



**Town of Wenham
BOARD OF SELECTMEN**

AGENDA

Thursday March 28th

1:00 PM

Wenham Town Hall – 138 Main Street

Notice of public meeting as required by M.G.L. Chpt.30A §18-25

All audience members wishing to address the Board of Selectmen must go to the podium microphone and give their name & address.

1:00 P.M.

WELCOME: Call to order

PUBLIC INPUT: *ITEMS NOT ON THE AGENDA*

NEW BUSINESS

- A. Interviews with and Potential Selection of Consulting Firms for Town Administrator Recruitment
(105 minutes)

CH

- Collins Center for Public Management
- Community Paradigm Associates
- Municipal Resources, Inc.

- B. Other matters, as may not have been reasonably anticipated by the Chair (Discussion Only)

CH

2:45 P.M.

OLD BUSINESS

- C. Finalize Town Administrator Screening Committee Composition and Solicit Letters of Interest
(15 minutes)

JW

3:00 P.M.

ANTICIPATED ADJOURNMENT

BOARD OF SELECTMEN MEETING

March 28, 2019

NEW BUSINESS

A.

Interviews with and Potential Selection of Consulting Firms for Town Administrator Recruitment (105 minutes)

- Request for Qualifications, Executive Search Consultant for the Town of Wenham, Town Administrator, March 13, 2019
- Scope of Work for the Town of Wenham, Town Administrator Recruitment, Edward J. Collins, Jr. Center for Public Management, March 21, 2019
- Proposal, Executive Search Services, Wenham Town Administrator, Community Paradigm Associates, LLC, March 17, 2019
- Response to RFQ, Town of Wenham, MA, Executive Search Consultant for Town Administrator, Municipal Resources, Inc., March 2019

CH

REQUEST FOR QUALIFICATIONS

EXECUTIVE SEARCH CONSULTANT

For the Town of Wenham

Town Administrator

March 13, 2019

Response Due Date: March 22, 2019 at 9:00 a.m.

TABLE OF CONTENTS

PROJECT DESCRIPTION, ABOUT THE POSITION, & SCHEDULE AND TIMELINE	3
SUBMISSION DEADLINE AND INSTRUCTIONS	3-4
INSURANCE AND INDEMNIFICATION	4-5
QUESTIONS, ADDENDUM, OR PROPOSAL MODIFICATION	5-6
SCOPE OF WORK	6-7
FEE	7
MINIMUM REQUIREMENTS/QUALIFICATIONS	7
EVALUATION OF PROPOSALS AND CONSULTANT SELECTION	7-8
FORMS	
Tax Compliance Certification	9
Certificate of Corporate Authority	10
Certificate of Non-Collusion	11
Signature Page	12

PROJECT DESCRIPTION

The Town of Wenham Board of Selectmen is seeking qualifications from Executive Search Consultants to work with the Board and the Town in the recruitment and selection of an exceptional candidate for the position of Town Administrator.

ABOUT THE POSITION

See Attachment 1 – Town Administrator Job Description

SCHEDULE AND TIME LINE

After conducting interviews of potential Executive Search Consultants who have submitted a Proposal, the Board of Selectmen expects to select an Executive Search Consultant on March 28, 2019 and prefers that this Project result in the selection of a new Town Administrator within twelve (12) weeks after the Executive Search Consultant is engaged by the Town.

SUBMISSION DEADLINE AND INSTRUCTIONS

Sealed Proposals must be received and registered by the Chief Procurement Officer, Wenham Town Hall, 138 Main Street, Wenham, MA 01984 by March 22nd, 2019 at 9:00 a.m., at which time and place they shall be publicly opened. Proposals MUST include one (1) original and three (3) copies. No proposals will be accepted after the time and date noted. Wenham Town Hall is open to receive proposals from 9:00 a.m. – 4:30 p.m. Monday, Wednesday, and Thursday, from 9:00 a.m. – 7:00 p.m. on Tuesday, and from 9:00 a.m. – 1:00 p.m. on Friday.

Request For Qualification documents may be obtained from the Chief Procurement Officer by emailing Peter Lombardi, Town Administrator, at plombardi@wenhamma.gov.

Proposals are to be sealed and properly identified on the outer envelope as Proposal for Executive Search Consultant with the applicant's name and address and delivered to:

Peter Lombardi
138 Main Street
Wenham, MA 01984
978-468-5520 x. 2

The following information is specifically required to be included in the Proposal submission:

1. Name and address of applicant, telephone number, and e-mail address;
2. Brief résumé of principals and of the staff to be assigned to the Project;
3. List of successfully completed projects that would best illustrate qualifications for the Project;
4. Five (5) references for projects of a similar or larger scope, with contact name, title, and telephone number who can speak to the quality of services provided for similar Town Administrator recruitment processes;
5. Names and qualifications of any outside vendors that may be used for the Project;
6. Statement of the scope and type of services proposed for the Project. Based on the guidelines and information in this RFQ, the applicant should describe the process and methodology to be used in the completion of services with specific reference to examples of similar projects in which this methodology has been used.
7. Statement of any legal or administrative proceedings, pending or concluded adversely, to the applicant within the past five (5) years which relate to the applicant's performance of this type of work.
8. Appropriate certifications of insurance.
9. Provide samples of work, such as reports, a sample position profile, evaluation forms, and other decision-making tools.
10. A current firm brochure may be submitted with the proposal.
11. Completion of the forms located at the end of this RFQ package.

Applicants must also execute, as required by law, and include in the sealed submission, the Certificate of Non-Collusion, the Certificate of Corporate Authority, and the Certificate of Tax Compliance, copies of which are attached.

INSURANCE AND IDEMNIFICATION

The selected firm shall obtain and maintain, at its own expense, general liability and motor vehicle liability insurance policies protecting the Town of Wenham in connection with any operations included in the contract, and shall have the Town of Wenham listed as additionally insured on the policies. General coverage shall be in the amount of \$1,000,000 per occurrence and \$2,000,000 aggregate for

bodily injury and property damage liability. Workers' compensation insurance, in accordance with the requirements of Massachusetts law, will also be required, if applicable.

Indemnification: The successful applicant shall agree to indemnify and hold harmless the Town of Wenham and its officers, boards and employees, and the Board of Selectmen, from and against all claims, causes of action, suits, damages, and liability of any kind which arise out of the negligence or willful misconduct of the successful applicant or its officers, employees, agents, and representatives regarding the services performed.

Proposals must be signed as follows:

1. If the proposer is an individual, by her/him personally.
2. If the proposer is a partnership, by the name of the partnership, followed by the signature of each general partner.
3. If the proposer is a corporation, by the authorized officer, whose signature must be attested to by the Clerk/Secretary of the corporation and corporate seal affixed.

QUESTIONS, ADDENDUM, OR PROPOSAL MODIFICATION

Questions concerning this request must be submitted in writing to the Chief Procurement Officer. All inquiries received two (2) or more days prior to the opening will be considered. Questions may be delivered, mailed, or emailed. Written responses will be emailed to all applicants on record as having received the RFQ.

If any changes are made to the RFQ, an addendum will be issued. Addenda will be emailed to all applicants on record as having received the RFQ.

All proposals submitted in response to this RFQ shall remain firm for ninety (90) days following the proposal opening. It is the Town's intent to award the contract within thirty (30) days after the proposal opening. The time for award may be extended for up to forty-five (45) additional days by mutual agreement between the Board of Selectmen and the selected Consultant.

After the opening of proposals, an applicant may not change any provision of the proposal in a manner prejudicial to the interests of the Town of Wenham or fair competition. Minor informalities may be waived or the applicant may be allowed to correct them.

The contract and its award process resulting from this Request for Qualifications (RFQ) are not subject to the Uniform Procurement Act pursuant to the M.G.L. c. 30B or the Designer Selection Law, Chapter 7C.

Issuance of this RFQ does not signify the Town's submission of this service to the provisions of the Act, and the contract and award will be made at the Town's discretion. If it becomes necessary to revise any part of this RFQ or otherwise provide additional information, an addendum will be issued to all prospective proposers who received copies of the original request. Award of a contract resulting from this RFQ shall be in strict accordance with the requirements of this document.

SCOPE OF WORK

The consultant shall:

1. Meet with the Board of Selectmen and Screening Committee as frequently and for such time as may be necessary to carry out his or her work;
2. Prepare, in consultation with the Board of Selectmen, a plan for the search, recruitment and selection of a qualified candidate for the position of Town Administrator;
3. Review the Town Administrator job description;
4. Work with Board of Selectmen to develop a profile of the Town and the desired candidate, taking into consideration the qualities and attributes that the next Town Administrator should possess;
5. Develop a plan to advertise the position and prepare advertisements for publication;
6. Utilize the consultant's network of local government professionals to actively recruit municipal managers that match the established candidate profile;
7. Prepare a recruitment report of potential candidates from the submitted applications with possible recommendations of candidates for preliminary review;
8. Assist the Screening Committee in reviewing applications;
9. Assist the Screening Committee in vetting and interviewing candidates, including development of questions, essays, and scenarios, as applicable;
10. Assist the Select Board in preparing for interviews in executive session and in open session under the Massachusetts Open Meeting law;
11. Conduct a full comprehensive background investigation of either the finalists or the selected candidate, at the Board of Selectmen's direction;
12. Assist in negotiating and drafting of employment agreement and terms and conditions with the selected candidate;

13. Make every effort to successfully complete the requirements of this Contract within twelve (12) weeks from the date of the signed contract;
14. Conduct other related tasks as may be requested by the Board of Selectmen.

FEE

The fee for this Project should be included as part of the qualifications response, and may be negotiated **upon selection and an agreed upon workplan**. The fee will include all expenses, direct and indirect, for this project. All proposals shall belong to the Town of Wenham. The successful applicant shall agree to comply with all applicable federal, state, and local laws in its performance of its contract with the Town of Wenham.

MINIMUM REQUIREMENTS/QUALIFICATIONS

Each proposal shall meet all of the following criteria in order to be considered further:

1. Consultants shall have been in the business of providing municipal executive recruiting for a minimum of three (3) years.
2. Consultants shall have successfully completed a similar process for at least five (5) comparable municipalities in the past three (3) years.
3. Consultants shall have at least two (2) qualified persons available to work on this project who will be able to start work on the project within ten (10) days of the award of the contract, and be able to work continuously to complete the project at the earliest possible date consistent with professional performance.

EVALUATION OF PROPOSALS AND CONSULTANT SELECTION

Proposals shall be evaluated based on responsiveness to the criteria as well as the terms and conditions contained in the RFQ and its attachments. Any proposal not meeting the Minimum Evaluation Criteria of this RFQ will be disqualified without further evaluation. The Board may determine that the Consultant's inability to meet the Minimum Evaluation Criteria is due to minor informalities, which are defined as minor deviations, insignificant mistakes, and matters of form rather than substance, and can be clarified, as provided above. In such cases, the Board of Selectmen may allow the Consultant to make minor corrections, except to cost items, and may apply the change to their Proposal.

Taking into consideration the Proposals, related fees, and results of the interview process, the Board of Selectmen will make a decision regarding selection of the Consultant with whom it wishes to enter into contract negotiations. The Board of Selectmen reserves the right to award the Project to a Consultant who has not provided the lowest price proposal. The Wenham Board of Selectmen reserves the right to accept any proposal in whole, and to reject any and all proposals if it shall be deemed in the best interests of the Town of Wenham to do so.

Upon the acceptance of a Consultant's proposal, the Town will prepare and submit an Agreement to the successful Consultant for signing. Incorporated by reference into the Agreement that is to be entered into by the Town and the successful Consultant pursuant to this RFQ will be (a) all of the information presented in or with this RFQ and the Consultant's response thereto, and (b) all relevant written communications between the Town and the successful Consultant whose proposal is accepted.

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c.62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, the below named business is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

(Date)

(Signature of individual submitting bid or proposal)

(Printed name of person signing bid or proposal)

(Name of business)

(Business address)

(Business phone number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

CERTIFICATE OF CORPORATE AUTHORITY

The principal, officer or person to sign below pledges under penalties of perjury, that he or she has been designated by the owner(s) or the Board of Directors of the below named firm as an authorized representative.

(Date) (Signature of individual submitting bid or proposal)

(Printed name and title of person signing bid or proposal)

(Name of business)

(Business address)

(Business phone number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

NON-COLLUSION STATEMENT

CONTRACTOR'S CERTIFICATION IN BID/PROPOSAL TO BE ATTACHED TO CONTRACT

Any person submitting a Bid or Proposal for the procurement or disposal of supplies and services to any governmental body shall certify in writing, on the Bid or Proposal, as follows:

"The undersigned certifies under penalties of perjury that this Bid or Proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals."

(Date) (Signature of person signing bid or proposal)

(Printed name of person signing bid or proposal)

(Title)

(Name of Business)

(Business address)

(Business Phone Number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

SIGNATURE PAGE

The applicant hereby certifies that:

1. The applicant has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of contract for these services.
2. No consultant to, or subcontractor for the applicant has given, offered, or agreed to give any gift, contribution or offer of employment to the applicant, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the applicant.
3. That no person, corporation, or, other entity other than a bona fide full-time employee of the applicant has been retained or hired to solicit for, or in any way assist the applicant in obtaining the contract for services upon an agreement or understanding that such person, corporation, or entity be paid a fee or other compensation contingent upon the award of the contract to the applicant.

I hereby attest with full knowledge of the penalties for perjury, as in accordance with Massachusetts G.L. C.7, S.38E that all information provided in this application for services is correct.

Firm

Signee (written)

Signee (typed/printed)

Title

Date

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

ATTACHMENT 1

Town Administrator Job Description (as amended BOS 12.31.14)

1. General Powers and Duties

The Town Administrator, under the direction of the Board of Selectmen, is responsible for the administration of all town functions and activities for which the office of Town Administrator is given responsibility. The Town Administrator is responsible for the efficient administration of all departments and employees under the jurisdiction of the Board of Selectmen.

The Town Administrator implements policies established by the Selectmen in accordance with the strategic direction they set forth. The Town Administrator manages the day-to-day operations of the Town in accordance with these policies and strategies. To do so, the Town Administrator maintains close contact with the Chair of the Board of Selectmen, keeps the Board of Selectmen advised of his/her activities and decisions, and makes recommendations regarding town operations as well as any developing concerns.

The Town Administrator provides leadership and direction in the development of short-range and long-range plans, provides professional advice to the Board of Selectmen and department heads, keeps the Board of Selectmen fully advised regarding all departmental operations, the availability of federal funds, grants, fiscal affairs, problems, administrative actions, and the long-range needs of the Town and gathers, interprets and prepares reports and recommendations for the Board of Selectmen and/or the Town at large including elected and appointed boards and committees.

The Town Administrator is the primary interface for the Town with neighboring towns, public and private sector organizations, and the Commonwealth.

The Town Administrator is subject to annual review by the Board of Selectmen.

2. Qualifications

2.1 Education and Experience

Qualifications for appointment include:

- Master's degree from an accredited institution of higher education in public or business administration or a related field of study
- At least five years of related professional municipal experience
- Expertise in the operation and organization of municipal government.

The Board of Selectmen may waive any or all educational or professional requirements should the Board of Selectmen determine that doing so would be in the best interests of the Town.

Job Description: Town Administrator (as amended BOS 12.31.14)

2.2 Specific Skills/Knowledge

The Town Administrator must have the following skills and knowledge:

- In-depth knowledge of MA municipal law as it affects Towns
- In-depth knowledge of Town management functions including goal setting, planning, and staffing
- Project management
- Familiarity with computer applications including MS Word, MS Excel, and municipal applications.
- Communication skills, both oral and written
- Collaborative approach to problem solving

2.3 Residency

There is no residency requirement for the Town Administrator.

3. Appointments

The Town Administrator:

- works collaboratively with the Board of Selectmen in the appointment of the police chief, fire chief, finance director, and treasurer/collector. Appointment and removal of these positions are subject to the approval of the Board of Selectman,
- appoints, supervises, and in appropriate circumstances, removes, subject to any applicable collective bargaining agreement and confirmation by the Board of Selectmen, all officers and employees of the town for whom no other method of selection is provided. The Town Administrator does not have the power to appoint or remove employees of the school department. The Town Administrator is required to consult with the appropriate department head or elected board prior to hiring an employee who serves primarily for that department.

The Town Administrator's appointment authority does not extend to non-employees appointed to committees or other positions by the Board of Selectmen or to the Town Moderator.

All appointments the Town Administrator is authorized to make shall be in compliance with applicable statutes and with the Town's Personnel Handbook.

Directly, or through departmental heads, the Town Administrator supervises and provides for recruitment and training of Town employees.

Job Description: Town Administrator

(as amended BOS 12.31.14)

4. Supervisory Responsibilities

The Town Administrator:

- Supervises and directs with respect to operations all employees in a manner consistent with the general policies adopted by the Board of Selectmen applicable to all departments and with the town's personnel bylaws, policies, procedures, rules and regulations.
- Development objectives and employment incentives for department heads, maintain close contact with their activities and department operations, evaluate their performance and makes recommendations as to their compensation and their scope of duties.
- Administers the Board of Selectmen's office by receiving and making appropriate disposition of all correspondence and communications, anticipates the needs of the Board of Selectmen for information and background material for setting policy and making decisions.
- Conducts regular staff meetings and reviews program goals and objectives with department heads; evaluates performance and effective utilization of equipment, manpower, and other records.
- Coordinates and cooperates with the Planning Board, Conservation Commission, Board of Health, and other boards, commissions and departments. Coordinates the activities of department heads not reporting to the Board of Selectmen, including the Library Director and Principal Assessor.

5. Public Relations

The Town Administrator serves as the public relations and communications officer of the town. He or she solicits input from and consults with department heads on matters involving their departments and with the Board of Selectman when necessary regarding Town policies and direction. The Town Administrator engages in a variety of public relations and town-wide coordination activities to ensure support from appropriate public and private constituencies and other institutions and government entities. He or she works with local, county, state and federal officials to identify and resolve problems, gain support, or exchange information. He or she makes presentations to staff, boards, commissions, civic groups, and the general public to communicate official plans, policies and procedures and to keep them up to date on Town activities. The Town Administrator may also serve as Chairperson of committees of statutory and *ad hoc* nature, and be the designee of the Board of Selectmen on other committees and boards.

Job Description: Town Administrator

(as amended BOS 12.31.14)

6. Record Maintenance

The Town Administrator ensures that full and complete records of the financial and administrative activities of the town are kept and makes available periodic reports to the Board of Selectmen, of all town administrative operations during the period. These reports are made available to the public.

7. Advice/Recommendations to the Board of Selectmen

The Town Administrator keeps the Board of Selectmen fully advised as to the needs of the town and recommends to the Board of Selectmen and to other elected town officers and agencies for adoption any measures requiring action by them or by the town meeting. The Town Administrator informs the Selectmen and other appropriate boards of all relevant statutory and regulatory changes.

8. Attendance at Board of Selectmen Meetings

The Town Administrator, in collaboration with the Chair of the Board of Selectmen, prepares the agenda for and attends all regular and special meetings of the Board of Selectmen, including executive sessions, unless excused in advance by the Chairman of the Board. The Town Administrator has a voice, but no vote, in all of its proceedings.

9. Facilities Maintenance

Through the appropriate boards, committees and agencies, the Town Administrator is responsible for the use and maintenance of all Town land and buildings other than those under the control of the school committee and the library trustees. He or she makes recommendations for acquisition and disposal as appropriate.

10. Budget

Under the leadership of the Finance Director, the Town Administrator assists in the preparation and presentation to the Board of Selectmen and, at the Board's direction, to the Finance Committee, an annual operating budget along with a schedule for submission of information by departments of the town. The proposed budget recommendation includes details concerning likely amounts to be raised by taxation and the resulting tax rate. Also, working with the Finance Director, the Town Administrator shall submit annually a five-year capital improvement plan, including cost estimates, proposed financing, costs associated with acquisition and future operation and maintenance of any capital item.

Job Description: Town Administrator

(as amended BOS 12.31.14)

11. Contract Negotiations

The Town Administrator participates in labor negotiations and grievance procedures as directed by the Board of Selectmen. This applies to all personnel contracts and collective bargaining agreements, including contracts with town employees involving wages, hours and other terms and conditions of employment. All such contracts and agreements are subject to the approval of the Board of Selectmen.

12. Payroll

The Town Administrator reviews and signs all payroll and expense warrants submitted by the Finance Director for payment of Town funds.

13. Procurement

The Town Administrator is the chief procurement officer for the Town, in accordance with chapter 30B of the General Laws. The Town Administrator prepares Request for Bid/Proposal specifications, analyzes the resulting submittals and serves as the Town's contract administrator.

14. Licenses and Permits

The Town Administrator supervises and monitors as appropriate the application process for all licenses and permits issued by the Town and schedules any meetings with the chairperson or department chair levels as required as part of the application process. In doing so the Town Administrator coordinates and cooperates as appropriate with the Planning Board, Conservation Commission, Board of Health, and other boards, commissions and departments.

15. Resources

The Town Administrator seeks out and works to obtain resources from federal, state, and other governmental jurisdictions, including working with the Hamilton Wenham Regional School District to secure joint grant opportunities.

16. Town Counsel

The Town Administrator coordinates, facilitates, and monitors the provision of services by town counsel, special counsel, and consultants. The Town Administrator coordinates litigation and legal opinions between the Board of Selectmen, Town Counsel and various boards, departments, committees and commissions, oversees and coordinates all legal research conducted by Town Counsel, Labor Counsel and Special Counsel; monitors the legal budget and manages all legal actions by and against the Town, including actions related to insurance claims.

Job Description: Town Administrator

(as amended BOS 12.31.14)

17. Other Duties

The Town Administrator oversees the Town's personnel system; proposes personnel policies to the Board of Selectmen; maintains personnel records of employees and; acts as Affirmative Action Officer for the Town. The Town Administrator provides leadership on local and regional initiatives that improve the overall performance of the Town in the delivery of services to the residents of the Town.

The Town Administrator performs any other duties required of the Town Administrator by local bylaws and regulations, votes of the town meeting, or votes of the Board of Selectmen.

18. Physical Requirements:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. Lifts/moves objects weighing up to 10 pounds, files, and types on a keyboard at a moderate speed. Operates an automobile to perform in-town and out-of-town travel to transact Town business (This requires a valid driver's license). Travel to night meetings is common place in order to confer with the Board of Selectmen and other town bodies. Regularly conveys information to the public.

March 17, 2019

Board of Selectmen
Town of Wenham
138 Main Street
Wenham, MA 01984

Dear Ms. Harrison and members of the Board of Selectmen:

I appreciate the opportunity to submit this proposal to the Town of Wenham for services that assist with the recruitment and selection of its next Town Administrator, in accordance with the Town's RFQ dated March 13, 2019. It is essential that this selection process result in an individual that has the skills, experience, and management approach to assist the Town in addressing its challenges and new opportunities.

Community Paradigm Associates, LLC was established in 2014 as a multi-dimensional organization focusing on governmental, nonprofit, community, and business concerns. Services provided by Community Paradigm Associates include: executive recruiting, economic and community development, strategic analysis and counsel, public finance, public policy, community engagement, strategic management and planning, social innovation, building high performing organizations, marketing and communications, professional development, process improvement, community sustainability, and tactical research and solutions. However, our primary service is focused upon executive recruiting of municipal managers for towns here in Massachusetts.

I believe that we bring four specific qualifications to the task of helping Wenham find its next Town Administrator:

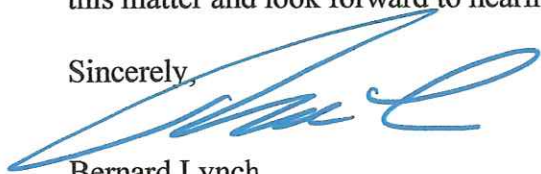
- First, we know the skills and characteristics of a municipal manager in carrying out his/her responsibilities. I, and two of our Senior Associates, performed the role for a combined total of approximately 100 years.
- Second, we have built a proprietary database hundreds of potential candidates based upon our extensive and current network of municipal managers, particularly here in Massachusetts and throughout New England. We utilize an approach of active recruitment, not simply advertising a position and waiting for responses.
- Third, the approach that we have always used in recruitments includes active engagement of the stakeholders of the community in the process. We believe this approach produces the best possible selections as well as crucial community support during the all-important first few months in the position.
- And fourth, now in our fifth year of business, we have become the most active municipal manager recruitment firm in the Commonwealth. We believe that distinction is the result of the customized, dedicated service that we provide to our municipal clients, which can be verified by contacting our clients for their opinion of Community Paradigm.

In accordance with the Town of Wenham's Request for Qualifications, we have organized materials that respond to the specifically requested information as outlined within the RFQ. On the attached "Town of Wenham Recruitment Services Proposal Requirements", we have identified the location of compliance with RFQ requirements regarding qualifications and submission information within the Proposal. We specifically address the Scope of Work requirements that are outlined on page 6 of the RFQ by describing our approach and implementation plan on page 2 of our proposal.

I certainly encourage the Town to review the recruitments that we have performed for other communities. I am confident that those communities will respond positively and enthusiastically to the results of our work and the hands-on process that we have managed and provided.

As the lead consultant on this project, I would be happy to respond to any questions regarding this matter and look forward to hearing from you. Thank you in advance for your interest.

