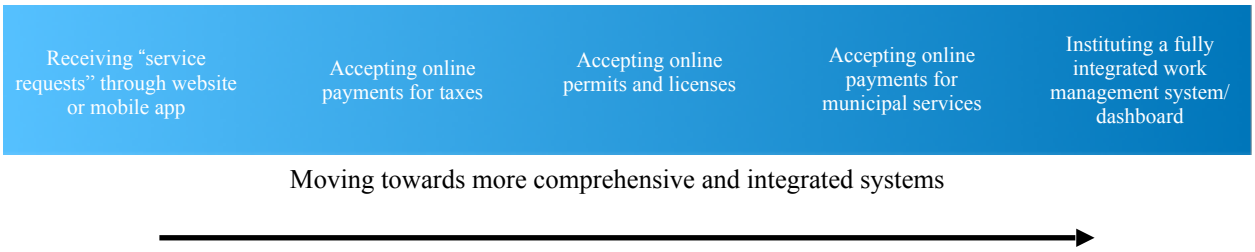
If you are considering a larger archiving project where records will solely be kept electronically or setting up a server, consult an IT professional with experience as there may be associated risks.

# 311/Online Municipal Services

311 was originally designed in larger cities as a non-emergency number that people could call to get information about Borough services. Over the years, it has expanded to cover a wide range of digital platforms and processes used to more effectively connect members of the public to municipal services. There are many benefits to moving non-emergency related municipal services online, including reduced burden on staff to respond to information and service requests that can easily be accessed on the website; transparency in the status of requests, payments, permits, etc.; efficiencies in departmental work flow management; added convenience to the public; and more.

While many options exist for moving municipal services online, we will cover some of the more common options, as well as a number of important high-level points to help you think through the best way to move forward with creating "311" style services.

The scale below illustrates the range of how these systems may be applied, from simple to more complex.




As you begin to move services online, there are several steps you can take that require only minimal cost and training of staff, including, but not limited to:

- **Fillable PDF documents**. This is a simple and low to no cost way to take a first step towards digitizing municipal services, and can be implemented in hours. Creating electronic forms that can be filled out and saved electronically allows you to transmit those documents electronically without the need for printing, mailing, and/or scanning. There are many programs that allow this function, such as Adobe Reader or Microsoft Word, and websites with form builders can be found as well. Not only does this save staff time, but fillable PDFs also reduce the cost and environmental burden associated with paper usage. Distributing forms in PDF format rather than as a .doc or other format, prevents people from editing necessary content accidentally, and reduces exposure to viruses or malware.
- **Online tax payments**. Allowing residents to pay their tax bill online is another relatively easy service to move online. One of the most broadly used services across the community, it offers a significant convenience to residents and greatly reduces staff time needed to reconcile payments, arguably justifying even a moderate cost. One example is Municipay, which integrates with your Munidex or Edmunds software, and provides you with an online payment page. Your tax collector and/or CFO are key to this process and should have more information.
- **Online service request systems**. This type of system allows the public to request or report issues with non-emergency municipal public services, such as streets or sidewalks needing repair, illegal dumping, potholes, streetlight outages, downed trees, property/code issues, etc. Some towns accomplish this process with a simple contact form on their website, allowing people to submit their contact information along with selecting the specific request or issue. Typically this type of system would route the entry to one staff member who would transfer the request to the appropriate department.

  While this simple system gets the job done, it provides limited value because there is no "dashboard" or system in place to actually manage the requests, and members of the public cannot track the progress of their request or view other requests submitted which can reduce redundancies. Instead of simply routing emails, you may want to consider a more advanced service request system. For exam-

ple, SeeClickFix is one of the most widely used service request systems for governments in the United States and offers a number of features including the ability for users to upload images and the location of where the service is needed, which would then be mapped for staff and the public to view. This type of platform creates a workflow by automatically routing submissions to the appropriate departments with internal and public tracking of progress. However, if you are looking for a more comprehensive system that can integrate easily with other products and incorporates a broader set of functions (e.g. allowing someone to report an issue with a pothole and also to file a construction permit), you may consider investigating one of the more comprehensive systems below.