Sincerely,



Bernard Lynch
Principal

Attachment: Town of Wenham Recruitment Services Proposal Requirements

**Town of Wenham
Recruitment Services Proposal Requirements
Town Administrator**

Proposal Requirements

1. Name and address of applicant, telephone number, and e-mail address;
Community Paradigm Associates, LLC
1 Saddleback
Plymouth, MA 02360

978-621-6733

Blynch@communityparadigm.com
2. Brief résumé of principals and of the staff to be assigned to the Project;
Included on pages 42-49
3. List of successfully completed projects that would best illustrate qualifications for the Project;
Included on pages 39-41
4. Five (5) references for projects of a similar or larger scope, with contact name, title, and telephone number who can speak to the quality of services provided for similar Town Administrator recruitment processes;
Included on pages 39-41
5. Names and qualifications of any outside vendors that may be used for the Project;
Included on pages 50-54, following the project team résumés
6. Statement of the scope and type of services proposed for the Project. Based on the guidelines and information in this RFQ, the applicant should describe the process and methodology to be used in the completion of services with specific reference to examples of similar projects in which this methodology has been used.
Included on pages 2-6
7. Statement of any legal or administrative proceedings, pending or concluded adversely, to the applicant within the past five (5) years which relate to the applicant's performance of this type of work.
Included on page 56
8. Appropriate certifications of insurance.
Included on page 55
9. Provide samples of work, such as reports, a sample position profile, evaluation forms, and other decision-making tools.
Included on pages 7-33
10. A current firm brochure may be submitted with the proposal.
Included on pages 34-38
11. Completion of the forms located at the end of this RFQ package.
Included on pages 57-60

PROPOSAL
EXECUTIVE SEARCH SERVICES
WENHAM TOWN ADMINISTRATOR
March 17, 2019



COMMUNITY PARADIGM ASSOCIATES, LLC

PROCESS AND METHODOLOGY

I. Approach and Plan for Performing Services

It is a challenging period in municipal management recruitment with a growing number of retiring current managers providing increased opportunities, fewer individuals entering the profession, and many individuals opting to remain in secure positions. The result of these forces is smaller candidate pools for municipalities.

It has also become a period in which greater citizen involvement in the selection process is desired and required. Such involvement helps to ensure community support for the individual selected. Community Paradigm Associates has facilitated community input in almost every municipal manager/administrator search we have conducted, and we have organized, guided and facilitated Screening Committees in reviewing and interviewing candidates.

The recruitment and selection process require an understanding and knowledge of the candidate pool, aggressive outreach, citizen engagement and participation, and a nimble and creative approach to finding and choosing the "right" individual for the community. The approach that would be utilized as described herein, along with the already described experience and knowledge will work in finding the best Town Administrator for the Town of Wenham. The following is a description of the process that will be utilized by the Consultant:

Preparation

1. Initial Consultation with the Board of Selectmen

It is most important to have a clear understanding from the Board of Selectmen on the experience, management style, and personal attributes the Selectmen wish the next Town Administrator to possess. The Consultant would meet with the members of the Board of Selectmen at the outset to obtain this information. This meeting would also be used to discuss recruitment strategies, discuss contractual provisions including compensation and conditions of employment, and review the timetable for the recruitment and selection process. A similar meeting will be held with the Screening Committee with a focus on process and timetable.

The mission of the Screening Committee is to ultimately narrow the field of candidates to three (3) or four (4) finalists to present to the Board of Selectmen.

2. Supporting Information and Community Consultation

It is generally helpful to gather the views of major Department Heads and other key town officials that will have regular interaction with the Town Administrator. These will be obtained through a round-table discussion with the consultant with follow-up information gathering with individual staff as deemed necessary. We would also propose to have a community forum and surveys to ascertain the thoughts of residents and businesses as to the qualities that would be beneficial for the next Town Administrator to possess. Community Paradigm has utilized such input sessions with success in most of its executive recruiting projects.

3. Preparation of Position Profile/Recruiting Brochure

The Consultant would assist in developing the required professional qualifications and recommended compensation package for the Town Administrator position based in part by the updated job description. The information gathered from the Board of Selectmen, Department Heads and town officials, and any community input received would complete the development of the position profile, which would serve as a report to the Selectmen on our findings. A community profile will also be developed with the position profile in order to create a Recruiting Brochure that will provide possible candidates a full understanding of the Town and its current issues, the statutory responsibilities of the Town Administrator position, and the expectations of the Selectmen and other members of the community. A sample Position Profile is included.

The Selectmen will be asked to endorse or amend this Profile which sets forth selection criteria, and in Executive Session discuss and decide parameters of a compensation and benefits package. Specifics related to this package are held to be confidential as they will be part of negotiations with the final candidate.

4. Advertisements and Active Recruitment of Candidates

Ultimately, the success of selecting a new Town Administrator for Wenham is ensuring the largest possible pool of qualified candidates. Certainly, one manner of gaining applicants is advertising the position through various publications and organizations. The consultant will make recommendations as to the most effective locations to advertise but at a minimum would include the International City and County Management Association (ICMA) and Massachusetts Municipal Manager's Association (MMMA) publications.

However, the most important activity in recruiting is conducting targeted outreach to prospective, qualified candidates. This activity is imperative, as many qualified candidates do not respond to advertisements for various reasons. In particular, in highly visible positions, such as municipal managers, there is some concern about premature public disclosure of candidates, which could impact existing positions. A consultant-initiated contact can ease such concerns and expand the pool of candidates. The Consultant will conduct outreach by utilizing:

- Our MMA professional network;
- Our ICMA professional network;
- A professional academic network at Suffolk's MPA program;
- Our professional and alumni networks;
- Our database of municipal management professionals.

Review of Applicants

5. Receipt of Résumés

Applications and résumés should be sent directly to Community Paradigm Associates in order to maintain confidentiality of each inquiry and application. This will ensure the greatest number of qualified candidates. Any résumés sent to the Town, the Screening Committee, or the Board of Selectmen should be forwarded to the Consultant. All résumés need to be acknowledged by the Consultant.

6. Initial Review of Résumés

The Consultant will review all résumés to determine those which meet the Town's criteria as set forth in the parameters voted by the Board of Selectmen. Those that do not meet minimum criteria will be screened out from direct referral to the Screening Committee but will be made available upon request.

7. Screening Process: Review of Résumés and Assessment

The Consultant, summarizing each qualified applicant's experience, education and other notable information, and following telephone interviews, and utilization of assessment tools as deemed appropriate, will prepare a confidential assessment of the remaining 10-12 qualified candidates. This information will be provided by the consultant to the Screening Committee on a confidential basis, as will advisement by the Consultant as to which candidates are the most qualified. These reviews will occur in executive session and the Screening Committee will select the candidates to be interviewed in executive session.

Initial Interviews

8. Search Committee Interviews

It is recommended that the Screening Committee personally interview 6-8 candidates. Interviews would be expected to last 60-75 minutes. The Consultant will assist the Screening Committee with the interview process. This will include the notifications to candidates and scheduling of interviews as well as assisting the Committee with the interviews including methods of interviews, possible questions, and evaluating responses, etc. The Committee should only interview candidates once as second interviews are generally required to occur in public session; and public interviews of candidates prior to being named a finalist could have a chilling effect upon applicants/candidates.

9. Selection of Finalists

At the completion of the initial interviews the Committee will need to determine which three (3) or four (4) candidates should be forwarded to the Board of Selectmen as finalists. These finalists should NOT be ranked in any way as it can bias the process. Instead, a short description of the candidate can be prepared to accompany the finalists' résumés.

10. Reference and Background Review

The Consultant will obtain written authorization from each of the finalists acknowledging a desire to continue through the process and allowing for the Consultant to contact the finalists' provided professional references and conduct CORI checks as applicable. This process protects the finalists' confidentiality and the Town and its Screening Committee and Board of Selectmen from any charge of violation of privacy.

11. Referral of Finalists

Upon completion of the Reference and Background review, the Consultant will work with the Screening Committee, as needed, for final referral of finalist names to the Board of Selectmen. This step will allow for any modification to the chosen finalists if notable information is gathered during the background review. The Committee will take the final votes and publicly announce the finalists to the Board of Selectmen.

Board of Selectmen Selection

12. Finalist Interviews

The Consultant will assist the Board of Selectmen with the interview process including preparation, scheduling of interviews, etc. The Selectmen may choose to conduct two interviews, the first involving a preliminary introduction and review of credentials and experience; and a second meeting that follows time spent with members of the community and staff. The second interview could focus upon management style and thoughts and ideas regarding Wenham.

13. Selection

At the conclusion of finalist interviews the Selectmen will need to make a decision regarding the choice of the next Wenham Town Administrator. The Consultant will help with organizing the process of making that decision. Any vote to offer the position of Town Administrator to an individual should be “conditioned” upon the successful negotiation of a contract and any additional background checks deemed necessary.

14. Contract Negotiation

The Board of Selectmen can handle the process of negotiating an employment agreement directly or through the use of Town Counsel. The Consultant will assist with this process and can provide some valuable guidance in reaching a mutually beneficial agreement. It is strongly recommended that Town Counsel review an employment contract before execution. This should be done for the initial agreement and any future agreements in which language is modified.

II. Consulting Fee and Estimate of Costs

Option A

The fee associated with the entirety of these services under Option A is \$9,900.00 with \$2,475 payable at the conclusion of each phase.

Phase 1: Preparation and Recruitment (Steps 1-4)

Phase 2: Review of Applicants (Steps 5-7)

Phase 3: Initial Interviews (Steps 8-11)

Phase 4: Board of Selectmen Selection (Steps 12-14)

Option B

An alternative scope of services that can be offered to reduce costs to the Town would be the following:

Phase 1: Preparation and Recruitment (Steps 1-4)

Phase 2: Review of Applicants (Steps 5-7)

and, “Reference and Background Reviews”, as described in Phase 3. Other aspects of the project would be managed in-house with Town staff.

The fee associated with Option B is \$6,600.

The proposed fee under either option does not include expenses related to the search (advertisements, printing, miscellaneous, etc.), which will be paid directly by the Town or as reimbursement to the consultant with appropriate documentation. It is estimated that these costs will total approximately \$700.00.

III. Recommended Timetable

The following timetable anticipates an April 1, 2019 start date and completion of the process in mid-July of 2019 in order to have a selection starting in the position in early September of 2019.

Dates	Actions
April 1 – April 23	Information gathering with Screening Committee, Board of Selectmen, Department heads, and community; Position profile and advertisement created, reviewed and approved.
April 24 – May 17	Position advertisements placed; Active recruitment.
May 17 – May 29	Initial Screenings, including telephone interviews and preliminary background reviews. Review applicants with Screening Committee
Weeks of June 3- June 10	Semi-finalist interviews with Screening Committee.
Week of June 17	Full background reviews and additional reference checks.
Week of June 24	Names of 3-5 Finalists submitted to Board of Selectmen.
Weeks of July 1 - July 8	Finalist interviews with Board of Selectmen and Selection. Negotiation of Employment Agreement.

Sample Recruitment Materials

The following documents are included as examples of the work product generated in the process of assisting client communities with executive recruitment.

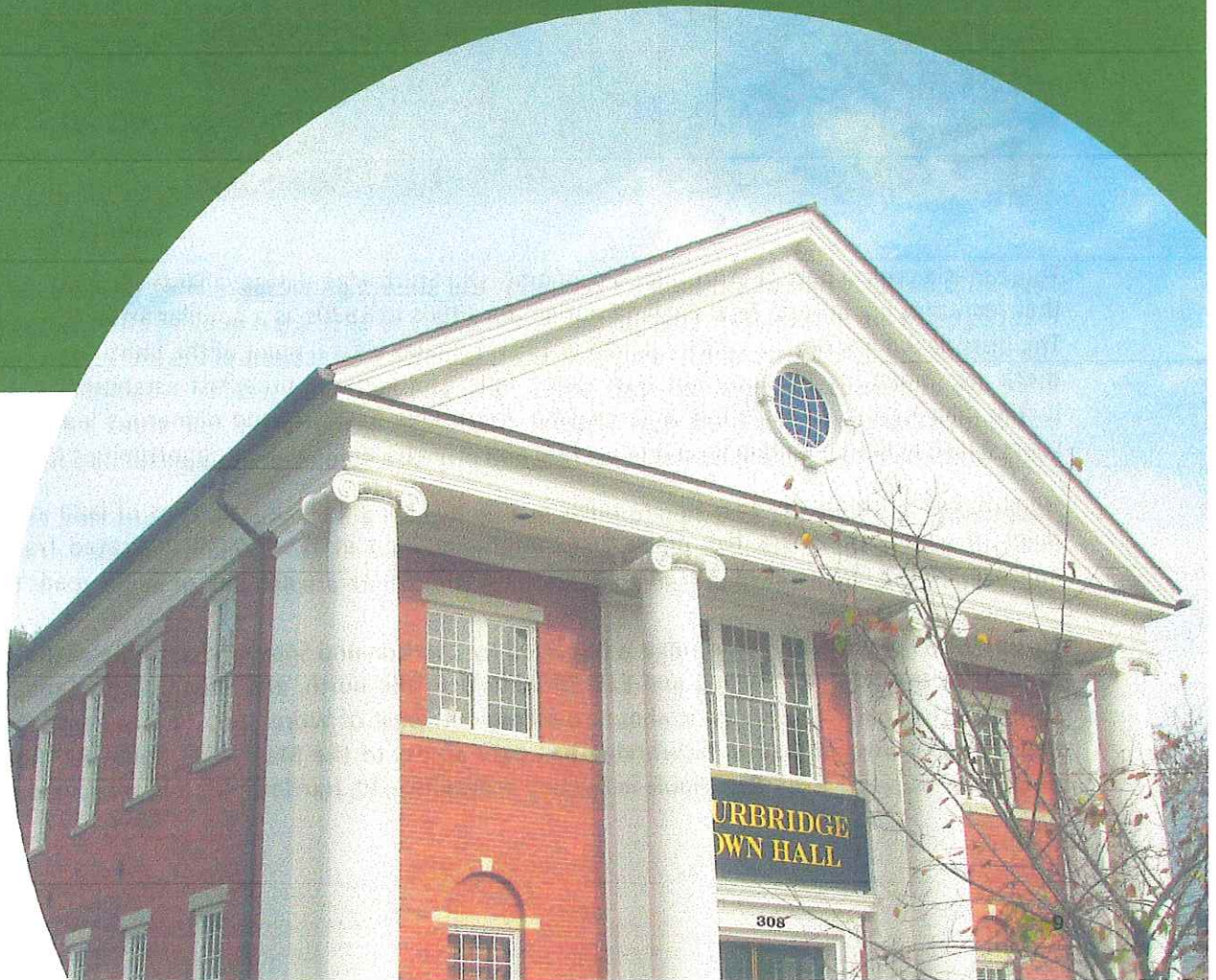
- **Sturbridge Town Administrator Position Profile**-we develop extremely robust position profiles based upon review of local materials, interviews with Select Board members, department heads, and based upon the direction of the Town we speak with staff, key local leaders and hold a community forum to gain citizen input. The profile, which is circulated electronically to candidates and individuals targeted for recruitment, utilizes hyperlinks to drive the candidates to specific documents and websites.
- **Norwood Community Forum Press Release**-we provide public information materials for our clients such as press releases, website announcements, social media posts, etc. in order to communicate information to the community at large, or targeted audiences. Attached is a press release announcing the community forum that was held in Norwood.
- **Wayland Job Posting**-we develop job posting/advertisements that summarize community information, desired and required qualifications and application process. Generally, we use this posting to advertise on the Mass Municipal Association (MMA) website, International City and County Management Association (ICMA) website, and possibly other New England municipal association websites. We also use the posting to circulate to area universities that have alumni job boards.
- **Stoughton Questions**-we work with Search Committees and Select Boards in developing interview questions that address general management skills and experiences and town-specific issues that result from the position profile development process.
- **Sample Interview Score Sheet**-based upon the interest of the Screening Committees we generate Town specific scoring sheets that can be utilized in an attempt to quantify interview results.

- **Sample Preliminary Interview Report (sample)**- see above. Specific information has been redacted for confidentiality.
- **Amherst Status Report and Select Board Interview Plan**-we provide status reports and technical assistance to the Select Board on the search process and recommendations for a community focused selection process. In Amherst we developed a day long procedure of providing information to finalists while simultaneously obtaining multiple perspectives of the finalists through interaction with key stakeholders
- **Hamilton Report to Selectmen transmitting Finalists**-upon selection of finalists we conduct reference and background reviews of each candidate before they are announced to the Select Board. In that procedure we prepare a report that reviews the credentials of the candidates and a summary of reference feedback received. Copies of resumes are included with these reports.

Sturbridge, MA

Town Administrator

Community & Position Profile



The Community

The Town of Sturbridge, Massachusetts, is a vibrant and inclusive community of approximately 10,100 residents located at the crossroads of New England. It has a tradition of highly responsive government service, has strong citizen engagement, and is known as a destination for tourists who come to visit its charming downtown, Old Sturbridge Village, and numerous historic sites. The Town is seeking a seasoned municipal management professional with exceptional leadership and communication skills to serve as Sturbridge's next Town Administrator.

History: Identified by the English as early as 1640 as a place where valuable graphite could be mined, the General Court was convinced by the early landowners – after two unsuccessful requests – that the land could be farmed and [Sturbridge](#) was incorporated in 1738. The first settlers built sawmills and



gristmills along the Quinebaug River and, soon after the industrial revolution began, larger factories were built in the Fiskdale and Westville villages of Sturbridge. The industrial growth away from Sturbridge Center has preserved the area much as it appeared in 1840. The Common area has been placed on the National Register of Historic Places, and Sturbridge strives to preserve and protect it.

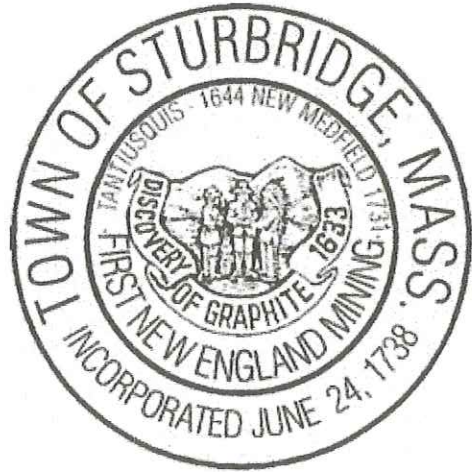
Tourism is a critical part of Sturbridge's economy. [Old Sturbridge Village](#), a large outdoor living museum that recreates life in rural New England during the 1790s to 1830s, is a popular attraction in Sturbridge. The historic Publick House, which opened in 1771, remains a focal point of the Sturbridge Common, and there are numerous antiques and craft shops, inns, and bed and breakfast establishments. While the textile mills have long since left New England, Sturbridge has attracted numerous industries over the years which help to maintain its stable tax rate and provides employment opportunities for residents.

Geography: Sturbridge is 39.0 square miles in size, including 37.4 square miles of land and 1.5 square miles of water. There are five major lakes and waterways in Town, nine dedicated trail areas, and approximately 6,000 acres of preserved open space land. There are 86 miles of public roads in Town.

Part of Worcester County, Sturbridge is bordered by Charlton and Southbridge to the east, Brimfield and Holland to the west, Brookfield and East Brookfield to the north, and Union, Conn., and Woodstock, Conn., to the south. Sturbridge is about 16 miles southwest of Worcester, 29 miles east of Springfield, and 55 miles west of Boston. Sturbridge has easy access to the Mass Pike, Route 84, Route 20, and Route 131. Airport access is available in Boston; Providence, RI; Hartford, CT; and Manchester, NH.

The community consists primarily of residential properties with various business and retail districts located near the Town Center and along major thoroughfares. The Town is interested in thoughtful economic development that will not detract from the community's charm and historic character.

Assessed Values: Sturbridge's total assessed value is approximately \$2.19 billion in FY2019. Residential properties account for 81.48% of the Town's total assessed value, while commercial and industrial properties account for 14.51% and personal property for 3.99%. The average residential property assessment in Sturbridge for FY2019 is \$294,597. While the Town's population is primarily middle-income, according to the 2010 U.S. Census statistics, there are 3.6% of residents with annual incomes below the poverty level.



Census Data: According to the 2010 U.S. Census, the Town of Sturbridge's racial makeup is 96.3% white, 2.6% Hispanic or Latino, 1.3% Asian, 0.9% two or more races, 0.3% Black or African American, and 0.2% American Indian or Alaskan Native. The median household annual income is \$85,000, which is about 20% higher than the state median household annual income of \$70,954. The Town is demographically somewhat dissimilar to the state regarding resident age cohorts with differences in, for example, the under-18 years cohort with Sturbridge at 24.6% in the 2010 U.S. Census versus 20.0% for the state. In the under-5 years cohort, Sturbridge has 5.0% of its population which is similar to the state's 5.3%. Additionally, in the 65 years and over cohort Sturbridge has 18.9% of its population compared to the state's 16.2%. The median age of Sturbridge's residents is 43.1 years, only slightly older than the state's 39.1 years.

Government and Finance

Board of Selectmen: Sturbridge's government includes a five-member [Board of Selectmen](#) that serves as the governing body of the Town. Board of Selectmen members are elected to staggered three-year terms to oversee all matters impacting the interest and welfare of the community and are responsible for ensuring that Town government is responsive to and reflective of community needs and values. The [2017 Annual Town Report](#) is located on Sturbridge's municipal website. The Board would like a Town Administrator to work collaboratively with members on creating joint goals and objectives and routinely reporting on the metrics of those goals.

Committees: There is also an elected five-member School Committee that oversees the policies and budget of the Town's public elementary school system. The elementary school's [FY2019 budget](#) is approximately \$11.3 million. Sturbridge sends students in grades 7-12 to the Tantasqua Regional School District, which is overseen by the Tantasqua Regional School Committee. The FY2019 budget for public education is \$18.3 million. Other elected positions in Town include: Board of Health, Board of Library Trustees, Zoning Board of Appeals, Recreation Commission, Board of Assessors, Town Clerk, Moderator, and Constable. In addition, the Town utilizes many other appointed boards and commissions to conduct municipal operations. A nine-member Finance Committee is appointed by the Town Moderator. Its recommendations on warrant articles at Town Meeting is the main motion voted upon by representatives.



Town Meeting: Sturbridge has an Open Town Meeting form of government. Town Meeting is the legislative body of the Town and typically meets for the Annual Town Meeting on the first Monday in June for the transaction of all business for the Town, other than matters to be determined by ballot. The [Town of Sturbridge Charter](#) and the Town's [General Bylaws](#), as amended in 2018, can be viewed on Sturbridge's municipal website.

Town Administrator: The [Board of Selectmen](#) appoints the position of Town Administrator to serve as chief administrative officer of the Town. The [Town Administrator](#) is responsible for executing the policy directives of the Board of Selectmen and for managing the operations and activities of the Town.

The [Town Administrator](#) is specifically responsible for providing support to the Board of Selectmen, supervising all departments under his/her jurisdiction, financial management and budgeting, handling personnel and benefits administration, hiring and firing of personnel, collective bargaining, procurement, preparing the warrant for the annual and all special Town Meetings, attending Board of Selectmen meetings, maintaining all records of the Board of Selectmen meetings, responding to written and verbal inquiries from the public, inventory of all Town property, and coordination of the Annual Town Report. Sturbridge seeks a Town Administrator interested in a tenure of at least five to eight years.

Financial Snapshot: Sturbridge holds a Standard & Poor's rating of AA+, with a stable outlook, as stated in a rating action of November 2017. The rating was based upon the community's conservative financial management policies and practices, balanced budget, strong debt position, and prudent conduct of operations. Local property taxes generate about 74% of revenue, demonstrating a lack of dependence on central government revenue. Additional revenue is obtained from state aid (14%) and local receipts (12%).

In FY2019, the Town has a [\\$32.58 million budget](#), which includes general government, education, public safety, public works, health/human services, and debt. The [Finance Committee Report](#) for FY2019 details its recommendations for the annual budget and Town Meeting articles.



As of November 2018, Sturbridge had a general stabilization balance of \$2,238,036, a capital stabilization balance of \$628,050, a fire apparatus stabilization balance of \$201,628, and an ambulance stabilization balance of \$65,496. Sturbridge's OPEB trust fund balance is \$694,172. As of June 30, 2018, the Town's OPEB liability is approximately \$18.87 million and its net pension liability is about \$18.31 million. As of July 1, 2018, Sturbridge had \$4,738,011 in certified free cash. Sturbridge has excess levy capacity of \$884,164. The [FY2019 tax rate](#) for all properties is \$19.15 per thousand of the property's assessed value.



Challenges and Opportunities

- **Finances**

Sturbridge has a Standard & Poor's rating of AA+ with a stable outlook, according to a November 2017 rating action. The Town's goal is to manage its finances in a manner that will maintain or improve its high rating. Sturbridge's [FY2019 budget](#) is approximately \$32.58 million. The FY2019 budget represents a 3.3% increase over the prior year. The FY2019 general government budget increased 3% over FY2018, health insurance increased 7.5% and pension costs rose 9%. Standard & Poor's highlighted Sturbridge's conservative financial management policies and practices, balanced budget, strong position, and prudent conduct of operations as strengths.

- **Economic Development**

Sturbridge has numerous businesses, including corporate, retail and professional services establishments. Currently, 81.48% of the tax base is residential and additional businesses, which are appropriate for the character of the Town, would be welcome. The Town's [Master Plan](#) goals include the potential expansion of business/industrial zoning on the east end of Route 20, encouraging future development along Route 20 and Route 131 at key locations, and possibly creating a business incubator to support the growth of small businesses. There are a number of ongoing or recently completed projects in Town, including a 40,000-square-foot office building, a new Holiday Inn Express, a Panera Bread restaurant, and a large expansion of the Publick House. A medical marijuana dispensary has permit approvals to locate at the Sturbridge Business Park on Route 20. A commercial tourist district revitalization plan, which includes streetscaping, new sidewalks, bike lanes, and landscaping, would benefit from a Town Administrator's support. A former mill site at the corner of Route 20 and Holland Road could be developed into such projects as housing, office space, and a café, with thoughtful and creative guidance. Sturbridge has an Economic Development and Tourism Coordinator to assist with such projects. Approximately 48% of the Town has municipal sewers and about 50% has Town water. Traffic congestion on Route 20 poses challenges for future development and residents traveling the roadway.

- **Education**

Sturbridge highly values education. Sturbridge's School Committee has jurisdiction over elementary education and operates [Burgess Elementary School](#) for students in grades PreK-6. Sturbridge – along with Brimfield, Brookfield, Holland, and Wales – is a member of the Tantasqua Regional School District, which operates a [junior high school](#), a [high school](#), and a high school [technical division](#). Sturbridge currently has 914 students receiving services from Burgess Elementary School and 780 students being served by the Tantasqua Regional School District. Illustrative of the Town's strong support of education is the fact that 95% of Sturbridge's residents age 25 years and older have a high school diploma and about 49% of the population age 25 and older have a bachelor's degree or higher. The Town owns and operates 16 school buses.

- **Capital Needs**

Like many communities, Sturbridge is facing a number of significant capital projects as infrastructure ages and programmatic needs change with time. Renovating or replacing the current Senior Center, or constructing a Community Center to encourage interaction for all age groups, is a priority mentioned by numerous Town officials and residents. Additional large capital projects that are expected to be considered in the coming years include additional recreation fields, a new or renovated Public Safety building, a Department of Public Works facility, and the possible need to upgrade aging water pipes. These multi-million-dollar projects will require creative financing, state and federal funding advocacy, and strong community support.



- **Housing**

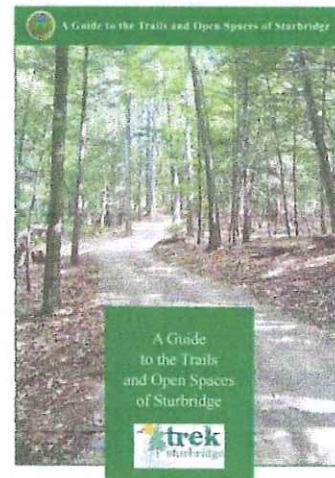
Sturbridge's Master Plan notes that [housing](#) is the most prevalent land use in Sturbridge. The Town's listed housing goals include: providing high-quality affordable housing via flexible zoning bylaws, regulations, and programs; ensuring that needed housing choices are available; providing opportunities for residents to make home improvements; and developing a plan to meet the 10% housing affordability goal. Currently, Sturbridge is at 5.6% for affordable housing. A 97-unit 40B development was recently approved and, if completed, will bring the Town to nearly 10%. Approximately 82% of the housing units in Sturbridge are owner occupied with a median value of \$290,600, according to U.S. Census data. There are 3,025 single-family homes in Sturbridge as well as 250 condominiums, 73 two-family houses, seven three-family homes, 28 mobile homes, 27 apartment buildings, and 650 vacant parcels.

- **Tourism**

Sturbridge is a popular community for day-trippers and tourists visiting the Commonwealth. Visitors can spend their days touring Old Sturbridge Village, which is a recreation of colonial Massachusetts, hiking miles of trails through the New England countryside, stopping into dozens of merchant shops, and enjoying cuisine from around the world at the Town's many highly rated restaurants. Sturbridge has more than 800 hotel rooms and one-third of the Town's 6% room tax is earmarked for the [Sturbridge Tourist Association](#) and Betterment Committee. The remaining two-thirds is put into the Town's general fund. The Town also has a Special Events Committee to assist with its many community activities.

- **Open Space and Recreation**

Sturbridge was one of the first communities in the Commonwealth to adopt the Community Preservation Act. Approximately 20% (6,000 acres) of Sturbridge's land is dedicated open space, consisting of land owned by the town, state, federal, and conservation organizations as well as lands protected by conservation easements or the purchase of development rights. Sturbridge is fortunate to have numerous parks, recreation areas, conservation lands, ponds, forestlands, open fields, and rocky crags as well as Big Alum, Westville, and Leadmine lakes, Quinebaug River, and Leadmine Mountain. A [Guide to the Trails and Open Spaces of Sturbridge](#) is on the municipal website. There are miles of trails for hiking. Sturbridge also offers several playing fields, sports programs for adults and children, and playgrounds. The Town hosts summer Concerts on the Common.



- **Green Energy**

In June 2018, Town Meeting approved the adoption of a "stretch energy code" for new construction, to begin in January, which is a prerequisite for Green Community designation by the state. Such designation would qualify Sturbridge for state funding for energy efficiency items up to \$140,000 and make the Town eligible to compete for future energy grants.

- **Water Resources**

Protecting the Town's fresh water system to preserve high quality drinking water and maintaining or improving the health of their lakes and ponds are critical for Sturbridge. There are five major lakes and waterways in Town. The Sturbridge Water Department is operated and maintained by Veolia. The [2017 Drinking Water Quality Report](#) can be located on the Town's website.

- **Public Safety**

The Sturbridge [Police Department](#) has 12 full-time officers, three sergeants, two lieutenants, chief, two school resource officers, one K9 officer, one part-time officer, and one administrative assistant. Its annual budget is about \$2.6 million. Dispatch

is handled by 11 dispatchers and one supervisor. The Sturbridge [Fire Department](#) has 14 full-time firefighters and 10 on-call firefighters. It has an annual budget of approximately \$1.4 million and responds to about 2,000 calls per year. The Fire Department also runs the Town's ambulance service and operates two ambulances. Both departments are operated from a public safety complex on Main Street.



- **Citizen Engagement**

The Town embraces civic engagement and appreciates the high levels of participation and discourse residents provide. The next Town Administrator must be a skilled communicator with a strong belief in transparency. Citizens serve on a significant number of elected and appointed boards and committees as well as in other volunteer capacities. Maintaining a strong and collaborative relationship between residents, employees, and volunteers is vital to the success of the community. Ideas and recommendations regarding improved methods of communicating with and engaging citizens, including new technologies and use of social media, would be welcome.

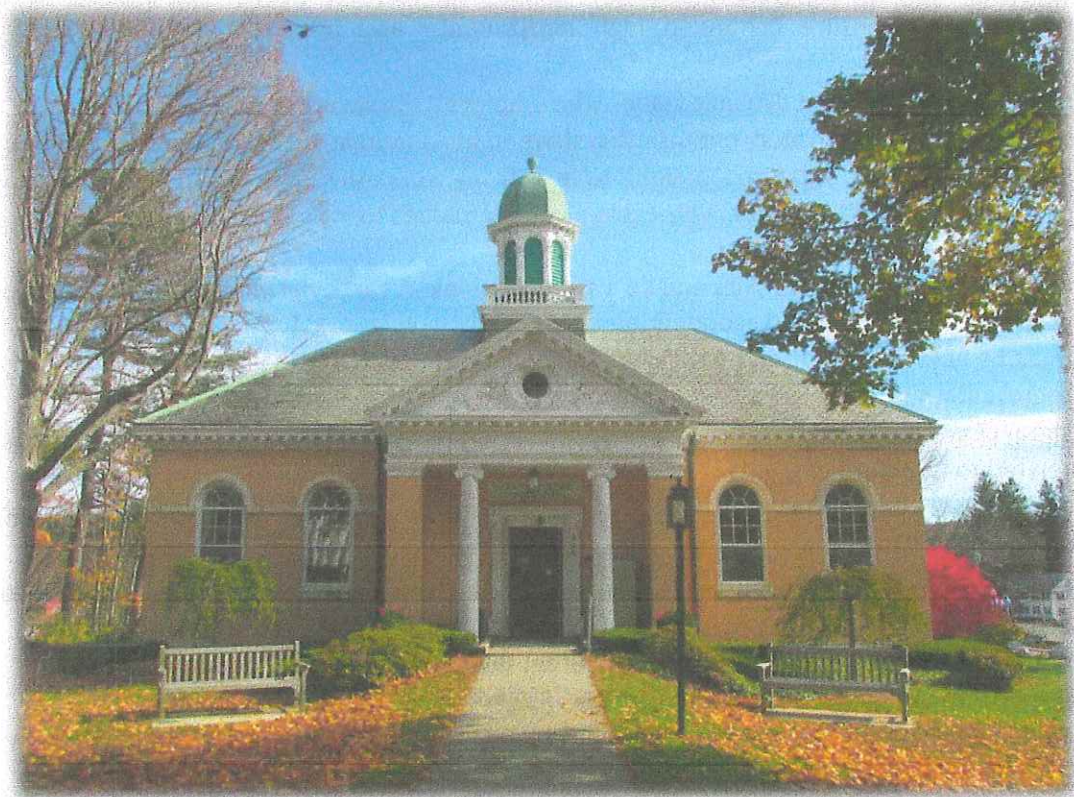


Photo Credit: John Phelan

Candidate Qualifications

Competencies: The Sturbridge Board of Selectmen seeks a Town Administrator with strong leadership abilities, municipal management experience, and an interest in a tenure of at least five to eight years in Sturbridge.

The successful candidate:

- must be able to demonstrate prior success in leading a complex municipal organization.
- should be competent in all areas of municipal management and operations, but especially in finance and budgeting, personnel administration, economic and community development, and project management.
- should have experience in sustainable economic development.
- must be a visionary and decisive leader who can work well with various interests of the Town.
- is expected to work cooperatively and collaboratively with staff, citizens, volunteers, and the business community. He or she should make customer service a priority.
- must recognize the value of technology and strive to implement systems integration, reduce redundancies, and increase efficiencies via the use of technology. He or she should utilize Sturbridge's many assets to bring the Town to the next level.
- should be highly approachable, a skilled and effective communicator, and have an open-door management style.
- should be knowledgeable of municipal management best practices.
- must be fair, inclusive, collaborative, ethical, and committed to transparency in government.
- must be able to delegate effectively, mentor department heads, and provide support and motivation to ensure continued high performance and professional growth for Sturbridge employees.
- must be a strategic and dynamic leader who employs a teamwork approach.
- should be highly motivated, enthusiastic, strive to build morale, and have a sense of humor.
- must be dedicated, organized, patient, have a strong work ethic, and inspire trust and confidence.
- must have the ability to effectively explain complex issues to individuals, committees, and the citizenry.
- must have strong finance skills and be a strategic thinker, particularly in regard to budgeting, project management, and economic and community development.
- must be able to develop and sustain credible relations with residents, staff, and union representatives.
- should have proven experience working with state officials and state government, particularly related to funding and grants.
- should have proven experience in all phases of grant management, from acquisition to completion.
- should be skilled in team building, and in developing and maintaining relationships.
- should be a creative problem-solver and active listener who is accessible, open to new ideas, and a consensus-builder.
- must lead by example, have conflict resolution skills, inspire respect, and be respectful.
- must be a community unifier who manages projects in a participatory manner.
- should embrace participation in community events and enjoy being part of the community.



Education and Experience:

- The successful candidate should possess a bachelor's degree in a field related to municipal management, with a master's degree in public administration, business management, or a related field preferred.
- A minimum of 3-5 years of progressive experience as a municipal city/town manager or administrator, as an assistant city/town manager or administrator, or education and experience in or relatable to municipal government that is equivalent is required.
- Massachusetts experience is preferred.

Compensation Package

The Town of Sturbridge will offer an employment agreement and compensation package that is competitive with comparable area communities, with a salary of \$145,000+/-, commensurate upon qualifications. An attractive benefits package, including health and retirement plans, is part of the Town Administrator's total compensation. Residency is not required.

How To Apply

Interested applicants should send cover letters and résumés, in confidence, by December 9, 2018, 5:00 p.m., via email to:

Apply@communityparadigm.com

Subject: Sturbridge Town Administrator Search

Please submit a single PDF containing both cover letter and résumé.

Following the closing date, résumés will be reviewed according to the outlined qualifications. The Sturbridge Town Administrator Search Committee will interview the most qualified candidates in confidence. Based upon these interviews, a selection of finalists will be chosen for further evaluation and reference checks and then forwarded to the Board of Selectmen. Finalists will be contacted for references and approval of background reviews before their selection is advanced to the Board of Selectmen. The Sturbridge Board of Selectmen will select the Town Administrator.

Questions regarding the position should be directed to:

Bernard Lynch, Principal
Community Paradigm Associates
Blynch@communityparadigm.com
978-621-6733

The Town of Sturbridge, Mass., is an Equal Opportunity Employer.





FOR IMMEDIATE RELEASE
SEPTEMBER XX, 2017

CONTACT: Fran Jessoe
781-762-1240 x132
Bernard Lynch
978-621-6733

NORWOOD SELECTMEN TO HOLD COMMUNITY FORUM TO GAIN CITIZEN INPUT ON TOWN'S NEXT GENERAL MANAGER

NORWOOD, MA – The Norwood Board of Selectmen is pleased to announce it has scheduled a community forum on September 14 to give citizens the opportunity to share their thoughts on the qualifications and characteristics they believe the Town's next General Manager should possess.

The forum will be held on Thursday, September 14, at 7:00 p.m. at the Norwood Town Hall at 566 Washington Street.

"We are interested in hearing citizens' recommendations regarding the expertise and qualifications they would like to see in their next General Manager," said William Plasko, Chairman of the Norwood Board of Selectmen. "It is important that Norwood's citizens are an integral part of the Town Manager selection process."

The Town has hired the consulting firm Community Paradigm Associates, LLC, to assist in the search process. Representatives from the firm, including Principal Bernard Lynch, will attend the community forum along with representatives of the Board of Selectmen.

Current General Manager John Carroll announced that he would be retiring in December of this year. Mr. Carroll has served as Norwood's General Manager since 1978. The Board of Selectmen plans to have a new General Manager selected within approximately 12 weeks.

For more information on the community forum, please contact Board of Selectmen Administrative Assistant Fran Jessoe at 781-762-1240 x132.

Town Administrator

Town of Wayland

Wayland, MA (14,000 pop.), is seeking an innovative and community-focused leader with excellent interpersonal and collaboration skills to serve as its next Town Administrator. This attractive community is located in the MetroWest region of Eastern Massachusetts, approximately 18 miles west of Boston. A principally residential community, Wayland has a AAA credit rating, strong finances, and an excellent public school system. Wayland is led by a five-member Board of Selectmen, has an open town meeting form of government, and a total FY19 operating budget of approximately \$79.9 million. The successful candidate will have a Bachelor's degree (Master's preferred) in public administration or related field and at least three to five years of progressive and relevant management experience, with demonstrated skills and abilities in municipal finance, economic development and community planning, project management, personnel administration, municipal procurement, use of technology, and intergovernmental relations. Candidates should have a proven record of municipal leadership and team building, and be able to build cooperative relationships with appointed/elected officials, residents, and town employees. Annual salary: \$175K+. The successful candidate will receive an attractive compensation package including health and retirement plans, commensurate with qualifications and experience. Wayland is an equal opportunity employer.

For additional information related to the position, the community, and the application process, visit www.communityparadigm.com or contact Bernard Lynch, Principal, Community Paradigm Associates at blynch@communityparadigm.com.

Résumés and cover letters via email, in confidence, by June 15, 2018, to: apply@communityparadigm.com. Subject: Wayland Town Administrator Search. Please submit a single PDF containing both cover letter and résumé.

Town of Stoughton

Town Manager Finalist Interview Questions

The following questions are suggested to assist the Stoughton Board of Selectmen in its Town Manager candidate interview process. These questions can be modified and/or deleted to meet the needs of the Board and follow-up questions can be added and/or deleted, as deemed appropriate by the Board.

Suggested Questions:

1. **Introduction**

Thank you for your interest in our community. We would like you to take a few minutes to tell us about your specific interest in, and qualifications for, this position. How do your qualifications and experiences match up with the challenges and opportunities detailed in the position profile?

2. **Finance**

Please describe your role in financial planning in your past positions as well as your financial management strategies for ensuring organization sustainability.

With community needs often more than revenues will allow, please give us an example of how you have done, or would do, "more with less."

Tell us about any innovative programs or practices you have implemented that reduce costs while still providing excellent services.

What experience do you have with OPEB (Other Post Employment Benefits)? What is your philosophy on how this issue should be addressed?

In your prior positions, what were your responsibilities regarding the preparation of the annual town budgets – operating, capital, override requests, etc.?

3. **Project Management**

Current construction projects in Stoughton include a new high school, library, and water treatment plant. Please tell us about any large municipal projects you have managed in your past roles.

Does anything stand out to you from the learning experiences you gained through managing these projects?

4. **Economic Development**

Please describe your economic development experience with specific examples of how you've attracted business growth, and retention. Would these ideas work in Stoughton?

Stoughton expects to be designated as Bio-Ready: Silver Status by the end of 2018. How do you see this benefiting the Town? What might you do, as manager, to capitalize on such a designation?

Do you have any specific experience with downtown commercial districts, particularly related to increasing their economic vibrancy?

Have you had experience negotiating TIF agreements?

5. Strategic Planning

The Board of Selectmen is developing a comprehensive strategic plan, called “Stoughton 300,” which is designed to establish a vision of the Town in 2026. What do you think the Town Manager’s role should be in developing and finalizing this plan?

How do you work to encourage the specific types of development that are appropriate for a community or neighborhood?

6. Energy Conservation

Many cities and towns in the Commonwealth and nationally are taking leadership roles in energy conservation and greenhouse gas reduction (e.g., Mass Green Communities, ICLEI, dedicated energy managers, etc.). Do you have a vision for Stoughton in this area?

7. Managing through Resistance

Tell us about a time when you had a polarized issue. How were you able to bring groups together and get something accomplished?

8. Management Style

How would you define your management style and ability to motivate the professional staff?

How would you build your senior management staff into a strong, creative, and supportive management team?

9. Personnel Management

Can you describe your experiences in implementing or following a Personnel System?

What do you look for in choosing new employees, particularly department heads?

How involved have you been in collective bargaining?

How do you hold employees accountable and maximize their performance? And, how do you help or mentor department heads to develop as effective leaders?

10. Goal Setting

Please describe your approach to goal setting for staff and for yourself.

Can you describe a goal that you are working on in your current position, how it was initiated, and how success will be measured?

11. Policy Development

An important part of the Town Manager’s role is to develop policy proposals and policy alternatives to recommend to the Board of Selectmen. Can you tell us about a particular policy you successfully proposed and implemented in your current or past roles?

12. Employee Relations

Beyond senior management, how would you build relationships and trust with Town employees?

How do you hold employees accountable and maximize their performance?

Do you believe in mentoring employees? What are your thoughts on succession planning?

13. Citizen Relations and Transparency

Please tell us how you would strive to develop relationships with Stoughton citizens and how you would promote transparency in local government.

Can you give us any examples of how you have done this in your current or past communities?

14. Relationship with Other Town/State Entities (Schools, Independent Boards, Etc.)

Please describe how you would develop, manage, and increase relationships with other Stoughton stakeholders, particularly elected and appointed board members and school personnel.

How would you develop relationships with state representatives and officials?

And, how about with other communities in the region?

15. Relationship with the Board of Selectmen

Can you describe the process you envision for working with the Stoughton Board of Selectmen to set goals and objectives?

How do you envision the overall relationship will work?

Imagine a scenario where the Board of Selectmen is taking a position or moving in a direction that you believe would not benefit the Town. How would you handle this?

16. Technology

Please describe your knowledge and use of technology, such as software specifically for municipal purposes and communication tools including social media and resident alerts, to make local government more effective and efficient.

17. Career Accomplishment

What has been your most satisfying career accomplishment and why?

18. Career Disappointment

What has been the biggest disappointment in your career and what did you learn from it?

19. Candidate Questions

That ends our questions for the night. Now it's your turn. Are there any questions you would like to ask us?

Candidate Name _____ Date _____

Interview Score Sheet

<i>Directions: Insert a score for each section. Space for notes is below each section.</i>	Excellent	Very Good	Good	Fair	Needs Improvement	Total
1. Introductions	10	8	6	4	2	
2. Management	10	8	6	4	2	
3. Financial Management Skills	10	8	6	4	2	

4. Community & Econ. Development	10	8	6	4	2	
5. External Relations	10	8	6	4	2	
6. Personnel Management	10	8	6	4	2	

7. Board-Manager Relations	10	8	6	4	2	
8. Operations & Service Delivery	10	8	6	4	2	
9. Grant Writing	10	8	6	4	2	

10. Citizen Relations/Communications	10	8	6	4	2	
11. Responsibilities/Authority	10	8	6	4	2	
12. Candidate Questions	10	8	6	4	2	
TOTAL						

Community Paradigm Associates, LLC

1 Saddleback

Plymouth, Massachusetts 02360

Natick Town Administrator Assessment Questions

December 31, 2017

Below are three assessment questions that you are asked to address. Each question should be answered in 1-2 pages. Where possible cite specific examples from your own experience in responding to the questions. These responses should be emailed back to blynch@communityparadigm.com by 5:00 PM on January 14th.

Essay Questions

1. During the process of this search, Natick has identified the importance of leadership skills in its next Town Administrator. If you were to be appointed to the position of Natick Town Administrator, how would you promote a shared vision for Natick's future and then work to gain support for that vision from various stakeholder groups? What methods would you use in keeping employees, local officials, residents, and the business community of the Town informed, connected, and empowered as plans and projects related to the shared vision move forward? How would you increase the engagement of newer residents and promote efforts for collaboration between the community's longtime and newer residents? Cite specific examples of efforts that you have undertaken in previous positions to illustrate your approach to this issue.
2. The Natick Town Administrator must be a dynamic leader who has a proven track record of building a strong management team. This skill and experience is particularly important as Natick, like other communities, faces a changing workforce as experienced staff moves into retirement. Please describe the process and practices utilized by you to develop, support, and measure the effectiveness of the Management Team in other communities in which you served? Include in your comments elements of training and development, team meeting models, communication methods, and means of holding team members accountable.

3. Managing personnel issues within an organization is often a difficult balancing act that requires great care to insure that each individual employee contributes to their maximum effectiveness, and feels connected to the overall mission of the organization. Often, different personality types and informal groups that establish themselves complicate this challenge. As the leader of an organization you could encounter a situation like this:

Joe Smith has been working for the Town in the Public Works Department for 18 years. He has always received very positive performance evaluations and has been promoted twice based on his work ethic, performance, and job knowledge. Everyone likes Joe. He is quick to lend a hand on work projects and to offer his help off hours for people's personal issues (helping people move, volunteering at fundraising events, etc.). His family is also extremely well liked throughout the community. His mother was the High School's Nurse for 30 years. Several years ago, Joe's wife tragically passed away.

Recently, Mary was hired as a new employee at the Community Center, which is maintained by the DPW Division in which Joe works. Joe and Mary quickly developed a friendly relationship based upon some mutual interests. However, Joe's interest in a different type of relationship became quickly apparent and was politely dismissed by Mary. Joe's efforts became more intense, including unexpected visits to her home and attendance at after-work gatherings and events Mary had typically attended but that Joe had previously eschewed. Mary made complaints to the DPW Director that resulted in disciplinary warnings to Joe, but the behavior continued.

The matter is now presented to you as Town Administrator. Describe the various considerations you need to make, and explain in detail how you would handle this matter particularly in relation to those considerations.

Community Paradigm Associates, LLC

1 Saddleback

Plymouth, Massachusetts 02360

Memorandum

To: Amherst Select Board
From: Bernard Lynch
Date: March 9, 2016
Re: Search Status and Proposed Select Board Interview Process

The purpose of this memo is to provide the Select Board with a status report on the Town Manager search, and propose a plan for the Select Board Interview Process that will occur after the Screening Committee finishes its work, and will hopefully result in the selection of a Town Manager for Amherst that can successfully continue moving the Town forward. I present the plan at this time so that we can all set aside the necessary time in our schedules.

Status

We had a very productive initial meeting with the appointed Screening Committee on March 2nd. The Committee is very impressive in its backgrounds, experiences, and commitment to the Town and task at hand. The members appointed a Chair and Clerk after which, we reviewed the process, set several meeting dates for interviews and deliberations, and discussed interview questions. The committee made a number of recommendations of questions that would delve further into some of the finer points of the Position Profile, and help the members in narrowing the preliminary field of candidates to the finalists.

As of today I have received 38 résumés of candidates that objectively meet the requirements of the position and I am expecting another 4-5 by the deadline. I am very pleased with the results of our efforts to bolster the applicant pool through outreach and recruiting. I will work to narrow the field to the 8 or 9 that will be interviewed by the Screening Committee. We also have another 24 candidates that have applied but do not in any way meet the requirements of the position.

The Screening Committee will be receiving the résumés of the candidates to be interviewed during the week of March 14th with interviews planned for the week of March 21st and the 28th. The Committee will narrow the field to the potential finalists and I will perform background reviews, with the final decision on finalists for the Select Board planned for the first week of April, and presentation of names on April 11th.

Select Board Interview Process

After the Select Board receives the names of finalists on April 11th we will work to set up the interviews for the week of April 25th. It is our goal that the process be quite comprehensive to elicit the most information from the finalists as to their skills, experience, style and overall fit with the Amherst community. As part of the process the Select Board is the ultimate decision maker but we want to also include the public and staff within the process.

Accordingly, working with Peter Hechenbleikner and Deb Radway, I am suggesting the following format. We are setting aside each day during the week of April 25th with finalists coming to Amherst beginning on that Monday and each day thereafter as needed. The Interview Day(s) will consist of the following:

- | | |
|---------|--|
| 9:00 AM | Meet with the Select Board for a relatively quick introductory session to say hello, learn a little bit about the candidate in a relatively informal setting |
| 10:00AM | Finalist receives a tour of the Town visiting key facilities and sites in the Town and meeting some key staff. |
| 12:30PM | Lunch (with?????) |
| 2:00PM | Break |
| 3:00PM | Community Meeting to introduce to the public and any staff and hear about issues and receive questions. |
| 4:30PM | Break |
| 6:30PM | Formal Interview with the Select Board for approximately two hours. |

I plan to provide the Board with some suggested questions relating to skills, experiences and some Amherst specific issues that can drive the discussion.

It is anticipated that the Select Board will be able to reach a decision on appointing the Town Manager at their meeting on May 2nd at which time the Town and the selected candidate can commence negotiations for an employment agreement.

Please feel free to give me your thoughts on the process as outlined so that we adequately meet your expectations and ensure that the Board obtains the best outcome. And, please contact me with any questions you might have pertaining to the status of the search, or the proposed process.

Town of Hamilton



TOWN MANAGER FINALISTS

Application Materials and References Report

July 24, 2018



COMMUNITY PARADIGM ASSOCIATES, LLC

Joseph Domelowicz

Joseph Domelowicz is currently serving as Assistant Town Manager in Winthrop (population 18,000), which has an operating budget of \$59.47 million. He assists in the oversight of departments, budget development, capital improvement project priorities, managing large planning projects, and seeking and managing state and federal grants. He also is responsible for economic development planning as well as energy management and planning. Prior to that, he was an energy assurance analyst/project coordinator for URS Corp., which is an international engineering and consulting corporation. He has also worked for the Metropolitan Area Planning Council as a senior municipal services coordinator. Earlier in his career, he worked as a newspaper reporter/editor for about 12 years. Mr. Domelowicz holds a bachelor's degree in English from State University of New York at Buffalo and a master's degree in Public Affairs from UMass Boston.

Reference Comments

The following reference comments were provided by five individuals currently serving as appointed officials and/or department heads in Winthrop, North Andover, and Swampscott as well as a high-ranking member of Governor Baker's administration.