The solutions mentioned so far do not require major purchases or significant training. Unless you are designing products or services in house, you will likely need to purchase a more comprehensive system in order to move to more advanced or comprehensive digital processes. For example, Spatial Data Logic (SDL) and GovPilot are two of the most common platforms used by most New Jersey towns, and both are available on state contract. Navigating the pricing and features can be complicated, so make sure to consult a third party or knowledgeable staff who understands these systems well and can ensure the product purchased will meet the Borough's goals at the lowest possible cost. It is worth noting the more functions you transfer into one of these comprehensive systems, the more value you will receive.

Below are some functions of a more comprehensive digital municipal service system and considerations when determining how and whether to move forward:

- **Incremental rollout of the service request system.** Consider rolling out the use of an online service request system one department or commission at a time. You might start with one that has the strongest IT competency so you can work out the kinks with this group before rolling it out to others. For example, imagine you have an active IT-competent shade tree commission. Start by creating online tree requests, which will likely also involve public works, which can then lead into incorporating other public works functions, construction and clerk functions, and so on. More advanced systems allow for a number of options, so be sure to walk through the needs of each department before making a decision on a platform.
- **Online program registrations**. Moving existing registration processes (e.g. municipal recreation programs) online and into a new 311 system will expose members of the public to using the new system, increasing the likelihood they will use other system functions in the future.
- **Online construction and related permitting**. Digitizing the permitting process for municipal departments such as construction, planning and zoning, fire prevention, building, and code enforcement, may provide some of the greatest benefits to the public. Putting these process online will reduce the number of required in-person office visits for functions dealing with inspections, opening a new business, home and business improvements, etc. You can implement a system that allows residents and business owners to apply for permits on the municipal website, add a tracking function so the progress of such permits can be viewed internally as well as publicly, and even take payments online. Most systems offer advanced features to make tasks even more efficient, for example allowing inspectors in the field to enter data on a tablet or mobile device which can be instantly transmitted to a contractor. No matter what level you start at, digitizing permits will make projects faster and require less staff time, thereby reducing the cost of providing these services and greatly improving the experience for the resident, business owner, or contractor.
- **Online Clerk and annual licensing processes**. Next, you may want to consider moving annual licensing requirements that may be overseen by your Clerk (e.g. food licenses, ABC permits, games of chance, or any registration or licensing process) into a system such as this. Setting up such systems can save staff a considerable amount of time and the ability to send electronic reminders to people will incentivize more residents and businesses to stay current in their registrations or filings.
- **Online municipal forms.** Once you have a number of departments and staff using the system well, you may want to consider moving all forms into the system. This is something you will want to determine ahead of time, to make sure the platform you are looking at can do this effectively and with-

out increased costs. Moving forms for OPRA requests, block parties, street openings, park reservations, etc. online will help organize much of the internal work across departments. It will also provide a consistent and professional experience for your constituents, many of whom who will happily opt for a digital interaction with the Borough.

- **311 "call center" function for all staff.** These systems also make submitting service request offline more convenient and efficient. Instead of a resident calling and being transferred to a specific person or department to fulfill a question or request, anyone who answers the phone would have the ability to quickly type in the caller's issue directly into the system, making every staff person a de facto "call center." This is a more convenient process for members of the public, because they can quickly report an issue with whoever they speak to; and an efficient way for staff to log and track every request. You can also institute this type of process for individuals visiting the municipal building and want to submit a request for service. Setting up this type of system requires a small amount of training for each staff answering the phone, but will ultimately save time and organize requests in a much more efficient manner.
- **Internal work management.** When enough staff or entire departments are using a system like this on a regular basis, you can begin to use it to gain insights into what work is happening at any given moment, whether projects are off track or need follow up, etc. For example, managers are able to view all of the requests for information and services that have been received, how many of those requests were filled, communications and interactions with the public, and internal conversation among staff in one place.
- **Gain insights with data and reports**. After using a system consistently over a certain period of time, you can generate reports based on the data in the system. Valuable information about the current state of affairs can then be provided to department heads, the governing body, or public. For example, maybe you receive a significant amount of general complaints about public works. After analyzing the data, you see out of the five most reported issues, four are being completed on time; however tree requests are consistently completed later than anticipated. You can then drill down on whether there are operating or budget issues (e.g. Are more staff or equipment needed? Is there a bottleneck in the process?) Having access to data to help justify budgetary decisions can be very helpful and ensure that people are making informed decisions, rather than relying on perceptions of how things work.