Mr. Domelowicz is described as someone who excels at managing projects, problems, and people. References said he knows how to assess projects and tasks, and understands the resources, needs, and how to get a job done.

He is described as someone with solid contacts at the state and community level. References said he is considered a key person in Winthrop who served as a great asset to the interim town manager there. References said he is good at managing people, including department heads. He is said to have strong listening skills and knows how to talk to people. References described Mr. Domelowicz as thoughtful, well spoken, meticulous, a hard worker, dedicated, and an excellent writer. References said he is well liked by fellow staff members and is willing to roll up his sleeves and do whatever the job requires.

As chairman of the Article 6 Committee in Swampscott, which is a committee set up to explore regionalization, consolidation, outsourcing, and better service delivery for the same or lower costs, Mr. Domelowicz is said to be a top contributor to the team and someone who is savvy, creative, passionate, and committed. He is described as being highly approachable, innovative, decisive, and collaborative.

Mr. Domelowicz is experienced at grant writing, good at providing a different perspective, and understands conservation laws and the need to protect natural resources, a reference said. He is good at team building, is a consensus builder, and understands municipal government, according to his references.

As a Town Meeting member in Swampscott, Mr. Domelowicz is described as someone who can read other people and a room well, that he encourages others to share and discuss ideas, and that he is a person with whom others enjoy working.

One reference, who is well acquainted with Mr. Domelowicz's work in Winthrop, Chelsea and Swampscott, described him as someone who is extremely approachable and very inclusive. The reference said he has great communication skills, looks to find consensus on issues, and is willing and able to ask others' advice when he doesn't know the answer. He said he is a good team player and seeks to build consensus.

The member of Governor Baker's administration described Mr. Domelowicz as being skilled at relationship building, engaging, talented, and a good communicator. The state official said he appointed Mr. Domelowicz to a state board and relied on him to gather important data and information that served to help him make informed decisions. The reference said he could count on Mr. Domelowicz to always do the right thing regardless of any political or outside pressure. The state official said Mr. Domelowicz is committed to the profession of municipal management, is someone upon whom others can rely, and is an "awesome" person and professional.

FIRM PROFILE

Community Paradigm Associates, LLC, is a multi-dimensional organization focusing on governmental, nonprofit, community, and business concerns. It develops transformational initiatives and innovative solutions designed to enhance the dynamics of communities. Its Principal and Associates draw upon their extensive government, academic, and private sector experience to provide the answers clients need to effectively and efficiently manage their organizations.

Principal Bernard F. Lynch has devoted more than 35 years to guiding cities and towns toward brighter futures by focusing on the efficiency and responsiveness of organizational day-to-day operations as well as highly transformational initiatives that bring communities to a new level. His experience as an innovator, strategist, educator, researcher, and leader allow him to consider challenges from various viewpoints. Known for his collaborative problem-solving and innovative solutions, Mr. Lynch steered a Massachusetts city away from potential receivership to solid fiscal stability. He has managed the successful conception and completion of public libraries, police stations, community centers, school buildings, bicycle and walking trails, and recreation facilities.

Mr. Lynch served as City Manager of Lowell, Massachusetts, for eight years and as Town Manager of Chelmsford, Massachusetts, for 20 years. He serves on Lieutenant Governor Karyn Polito's Task Force on Local Government Workforce Skills Gap, is a Senior Fellow at Suffolk University, and serves as an adjunct professor at both Suffolk University and University of Massachusetts Lowell. He earned a Master of Public Administration degree from University of Massachusetts Amherst and a Bachelor of Science degree in Political Science from the University of Lowell.

Senior Associate Peter Hechenbleikner has 45 years of government experience, including over 30 years in Massachusetts. Prior to his retirement in 2013, he served as Reading's first Town Manager and he has continued his commitment to local government service by serving in a number of interim assignments and providing consulting to municipalities. He has extensive experience in operational reviews, government studies, budget development, and organizational development. He holds a Master of Science in City and Regional Planning from Pratt Institute in Brooklyn, New York, a Bachelor of Arts degree in Political Science and Public Administration from the University of Cincinnati, and a Certificate in International Studies from the University of Manchester, England.

Senior Associate Rocco Longo has devoted his career to local government, including 46 years working in the municipal sector with 34 of those years as a municipal manager. He served as the Chief Administrative Officer in the towns of Billerica, Marshfield, Duxbury, and Northborough in Massachusetts, as well as in the City of Wellsburg in West Virginia. Mr. Longo has extensive experience

in strategic planning, organizational development, team building, financial management, budgeting, collective bargaining, and personnel management. He directed major construction projects including a library, senior center, seawall, and ball fields as well as substantial reconstruction of school buildings. Mr. Longo was responsible for budgets of up to \$120 million and for organizations with as many as 550 employees. He served on both the Massachusetts Municipal Association Board of Directors and the Massachusetts Municipal Managers Association Executive Board for two terms. Mr. Longo holds a Master of Public Administration from West Virginia University and a bachelor's degree in Political Science from Salem College.

Senior Associate Mary Beth Bernard has 16+ years of municipal experience, including serving as the Assistant Town Manager of Foxborough and as Human Resources Director in Westwood and Wrentham. Ms. Bernard has extensive experience in recruiting, hiring, contract negotiations, compliance, and employee training and development. She earned a Bachelor of Science degree in psychology from Boston State College. Ms. Bernard is an SHRM senior certified professional and earned a Graduate Certificate in Local Government Leadership and Management from Suffolk University's Moakley Center.

Senior Associate Ray Santilli has nearly 40 years of experience working in the municipal sector, including 17 years as the Assistant Town Manager in North Andover, Mass. Mr. Santilli also served as a purchasing director, director of community services, and human resources director in North Andover, and as Planning/Budget/Personnel Director for the Cambridge Police Department. He earned his Master of Business Administration from Boston College and a Bachelor of Science degree in Criminal Justice from Northeastern University.

Senior Associate Sharon Flaherty has more than 25 years of experience in communications, public relations, project management, digital and traditional marketing, and brand management. She has worked as an editor at daily and weekly newspapers, and directed marketing and communications departments in the financial industry. Ms. Flaherty served as an adjunct professor in business at Middlesex Community College. She earned a Master of Business Administration degree from Rivier University, a Master of Arts degree in English and Writing from Southern New Hampshire University, and a Bachelor of Arts degree in Communications from Rivier University.

Associate Sam Gonyea is a candidate for a Juris Doctor/Master of Public Administration at Suffolk University. He specializes in contract law, budgeting, and research. He previously worked as an intern at the Suffolk County District Attorney's Office, as a law clerk at a Boston law firm, and as an intern at Massachusetts Superior Court. Mr. Gonyea holds a Bachelor of Arts degree in Political Science from Fitchburg State University.

Community Paradigm Associates has affiliations with numerous highly experienced municipal management professionals and industry professionals who assist with various projects. It has a network that includes professionals in such areas as finance, public works, telecommunications, land use and development, public safety, emergency management, municipal law and process, personnel management, and sustainability. Each is an experienced and proven leader in his or her field.

Services provided by Community Paradigm Associates include: executive recruiting, economic and community development, strategic analysis and counsel, public finance, public policy, community engagement, strategic management and planning, social innovation, building high performing organizations, marketing and communications, professional development, process improvement, community sustainability, and tactical research and solutions.

Client List

- **Executive Recruitment**

- Municipal

- Town of Winchendon, Town Manager (2015)
- Town of Amherst, Town Manager (2016)
- Town of Wellesley, Executive Director (2016)
- Town of Scituate, Sewer Superintendent (2017)
- Town of Shrewsbury, Town Manager (2017)
- Town of Leicester, Town Administrator (2017)
- Town of Plympton, Town Administrator (2017)
- Town of Norfolk, Town Planner (2017)
- Town of Salem, NH, Town Manager (2017)
- Town of Norwood, General Manager (2017)
- Town of Lynnfield, Town Administrator (2017)
- Town of Ipswich, Town Manager (2018)
- Town of Natick, Town Administrator (2018)
- Town of Boxborough, Town Administrator (2018)
- Town of Avon, Town Administrator (2018)
- Town of Weston, Town Manager (2018)
- Town of Wayland, Town Administrator (2018)
- Town of Hamilton, Town Manager (2018)
- Town of Oxford, Town Manager (2018)
- Town of Stoughton, Town Manager (2018)
- Town of Walpole, Community Planning Director (2018)
- Town of Bourne, Director of Finance (2018)
- Town of Becket, Town Administrator (2019)
- Town of Coventry, RI, Town Manager (Ongoing)
- Town of Rutland, Town Administrator (2019)
- Town of Sturbridge, Town Administrator (2019)
- Town of Adams, Town Administrator (2019)
- Town of Brewster, Town Administrator (2019)
- Town of Norfolk, Town Administrator (2019)
- Town of Ashland, Town Planner (2019)
- Town of Lakeville, Town Administrator (Ongoing)
- Town of Marion, Town Administrator (Ongoing)
- Town of Great Barrington, Town Manager (Ongoing)
- Town of Rockland, Town Administrator (Ongoing)
- Town of Rockland, Town Accountant (Ongoing)
- Town of Palmer, Town Manager (Ongoing)
- Town of Dedham, Town Manager (Ongoing)
- City of Methuen, Chief Administrative and Finance Officer (Ongoing)

- **Non-Profit/Quasi-Governmental**

- Merrimack Valley Planning Commission, Executive Director (2016)
- Massachusetts Police Accreditation Commission, Program Manager (2017)
- Massport Community Advisory Committee, Executive Director (2018)
- Metro South/West WIOA / Partnerships for a Skilled Workforce, Executive Director (2018)

- **Public Management Projects**

- Town of Longmeadow: Selectmen/Town Manager Roles and Responsibilities and Setting of Joint Goals and Objectives
- Town of Southampton: Government Study and Charter Development
- Town of Winchendon: Personnel System
- Town of Millis: Budget Improvement Project
- Town of Framingham: Downtown Re-Development/Urban Center Housing
- Town of Ashburnham: Risk Assessment Project
- Town of Sharon: Operational Review of Health Department
- Town of Adams and Cheshire: Facilitation with Adams/Cheshire Regional School District
- Town of Westminster: Government Study/Town Charter Project
- Town of Shrewsbury: Organizational Assessment
- Town of Auburn: Selectmen on Aging/Elder Services Operational Evaluation
- Town of Norwood: Conservation Commission Operational Evaluation
- Town of Bridgewater: Strategic Plan
- Town of Auburn: Position Description Review
- Town of Pembroke: Capital Plan
- Massachusetts Municipal Management Association: Strategic Planning

- **Interim Management**

- Town of Winchendon, Interim Town Management
- Town of Avon, Interim Town Management

- **Non-Profit/Private Sector Projects**

- Axuda
 - Development of non-profit peer-to-peer micro-lending program
 - Community relations
- Colonial Power Group, Inc.
 - Government relations/Marketing and communications
- Sustainable Strategies 2050, LLC
 - Government relations



COMMUNITY PARADIGM ASSOCIATES, LLC

COMPLETED

MASSACHUSETTS MUNICIPAL EXECUTIVE RECRUITMENT CLIENT REFERENCE LIST

Client	Reference	Address	Phone #	Email Address
Weston, MA Town Manager	Tom Wenham Search Committee Chair	11 Town House Rd Weston, MA 02493	781-786-5000	tom@tgWenham.com
Wayland, MA Town Administrator	Lea Anderson BOS Chair	41 Cochituate Rd Wayland, MA 01778	508-358-7701	landerson@wayland.ma.us
Norwood, MA General Manager	Michelle Pizzi HR Director	Town Hall, 566 Washington St., Norwood, MA 02062	781-762-1240 x178	mpizzi@norwoodma.gov
Brewster, MA Town Administrator	Mark Forest Interim Town Administrator	2198 Main St. Brewster, MA 02631	508-896-3701	mforest@brewster-ma.gov
Hamilton, MA Town Manager	Shawn Farrell BOS Chair	577 Bay Road Hamilton, MA 01936	978-626-5202	sfarrell@hamiltonma.gov
Wellesley, MA Executive Director	Scott Szczebak HR Director	525 Washington St., Wellesley, MA 02482	781-431-1019	sszczebak@wellesleyma.gov
Natick, MA Town Administrator	Steve Levinsky Search Comm. Chairman	Town Offices 13 E. Central St., Natick, MA 01760	508-314-1695	levinskytasc@gmail.com
Amherst, MA Town Manager	Deborah Radway HR Director	4 Boltwood Ave. Amherst, MA 01002	413-259-3119	radwayd@amherstma.gov
Shrewsbury, MA Town Manager	Maurice DePalo Selectman	100 Maple Ave., Shrewsbury, MA 01545	508-841-8504	moedepalo@townisp.com
Ipswich, MA Town Manager	William Craft Selectboard Chair	25 Green St. Ipswich, MA 01938	978-356-6604	craft@eatoncummings.com
Leicester, MA Town Administrator	Harry Brooks BOS Chairman	3 Washburn Sq., Leicester, MA 01524	508-782-8420	BrooksH@LeicesterMA.org
Plympton, MA Town Administrator	Christine Joy BOS Chairman	5 Wenham Road, Plympton, MA 02367	781-585-2700	cjoy@town.plympton.ma.us
Boxborough, MA Town Administrator	Susan Bak BOS Chair	Town Hall 29 Middle Road Boxborough, MA 01719	978-264-1712	smbak55@gmail.com

Client	Reference	Address	Phone #	Email Address
Avon, MA Town Administrator	Steven Rose BOS Chair	65 East Main St. Avon, MA 02322	508-588-0414	srose@avon-ma.gov
Lynnfield, MA Town Administrator	Christopher Barrett Selectmen Chair (during search)	55 Summer St. Lynnfield, MA 01940	781-334-9410	cbarrett@town.lynnfield.ma.us
Northfield, MA Town Administrator	Tracy Rogers Selectboard Chair	69 Main St. Northfield, MA 01360	413-498-2901	Trogers.northfield@gmail.com
Bourne, MA Director of Finance	Thomas Guerino Town Administrator	24 Perry Ave. Buzzards Bay, MA 02532-3441	508-759-0600	TGuerino@townofbourne.com
Oxford, MA Town Manager	Cheryll Leblanc Selectmen Vice-Chair	325 Main St. Oxford, MA 01540	508-987-6027	Cheryll.Lebanc@gmail.com
Winchendon, MA Town Manager	Michael Barbaro BOS Chair	109 Front St., Winchendon, MA 01475	978-833-7069	MikeB@town.winchendon.ma.us
Norfolk, MA Town Planner	Jack Hathaway Town Admin.	Town Hall, 1 Liberty Lane, Norfolk, MA 02056	508-440-2855	jhathaway@norfolk.ma.us
Stoughton, MA Town Manager	Robert O'Regan BOS Chairman	10 Pearl Street Stoughton, MA 02072	781-341-1300	roregan@stoughton-ma.gov
Walpole, MA Community Planning Director	James Johnson Town Admin.	135 School Street Walpole, MA 02081	508-660-7304	jjohnson@walpole-ma.gov
Becket, MA Town Administrator	Katherine Warden Search Committee Chair	557 Main St. Becket, MA 01223	518-466-1267	KWarden319@gmail.com
Rutland, MA Town Administrator	Sheila Dibbs BOS Chair	250 Main St. Rutland, MA 01543	508-886-4100	Shdibb@gmail.com
Adams, MA Town Administrator	Christine Hoyt Board of Selectmen	8 Park St. Adams, MA 01220	413-743-8300 Dept. #170	choyt@town.adams.ma.us
Sturbridge, MA Town Administrator	Mary Dowling Board of Selectmen	308 Main St. Sturbridge, MA 01566	508-347-2500	dowlingmsgb@aol.com
Norfolk, MA Town Administrator	Scott Bragdon HR Director	One Liberty Lane Norfolk, MA 02056	508-440-2826	sbragdon@norfolk.ma.us
Ashland Town Planner	Michael Herbert Town Manager	101 Main St. Ashland, MA 01721	508-881-0100 ext. 7911	MHerbert@ashlandmass.com



COMMUNITY PARADIGM ASSOCIATES, LLC

ONGOING MUNICIPAL EXECUTIVE RECRUITMENT CLIENT REFERENCE LIST

Client	Reference	Address	Phone #	Email Address
Great Barrington, MA Town Manager	Steve Bannon Selectboard	334 Main St. Great Barrington, MA 01230	413-528-1619 ext. 2	scbannon@gmail.com
Coventry, RI Town Manager	Ed Warzycha Interim Town Manager	1670 Flat River Road Coventry, RI 02816	401-822-9186	townmanager@coventryri.org
Lakeville, MA Town Administrator	Clorinda Dunphy Human Resources	346 Bedford St. Lakeville, MA 02347	508-946-8800	cdunphy@lakevillema.org
Marion, MA Town Administrator	Paul Dawson Town Administrator	2 Spring St. Marion, MA 02738	508-748-3500	pdawson@marionma.gov
Methuen, MA Chief Administrative and Financial Officer	Paul Fahey Chief of Staff	41 Pleasant St. Methuen, MA 01844	978-983-8505	pfahey@ci.methuen.ma.us
Rockland, MA Town Administrator	Marcy Birmingham Interim Town Administrator	242 Union St. Rockland, MA 02370	781-871-1874 ext. 1100	mbirmingham@rockland-ma.gov

Brief résumé of principals and staff to be assigned to the project.

The following individuals will be assigned to this project, with résumés attached:

- Bernard Lynch, Principal and Project Lead
- Sharon Flaherty, Senior Associate
- Raymond Santilli, Senior Associate

In addition, Community Paradigm utilizes the services of Creative Services, Inc. for pre-employment screening that includes Criminal History Search, employment verification, motor vehicle driving record, and Fair Credit Reporting review. A firm profile is included within this section.

PROFESSIONAL EXPERIENCE

Community Paradigm Associates, LLC 2014-Present

Founder and Principal of multi-faceted consultancy with specialties in municipal law and process, economic and community development, public policy, process improvement, social innovation, tactical research and solutions, building high-performing organizations, public finance, thought leadership, strategic analysis and counsel, vision articulation, collaborative decision-making, and community sustainability. Current clients include but are not limited to the following:

- Municipalities seeking greater operational efficiencies and economic development
- Municipalities and Non-profits requiring assistance with executive recruitment
- Non-profits exploring and implementing social entrepreneurship opportunities
- Private developers interested in creating sustainable, high quality projects.
- Alternative energy ventures

City of Lowell, MA 2006-2014

City Manager, serving as Chief Executive Officer of Massachusetts' 4th largest city, with duties and responsibilities including strategic planning, financial management, operating and capital budget preparation and review, human resource management, collective bargaining, procurement, direction of city departments, coordination of elected and appointed boards and committees, etc. Major accomplishments of tenure include:

- Managed a financial turn-around and stabilization of the City after a bond downgrade and state notification of more stringent reporting requirements. Accomplished through the establishment and implementation of financial management policies, a strategic financial plan and sound budgeting system. Financial reserves as a percentage of the operating budget were increased from 2% to 9% during the period of 2006-2014 while the property tax levy below the limits of Proposition 2 ½ was increased by more than 100%. During this period the City experienced several bond rating upgrades and state reporting requirements were lifted.
- Instituted innovative data based management system modeled on Baltimore's CITISTAT program resulting in increased efficiencies and cost savings.
- Restructured City organization to create a revamped permitting and inspectional services function connected to City's planning and development operations for greater accountability, streamlined processes and user responsiveness.
- Directed and coordinated the implementation of a robust and detailed performance based budget document that served to provide communication of city operations, increase departmental planning and improve legislative resource allocation decisions.
- Prioritized the City's relations throughout the community with a focus upon transparent decision-making and responsiveness in order to increase accountability utilizing personal interactions and social media platforms for providing information and receiving citizen feedback.
- Implemented various personnel policies and operational procedures including the negotiation of changes in employee health insurance coverage to significantly reduce costs for the City and employees and address long term post-employment liabilities, and major changes in the City's collective bargaining agreements.
- Successfully recruited major corporate and retail businesses to locate in the City, including Motorola, Verizon, Plum Choice, Lowe's, and Target. Oversaw the private development of the \$800,000,000 Hamilton Canal District project and completion of the \$500,000,000 Boott Mills project.

- Developed high performing team of managers and employees. Recruited and hired all major department heads including Finance Director, Treasurer, Public Works Director, Planning and Development Director, Police Chief, Fire Chief, Library Director.
- Significantly improved crime rates via initiatives such as targeted deployments, establishing a multi-agency Anti Gang/Youth Development Task Force, law enforcement partnerships, and increased community policing.
- Developed and implemented first ever City Capital plan resulting in nearly \$200 million investment in city facilities including a new elementary school, new downtown parking garage, rebuild of water and wastewater plants, energy service contract for all municipal buildings, solar farm, parks and roadway improvements, downtown traffic reconfiguration, replacement of DPW fleet, and construction of a public safety communication and emergency operations center.

Town of Chelmsford, MA 1986-2006

Town Manager (1989-2006), first Town Manager serving as Chief Executive Officer with duties and responsibilities including financial management, operating and capital budget preparation and review, human resource management, collective bargaining, procurement, direction of town departments, coordination of elected and appointed boards and committees, grant writing, long term planning, etc. Major accomplishments of tenure include:

- Established and implemented financial management policies and a long-term financial plan and an award winning budgeting system. Financial reserves were increased from \$340,000 to \$8,000,000 during the period of 1992-2003 while property taxes were held below the limits of Proposition 2 1/2; and the Town experienced bond rating upgrades.
- Implemented various personnel policies and procedures including the negotiation of changes in employee health insurance coverage to reduce costs, and major changes in Town's collective bargaining agreements in order to reduce costs and increase operational efficiencies
- Established town's first consolidated Public Works Department, Public Facilities Department, Finance Department and Community Development Office; recruited and hired all department heads including Public Works Director, Finance Director, Community Development Director, Police Chief and Fire Chief,
- Led efforts to support and subsequently oversaw construction of a new Police Station, Library and reconstructed elementary school; and managed the acquisition and control of a municipal golf course and municipal ice rink. All projects were accomplished without Proposition 2 1/2 overrides or exemptions.
- Responsible for oversight of the redevelopment of Chelmsford Center; and the renovation and expansion of Chelmsford High School and two middle schools which were funded through a Proposition 2 1/2 exemption.

Executive Secretary (1986-1989), serving as Chief Administrative Officer at the direction of the Board of Selectmen, with duties and responsibilities including, budget preparation and review, human resource management, collective bargaining, procurement, coordination of town departments and appointed boards and committees, grant writing, long term planning, etc. Major accomplishments include construction of a new Senior Center and multi-purpose recreation complex, implementation of a town-wide sewer project and acquisition of a major multi-jurisdictional conservation area.

Prior Experience

Bernard Lynch and Associates, Independent Consultant, 1983-1986

Methuen Neighborhood Development Corporation, Executive Director, 1982-1983

Town of Chelmsford, Community Development Coordinator, 1980-1982

ACADEMIC EXPERIENCE

Moakley Center for Public Management, Suffolk University 2014-Present

Senior Fellow and Adjunct Faculty, in Graduate School of Management offering courses in Public Finance, Labor Relations, Strategic Leadership and Community Engagement.

University of Lowell and University of Massachusetts-Lowell 1980-Present

Adjunct Faculty, in Political Science Department offering courses in American Government, Public Administration, Urban Politics, Public Policy, State and Local Government, and Fiscal Policy.

EDUCATION

Master of Public Administration, University of Massachusetts-Amherst (1980)

Bachelor of Science in Political Science, University of Lowell (1978)

PROFESSIONAL AFFILIATIONS AND COMMUNITY SERVICE

- International City Management Association, Full/Retired Member
- Massachusetts Municipal Management Association, Full/Retired Member
- Middlesex Community College Leadership Advisory Committee (2016-Present)
- Innovation Academy Charter School Board of Trustees (2014-Present)
- Middlesex 3 Coalition, Founding Member and Member of Board of Directors (2010-2014)
- Massachusetts Municipal Association-Fiscal Policy Committee (1994-Present) (Prior Chair)
- Lowell Plan Board of Directors (2006-2014)
- Lowell Development and Finance Corporation Board of Directors (2006-2014)
- Lowell Regional Transit Authority Board of Directors (2006-2014)
- UMass Lowell College of Arts and Sciences Alumni Advisory Committee (2005-2012)
- Massachusetts Local Government Advisory Committee (2007-2009)
- Massachusetts Municipal Association Task Force on State & Local Finance, Service Delivery & Administrative Reform (2004)
- Merrimack Valley Economic Development Council-Board of Directors (2000-2014)
- Massachusetts Inter-Local Insurance Association – Director and member of Audit Committee and Investment Committee (1993-2006)
- Northern Middlesex Council of Governments (1987-2006)
- Lowell Community Health Center- Board of Directors (1999-2000)
- Special Legislative Commission on Affordable Housing (1988-1989)

Sharon L. Flaherty
sflaherty@communityparadigm.com
603-770-9959

SUMMARY

A results-oriented professional experienced in adult education, career counseling, research, public relations, marketing, communications, project management, and community relations. Strong writing and interviewing skills. Demonstrated success in developing and maintaining municipal, business, and community relationships.

**PROFESSIONAL
EXPERIENCE**

COMMUNITY PARADIGM ASSOCIATES, 2014-present

Senior Associate, Plymouth, MA

- Conduct interviews; recruit applicants; candidate management.
- Research and author strategic plans, client proposals, presentations, and communications.
- Develop and manage communications, public relations, proposals, projects, and marketing for consultancy focused on municipalities, nonprofits, and related businesses.
- Create ad copy and project collateral; manage client projects.

CAPE COD FIVE CENTS SAVINGS BANK, 2015-2016

Marketing Communications Officer, Orleans, MA

- Created and implemented marketing and promotional campaigns, including collateral, direct mail, social media, web banners, email, and SEO/SEM.
- Developed and implemented marketing communications and promotional strategic plans to increase customer base and deepen customer relationships.
- Steered media strategy, digital messaging, brand positioning, brand awareness, marketing collateral, public relations, and internal and external communications.
- Authored weekly internal newsletter, press releases, executive speeches, scripts, marketing copy, talking points, industry articles, and social media posts.
- Negotiated with and managed external vendors, creative agencies, and design firms.
- Led cross-functional project teams to market new products and acquisitions.
- Managed large-scale events for internal and external audiences.

JEANNE D'ARC CREDIT UNION, 2010-2015

Assistant Vice President – Marketing and Communications, Lowell, MA

- Constructed and managed \$1.2 million annual marketing and \$1 million ecommerce budgets.
- Managed and coached ecommerce team and marketing team.
- Generated new revenue streams resulting in \$100,000 of additional annual income.
- Created Print On Demand document center to reduce waste and increase efficiency.
- Managed creation and updates of website, microsites, and landing pages.
- Crafted and implemented regional marketing campaigns, including email blasts, brochures, direct mail, social media, SEO/SEM, and community outreach.
- Authored all press releases, industry articles and columns, executive summaries, scripts, social media and blog posts, internal communications, and marketing copy.
- Negotiated with and managed external vendors, creative agencies and design firms.
- Steered digital messaging, branch merchandising, internal and external communications, public relations, brand positioning, card designs, and marketing collateral.
- Led cross-functional teams to develop and market new products and services.
- Gained status leading annual foundation fundraiser, raising \$300,000 since 2010.
- Conceptualized and produced cable access show highlighting community relationships, financial education, and corporate philanthropy.

MIDDLESEX COMMUNITY COLLEGE, 2011-2015

Adjunct Professor – Business Department, Bedford and Lowell, MA

- Taught business courses to a widely diverse student population, ages 17 to 70.
- Developed and assessed course curriculum; student assessment and counseling.
- Assisted students with résumé and cover letter writing.

THE SUN/MEDIANEWS GROUP, 1995-2010***Editorial Page Editor*, Lowell, MA**

- Mentored and coached newsroom reporters and correspondents.
- Chaired editorial board meetings with national, state, and local government officials, business, and academic leaders, and community/neighborhood representatives.
- Authored daily editorials and periodic columns to provide consistent messaging.
- Managed all facets of social media outreach and video content.
- Initiated strong engagement with community organizations.
- Represented newspaper on radio and cable television, and served on media panels.

***Metro Editor*, Lowell, MA**

- Mentored and coached staff of 25 newsroom reporters and correspondents.
- Prepared website content, approved video content, managed social media messaging.
- Edited articles, wrote headlines, designed pages, led team in creating news packages.
- Managed news content for *The Broadcaster*, 65,000-circulation weekly newspaper.

***Education Reporter*, Lowell, MA**

- Delivered daily coverage of local, state, and national education issues, including the University of Massachusetts Lowell and Middlesex Community College.

***Reporter*, Lowell, MA**

- Crafted news content for various communities, reporting and writing articles and features on government, education, business, health care, politics, crime, and human interest.

EDUCATION

Rivier University, Master of Business Administration, Summa Cum Laude

Southern New Hampshire University, Master of Arts, English, Summa Cum Laude

Rivier University, Bachelor of Arts, Communications, Summa Cum Laude

**COMMUNITY
AFFILIATIONS**

Plymouth Cultural Council, 2016-present

Rebuilding Together Lowell, Board of Directors, 2010-2015

Greater Lowell Community Foundation, Nonprofit Grant Distribution Committee 2010-2015

Greater Lowell Community Foundation Advisory Board, 2010-present

Lowell Youth Development Collaborative, Board of Directors, 2006-2015

AWARDS

Credit Union Executive Society Golden Mirror Awards for Marketing

- Public/Community Relations; Website; Segmented Marketing

Credit Union National Association Diamond Awards for Marketing

- Social Media; Logo; Brand Awareness; Community/Public Relations

Journalism Awards (sample)

- Journalist of the Year, New England Press Association
- Business Feature, 1st Place, New England Press Association
- Human Interest, 1st Place, New England Newspaper Association
- Spot News, 1st Place, New England Press Association

RAYMOND T. SANTILLI

Cell (781) 775-7442

Email: santilli@rcn.com

EDUCATION

Boston College, Chestnut Hill, Massachusetts. Masters in Business Administration

Northeastern University, Boston, Massachusetts. Bachelor of Science in Criminal Justice

WORK EXPERIENCE

Town of North Andover, Massachusetts

Assistant Town Manager

September, 2001 to September, 2018

Duties include providing senior level analysis, consultation, and assistance to the Town Manager on strategic, operational, intergovernmental, and community relations issues; conducting research, analyzing information, and making effective recommendations as to course of action(s) in the planning and implementation of projects and programs; representing Town and/or Town Manager before other governmental bodies, citizen groups and regional organizations; fiscal responsibilities including assist in developing and preparing annual operating and capital improvement budgets; oversee all major projects that are components of the Town's Facilities Master Plan; administering the development of proposals for collective bargaining negotiations and conduct negotiations as required; risk management responsibilities include administering the Town's casualty and liability insurance programs; performing public relations responding to citizen concerns, answering questions and providing information; and assignment of special projects and additional responsibilities as directed by the Town Manager.

Purchasing Director

November, 2009 to September, 2018

Responsible for overseeing all purchasing functions for municipal departments; ensuring the Town engages in cost effective purchasing procedures and contract management, and is in compliance with Massachusetts laws governing procurement of supplies, services, materials, equipment, construction projects, telecommunications, and utilities; and providing assistance to School Department as needed.

Director, Community Services Division

October, 2004 to June, 2013

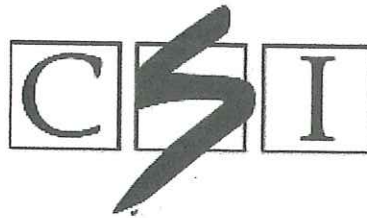
Responsibilities include management and supervisory oversight of the Veterans Services Department, Elder Services Department, Stevens Memorial Library, Youth & Recreation Services Department, and The Stevens Estate.

Human Resources Director

September 2001 to April, 2011

Responsibilities include advising Town Manager on various personnel matters including compensation and classification practices, recruitment of employees, maintenance of personnel records, interpretation of contract provisions, and use of personnel and resources; directing training and development programs for Town employees; administering worker's compensation, health and disability insurance programs to include budgetary responsibility, payment of claims, training and open enrollment process; overseeing the administration of the Town's performance review process ensuring that division directors/department heads are completing regular and probationary

Cambridge Police Department Cambridge, Massachusetts
Director, Planning/Budget/Personnel August, 1986 to September, 2001



Creative Services, Inc.

**Not ALL background checks are created equal.
Screen smart. Hire with confidence. Get the advantage.**



Employment Screening Solutions

Creative Services, Inc.

p. (800) 227-0002

f. (508) 339-2352

www.creativeservices.com

STATEMENT OF WORK

*CSI Confidential &
Proprietary*



Creative Services, Inc. ♦ Phone: (800) 227-0002 ♦ Fax: (508) 339-2352

Pre-Employment Screening Services

Prepared For

COMMUNITY PARADIGM ASSOCIATES

Objective

To provide COMMUNITY PARADIGM ASSOCIATES with a consistent and comprehensive pre-employment screening program that will minimize losses and maximize profits by helping your company make informed applicant decisions and manage the risks associated with the hiring process, and promote long-term retention.

Benefits

With an investment in the Creative Services, Inc. pre-employment screening program, employers can realize savings by identifying potential problem employees before hiring, thereby reducing costs associated with turnover, absenteeism, internal theft, workplace violence and liability claims. With our resources and expertise in assessing and evaluating hard-to-obtain and sensitive information, CSI's screening program frees your personnel from conducting time-consuming and complicated research while ensuring your company's compliance with legal hiring requirements.

Creative Services, Inc. Profile and Mission Statement

Creative Services, Inc. is a national background screening and security-consulting firm headquartered in Mansfield, Massachusetts, with a Nuclear Screening Operations Center located in Chapin, South Carolina. CSI has established a reputation for providing quality service to government contractors, private companies and publicly held corporations since 1976, and is recognized for its excellence in servicing industries with specialized needs, such as those requiring strict compliance with guidelines set forth by the Department of Transportation (DOT), the Drug Enforcement Administration (DEA) and the Nuclear Regulatory Commission (NRC). We keep abreast of compliance requirements through legal counsel, subscription to numerous industry and legal periodicals and membership in industry organizations.

CSI's success has been achieved through a commitment to maintaining a highly skilled management team and staff with diverse technical abilities and expertise, providing the flexibility to meet our clients changing and complex needs. Our screening professionals can interpret, and not merely report, sensitive information. We continue to emphasize the importance of interviewing and investigative skills while incorporating the best informational resources. It is this human element that characterizes the success of our performance as well as our client relationships. CSI delivers responsive, quality service at competitive prices.

CSI's mission is to deliver superior background investigations and exceptional client service to help employers reduce risk and improve workplace safety and security.

Request Procedure

After a field of candidates has been identified by COMMUNITY PARADIGM ASSOCIATES through a preliminary screening and/or initial interview, requests for background investigations may be made by standard mail, fax or on-line. CSI will alert authorized COMMUNITY PARADIGM ASSOCIATES representatives if a request cannot be processed due to missing or illegible information. Regardless of method of request, daily status reports will be issued, which identify the applicants' names and reference numbers on all requests received each day, thus verifying receipt of requests and promptly highlighting any discrepancies.

Reporting and Turnaround Time

CSI's commitment is to provide the most thorough, current and accurate information within the fastest turnaround time possible, with confidentiality and strict adherence to the law always a priority. CSI will provide COMMUNITY PARADIGM ASSOCIATES with partial results of background investigations within an average of three (3) business days for domestic requests (international requests vary).

Reports may be obtained by standard mail, secure email, fax or on-line. Our formal reporting format is uniquely designed to be concise yet informative, highlighted by an introductory "at-a-glance" executive summary which categorizes each of the components investigated. The details are then presented in clearly delineated sections, comparing applicant-supplied information to source-reported information and combining results of specific component-related questions with investigator comments.

Account Management

Each client is assigned a dedicated Account Manager who ensures the timeliness and quality of the work product. While each background investigation is processed by a strategically structured team consisting of intake coordinators, compliance analysts, informational resource experts and verification specialists, the Account Manager acts as the focal point of customer service for each client, applying their knowledge of the client's business to enhance responsiveness.

CSI can also provide a variety of Management Reports, generated at periodic intervals, to assist our clients in monitoring employee population, vendor performance and budget. These reports, which can be tailored to your specifications, include categories such as number of investigations/percentage of criminal records, turnaround time and monetary expenditures.

On-Line Client Access

CSI utilizes a custom software program that would allow COMMUNITY PARADIGM ASSOCIATES to communicate directly with our web site to submit screening requests and access results, if so desired. This system is accessible 24 hours a day, 7 days a week. The program is equipped with multi-level security features that prohibit unauthorized access. Log-ins and passwords are programmed based on client needs.

Fair Credit Reporting Act (FCRA)

All compliance activities are under the direction of our Compliance Department with the assistance of outside legal counsel. In addition to staying current with the Federal Fair Credit Reporting Act, our compliance program includes FCRA state analogues, driver privacy protection laws, and other applicable regulations.

The Federal Trade Commission wrote the "Summary of Your Rights Under the Fair Credit Reporting Act" in 1997. Its content cannot be altered, nor can significant changes be made in formatting.

CSI provides both "Release and Authorization" and "Disclosure & Acknowledgement" Forms for use by our clients. Applicants must sign this document to authorize CSI to conduct a background investigation. This document is made as broad as possible for the widest possible applicability in hiring. It is updated as appropriate based upon changes in federal and/or state law.

FCRA Adverse Action Process

Based on established adjudication, CSI can manage the FCRA process for COMMUNITY PARADIGM ASSOCIATES in accordance with the FCRA and state laws. CSI will direct a Preliminary Adverse Action letter to those applicants who do not meet COMMUNITY PARADIGM ASSOCIATES hiring, retention or promotional criteria. As mandated by the FCRA, CSI can also send a Final Adverse Action letter within the appropriate time frame. In addition, and as required under the federal FCRA, between the preliminary and final notice, CSI will conduct all re-investigation required in the case of applicant dispute.

Summary

CSI appreciates the opportunity to submit this pre-employment screening proposal to COMMUNITY PARADIGM ASSOCIATES. This proposal is valid for forty-five (45) days from the date of this Statement of Work. To accept this proposal, an Agreement/Amendment must be signed and returned.

Our screening programs, screening support and security consulting services are designed to assist our clients *before, during and after* the hiring decision. We look forward to becoming COMMUNITY PARADIGM ASSOCIATES's *partner in the employee selection process*.



CREATIVE SERVICES, INC.

"Your partner in the employee selection process"

Pre-Employment Screening Profiles:

The following is provided to COMMUNITY PARADIGM ASSOCIATES. Multiple profiles can be selected and additional profiles can be tailored to your specifications drawing on CSI's extensive menu of screening components.

Profile I

- **7-Year Criminal History Search - County/Statewide**
- **7-Year Criminal History Search - Federal**
- **Social Security Trace**
- **National Criminal Record Locator (includes the National Sex Offender Registry Search)**
- **7-Year Sex Offender Registry Search**

Profile II

- **7-Year Criminal History Search - County/Statewide**
- **7-Year Criminal History Search - Federal**
- **Social Security Trace**
- **Education Verification**
- **7-Year Employment Verification**
- **National Criminal Record Locator (includes the National Sex Offender Registry Search)**
- **7-Year Sex Offender Registry Search**

Additional Services:

- **FCRA Administration**
- **Motor Vehicle Driving Record**

Criminal Reporting Guidelines

Consistency in reporting criminal records is essential to complying with all federal and state laws. CSI's criminal reporting guidelines generally are as follows:

Unlimited Felony Convictions*; Five-Year Misdemeanor Convictions*; Pending Criminal Cases; Deferred Adjudication Cases^; Active Warrants.

** Exceptions to CSI's reporting guidelines exist in some states that further restrict the reporting of criminal information.*

^ Deferred adjudication cases are reported when the adjudication on the case is pending a future court date.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

11/14/2018

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Fred C. Church Insurance 41 Wellman Street Lowell MA 01851	CONTACT NAME: Debora Kobelenz PHONE (A/C, No, Ext): 978-322-7287 FAX (A/C, No): 978-454-1865 E-MAIL ADDRESS: dkobelenz@fredcchurch.com
INSURED Community Paradigm Associates, LLC 1 Saddleback Plymouth MA 02360	INSURER(S) AFFORDING COVERAGE INSURER A: Mount Vernon Fire Insurance Company INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:
COMMPAR-01	NAIC # 26522

COVERAGES**CERTIFICATE NUMBER:** 541570982**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			PPP2550692	10/5/2018	10/5/2019	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COM/PO/ AGG \$ 2,000,000 \$ COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			XL2558186	10/5/2018	10/5/2019	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$ PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> If yes, describe under DESCRIPTION OF OPERATIONS below		N/A				
A	Professional Liability Claims Made Full Prior Acts			PPP2550692	10/5/2018	10/5/2019	\$1,000,000 \$2,000,000 \$2,500 Each Claim Aggregate Retention

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

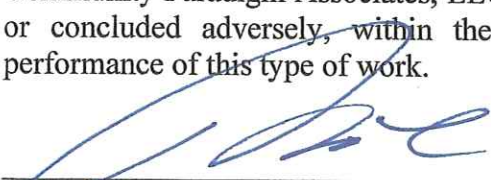
AUTHORIZED REPRESENTATIVE

March 17, 2019

Town of Wenham
138 Main Street
Wenham, MA 01984

To Whom It May Concern:

Community Paradigm Associates, LLC, has had no legal or administrative proceedings, pending or concluded adversely, within the past five (5) years, which relate to the applicant's performance of this type of work.



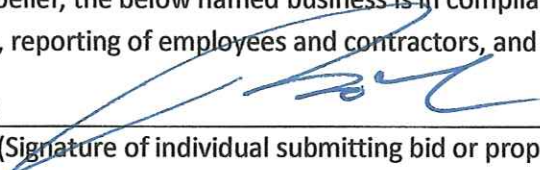
Bernard Lynch, Principal/Manager
Community Paradigm Associates, LLC

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c.62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, the below named business is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

March 18, 2019

(Date)


(Signature of individual submitting bid or proposal)

Bernard Lynch, Principal/Manager

(Printed name of person signing bid or proposal)

Community Paradigm Associates, LLC

(Name of business)

1 Saddleback, Plymouth, MA 02360

(Business address)

978-621-6733

(Business phone number)

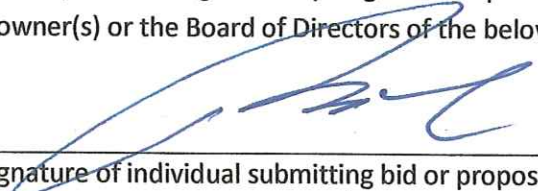
MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

CERTIFICATE OF CORPORATE AUTHORITY

The principal, officer or person to sign below pledges under penalties of perjury, that he or she has been designated by the owner(s) or the Board of Directors of the below named firm as an authorized representative.

March 18, 2019

(Date)


(Signature of individual submitting bid or proposal)

Bernard Lynch, Principal/Manager

(Printed name and title of person signing bid or proposal)

Community Paradigm Associates, LLC

(Name of business)

1 Saddleback, Plymouth, MA 02360

(Business address)

978-621-6733

(Business phone number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

NON-COLLUSION STATEMENT

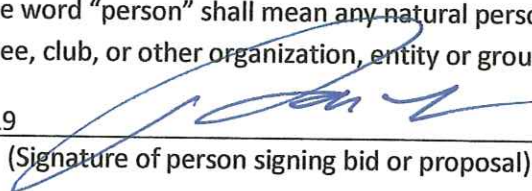
CONTRACTOR'S CERTIFICATION IN BID/PROPOSAL TO BE ATTACHED TO CONTRACT

Any person submitting a Bid or Proposal for the procurement or disposal of supplies and services to any governmental body shall certify in writing, on the Bid or Proposal, as follows:

"The undersigned certifies under penalties of perjury that this Bid or Proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals."

March 18, 2019

(Date)


(Signature of person signing bid or proposal)

Bernard Lynch

(Printed name of person signing bid or proposal)

Principal/Manager

(Title)

Community Paradigm Associates, LLC

(Name of Business)

1 Saddleback, Plymouth, MA 02360

(Business address)

978-621-6733

(Business Phone Number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

SIGNATURE PAGE


The applicant hereby certifies that:

1. The applicant has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of contract for these services.
2. No consultant to, or subcontractor for the applicant has given, offered, or agreed to give any gift, contribution or offer of employment to the applicant, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the applicant.
3. That no person, corporation, or, other entity other than a bona fide full-time employee of the applicant has been retained or hired to solicit for, or in any way assist the applicant in obtaining the contract for services upon an agreement or understanding that such person, corporation, or entity be paid a fee or other compensation contingent upon the award of the contract to the applicant.

I hereby attest with full knowledge of the penalties for perjury, as in accordance with Massachusetts G.L. C.7, S.38E that all information provided in this application for services is correct.

Community Paradigm Associates, LLC

Firm



Signee (written)

Bernard Lynch

Signee (typed/printed)

Principal/Manager

Title

March 18, 2019

Date

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET



EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT
JOHN W. McCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES
UNIVERSITY OF MASSACHUSETTS BOSTON

100 Morrissey Boulevard
Boston, MA 02125-3393
P: 617.287.4824
F: 617.287.5566
mccormack.umb.edu/centers/cpm
collins.center@umb.edu

SCOPE OF WORK FOR THE TOWN OF WENHAM TOWN ADMINISTRATOR RECRUITMENT



Table of Contents

Submission Information	1
How the Collins Center Will Assist the Town Recruit a Town Administrator.....	2
Project Approach.....	2
Task One: Understanding the Town and Preparing a Profile	2
Task Two: Networking and Recruitment of Candidates	3
Task Three: Screening, and Presentation of Paper Candidates.....	3
Task Four: Preliminary Interviews	4
Task Five: Reference and Background Checking	4
Task Six: Guidance on Final Interview and Selection	5
Timeline	5
Professional Fees, Expenses and Payment Schedule	5
Resume of Mary Flanders Aicardi, MPA.....	6
Resume of Robert Halpin, MPA.....	7
Recruitments Performed by the Collins Center	8
References.....	10



EDWARD J. COLLINS, JR. CENTER FOR PUBLIC MANAGEMENT
JOHN W. MCCORMACK GRADUATE SCHOOL OF POLICY AND GLOBAL STUDIES
UNIVERSITY OF MASSACHUSETTS BOSTON

100 Morrissey Boulevard
Boston, MA 02125-3393
P: 617.287.4824
F: 617.287.5566
mccormack.umb.edu/centers/cpm
collins.center@umb.edu

March 21, 2019

Peter Lombardi
Town Administrator
138 Main Street
Wenham, MA 01984

via email

Dear Mr. Lombardi,

The Edward J. Collins, Jr. Center for Public Management is pleased to provide this scope of services detailing its proven approach and experience in recruiting municipal leaders for organizations in transition. The Center has a great deal of sensitivity to the pressures of such transitions, and how they can impact public organizations and the communities and constituencies they serve.

The Collins Center was established in July 2008 at the McCormack Graduate School of Policy and Global Studies to further the public service mission of the University of Massachusetts Boston. The Center is a vehicle to aid municipalities and state agencies to help improve public management. As part of the Center's work it has established an executive recruitment practice in the belief that helping public organizations select the best leaders will result in increased organizational effectiveness.

The Collins Center has carried out over 70 successful recruitments in Massachusetts for Town Administrators, Town Managers and key Department Heads. A comprehensive list of Collins Center recruitments is attached. We understand that the manner in which this search is carried out as well as the outcome will serve as a signal to residents of the Town's open and transparent approach to governance.

The Collins Center team will include Mary Aicardi and Robert Halpin. Mary leads the human resources practice for the Collins Center and has worked almost three decades in the public sector human resources and labor relations arena. She has extensive experience in recruitment. Bob is the recently retired Town Manager of Framingham and has decades of public sector experience. Biographies of Mary and Bob are attached.

Following is a comprehensive proposal to provide recruitment services for the Town Administrator. A careful definition of the challenges that the Town will face and the organizational environment that the new Town Administrator will engage and manage is a key component of the recruitment process.

As you know, transactions with the Commonwealth, including the University, are exempt from the provisions of Chapter 30B, the Uniform Municipal Procurement Act (Section 1 (b)(4)).

We are available to begin within ten days of selection. The Collins Center looks forward to working with the Town on this important endeavor.

Sincerely,

A handwritten signature in black ink, appearing to read "Stephen McGoldrick". The signature is fluid and cursive, with the first name "Stephen" and last name "McGoldrick" clearly distinguishable.

Stephen McGoldrick
Director

SUBMISSION INFORMATION

1. Name and address of applicant, telephone number, fax number and email address.

Collins Center for Public Management
McCormack School of Policy and Global Studies
University of Massachusetts Boston
100 Morrissey Boulevard
Boston, MA 02125
Project Manager: Mary Flanders Aicardi, Human Resources Practice Leader
Direct Phone: 508-215-8992
Email: Mary.Aicardi@umb.edu
Office Phone: 617-287-4824
Office Fax: 617-287-5566

2. Brief resume of principals and staff to be assigned to the project.

Please see attached resumes of the assigned principals.

3. List of completed projects that best illustrate qualifications for this project.

Please see attached comprehensive list of projects.

4. Five references for projects of a similar or larger scope, size and complexity.

Please see attached list of references.

5. Names and qualifications of any outside vendors that may be used for this project.

The Collins Center uses the services of a vendor to conduct CORI, Educational and Credit Checks:
Accent Investigations, LLC, P.O. Box 35, North Attleboro, MA 02761. 888-889-5248

6. Statement of any legal or administrative proceedings, pending or concluded.

The Collins Center has had no legal or administrative proceedings against the organization.

7. Sample of work. (reports, etc.)

Please see the attached Profile

How the Collins Center Will Assist the Town Recruit a Town Administrator

The Collins Center will work with Wenham to understand the most critical issues the Town is facing, as well as the culture and the leadership styles that would be best suited to move the Town forward.

In implementing this approach, the Center will:

- Carefully consider the challenges a new Town Administrator will face in the short and long term
- Develop a Profile of the community and the Town Administrator position with particular attention to identifying the Town's priority issues. The Profile will specify the professional and personal qualities needed to succeed as Town Administrator.
- Confirm and refine the schedule for this project to meet the Town's specific requirements. Most recruitments take approximately 3-4 months from the date the engagement begins.
- Build a competitive pool of candidates utilizing the Center's extensive network, traditional advertising and targeted outreach and recruitment; and
- Support the Town's evaluation of candidates. The recruitment team will help plan the interview process and assist the Board of Selectmen throughout the Town Administrator appointment process.

Project Approach

The following information is provided to illustrate the Center's approach to executive recruitment and what it believes are successful outcomes of each stage of a search. The Center believes that a significant risk in selection is choosing the best person from a mediocre pool of candidates. The Center's principal effort is directed at giving its clients a pool of well-qualified candidates, thereby reducing this risk.

Task One: Understanding the Town and Preparing a Profile

The recruitment team begins the search with a simple question. What criteria would the organization use to determine that the appointment was successful?

The recruitment team will learn about the organization from the viewpoint of major stakeholders, and it wants to understand and document the major challenges facing the organization. The Town Administrator

job description will be reviewed. Individual meetings will be held with the members of the Board of Selectmen and major stakeholders. Group meetings will be held for employees and elected officials and will hold a public forum if requested. At each of the meetings or forums, the following questions will be asked:

- What are the challenges facing the Town?
- What are the challenges facing the next Town Administrator?
- What are the key characteristics of the next Town Administrator?

Outcome: A Profile will be prepared for approval by the Board of Selectmen which will contain a description of the challenges facing the Town and the new Town Administrator, along with the qualities and qualifications for the position. Once approved, the recruitment will commence using the Profile as a marketing tool for the position. A sample Profile is attached.

Task Two: Networking and Recruitment of Candidates

The position will be advertised with the ICMA and MMA, which is typical. However, at the same time, the recruitment team engages in extensive direct networking using the Centers broad network and personal contacts. Often the best person for a job is not looking for a job which is why our direct networking is a critical part of the process. The Center's approach is to find candidates that have faced challenges that are of similar magnitude and complexity to those faced by the town.