More platforms to move service requests, permitting and payments online can be found in the PIE Solutions Catalog. You can earn points for implementing several of these services through Sustainable Jersey's Online Municipal Public Service Systems action.

# Email Messaging Services

Outside of a municipal website, email continues to be the best way for local governments to share information with community members, as a large portion of the population has an email address, and emails can be accessed from both mobile and desktop.

If the Borough plans to consistently use email to communicate with the community, consider using an email service that includes a newsletter function. Newsletters allow for a considerable amount of information to be included in a consistent and organized format. These types of email services allow multiple users with different permissions to draft or send emails, create saved templates, create email and newsletter signup forms and manage registrants, track opens and clicks, and much more.

Before purchasing this kind of software, create a communications policy and plan for more effective and efficient use of the tool. This will ensure the following are taken into account:

1. Understand how many contacts you have and how frequently you are sending emails, as that will impact pricing.
2. Create a process for utilizing the software (e.g. who/how/when the drafting, sending and tracking of emails will occur) and ensure that the staff responsible have an opportunity to preview the particular tool you are considering.
3. Invest time in training at the start prepare staff and to reduce the chance for errors. Have appropriate staff take tutorials, practice sending emails, and familiarize themselves with the tool.

Many of these tools have built in analytics to track the effectiveness of your emails (e.g. open rates, dates/times of views, link clicks, unsubscribes). Work with an IT-savvy staff member or communications professional to analyze this data and optimize your communication. Try sending emails and/or newsletters on different days and times of day, and incorporate varied content to see what works best for your community.

Some commonly used platforms include Mailchimp, Constant Contact, Moosend, or Sendinblue. You can find more email services in the PIE Solutions Catalog.

# Municipal Websites and Analytics

Having a functional and comprehensive website that is easy to navigate is crucial to inform, engage, and provide services to your community.

Sustainable Jersey's Municipal Communications Strategy and Digitizing Public Records actions include best practices on baseline information that should be included on any municipal website.

**Tip**: I have found that websites are one of the projects that can be the simplest, but which often become the most complicated. This is an area where you can find significant value by following a set of best practices and clear planning principles. You'll kick yourself later if you don't start on the right foot!

Consider the following guidance when contemplating a new website in order to maximize the chance of a smooth transition and an end product that is valuable for your community:

Before the purchase:

1. **Create a small team with a clear point person to oversee the project.** One of the biggest things that drives website projects off-track are "too many cooks in the kitchen." Create a small project team, of no more than 3-5 people, and assign a full-time staff person or paid professional to be the project manager who will directly communicate with the vendor once selected. While familiarity with website development is a benefit to understand the products and services being sold, strong project management skills are the most important quality in the project manager.

2. **Understand your needs and goals**. Why are you pursuing this project? What are the problems with the current site? At this stage, what are the goals of a new one? Approach vendors with a clear set of goals for the new website, rather than let their products frame the conversation. You may consider going through an expedited project planning process to uncover these details.

3. **Review vendors' project plan beforehand.** Although it is important to review the technical aspects of a vendors' product or service, it is equally as important to understand how they organize and implement projects. For example, it may be a red flag if a vendor doesn't have a clear or organized project plan or a readily available onboarding timeline. But a vendor with a thorough, and clear process for how they accomplish their projects on deadline would be valuable to know.

4. **Understand the cost structure**. Your website should be expected to last at least three years before needing any major upgrade. Make sure you understand the total costs for at least three or five years out, not just what you pay upfront. This would include costs for maintenance or service contracts, hosting, domain registration fees, SSL licenses, and ongoing revisions. Some companies offer discounts on multi-year contracts. Make sure your IT professional has vetted the cost structure, and feels confident that you will be getting what you need from any service contract.

5. **Review prior work of each potential vendor**. It is critical to research prior work and check the references of vendors in this space, as you want to make sure that the website capabilities and services they are providing worked well for other communities. This information is very hard to tell from marketing materials. Reach out to prior clients and their project staff to get feedback.

6. **Understand the process for ongoing editing and maintenance of the website**. It is critical to understand how updates to the website will be made, who can post news articles, how emergency alerts are added, and the process for remedying technical problems that may arise. Ironing out all of these scenarios ahead of time will save tremendous headache down the road. Some things to understand, in terms of responsibilities and associated costs are: a) who is responsible for providing regular updates to the website, including adding calendar and news items, b) how are emergency alerts/banners created or added, c) who can update a design or non-content aspect of the website, and d) who handles technical problems with the website?