Outcome: At the conclusion of networking, the Center will compile resumes to be presented to the Screening Committee and recommend candidates who best meet the needs of the Town.

Task Three: Screening, and Presentation of Paper Candidates

The Collins Center will meet with the Screening Committee to plan the review process. The Collins Center will provide guidance to the Screening Committee on issues of confidentiality and avoiding social media searches. The Collins Center will help establish a set of standardized questions to be asked of all candidates, in accordance with MCAD guidelines.

Typically, the Screening Committee is given a charge by the Board of Selectmen and the Profile to guide its

work. The Collins Center will provide a report of potential candidates to the screening committee and will meet in executive session to evaluate applications to determine which candidates will be selected for a preliminary interview.

The Center recommends and uses a consensus approach to deliberations of candidates. Doing so encourages discussion and allows for support of those candidates moving forward without a “score” and enables candidates from non-traditional and diverse backgrounds to be evaluated.

Outcome. Candidates to be invited for a preliminary interview will be identified.

Task Four: Preliminary Interviews

After candidates are selected for a preliminary interview, the recruitment team will schedule and facilitate the preliminary interviews. At the conclusion of the interviews the recruitment team will facilitate the Screening Committee’s deliberations to identify potential finalists. Similar to the review of resumes, a consensus approach is taken to determine which candidates to move forward.

Outcome: Screening committee will identify tentative finalists.

Task Five: Reference and Background Checking

Reference checks of tentative finalists are extremely thorough. The recruitment team will speak with employers, professional peers, and subordinates, systematically posing the same questions to references for each potential finalist. The Center will arrange for credit, criminal history, and verification of educational credentials for the finalists.

Outcome: Presentation of qualified well vetted candidates to the Board of Selectmen.

Task Six: Guidance on Final Interview and Selection

The recruitment team will help the Board of Selectmen plan the final interview process by providing guidance with the process and structuring the discussion, questions, and format. While the recruitment team is available to work to clarify issues, establish a framework, and facilitate communication, negotiating the conditions of employment is the sole responsibility of the Board of Selectmen.

Outcome: A well-organized final interview and selection process.

Timeline

The estimated timeline for the recruitment is three to four months. The source of most delay is in scheduling meetings with the Screening Committee. If scheduling is not difficult, the time line is three months.

Month 1	Interviews/meetings with Board of Selectmen; Employees; Stakeholders; Public Development and approval of the profile Placement of advertisement and begin recruitment
Month 2	Recruitment, Networking, Outreach Meet with Screening Committee to establish process; set dates; determine questions Compile resumes for Screening Committee
Month 3	Distribute resume books to Screening Committee Meet with Screening Committee to determine which candidates to invite for interview Interview candidates Perform reference and background checks
Month 4	Finalists announced Interviews with Board of Selectmen

Professional Fees, Expenses and Payment Schedule

The professional fee for carrying out Tasks One through Six is \$10,000. The payment schedule is as follows:

- \$5,000 when Task 1 is complete
- \$5,000 when Task 6 is complete.

The Town will be responsible for candidates' and screening committee expenses. In addition, the background check that includes criminal, educational and credit checks will be conducted for a fee of \$350 per candidate which will be billed at the conclusion of the project.

Mary Flanders Aicardi, MPA

BACKGROUND

Mary is an experienced human resources and labor relations professional who began her public sector career when she was a graduate student working as a Labor Relations Graduate Intern for the Massachusetts Highway Department. Since then, she has worked for a variety of organizations in management roles and as a consultant. She brings 25+ years of experience to her work. Since joining the Collins Center for Public Management in 2009, Mary has grown the human resources practice from recruitments and organizational studies to a full-service human resources practice including recruitment, classification and compensation studies, training and development, executive coaching, and human resources structural and policy reviews.

WORK EXPERIENCE

- Practice Leader for Human Resources, Collins Center for Public Management 2009 – Present
- Consultant/Interim Human Resources Director – Town of Braintree 2008-2009
- Independent Human Resources & Labor Relations Consultant 2004 –2009
- Interim Human Resources Director, Lasell College, Newton, MA 2010 (5 months)
- Personnel Director, Town of Watertown, MA 1995 - 2004
- Asst. Personnel Director, Town of Barnstable, MA 1992 - 1995
- Employee Relations Management Intern, Town of Wellesley, MA Summer 1992
- Organizing Apprentice, A.F.S.C.M.E., Dekalb, IL Fall 1991
- Labor Relations/Personnel Management Graduate Intern, MA Highway Dept. 1990- 1991
- Recruiter of Volunteers, Friends of the Elderly, Roxbury, MA 1987 - 1989

EDUCATION

University of Massachusetts at Amherst
Master's degree in Public Administration
Bachelor of Arts, Political Science

TRAINING/CERTIFICATION

MCAD Certified Trainer for Discrimination and Sexual Harassment Prevention 2002
Certified as a Train the Trainer in Continuous Quality Improvement (CQI) 1994
Trained as a Union Organizer at the Meany Center in Silver Springs, MD 1991

PROFESSIONAL AND COMMUNITY ASSOCIATIONS

Management Member, Joint Labor Management Committee
Elected Town Meeting Member, Town of Shrewsbury
President, Shrewsbury Education Foundation
Board Member and Past Chair, Massachusetts Municipal Personnel Association

ROBERT HALPIN, MPA

EXPERIENCE

2018 – Present	Senior Associate, Edward J. Collins, Jr. Center for Public Management, University of Massachusetts at Boston
2012 – 2018	Town Administrator, Town of Framingham, MA and Special Advisor to the Mayor, City of Framingham, MA.
2010 – 2012	Consultant, Economic Development and Clean Energy Industry Collaboration
2000 – 2010	President, Merrimack Valley Economic Development Council, Inc.
1996 – 2000	Town Administrator, Town of North Andover, MA
1985 – 1996	Town Administrator, Town of Westford, MA.
1978 – 1985	Executive Secretary, Town of Pepperell, MA.

EDUCATION

Master of Public Administration, Suffolk University, Sawyer School of Management, Boston, MA
Bachelor of Art, Community Planning and Management, University of Massachusetts at Boston

PROFESSIONAL ASSOCIATIONS

Member, International City/County Management Association
Member and Past President, Massachusetts Municipal Management Association
Former Member, Board of Directors, Massachusetts Municipal Association
Former Member, Massachusetts Local Government Advisory Committee
Former Member, Massachusetts Joint Labor/Management Committee

RECOGNITIONS AND AWARDS

President's Award, United Way of Tri-County MA. (2013)
Citizen of the Year, Framingham Rotary Club, (2014)
'10 to Watch in Metro West' Massachusetts, Worcester Business Journal, (2015)

RECRUITMENTS PERFORMED BY THE COLLINS CENTER

POSITION	CLIENT
Town Administrator	Town of Barnstable
Town Administrator	Town of Belmont
Town Administrator	Town of Brewster
Town Administrator	Town of Bridgewater
Town Administrator	Town of Burlington
Town Administrator	Town of Carver
Town Administrator	Town of Chatham
Town Administrator	Town of Cohasset
Town Administrator	Town of Dracut
Town Administrator	Town of Dover*
Town Administrator	Town of East Longmeadow
Administrative Coordinator	Town of Erving
Town Administrator	Town of Fairhaven
Town Administrator	Town of Foxborough
Town Administrator	Town of Framingham
Town Administrator	Town of Great Barrington
Town Administrator	Town of Holliston
Town Administrator	Town of Longmeadow
Town Administrator	Town of Mansfield
Town Administrator	Town of Marblehead
Town Administrator	Town of Mashpee
Town Administrator	Town of Medway
Town Administrator	Town of Millis
Town Administrator	Town of Millbury
Town Administrator	Town of North Reading
Town Administrator	Town of Northfield

Town Administrator	Town of Norwell
Town Administrator	Town of Plymouth
Town Administrator	Town of Princeton
Town Administrator	Town of Randolph*
Town Administrator	Town of Reading
Town Administrator	Town of Rutland
Town Administrator	Town of Sharon
Town Administrator	Town of Sherborn
Town Administrator	Town of South Hadley
Town Administrator	Town of Southampton
Town Administrator	Town of Southbridge
Town Administrator	Town of Topsfield
Town Administrator	Town of Walpole
Town Administrator	Town of Wilbraham
Town Administrator	Town of Winthrop
Town Administrator	Town of Yarmouth

*Ongoing search

REFERENCES

Town of Millbury – Town Administrator

David Roach, Chair, Screening Committee (former Superintendent of Schools)
Droach40@gmail.com
508-865-0520

Tow of East Longmeadow – Town Administrator

Kevin Manley, Town Council Member (President at time of search)
413-883-7198
Kevin.manley@eastlongmeadowma.gov

OR

Joe Ford, Chair of the Screening Committee (Town Council Member)

413-478-5847
Joe.ford@eastlongmeadowma.gov

Town of Cohasset – Town Administrator (and assist with Library Director)

Paula Linhares, HR Coordinator – current
781-383-4105
plinhares@cohassetma.org

City of Brockton – Human Resources Director & Currently Chief Financial Officer

Mayor William Carpenter
508-580-2173
mayor@cobma.us
45 School Street, Brockton, MA 02301

Sandra Knight, Personnel Director

508-562-7295
sknight@cobma.us

Town of Norwell

Ellen Allen, Chair (screening committee member)
Norwell Board of Selectmen
ellenallennorwell@comcast.net

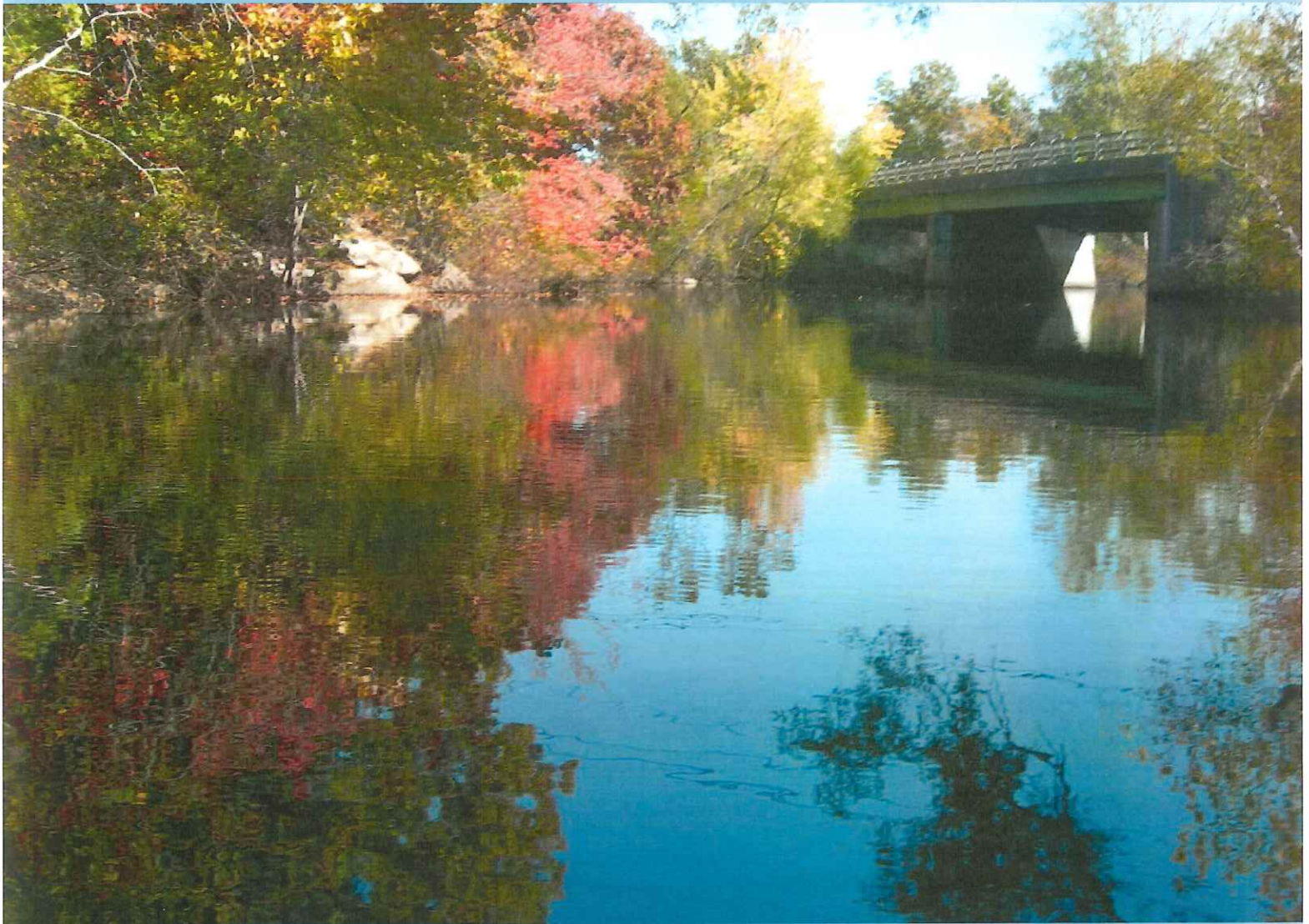
Town of Millis – Town Administrator

Karen Bouret – Operations Manager
508-276-2634
kbouret@millis.net

Town of Millis, Massachusetts

Town Administrator

Profile



EDWARD J. COLLINS JR. CENTER FOR PUBLIC MANAGEMENT
JOHN W. McCORMACK GRADUATE SCHOOL OF
GLOBAL AND POLICY STUDIES
UNIVERSITY OF MASSACHUSETTS BOSTON

Introduction

The Town of Millis has retained the services of the Edward J. Collins Jr. Center for public management at the University of Massachusetts to assist in the town's recruitment of a new Town Administrator. For more information about the Town of Millis, please consult Millis's website (www.Millis.Org).

The Town of Millis

Millis (population approximately eight thousand) is a residential community about 31 miles west of Boston. Millis combines a small town feel with proximity to metropolitan Boston by road and by commuter rail from adjacent towns. The Town is characterized by a pastoral landscape, the Charles River and its tributaries, a history of high service expectations, and its own K-12 school system. Most of the property tax burden is carried by residential property.

Millis' post war growth followed the general suburban trend with the population growing from twenty-five hundred in 1950 to eight thousand in 2000. A statement on demographic trends is on the Collins Center website.

Organizational Design and Governance

The governance structure consists of a three-member Board of Selectmen elected for three-year staggered terms and an Open Town Meeting as the legislative body. The Town Moderator is elected yearly and serves as the presiding officer at Town Meetings. The following multiple-member bodies are elected: Planning Board, Board of Health, Library Board of Trustees, and School Committee. Among the administrative staff only the Town Clerk is elected.

The Town Administrator position is vacant as a result of the departure of a twenty-five year predecessor to take a similar position in another Town. The Town Administrator position was established in the 1980s by the Town's Home Rule Charter and additional duties are specified in by-laws enacted by Town Meeting. The Home Rule Charter, the general by-laws of the town and the most recent Town Annual report are available on the Town's website.

In accordance with the Town By-laws, the Town Administrator serves as chief administrative officer, human resource director and chief procurement officer. He/she also serves as the Director of Public Works. In practice, daily operations are managed by a Deputy Director and the Town Administrator addresses financial and programmatic issues. The Town Administrator also serves as the de facto budget director.

The current Board of Selectmen views that the accretion of responsibilities should be carefully reviewed by the new Town Administrator with a view toward developing specific recommendations that will result in disaggregating some of the responsibilities now in the Town Administrator's portfolio with the view that this will enable the new Town Administrator to spend more time

implementing the Town's strategic vision and focusing on economic development.

Public Finance

Millis had total General Fund revenues for FY2016 of approximately twenty-seven million dollars. Eighteen million (67%) of this amount was from Property Taxes. State aid was approximately six million dollars. In FY2016, the school budget was fifty-three percent of the General Fund budget. The Town has a single property tax rate applicable to all classes of property. Over eighty-nine percent of the assessed value of property is residential. Since 1999 the Town has voted four operating overrides, most recently in 2009 and three debt exclusions. The Town's bond rating is Aa3 from Moody's. A copy of a recent Offering Statement is posted on the Center's website. Detailed financial information for the Town may be obtained at the web site of the Massachusetts Department of Revenue, Department of Local Services.

Challenges for the Town Administrator

Maintaining and strengthening the full confidence of the Town's leaders and residents in the Office of the Town Administrator. While much of the power of the position is a consequence of delegation by the Board of Selectmen and the long tenure of the previous incumbent, the Town Administrator will gain much of his/her influence through superior knowledge, ability to work with people and communication skills. The first Town Administrator has established positive expectations for the position. The new Town Administrator will have to build on this foundation.

Fostering incremental steps toward modernization. There has been discussion within the Town about broader distribution of the functions now carried out by the Town Administrator with a view toward enabling the Town Administrator to engage in a broader leadership role implementing strategies developed by town meeting and the board of selectmen. A first task of the new Town Administrator will be to assess the current situation and make recommendations that can be implemented by the Board and Town Meeting.

Economic Development and Planning. Millis is a nearly fully built-out town. Identification and consideration of the development opportunities that can mitigate the dependence on residential property in collaboration with the Town's land use regulatory bodies will be an on-going task. The Town Administrator will be expected to lead the development of the Town's master plan to create a blue print and long-range vision to guide development in the Town. The master plan will focus on how the Town's design can be enhanced to attract new business as well as to protect existing businesses.

Communication. Well-developed communication skills in Millis are essential. Open, accurate and timely communication by the Town Administrator with all Town government entities, the public, the many volunteers and

employees needs to be strengthened and integrated into the normal operational practices of the Town. The Town Administrator must be able to engage the members of the Board of Selectmen and elected and appointed Boards and department heads in an on-going dialogue about the critical issues that face the Town. Development of social media as an effective communication tool is a town goal.

Managing the Town's Administrative Functions. The small scale of the Town government means that the Town Administrator needs to have the technical skills to perform and/or closely manage all of the critical administrative functions. Initially the next Town Administrator cannot simply manage by delegation; he/she must have the ability to perform these functions in a hands-on manner and coach, mentor and encourage subordinates to grow in their jobs. Improving processes and increasing the utilization of Information Technology are expected to contribute to efficiency and effectiveness. The Community Compact Initiative emphasizing the budget process and a strategy for a housing development plan needs to be integrated into the administration of the Town.

Infrastructure, Capital and Regulatory Compliance. Millis has a significant amount of deferred capital projects and it also faces the pressures of complying with stormwater and related regulations that are particularly significant given the town's location in the Charles River watershed. The Town Administrator will need to take a lead role on these topics.

Maintaining a Positive Labor Relations and Management Climate. The labor relations climate has been generally positive. Lead responsibility in collective bargaining is the responsibility of the Town Administrator. The Town recently completed a Human Resource audit that recommended strengthening this function.

Sustaining a High Level of Public Services. High service levels have been sustained by residents' ability and willingness to pay for current service levels, but that willingness to pay may be eroding in the current economic climate. Since the potential for new growth and state aid are limited, town expenses must be managed carefully. The Town has been managed conservatively and presently has adequate fund balances.

Medium Term Budget Planning. Like all Massachusetts municipalities, Millis is facing revenue constraints and growing cost pressures. A significant amount of the Town Administrator's time will be required to forge town-wide strategies to keep these in balance over a three to five year time horizon.

Managing in a small town context. Millis, like many small towns, has a work force that either resides in the Town or has close ties to the Town. The Town also has many residents whose families have lived in Millis for a several generations and are deeply rooted in the community. The Town Administrator must have the skills to function effectively in a small town environment.

Developing and Sustaining Institutional Capacity, Staff Development and Morale. The Town has a well-regarded cadre of department heads and key staff.

Maintaining staff morale, fully utilizing the considerable talents of staff and maintaining high performance standards will be critical to the success of the new Town Administrator. The Town Administrator cannot be desk bound. She/he needs to be comfortable working both inside and outside the Town Hall environment. The Town Administrator must foster a culture of continuous operational and institutional improvement; simply presiding over the status quo is not acceptable.

Regionalization of Services. Opportunities exist for small towns, like Millis, to realize financial and operational benefits by partnering with neighboring/similar communities to provide critical services. The Town Administrator must facilitate and support regional solutions when that is in the Town's interest and should spearhead the study and implementation of regional initiatives.

The Ideal Candidate

The Millis Board of Selectmen seeks a Town Administrator who has the demonstrated capacity to lead a Town with a long tradition of high-level services. The next Town Administrator must have experience in an environment of similar scale and complexity.

A working knowledge of municipal law and practice especially in the Massachusetts context is preferred. Experience in labor relations, municipal finance, and budgeting as well as in fashioning agreements with other governments is essential, as is experience in community planning and procurement.

Millis seeks a Town Administrator with the skill, energy, creativity and experience to achieve Millis's goals, including preserving public service levels, balancing selective development decisions with residents' concerns about growth, and maintaining the Town's positive civic attitude toward the future.

Millis seeks a Town Administrator willing to commit to a tenure long enough to build a multi-year approach to ensuring the sustainability of the Town's service levels.

The following attributes have been deemed important in Millis's next Town Administrator.

Personal Attributes

The next Town Administrator needs to be:

- Able to demonstrate unquestioned integrity.
- Able to communicate effectively with all elements of the community.
- Able and willing to play a highly visible role in the community. The ideal candidate must participate broadly across the leadership structure of the community and region and be a champion of the community.
- Comfortable engaging directly with citizens. The Town Administrator must have sufficient direct engagement with the civic community so that he/she can gain a thorough understanding of the Town's culture. Through formal and informal interaction the Town Administrator's concern for the Town's residents' needs to become evident.

- Able and willing to work openly with community groups and employees. A direct, collegial, facilitative style that fosters joint problem solving is needed.
- Able to be a vocal and positive spokesperson for the Town's agenda at Town Meetings, at public forums, at state agencies and with the media. The successful candidate must be able to use the status inherent in the Town Administrator's position to advance the Town's agenda.
- Able to assume a strong organizational management role. The successful candidate must be direct, assertive, facilitative, and clear.
- Able to create and sustain a goal-oriented environment by establishing, maintaining and promoting effective policies and initiatives. The Town Administrator will be a genuinely inclusive leader who is capable of exerting influence and direction in a manner that shares successes with elected officials, professionals and volunteers.

Professional Attributes

The Town Administrator should:

- Be a leader of a comparable organization with experience in finance, capital and operational planning, expenditure management, human resources and labor relations, public facilitation, and staff development.
- Be a professionally stable person with a record of tenure and consistent career growth. The Town seeks a committed management professional willing to stay for a significant period, but who is also willing to take risks to improve the organization.
- Be an innovator who in addition to nurturing a culture of continuous improvement can perceive and act on opportunities for novel and effective ways to move the town forward.
- Be able to engender the effective use of current and new Information Technology systems to enhance municipal service delivery and operations.
- Be able to demonstrate a background in guiding the development of a shared strategic vision for the community. The ideal candidate must be a coalition builder, equally at home with private sector and community leaders.
- Possess a Bachelor's Degree and preferably a Master's Degree and at least five to seven years of experience as a town or city Manager/Administrator, Assistant Town Administrator/Manager or other position that oversees the day-to-day operations of a public entity governed by an elected policy body that makes decisions in public.
- Be able to set the stage for continuing the Town's capital plan with particular focus on long-term capital planning, utilizing the decline in debt service for existing projects when it occurs, and federal and state resources whenever possible. Pursuing the Town's capital plan while maintaining the Town's bond rating is the goal.
- Be experienced in working effectively in a political environment providing impartial guidance to elected officials to identify and address the long-term strategic needs of the community and the short-term tactical steps necessary to deliver services.
- Be capable of keeping elected officials comprehensively informed, while staying detached from the political process and ensuring that staff maintains a similar detachment.
- Be comfortable managing in an environment where many employees are members of a collective bargaining unit.
- Be familiar with highly participative local government environments with dynamics similar to those in Millis,.
- Be familiar with the Massachusetts municipal context, particularly Town government .
- Be comfortable working in an environment often characterized by vigorous debate among well-informed citizens who are active in local decision-making processes. While key decisions made by the Board of Selectmen and Town Meeting may be closely decided, the Town Administrator must effectively represent and implement decisions in a professional manner.
- A person committed to the standards and ethics for municipal management professionals specified by the International City Management Association.

Salary and Schedule

The search begins in August 2016 and is expected to end by January 2017. Applications should be received by October 27th, 2016. The compensation of the previous Town Administrator was in the mid 160s. The Town is willing to negotiate a competitive compensation package and an employment contract DOQ with the selected candidate.

How to Apply

Applications are preferred electronically. Please send your resume with a cover letter addressing the job requirements to this email address: recruitment.umb@gmail.com. The words **Millis Town Administrator** and your **LAST NAME** must appear in the subject line. Please combine all of your documents in a single file. Kindly use PDF format, if possible.

Should you have any questions regarding this opportunity, or a recommendation of a colleague, please contact: Dick Kobayashi, Senior Associate 617-489-8812, or Mary Flanders Aicardi, Senior Associate 508-215-8992.

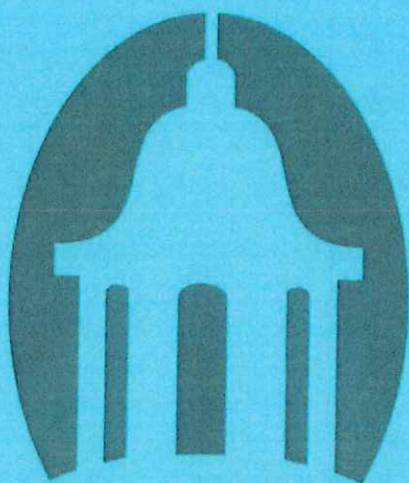
To learn more about the Edward J. Collins Jr. Center for Public Management at UMASS Boston, please visit: www.collinscenter.umb.edu

RESPONSE TO RFQ
TOWN OF WENHAM, MA
EXECUTIVE SEARCH CONSULTANT FOR
TOWN ADMINISTRATOR
MARCH 2019

Prepared by:
Municipal Resources, Inc.
120 Daniel Webster Highway
Meredith, NH 03253
603-279-0352
866-501-0352 Toll Free
603-279-2548 Fax
all@mrigov.com
www.mrigov.com



TABLE OF CONTENTS



Municipal
Resources
Inc.