7. **Set a firm deadline for the project.** Website projects often fall behind schedule because of issues with some of the items mentioned here. Ensure you have a firm deadline and detailed timeline that shows a clear path (with buffer) to meeting the deadline. Both the deadline and timeline should be agreed upon by all stakeholders involved.

Creating the new website:

1. **Use available analytics and data to shape the new website**. If you do not have analytics software on your current website, investigate whether it is possible to install. Understanding how users interact with your website can be very valuable (e.g. how often pages are visited, which links and pages are use the most, whether people get lost looking for certain items, etc.). Using analytics data will provide accurate evidence to support decision making and guide the project successfully. Reviewing the analytics data on an ongoing basis can provide the Borough with useful insights about the community not otherwise understood, based on the information being looked at and processes used on the website.

2. **Create mobile versions.** Websites these days must be able to automatically scale to different screen sizes. Vendors should build in this "responsive design" as part of the project. Your website should also be fully functional on a desktop, tablet, or mobile, and compatible with all major operating systems. You may have the ability to create or have a mobile application, but that should only be in addition to a mobile website, not instead of it.

3. **Plan on additional revisions or upgrades**. Not only is it worth planning for minor upgrades or additions of new features every so often, having a proactive schedule to organize and triage smaller issues with the website may reduce ongoing maintenance costs. Planning reviews of the website six months or one year after launching may help reduce delays of the initial launch due to small details holding up the process. Additionally, instead of making ad-hoc changes as feedback arises (which can be expensive and time consuming), it allows you to gather feedback and review it a more formal, organized fashion at predetermined dates.

4. **Purchase an SSL and use a .gov address**. Have your team's IT expert review the security features provided by vendors. One way to ensure that your site is fully "secure" and user data is protected is to use a Secure Socket Layer (SSL) on every page of the site. This helps protect all data transmitted on the site from hackers, identity theft, etc. Additionally, using a .gov address gives you access to various security features provided by the federal government, which oversees .gov provisioning. While this function can be expensive, it helps to build trust in the municipal brand.

5. **Incorporate language translation and ADA features**. Every website is legally required to meet ADA requirements (which your vendor should be familiar with). But you can go a step further in providing modern accessibility features, such as translating the website into other languages. This is especially important if there are non-English languages spoken in your community. Using the free Google Translate or similar plugin can meet most of the translation goals, however the translation accuracy is not 100%. Other translation services are available at a cost.

6. **Carefully review the current site, but don't necessarily start from it.** Although you want to perform a review your current site, which may include evaluating analytics data, or conducting user surveys, you don't necessarily want to use it as a starting point. Rather allow yourself to start from scratch (or best practices from the vendor) and see where that gets you. You can then compare what you come up with to your current site to see if you have missed anything. But doing it this way allows you to break out of assumptions that may have been unintentionally built into how the prior website was made so that you are not just creating a "new version" of the same thing.

7. **Incorporate local photography and artwork.** Some websites rely on images as part of the design. Rather than licensing or using free stock images, go local! Research local artwork or photography to digitally showcase on the website. You might ask professional artists to donate their work in return for exposure, solicit submissions from community members, or host a contest. Make sure to properly license and/or attribute all of those great images.

# Phone Systems

Outdated phone systems can be a significant discretionary operating expense while actually constraining the ability of the municipal government to work efficiently. New systems are affordable and offer many helpful features that improve municipal operations.

Older phone systems that rely on offsite hardware can be unknowingly expensive. Although in certain conditions these systems may be a good option, more often than not, the costs are higher than they seem because multiple vendors service different parts of the system, while the municipality is often on the hook for maintaining the hardware. Some of these systems have quality issues with old "POTS" (Plan Old Telephone Service) lines, and lack the features that you should have access to.

Such features of an updated phone system include:

- Remote functionalities so that staff can easily use the system as if they were at their desk. This includes taking incoming calls, making outgoing calls, dialing extension, and accessing voicemail.
- Ability to create "automated receptionists" that can direct callers to specific departments which reduces the need for staff to field calls that interrupt important tasks.
- Ability to easily update outgoing messages so that critical emergency information can be immediately made public.
- Redundancy in case of internet or service loss.
- Encryption of calls to protect all communication.