TABLE OF CONTENTS

PROPOSAL

Letter of Interest	1
Scope of Work	4
Tenure Guarantee	7
Timeline	7
About Municipal Resources, Inc.	8
Project Team	8
Corporate Structure	11
References	12
Sample Promotional/Marketing Materials	13
Certificate of Liability Insurance	13
Legal/Administrative Proceedings	13
Required Certifications	13
Fees	14

APPENDICES

References	A
Sample Promotional/Marketing Materials	B
Certificate of Liability Insurance (generic)	C
Required Certifications	D

PROPOSAL



Municipal
Resources
Inc.

120 Daniel Webster Highway
Meredith, NH 03253



Municipal Resources
www.municipalresources.com

tel: 603.279.0352 • fax: 603.279.2548
toll free: 866.501.0352

March 20, 2019

Peter Lombardi, Town Administrator
138 Main Street
Wenham, MA 01984

RE: Response to RFQ – Executive Search Consultant

Mr. Lombardi:

Municipal Resources, Inc. ("MRI") is pleased to submit this response to your Request for Quotes for an Executive Search Consultant. Enclosed please find one (1) original and three (3) copies of our response.

Municipal Resources, Inc. has 29 years of experience with public sector executive recruitments and our record for helping towns identify and select candidates with the right "fit" is impressive. By investing time and energy to learn about the specific challenges of the job and understand the personality of the community, we can identify candidates with the right blend of management skill, leadership style, values, philosophy, and approach to ensure a "fit" for success. Because the scope of services offered by MRI across the region and our many contacts, particularly in Massachusetts, MRI can leverage those contacts to directly recruit quality candidates.

MRI has specific experience working with the Town of Wenham, having assisted with the Town Administrator Recruitment in 2014, as well as numerous other recruitment and promotional processes, public safety studies, and assistance in other areas such as CIP and Human Resources.

In addition, during the last few years MRI has assisted many Massachusetts' communities, similar to yours, with recruiting and selecting town administrators and managers, including the following:

- Concord, MA- Town Manager (active)
- Acton, MA - Town Manager
- Bedford, MA - Town Manager
- Berlin, MA – Town Manager (active)
- Canton, MA - Town Administrator
- Danvers, MA - Town Manager
- Hanover, MA - Town Manager
- Lexington, MA - Town Manager
- North Andover, MA – Town Manager (active)
- Sudbury, MA - Town Manager

UNIQUE SERVICES IN PUBLIC SECTOR RECRUITMENT

MRI has been serving municipalities and school districts for nearly 30 years. During that time, we have provided services to more than 500 public sector organizations. In conducting recruitment and selection services, we endeavor to do more than merely match candidates to job openings:

- We work closely with you to understand the leadership and management aspects of the position that may be unique to your community in order to establish and clarify job expectations.
- We work closely with each applicant to help them understand the position requirements and the expectations you have for the successful candidate while keeping them abreast of their status at each step in the selection process.
- We recognize that the client is not only hiring a senior executive but may very well be bringing an entire family into the community. Consequently, we work with the applicants to enable them to learn as much as possible about the region as well as the client community, and we help the client prepare to support the assimilation of the new manager. We are also careful to ensure that economic expectations and family needs or special circumstances are clearly understood early in the selection process.
- We stay actively involved through the final selection and formal appointment. Our objective is to initiate and establish long-term, successful relationships between the individuals we help place and our clients.

We understand that every community is different; therefore, every search is different. MRI works hard to understand the intricacies and uniqueness of each client's organization, and then tailors the process to meet their specific needs and expectations.

Alan Gould, President, will act as the Principle-In-Charge and Project Manager for this project and will oversee all aspects of the recruitment process.

We look forward to the possibility of once again working with the Town of Wenham. Please feel free to contact us if you have any questions or need additional information.

Respectfully submitted,

MUNICIPAL RESOURCES, INC.

By:



Alan S. Gould, President
Municipal Resources, Inc.
120 Daniel Webster Highway
Meredith, NH 03253
(603) 279-0352
(603) 765-5998 Cell
agould@mrigov.com
www.mrigov.com

SCOPE OF WORK

MRI will work with the Board of Selectmen, Senior Staff/Division Directors and Screening Committee and others as needed to recruit and select an exceptional candidate for the position of Town Administrator for the Town of Wenham. MRI will undertake the following activities in this comprehensive executive recruitment process, in accordance with all applicable Massachusetts State Laws:

1. Work with the Board of Selectmen and others as needed to review the recruitment process and work toward developing an **"Ideal Candidate Profile and Challenge Statement"**. The **Ideal Candidate Profile and Challenge Statement** helps to:
 - a. Identify critical organizational issues and challenges;
 - b. Clarify roles, responsibilities, and expectations for the position;
 - c. Understand the qualities, strengths, and characteristics of candidates envisioned for the Town Administrator;
 - d. Characterize the most desirable management strengths, behavioral styles, personal attributes, and motivating values needed in the ideal candidate to increase the probability of success in the role; and
 - e. Identify the likely issues and opportunities that the next manager must be prepared to address.
 - f. Provide for potential candidates a profile of the community that encompasses the uniqueness of the community, demographics, economic stability and employment sectors, citizen involvement and form of government.

In order to gain input from the community and other stakeholders, MRI will interview other key officials, as identified by the Board of Selectmen and Screening Committee, will open an e-mail address for this specific recruitment that will provide for electronic community input, and can schedule/facilitate up to two listening sessions, public forums as well interviews with department heads and other key stakeholders. Once approved by the client, the Ideal Candidate Profile and Challenge Statement will be posted on MRI's recruitment website for potential candidates to review.

2. We will work with the appointing authority to develop a timeline for the recruitment process so that the Client and all candidates can plan accordingly.
3. We will develop ad copy, recommend advertising venues, and coordinate placement of the ads. Resumes are typically received for at least 30 days.
4. We will research MRI's database and contact potential candidates from other similar recruitments we have conducted in the past 12 months. It should be noted that MRI's advertising is targeted at venues that are most likely to engage candidates with the professional training, and experience desired by the client. Since some of these advertising venues will be viewed nationally and even internationally, we expect to have approximately 17 states represented in the candidate pool. MRI's recruitment efforts go well beyond the team identified in this proposal as we leverage our entire consulting group for the benefit of the client.
5. We will canvas MRI's professional network to identify and reach out to promising potential candidates to invite their application.
6. We will receive, acknowledge and hold all resumes in confidence, forwarding to the Screening Committee as desired. We have found that assured confidentiality will increase the number and quality of applicants rather significantly. We acknowledge receipt of all resumes and keep candidates apprised of their status at each selection point throughout the process.
7. We will provide you with an overview of relevant information about the candidate pool, answer questions, and review selection criterion at each decision point throughout the process.
8. We will establish a team of professional consultants who will screen and review all resumes for minimum qualifications before ranking them against the Ideal Candidate Profile.
9. In coordination with the Board of Selectmen and/or Screening Committee, we will develop a written essay questionnaire to be distributed to the top qualified candidates (generally 12 to 15 candidates), focusing the questions on matters of special relevance to the client's needs or current situation. The questions will be prepared in consultation with the appointing authority and or Screening Committee. Candidates will have a specified amount of time to respond (typically 10 days), after which our team of consultants will review and rank the responses.

10. After essay responses have been returned, reviewed, and ranked, we conduct a web search of the top remaining candidates (generally 10 to 12) and canvas our consultants, to identify potential issues or controversies in other jurisdictions. Then, two members of our team will conduct telephone interviews with these candidates, placing the focus on current position and reasons for leaving; career history of successes and failures; future personal and professional goals; and their understanding of best practices and contemporary professional thinking in the field. In addition to screening the candidates, this interview provides for follow-up to the essay responses and information found in the web searches. It also assists us in determining the verbal communication skills of the candidate and his/her ability to answer questions spontaneously.
11. MRI then work with the Screening Committee through a review of the candidate pool and related submittals, prepare the Committee for, and facilitate on site interviews with those candidates selected by the Screening Committee.
12. MRI will prepare the Board of Selectmen for interviews with the finalists advanced by the Screening Committee and facilitate those interviews. All meetings will be in conformance with the Massachusetts Open Meeting Law.
13. Following interviews with the finalists, the appointing authority, in consultation with our lead consultant, will determine what, if any, additional steps are needed to arrive at a final selection, such as additional interviews or an onsite "meet-and-greet".
14. We will assist with the development of terms and conditions of employment, preparation of a conditional offer of employment, and creating a draft of an employment agreement.
15. If the final candidate will be relocating to the community from a significant distance, we may recommend and can coordinate a family visit to the community prior to making a conditional offer of employment.
16. We will complete a comprehensive background investigation on the selected candidate which shall include, but not be limited to, previous employment, and criminal and motor vehicle records checks, finances, references, and interviews with previous employers. In order to protect the client, MRI will not complete a comprehensive background on a candidate before a conditional offer of employment is accepted, unless the Town provides a waiver.

TENURE GUARANTEE

To the extent that Municipal Resources is engaged to conduct a comprehensive recruitment as described above, we will guarantee to undertake a recruitment and selection process at no expense to the community should the employment relationship, after it is negotiated and documented by an executed employment agreement, be terminated by either party within 12 months. There shall be no cost for MRI's recruitment services; however, the Client shall cover the costs associated with advertising and interviews.

TIMELINE

We have significant experience structuring and conducting all sorts of executive recruitment projects for municipalities, and we are very willing and able to customize our approach to accommodate any unique requirements of a community or to fit within budget constraints.

MRI understands that the Town wishes to complete the recruitment process within 12 weeks of the execution of an agreement for services. A recruitment as described above typically takes approximately **90-120 days** to complete. MRI is ready to begin work on the recruitment as soon as a contract has been executed.

The following schedule represents the typical timeline MRI would like to meet in the recruitment and selection process. As you will see, the approximate 30 day run time for resume submission is the longest period of time over which we have no control. During this period, resumes are being received, acknowledged, and scored, while we are gathering information that will help us to narrow the field and develop essay questions. Once the resumes have been scored, things will move along pretty quickly.

The Town desires that the consultant make every effort to bring this process to completion within 3 months from the signed contract for services, but recognizes that scheduling of various meetings may extend this timeline.

TDB	Award of Contract
First 30 days	Advertisements are written and posted. MRI team gathers information from the client (interviews, community engagement...) in order to develop the Ideal Candidate Profile & Challenge Statement. Resumes are accepted and reviewed by the MRI team.
Week 5	Resume deadline, final scoring. First cut made and essay questions distributed by MRI to top 12 to 16 candidates.

Week 7	Candidate essays are due and reviewed by the MRI team.
Week 8	Preliminary background work and MRI telephone interviews with remaining candidates.
Week 11	Onsite panel interviews. Hiring authority interviews of the finalists could follow immediately.

Since there is little room for “compression” of this schedule, any delays will need to be added to the end of the process. The background investigation on the selected candidate will likely take about two weeks. During that two-week period, we will be assisting the Client with contract negotiations. We normally expect a two- or four-week delay between the signing of a final contract with the start date of the chosen candidate, since he or she likely has a contractual obligation to a current employer.

In our experience, if a process runs significantly longer than the 3 months outlined in this schedule, desirable candidates may withdraw for other employment opportunities.

ABOUT MUNICIPAL RESOURCES

Founded in 1989, the MRI team includes two principals, a staff of eleven full-time professionals, four administrative support staff, ten part-time professionals, and a large group of professional affiliates who are available for consulting services as necessary.

MRI is committed to providing innovative and creative solutions to the problems and issues facing local governments, school districts, and community-based organizations throughout New England.

THE PROJECT TEAM

All Principal Consultants affiliated with the firm have substantial experience in government service, a background which proves beneficial to our clients, as we are able to fully understand and address the issues and concerns of the officials and decision makers with whom we do business.

We believe that Municipal Resources has the best collection of talent that any consultant can produce at any price. Generally, our affiliates are current or recently retired practitioners in their field. They have held or hold positions at or near the top in their respective fields. All

consultants assigned to this team are veterans of similar projects and have specialized in Massachusetts recruitments.

In keeping with our hallmark multi-disciplinary approach to problem-solving, we plan to use the following team:

PRINCIPAL-IN-CHARGE/PROJECT MANAGER

Alan S. Gould, President and Chief Operating Officer, is a graduate of Saint Anselm College with a BS degree in Criminal Justice. He is certified as a Public Manager by the American Academy of Certified Public Managers and has completed numerous management and leadership programs including the Babson Command Training Institute and the FBI's LEEDS program. He is recognized for his creativity in community policing and his leadership in promoting ethics in the law enforcement community. Mr. Gould began his public-sector career with the Salem, NH, Police Department where, during 21 years, he served at all ranks of the Department. He served as Chief of Police in Rye, NH, where, upon retirement from law enforcement, he was appointed and served as Town Administrator until joining MRI in 2008. Mr. Gould served as the Ethics Instructor at the New Hampshire Police Academy for 15 years and has been an instructor of college courses in Criminal Code, Criminal Investigation, Report Writing, Constitutional Law, and Juvenile Delinquency. Among his many community involvements, Alan served as an initial incorporator of two non-profit organizations; one addressing family violence and visitation issues, and the other established to help seniors remain in their homes as they age. He continues to serve as Deputy Emergency Management Director in the coastal community of Rye, NH, located within the Seabrook Nuclear Power Plant's Emergency Planning Zone. In addition to his responsibilities as MRI's Chief Operating Officer, Mr. Gould manages most of the company's public safety projects including operational studies and "internal" investigations. Mr. Gould also specializes in recruitment/selection processes for executive level municipal positions and has completed dozens of processes for top management positions throughout New England, including those listed previously in this letter.

TEAM MEMBERS

Robert Mercier is a senior level executive manager with over 35 years in both the private and public sectors. He has direct experience managing public budgets in excess of \$100 million, and in developing policy and implementing programs that promote positive, smart business growth. Most recently he served as the Town Administrator for Burlington, Massachusetts from 1999 to 2012, returning to the community after serving as the Town's first Town Administrator from 1980 to 1986. He also served as Town Manager in Billerica, MA, from 1986 to 1991, and as President and Chief Executive of the Regional North Suburban Chamber of Commerce, serving 13 communities along Route 128. Bob was Town Manager in Billerica, MA, from 1991 through

1998. He served as Interim Administrator in Boxborough in 1999 and Interim Town Administrator in Wayland in 2013. He received his BA in Education and History from the University of Lowell and earned his Masters' Degree in American Government from Salem State University. Mr. Mercier has also received a Post Graduate Certificate in Leadership and Organizational Management from Notre Dame University. Mr. Mercier is a former member of the MBTA Advisory Board and has served on the Route 3 Advisory Committee that contributed to the successful, on time and on budget expansion of the Route 3 corridor. He joined MRI in 2014 and serves as a municipal management consultant specializing in Massachusetts recruitments.

Reginald (Buzz) S. Stapczynski, ICMA-CM, has 40 years of public sector management experience at the local, county, and state levels of government. He served as Town Manager of Andover, MA, for 25 years. As Chief Executive Officer, he was responsible for the administration and management of a full-service municipality. He was responsible for \$170 million operating budget for municipal/school departments; maintenance and construction of municipal/school infrastructures, managing millions in capital projects; economic development/planning of the Town's industrial/commercial base. During his tenure, the rating agencies recognized his administration for outstanding fiscal management by awarding Andover with the AAA bond rating. He also served as Town Manager in Wilmington, MA, for many years. Buzz worked for the Commonwealth of Massachusetts in the Department of Mental Health as a Budget Manager. Prior to coming to Massachusetts, Stapczynski worked for Fairfax County, VA, as a Budget Analyst in the Office of Management and Budget. Buzz is the former President of the Massachusetts Municipal Association (MMA) and the Massachusetts Municipal Management Association (MMAA). He served on the Massachusetts Interlocal Insurance Association, Inc. (MIIA) Board of Directors. He was on the Governor's Advisory Council during the Dukakis and Weld Administrations. More recently, he participated on Lieutenant Governor Polito's Special Municipal Focus Group. He is the former Chair of the MMAA's Future Managers Committee. Buzz received his B.A. in Politics from The Catholic University of America in Washington D.C., and Master's in Public Administration from the University of Kansas. He attended the Harvard University, J.F.K. School of Government Program, for Senior Executives in Local Government. Buzz brings a wealth of knowledge to MRI in all areas of government administration, as well as experience with public/private partnerships.

Carol M. Granfield, ICMA-CM, has a master's in administration from Central Michigan University and is one of 1266 ICMA Credentialed Managers in the country. Ms. Granfield is also a graduate of the Senior Executive Institute at the University of Virginia, Harvard JF Kennedy School of Government summer program, Leadership New Hampshire and Fairfax, and one year of law school at Massachusetts School of Law. She is an adjunct professor at Granite State College where she teaches Human Resources and Public Administration. She possesses over 38 years of public sector management experience and 9 years of private sector experience. Ms. Granfield, a native of Pittsfield, Massachusetts, has broad public service experience at the town,

city and county levels of government. Ms. Granfield has served in Town Administrator/Town Manager positions in large and small communities in New Hampshire (Derry, Meredith, Hooksett, Moultonborough), and as County Manager in Cumberland County, Maine; Town Manager in Dixfield and Kittery, Maine; Director of Administration in Herndon, Virginia; and Personnel Director in Fairfax, Virginia. Ms. Granfield's expertise in Human Resources and Labor Relations includes the establishment of personnel policies; organizational studies; wage, classification, and benefit studies along with union negotiations to include the interest-based model. Ms. Granfield is co-author of the ICMA e-book, *Performance Appraisal Fundamentals: A Quick Guide to Fair, Consistent, and Useful Performance Appraisals*. Ms. Granfield has participated in many successful public sector executive recruitment projects and has also conducted strategic planning, goal setting, and team building programs in NH, ME and VA communities. She has also developed and implemented positive career development and training programs for employees of a number of municipal organizations. Ms. Granfield has given presentations at national conferences of the ICMA, the International Public Management Association for Human Resources, and at state conferences in VA, MA, ME, and NH. Ms. Granfield has served on many professional and civic boards to include the Public Employee Labor Relations Committee; ICMA Credentialing Board; NH Local Government Board, Maine Municipal Association Advisory Board, Belknap County Economic Development Commission, Derry Planning Board, and is Past President of the NH Management Association, IPMA-Virginia, Dixfield Economic Development Organization, and the Derry Village Rotary. Ms. Granfield is also appointed by the Governor to the NH Public Employee Labor Relations Board.

Elizabeth Mensinger, Recruitment Coordinator, graduated from Providence College with a Bachelor of Arts degree in Social Work and attained her Master of Social Work degree at the University of Central Florida. She has experience in business management as well as program development and implementation and has served in leadership positions in public, private and non-profit settings. Elizabeth has proven success in bringing together teams and creating effective and efficient processes to achieve goals. As MRI's Recruitment Coordinator Elizabeth is responsible for establishing and maintaining professional relationships with candidates and for identifying candidates with the attributes sought for the various recruitment positions. Elizabeth also provides Job Task Analysis services and data collection and analysis for MRI's Public Safety studies.

CORPORATE STRUCTURE

MRI is an S Corporation registered in New Hampshire, with the following officers:

Alan S. Gould, President and Chief Operating Officer
Christian Pearsall, Treasurer
Patrick H. Wood, Esquire, Secretary
Justin Van Etten, Chairman, Board of Directors, Co-Owner
Donald R. Jutton, Sr., Founder and Member, Board of Directors, Co-Owner

There are no officials or employees from the Town of Wenham who are related to any of the partners, officers or directors of Municipal Resources, Inc., or who have an ownership interest in the company.



REFERENCES

Acton, MA

Town Manager Recruitment 2018
Land Use & Econ. Dev. Director Recruitment 2015
Janet K. Adachi, Chairman Board of Selectmen
472 Main Street, Acton, MA 01720
jkajeg@msn.com

Bedford, MA

Town Manager Recruitment 2018
William S. Noonan, Chair
10 Mudge Way
Bedford, MA 01730
(781) 275-1111

Hanover, MA

Brian Barthelmes, Selectman
Town Manager Recruitment 2018
550 Hanover Street, Hanover, MA 02339
(781) 826-5000 or Brian.barthelmes@hanover-ma.gov

Lexington, MA
Town Manager Recruitment 2018
Suzie Barry, Chair, Board of Selectmen
2nd Floor, Town Office Building
1625 Massachusetts Ave
Lexington, MA 02420
(781) 698-4581 or suziebarrylex@gmail.com

Sudbury, MA
Director of Public Works Recruitment 2016
Town Manager Recruitment 2015
Melissa Murphy-Rodrigues, Town Manager
Board of Selectmen's Office
278 Old Sudbury Road, Sudbury, MA 01776
(978) 639-3382 or townmanager@sudbury.ma.us

Municipal Resources, Inc. has completed 48 successful recruitments for the position of Town Manager/Town Administrator and City Manager in New England within the past 3-5 years.

See **Appendix A** for additional references.

SAMPLE PROMOTIONAL/MARKETING MATERIALS/FIRM BROCHURE

See **Appendix B** for samples.

CERTIFICATE OF INSURANCE

Municipal Resources, Inc. maintains insurance in the coverages and limits as shown on the attached generic Certificate of Insurance. (See **Appendix C**)

LEGAL OR ADMINISTRATIVE PROCEEDINGS

MRI has been not been involved in any legal or administrative proceedings within the past five (5) years which relate to the type of work outlined in the Scope of Services.

REQUIRED CERTIFICATIONS

See **Appendix D** for forms provided by the Town of Wenham which are required as part of this submission.

FEES


Fees for services are based upon the specific recruitment and selection process that is structured for your unique circumstances and agreed upon workplan. The recruitment process described above is offered at a cost of **\$14,800.00** and includes up to five onsite meetings with the Screening Committee. All meetings and facilitation of interviews with the Board of Selectmen are included in this price.

Advertising venues will be selected upon consultation with and approval by the client. Costs are included in the fees above.

The Town of Wenham shall be responsible for providing food and interview rooms for the interview panel(s).

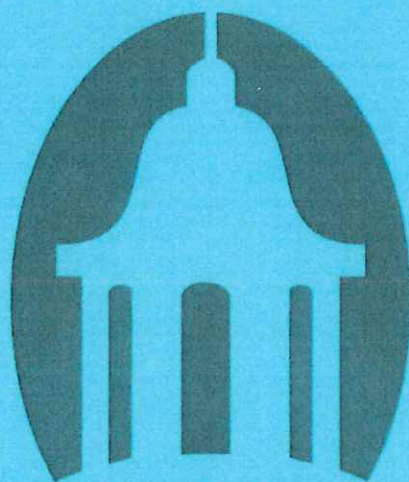
Respectfully submitted,

MUNICIPAL RESOURCES, INC.

By: 

Alan S. Gould, President
Municipal Resources, Inc.
120 Daniel Webster Highway
Meredith, NH 03253
(603) 279-0352
(603) 765-5998 Cell
agould@mrigov.com
www.mrigov.com

APPENDIX A



Municipal
Resources
Inc.