Work with a trusted IT professional when designing a new system to ensure you get the right product and service, and favorable contract terms. This will ensure that you drive the conversation around the Borough's goals.

# Electronic Signatures

Electronic signatures are as legally binding for most types of contracts and documents as hard copy signatures. Moving any permissible documents to an electronic process can have significant benefits including:

- Reduction of the high environmental cost of printing and physically transporting or mailing documents for signatures;
- Significant decrease in the time required of staff to sign documents, and can result in documents being signed by multiple parties within minutes instead of days;
- Reduction in costs to the taxpayer, such as postage, shipping costs, and staff time; and
- Greater security to the authenticity of the documents, with most traditional services offering various verification layers and data logging for audits.
- We recommend working with your municipal attorney to develop a proper policy and/or procedure, or seeking guidance from third parties such as the League of Municipalities, the New Jersey Municipal Managers Association or Municipal Clerks Association of New Jersey.

Some widely accepted services which come with free plans or trial periods include: Pandadoc, Hellosign, Rightsignature, and Docusign. These services come with wide variety of features, including mobile signatures, email notifications, archival of signed documents, and security features. They may also allow for a degree of "contract management," which can help you keep your contracts organized and schedule reminders to renew them on time.

# Online Governing Body Information/Meetings

As many municipalities learned in 2020, the ability for citizens to virtually interact with your Governing Body can open doors to a new type of public participation. It is important to find opportunities for people to continue engaging online and staying connected to your Governing Body once the pandemic is over and we return to business "as usual."

There are a variety of ways to do this, all of which will help your public be more informed, better connect people into the work you are doing, and will likely reduce the volume of OPRA requests. Some ideas below range from the simple to more complex:

**Providing agenda, minutes, ordinances and resolutions online**. It is no longer enough to simply post the agenda document itself to the website prior to a Governing Body meeting. The public should be provided with the full agenda packet that is readable text (not an image), such that the document can be searched, annotated, etc. This agenda packet should include all of the backup materials, including ordinances, resolutions, the bills list, or presentation materials. This can be done by just simply posting the more comprehensive .pdf to the website at least 48 hours prior to the meeting, the same version that Governing Body members receive, minus any specifically OPRA-exempted confidential materials.

**Creating online document folders**. Ideally done through a document management solution, consider creating user friendly ways of accessing all of the related documentation in the agenda packet, beyond the full pdf. For example, you may consider organizing your "agenda center" with various document folders for agendas, minutes, resolutions, and ordinances, at a minimum, so that people can find any needed document by type and date. You may consider including committee documents and other information used at meetings, such as presentations or studies.

**Recording and streaming meetings**. Ideally, your public Governing Body meetings are both recorded and streamed live online. Municipalities are currently doing so via their remote meeting software, making the streaming and recording even easier than if meetings were held in person. Most municipalities have seen an increase in the number of attendees at these fully virtual meetings. Setting up your Council chambers to livestream and/or record audio and/or video of the meetings is an excellent way to improve transparency and give more people the option to hear what is being discussed at the meetings.

**Integrated solutions**. There are several integrated solutions to help tie all of the pieces together, so the Governing Body public meeting videos can be synced to the agenda and people can easily skip to parts of the meeting that cover specific topics, etc. Some of these solutions allow people to share clips of video via email or social media accounts, or save information to their own account. All of these options help to more actively engage people into the public meetings.

More tools to assist with remote public meetings can be found in the PIE Solutions Catalog.

# PART FOUR

## Appendix

The Appendix includes your PIE Technology Assessment documents, as well as a number of additional resources such as sample policies, details on project planning, and extra templates.

We have included:

- All of the documents used with Sustainable Jersey during the PIE Tech Assessment Process (not including emails)
- Additional project planning guidance
- Sample social media policies
- Sample communications template
- Shared Service Grant for regional construction services
- Sample for creating an “opening new businesses” checklist

All of these documents can be found in your personalized Google Drive folder. We suggest downloading or copying them into your records storage to ensure you are able to keep copies of all documents.

**Please note:** The Action Plan contains the URL to your personalized document folder. If you want to share a version of this report publicly, you may consider sharing the “public” copy provided to you by Sustainable Jersey, which is identical, except it doesn’t include this link. You can also contact Sustainable Jersey to request the removal of files from the Google Drive link once you have downloaded them.