MANAGEMENT RECRUITMENT REFERENCES

MASSACHUSETTS

Acton, MA

Town Manager 2018
Land Use & Econ. Dev. Director 2015
Steven Ledoux, Town Manager
472 Main Street
Acton, MA 01720
(978) 929-6611

Andover, MA

Finance Director 2011
Police Chief Recruitment 2013
Steven Bucuzzo, Asst. Town Manager
36 Bartlet Street
Andover, MA 01810
(978) 632-8220

Ashland, MA

Town Manager 2012
Steven Mitchell, Chairman
Board of Selectmen
101 Main Street
Ashland, MA 01721
(508) 881-0100

Assumption College

Public Safety Director 2013
Christian McCarthy
Executive Vice President & Treasurer
Assumption College, Finance Office
500 Salisbury Street
Worcester, MA 01609
(508) 767-7424

Bedford, MA

Town Manager 2018
Richard T. Reed
10 Mudge Way
Bedford, MA 01730
(781) 275-1111

Boylston, MA

Town Administrator 2008
Kenneth Sydow, Selectman
221 Main Street
Boylston, MA 01505
(617) 654-3697

Canton, MA

Town Administrator 2016
Jody Middleton
Human Resources Director
801 Washington Street
Canton, MA 02021
(781) 821-2936

Concord, MA

Town Manager 2018
Parks & Rec Director 2016
Christopher Whelan, Town Manager
PO Box 535
22 Monument Square
Concord, MA 01742
(978) 318-3000

Danvers, MA

Town Manager 2014
Steve Bartha
Town Manager
One Sylvan Street
Danvers, MA 01923
(978) 777-0001

Dartmouth, MA

Town Administrator 2017
Executive Administrator 2009
Police Chief 2009
David Cressman, Town Adm.
400 Slocum Road
Dartmouth, MA 02747
(508) 910-1820

Dighton, MA

Town Administrator 2017
John P. Taylor, Chairman
Dighton Board of Selectmen
979 Somerset Avenue
Dighton, MA 02715
(508) 669-6431

Everett, MA

Chief Financial Officer 2015
Kevin O'Donnell
Human Resource Director
City of Everett
484 Broadway, Everett MA 02149
(617) 394-2282

Hanover, MA

Director of Comm Dev & Planning 2018
Town Manager Recruitment 2017
Brian Barthelmes, Selectman
550 Hanover Street
Hanover, MA 02339
781-826-5000

Kingston, MA

Town Administrator 2013
Nancy M. Howlett
Acting Town Administrator/
Chief Procurement Officer
26 Evergreen Street
Kingston, MA 02364
(781) 585-0500

Leicester, MA

Town Administrator 2013
Doug Belanger, Chairman
Leicester Board of Selectmen
3 Washburn Square
Leicester, MA 01524
(508) 892-7000

Lenox, MA

Town Manager Recruitment 2013
David Roche, Chairman
Lenox Board of Selectmen
Town Hall
6 Walker Street
Lenox, MA 01240
(413) 637-5500, x-7

Lexington, MA

Town Manager 2018
Suzie Barry, Chair
Board of Selectmen
2nd Floor, Town Office Building
1625 Massachusetts Ave
Lexington, MA 02420
(781) 698-4581

Manchester-by-the-Sea, MA

Police Chief Recruitment &
Assessment Center 2016
Fire Chief Recruitment &
Assessment Center 2016
Police/Fire/EMS Studies 2015
DPW Director Recruitment 2014
Dispatch Study 2014
Town Admin Recruitment 2012
Police Chief Recruitment 2007
Interim Police Chief 2007
Gregory Federspiel, Town Administrator
10 Central Street
Manchester-by-the-Sea, MA 01944
(978) 526-2000

Marblehead, MA

Town Administrator Recruitment 2011
Anthony M. Sasso, Town Administrator
Abbot Hall
188 Washington Street
Marblehead, MA 01945
(781) 631-0000

Mendon, MA

Town Administrator 2013
Fire Chief 2018
Diane Willoughby
Administrative Assistant
20 Main Street
Mendon, MA 01756
(508) 473-2312



Deering, NH

Fire Chief Recruitment 2016
 Russell McAllister
 Town Administrator
 762 Deering Center Road
 Deering, NH 03244
 (603) 464-3248

Derry, NH

Town Administrator 2016
 Town Administrator 2010
 Larry Budreau, Human Resources Dir.
 14 Manning Street
 Derry, NH 03038
 (603) 845-5403

East Kingston, NH

Clerk 2011
 Matthew Dworman, Chairman
 Board of Selectmen
 24 Depot Road
 East Kingston, NH 03827
 (603) 642-8406

Enfield, NH

Town Manager 2017
 Town Administrator 2005
 Police Chief Recruitment 2018
 Enfield Board of Selectman
 PO Box 373
 Enfield, NH 03748
 (603) 632-7389

Farmington, NH

Town Administrator 2012
 Board of Selectmen
 356 Main Street
 Farmington, NH 03835
 (603) 755-2208

Gilmanton, NH

Town Administrator 2018
 Board of Selectmen
 PO Box 550
 Gilmanton, NH 03237
 (603) 267-6700 x 12

Gorham, NH

Fire Chief Recruitment 2016
 Police Lieutenant Recruitment 2018
 Robin Frost, Town Manager
 20 Park Street
 Gorham, NH 03581
 (603) 466-3322

Greenland, NH

Town Administrator Recruitment 2018
 Vaughan Morgan, Chairperson
 Town of Greenland
 100 Town Square, PO Box 100
 Greenland, NH 03840

Hollis, NH

Building Inspector/Code Officer 2017
 DPW Director 2018
 Town Administrator 2018
 Interim Town Administrator 2018
 Board of Selectmen
 7 Monument Square
 Hollis, NH 03049
 (603) 465-3701

Hooksett, NH

Town Administrator 2009, 2019
 Police Chief Recruitment 1999
 Hooksett Town Council
 35 Main Street
 Hooksett, NH 03106
 (603) 485-8472

Hudson, NH

Land Use Director 2017, 2018
 Stephen Malizia, Town Adm.
 12 School Street
 Hudson, NH 03051
 (603) 886-6024

Jaffrey, NH

Town Manager 2016
 Donald MacIsaac, Chairman
 Jaffrey Select Board
 10 Goodnow Street
 Jaffrey, NH 03452
 (603) 532-7880

Laconia, NH

City Manager 2011
 City Council
 45 Beacon Street East
 Laconia, NH 03246
 (603) 527-1270

Lakes Region Planning Commission

Meredith, NH
 Executive Director 2013
 Warren Hutchins
 103 Main Street, #3
 Meredith, NH 03253
 (603) 279-8171

Lebanon, NH

City Manager 2017
 DPW Director 2018
 Shaun Mulholland, City Manager
 City of Lebanon
 51 North Park Street
 Lebanon, NH 03766
 (603) 448-1071

McGregor Memorial EMS

Executive Director 2018
 Matthew Willett, Chair
 47 College Avenue
 Durham, NH 03824
 (603) 312-2052

Meredith, NH

Town Manager 2003
 Assessor 2005
 Frank Michel, Esquire
 66 NH Route 25
 Meredith, NH 03253
 (603) 279-6100

Moultonborough, NH

Town Administrator 2015
 Carol Granfield, Interim TA
 PO Box 139
 Moultonborough, NH 03254
 (603) 476-2347

**NH Community Development
Finance Authority**

Executive Director 2004
 Michael Long
 Former Chairman of the Board
 Community Guaranty Saving Bank
 Plymouth, NH
 (603) 536-0001

Northfield, NH

Town Administrator Recruitment 2019
 Board of Selectmen
 Town of Northfield
 21 Summer Street
 Northfield, NH 03276

Pittsfield, NH

Town Administrator 2007
 Board of Selectmen
 PO Box 98
 Pittsfield, NH 03263
 (603) 435-6291

Plaistow, NH

Town Manager 2006
 Board of Selectmen
 145 Main Street
 Plaistow, NH 03865
 (603) 382-8469

Raymond, NH

Town Manager 2007
 Board of Selectmen
 4 Epping Street
 Raymond, NH 03077
 (603) 895-4735

Richmond, NH

Police Chief Recruitment 2018
 Board of Selectmen
 105 Old Homestead Highway
 Richmond, NH 03470
 (603) 239-4232

Rochester, NH

Commission of Public Works 2015
 Daniel Fitzpatrick
 City Manager
 31 Wakefield Street
 Rochester, NH 03867
 (603) 332-1167



Salem, NH

Town Manager 2010
 Michael J. Lyons, Chairman
 Board of Selectmen
 33 Geremonty Drive
 Salem, NH 03079
 (603) 890-2128

Somersworth, NH

Police Chief Assessment Center 2016
 Director Dept. of Public Works 2013
 Economic Development Mgr. 2012
 Fire Chief 2011
 Robert M. Belmore, City Manager
 City of Somersworth
 One Government Way
 Somersworth, New Hampshire 03878
 (603) 692-9503

Stratham, NH

Town Administrator 2018
 Board of Selectmen
 10 Bunker Hill Avenue
 Stratham, NH 03885
 (603) 772-7391 x187

Thornton, NH

Town Administrator 2017
 John Paul Hilliard, Chairman
 Board of Selectmen
 16 Merrill Access Road
 Thornton, NH 03285
 (603) 726-8168

Wakefield School District, SAU 101

Superintendent Search 2016
 Norma Joy, Chairperson
 Wakefield School Board
 18 Commerce Way
 Milton, NH 03851
 (603) 534-1864

Warner, NH

Town Administrator 2013
 David Karrick, Chairman
 Board of Selectmen
 PO Box 265
 5 East Main St.
 Warner, NH 03278
 (603) 456-2298

Wilton, NH

Town Administrator 2018
 Board of Selectmen
 PO Box 83
 42 Main Street
 Wilton, NH 03086
 (603) 654-9451

Windham, NH

David Sullivan, Town Administrator
 3 North Lowell Road
 Windham, NH 03087
 (603) 432-7732

Wolfeboro, NH

Town Manager 2017
 Fire Chief 2016
 David Owen, Town Manager
 84 South Main Street
 Wolfeboro, NH 03894
 (603) 569-8161

MAINE**Berwick, ME**

Town Manager &
 Interim Town Manager 2015
 Bryan O'Connor, Chairman
 Berwick Selectmen
 11 Sullivan Street
 Berwick, ME 03901
 (207) 698-1101

Brunswick, ME

Town Manager 2009
 Fran Smith, Town Clerk
 28 Federal Street
 Brunswick, ME 04011
 (207) 725-6659

Kittery, ME

Town Manager Recruitment 2013
 George V. Dow, Chairperson
 Kittery Town Council
 200 Rogers Road Extension
 Kittery, ME 03904
 (207) 475-1329

Portland, ME

City Manager Recruitment 2015
 Gina Tapp, HR Director
 City of Portland
 389 Congress Street
 Portland, ME 04101
 (207) 874-8300

Sabattus, ME

Interim Town Manager &
 Community Development 2011
 Town Manager 2009
 Board of Selectmen
 Town of Sabattus
 190 Middle Road
 Sabattus, ME 04280
 (207) 375-4331

Somerset County, ME

County Administrator 2013
 Earla J. Haggerty
 Interim County Administrator
 Somerset County
 41 Court Street
 Skowhegan, ME 04976

RHODE ISLAND**East Greenwich, RI**

Fire Chief Recruitment 2018
 Ms Gayle Corrigan, Town Manager
 Town of East Greenwich
 125 Main Street
 East Greenwich, RI 02818

Portsmouth, RI

Town Administrator 2011 & 2015
 Police Chief 2013
 Fire Chief 2012
 Richard A. Rainer, Jr.
 Town Administrator
 2200 East Main Road
 Portsmouth, RI 02871
 (401) 683-3255

Westerly, RI

Town Manager 2018, 2015
 45 Broad Street
 Town Hall
 Westerly, RI 02891
 (401) 348-2500

VERMONT**Essex & Junction of Essex**

Municipal Manager 2017
 Town of Essex and Village of Essex Jct
 81 Main Street
 Essex Junction, VT 05452

Hartford, Vermont

Town Manager 2018
 171 Bridge Street
 White River Junction, VT 05001
 (802) 295-9353

Shelburne, VT

Town Manager 2018
 Jerry Storey, Chair of the Selectboard
 Town of Shelburne
 PO Box 88
 5420 Shelburne Road
 Shelburne, VT 05482
 (207) 474-9861, X-232



CONNECTICUT

Cromwell, CT

Town Manager 2013 & 2015
Public Works Director 2014
Enzo Faienza, Mayor
Town of Cromwell
41 West Street
Town Hall, 1st Floor
Cromwell, CT 06416
(860) 632-3410

Killingly, CT

Town Manager 2013
172 Main Street
PO Box 6000
Danielson, CT 06239
(860) 779-5334

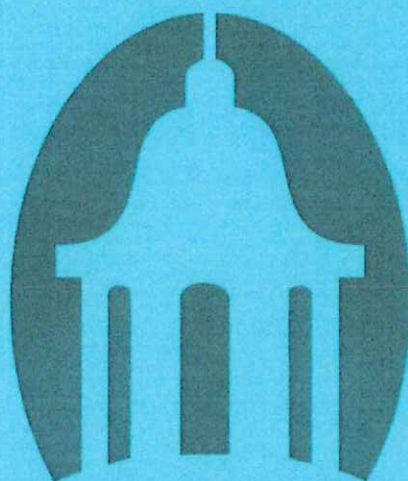
Simsbury, CT

Town Manager 2017
Lisa Heavner, First Selectwoman
933 Hopmeadow Street
Simsbury, CT 06070
(860) 658-3230

Windsor, CT

Public Works Ops Mgr 2016
Peter Souza, Town Manager
275 Broad Street
Windsor, CT 06095
(860) 285-1800

APPENDIX B



Municipal
Resources
Inc.

DANVERS, MA

TOWN MANAGER

IDEAL CANDIDATE PROFILE & CHALLENGE STATEMENT

The *Ideal* Candidate for the position of Danvers, MA Town Manager will have:

A graduate degree in public administration or related field (BA/BS required)

At least 10 years of senior management experience

The willingness and ability to establish residency in and make a long term commitment to the community

A proven record of thoughtful financial management and strategic capital planning

The ability to think "outside the box" and to provide innovative solutions

Strong public speaking and presentation skills

Extensive knowledge of, and experience with collective bargaining

The ability to "listen" and to provide the highest level of customer service

A proven record of nurturing a positive culture

A demonstrated ability to provide unbiased guidance

The ability to organize and manage people

Strong public ethic, integrity and accountability

Ability to manage large scale public projects

Demonstrated skills as a consensus builder

Among the toughest challenges facing the successful candidate, will be heading an organization that has been lead, for the past 35 years by the same manager. The retiring manager has an exceptional record of service to the Town and has built an excellent team which provides exemplary services to the community. During his tenure, Mr. Marquis was very highly regarded throughout the community and by his professional peers. The new manager will need to earn the respect of the community in his or her own style and have the confidence to not be beleaguered by the inevitable comparisons to his or her predecessor. He or she must have a proven record of establishing positive internal as well as external relationships while holding her/himself and others to the highest standards of integrity and accountability. The Town Manager must also be fully committed to the concept of transparency in government and ensure transparency throughout the organization.



With an AA+ bond rating, Danvers is proud of its history of strategic financial management. Great thought has been put into managing capital expenditures so as to minimize fiscal impact from year to year. In fact, Danvers has never needed a "Prop 2 ½" over-ride. The next Town Manager will be expected to demonstrate the same fiscal acumen.

A number of top and mid-management positions will likely need to be filled during the next few years. Currently in place is a well respected management team that provides a high level of quality services to the community. It will be crucial for the next manager to have a proven record of recruiting, selecting and grooming a high performance team. Given shifts in personnel and budgets over the years, many department managers are wearing several hats that may not necessarily be traditional. As these managers retire, the Town Manager will need to assess skills and "juggle" the duties of the management team in order to maintain the expected level of service while staying within budget limitations. It is also expected that a number of elected officials and members of appointed committees will begin to "retire" from community service. With them, will be a loss of institutional knowledge that will be hard to replace as a new generation of civic volunteers moves into many of these positions. The new manager will be called upon to make a number of key appointments and to educate and support these citizens in their desire to become involved with the community.

The Danvers Town Manager serves as the lead negotiator with the Town's many collective bargaining units. Currently the Manager is in negotiations with seven of those units. The Town Manager must be an experienced and effective negotiator with demonstrated skill and success in managing and administering collective bargaining agreements. An immediate challenge facing the successful candidate will be to understand the current agreements, develop appropriate relationships with the unions and be prepared to serve as the Town's chief negotiator.

In a unique partnership, the responsibility for the maintenance of the school properties and oversight of capital projects falls under the responsibility of the Town Manager. As a member of the School Committee, the Town Manager also participates in negotiations with the school collective bargaining units. To that end, maintaining the existing positive relationship with Danvers Public Schools must be a priority of the new Town Manager. In queue for the Manager will be to achieve funding for and managing the Smith School renovation which has been stalled by two previous unsuccessful attempts to attain State grants.

In addition to the technical and professional skills desired by the community, the new Town Manager must be an excellent written and verbal communicator that can portray calm in the midst of a storm. In recent years the Town has faced two crises that gained national attention; one, a massive gas line explosion, and the other, the murder of a teacher at Danvers High School. Throughout these crises the Manager became the face of the community and did so with calm and grace, exuding the professionalism the Town has come to expect.



HANOVER, MA
TOWN MANAGER

IDEAL CANDIDATE PROFILE & CHALLENGE STATEMENT

The *Ideal* Candidate for the position of Hanover, MA Town Manager will have:

<p>A graduate degree in public administration or related field</p> <p>Demonstrated experience in public management or relevant, transferable experience</p> <p>A proven record of thoughtful financial management and strategic capital planning</p> <p>The ability to be creative and identify innovative solutions</p> <p>Strong public speaking and presentation skills</p> <p>Extensive knowledge of, and experience with collective bargaining</p> <p>The ability to “listen” and to provide the highest level of customer service</p> <p>A proven record of nurturing a positive culture</p> <p>A demonstrated ability to provide unbiased guidance</p> <p>Willingness to manage Town affairs in an open and transparent manner</p> <p>The ability to lead, organize, inspire and manage people</p> <p>Demonstrated skills in working collaboratively and building consensus</p> <p>Strong public ethic, integrity and accountability</p>

The successful candidate for the Hanover Town Manager position must have a proven record of establishing positive internal, as well as external, relationships while holding her/himself and others to the highest standards of integrity and accountability. The Town Manager must also be fully committed to the concept of transparency and openness in government, ensuring those concepts are practiced throughout the organization. Nurturing positive relationships throughout the community, listening to the various constituencies, and working with the Town’s boards and committees will be a key to success. He or she must be unbiased, having the patience to seek and value input from all sides of an issue.

Given Hanover’s high expectation for quality and responsive services, the Town Manager is expected to lead, direct, mentor, and motivate a professional team that will consistently deliver these exemplary core community services. The Town Manager must seek to identify and



understand the vision of the community for its future and provide professional, technical, and management support to the elected officials in their effort to efficiently and effectively provide for the collective needs of those who live and work in the community. The ideal candidate must be able to anticipate and recognize potential problems, and then work with staff and other officials to develop solutions. The Select Board will depend on the Town Manager to present it with unbiased information on important matters in a relevant, meaningful way that provides the appropriate perspective.

Hanover is served by a number of well-respected, long tenured department heads. It is important for the new Manager to value these employees and maintain the positive working relationships that have already been established. Since a number of senior management positions may become vacant due to retirements over the next few years, it will be crucial for the next Manager to have a proven record of recruiting, selecting and grooming a high performance team.

Hanover is a very desirable community in which to live and a significant part of the challenge facing the new Town Manager will be to balance the costs of providing a high level of Town and education services at a sustainable tax rate. In order to achieve this the manager will need to help guide the Town in its desire to balance development, both commercial and residential, with the Town's desire to maintain its heritage and high quality of life. The Town will have a significant stake in the re-development of the Hanover Mall and the Manager must be a strong advocate for the Town. The Manager must also be willing to pursue innovative opportunities such as the current arrangement with the Hanover Public Schools for partnering in the facilities management and HR functions. To that end, maintaining the existing positive relationship with Hanover Public Schools must be a priority of the new Town Manager.

The Town Manager plays a significant role in negotiating and administering the Town's collective bargaining agreements. The Town Manager must be an experienced and effective negotiator with demonstrated skill and success in managing and administering collective bargaining agreements while balancing the needs of the employee with the ability of the residents to pay.

Finally, the ideal candidate must possess outstanding verbal and written communication skills. It is imperative that the Town Manager be able to communicate effectively with town leaders, staff, and the public. In order to do this, the Manager will need to have a high level of community engagement. It is the Town Manager's responsibility to keep the public informed, so he or she must be committed to operational transparency, and possess the ability to synthesize and communicate clear program/project level progress on cross-functional initiatives and activities inherent in a town Hanover's size. The Town Manager must leverage emerging technologies and other creative ways to promote community involvement. "Customer service" is a high priority for this community, which means the successful candidate must place great value on listening and providing accurate information to all members of the community.



Relevant Experience

Our experienced consultants have worked at all levels of municipal government in the Northeast. Many are recognized regionally or nationally for their expertise.

Effective Solutions

We've seen it all! Our collective experience will help identify practical solutions that are appropriate for your community and resources.

Valuable Results

Municipal Resources has a proven track record of helping municipalities provide efficient and effective services.



Serving the Northeast for
More than 25 years



Offices throughout New England

Corporate Office:

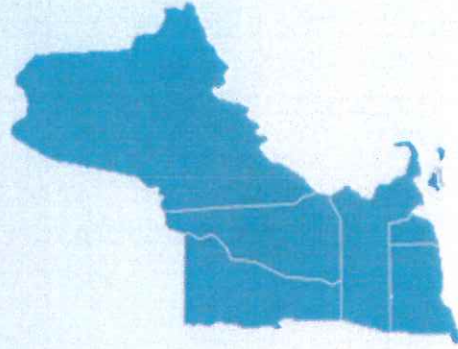
120 Daniel Webster Highway

Meredith, NH 03253

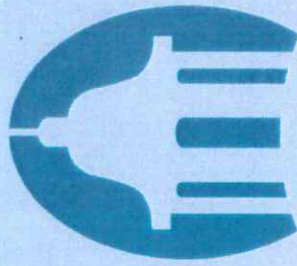
Ph: (603) 279-0352

Email: all@mrigov.com

Web: www.mrigov.com

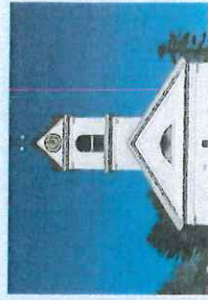


www.mrigov.com

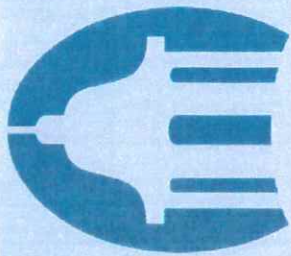


**Municipal
Resources, Inc.**

*Serving New England
Communities Since 1989*



Services for
Effective Government



Municipal Resources, Inc.

Serving municipalities in the Northeast for over 25 Years

Since 1989 MRI has had a proven track record of helping municipalities provide efficient and effective services because we understand the challenges facing local governments in New England.

Executive Recruitment

- Industry-leading programs to recruit and select key municipal positions
- Tenure guarantee
- Police and Fire Assessment Centers

Promotional Processes

- Professional Development Assessments
- Testing

Interim and Contracted Staffing

- Town Manager and Administrator
- Fire and Police Manager
- Finance, HR, Planning
- Code Enforcement
- Building Inspector

Management and Organizational Services

- Our team approach provides an objective view of municipal operations
- Operational and Efficiency Studies for Public Safety, DPW, Town Hall, Planning, IT
- Accreditation Assistance
- Regionalization and Shared Services
- Staffing Studies

Human Resources Service

- Internal Investigations
- HR Policy and Procedure Audits
- Wage and Classification Studies

Finance Services (Municipal & School)

- Interim and Long-Term Staffing
- Bookkeeping
- Budget Preparation
- Procedure Audit and Development
- Training and Support
- Capital Asset Program Development

Assessing Services

- Contracted Assessing
- Cyclical Fieldwork/Data Collection
- Revaluations



Relevant Experience | Effective Solutions | Valuable Results

APPENDIX C



Municipal
Resources
Inc.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
03/05/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER FIA/Cross Insurance 1100 Elm Street Manchester NH 03101		CONTACT NAME: Lynn Blanchard, CIC,CISR PHONE (A/C, No, Ext): (603) 669-3218 FAX (A/C, No): (603) 645-4331 E-MAIL ADDRESS: lblanchard@crossagency.com	
INSURED MUNICIPAL RESOURCES INC 120 DANIEL WEBSTER HIGHWAY MEREDITH NH 03253		INSURER(S) AFFORDING COVERAGE INSURER A: Massachusetts Bay Ins Co NAIC # 22306 INSURER B: Hanover Ins Co. 22292 INSURER C: Houston Casualty Co. 42374 INSURER D: INSURER E: INSURER F:	

COVERAGES

CERTIFICATE NUMBER: 19-20 All lines

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ODV8197631	01/26/2019	01/26/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000
	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY			AHV8041501	01/26/2019	01/26/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Medical payments \$ 5,000
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			ODV8197631	01/26/2019	01/26/2020	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N Y	N/A	WHV8198601 (3a.) MA ME NH	01/26/2019	01/26/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER D. Jutton excluded E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C	Professional Liability			H719112869	01/26/2019	01/26/2020	Each claim 2,000,000 Total- all claims 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

For Informational Purposes Only

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

© 1988-2015 ACORD CORPORATION. All rights reserved.

APPENDIX D



Municipal
Resources
Inc.

SIGNATURE PAGE

The applicant hereby certifies that:

1. The applicant has not given, offered, or agreed to give any gift, contribution, or offer of employment as an inducement for, or in connection with, the award of contract for these services.
2. No consultant to, or subcontractor for the applicant has given, offered, or agreed to give any gift, contribution or offer of employment to the applicant, or to any other person, corporation, or entity as an inducement for, or in connection with, the award to the consultant or subcontractor of a contract by the applicant.
3. That no person, corporation, or, other entity other than a bona fide full-time employee of the applicant has been retained or hired to solicit for, or in any way assist the applicant in obtaining the contract for services upon an agreement or understanding that such person, corporation, or entity be paid a fee or other compensation contingent upon the award of the contract to the applicant.

I hereby attest with full knowledge of the penalties for perjury, as in accordance with Massachusetts G.L. C.7, S.38E that all information provided in this application for services is correct.

Municipal Resources, INC.

Firm

Alan S. Gould

Signee (written)

Alan S. Gould

Signee (typed/printed)

President

Title

3/20/11

Date

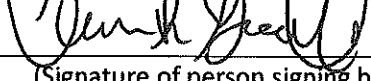
MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

NON-COLLUSION STATEMENT

CONTRACTOR'S CERTIFICATION IN BID/PROPOSAL TO BE ATTACHED TO CONTRACT

Any person submitting a Bid or Proposal for the procurement or disposal of supplies and services to any governmental body shall certify in writing, on the Bid or Proposal, as follows:

"The undersigned certifies under penalties of perjury that this Bid or Proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification, the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity or group of individuals."

3/29/14 
(Date) (Signature of person signing bid or proposal)

Alan S. Gould
(Printed name of person signing bid or proposal)

President
(Title)

Municipal Resources, Inc.
(Name of Business)

120 Daniel Webster Highway, Meredith, NH 03253
(Business address)

603-279-0352
(Business Phone Number)

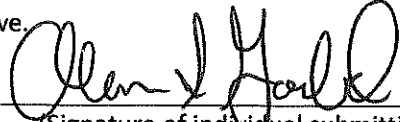
MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

CERTIFICATE OF CORPORATE AUTHORITY

The principal, officer or person to sign below pledges under penalties of perjury, that he or she has been designated by the owner(s) or the Board of Directors of the below named firm as an authorized representative.

3/19/19

(Date)



(Signature of individual submitting bid or proposal)

Alan S. Gould, President, Municipal Resources, Inc.

(Printed name and title of person signing bid or proposal)

Municipal Resources, Inc.

(Name of business)

120 Daniel Webster Highway, Meredith, NH 03253

(Business address)

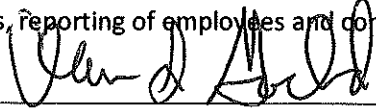
603-279-0352

(Business phone number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

TAX COMPLIANCE CERTIFICATION

Pursuant to M.G.L. c.62C, §49A, I certify under the penalties of perjury that, to the best of my knowledge and belief, the below named business is in compliance with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

3/26/11 
(Date) (Signature of individual submitting bid or proposal)

Alan S. Gould, President
(Printed name of person signing bid or proposal)

Municipal Resources, Inc.
(Name of business)

120 Daniel Webster Highway, Meredith, NH 03253
(Business address)

603-279-0352
(Business phone number)

MUST BE RETURNED SIGNED WITH THE SEALED PROPOSAL PACKET

BOARD OF SELECTMEN MEETING

March 28, 2019

NEW BUSINESS

B.

**Other matters, as may not have been reasonably
anticipated by the Chair
(Discussion Only)**

CH

BOARD OF SELECTMEN MEETING

March 28, 2019

OLD BUSINESS

C.

**Finalize Town Administrator Screening
Committee Composition and
Solicit Letters of Interest**

(15 Minutes)

JW