

MIDDLETON SELECT BOARD
MEETING AGENDA
FULLER MEADOW ELEMENTARY SCHOOL
NATHAN MEDIA CENTER
143 SOUTH MAIN STREET, MIDDLETON, MA 01949
TUESDAY, FEBRUARY 6, 2024
6:00 PM

This meeting is being recorded - Public Zoom Participation will not be available for this meeting

6:00 pm 1. Business

- a. Warrant: 2416 and FP33
- b. Minutes: January 9, 2024; January 23, 2024 OS; January 23, 2024 ES
- c. Acceptance of donations:
 - i. \$500 to the Middleton Food Pantry from Eagle Bank
- d. Town Administrator Updates and Reports

6:20 pm 2. Public Comment

6:30 pm 3. Department Head Update: Kristin Kent, Conservation Agent

6:45 pm 4. Vote on new common victualler license from Boba Tea & Snow Ice House, 248 S. Main Street, Manager Srey Pich Chat

6:50 pm 5. MSBA Vote to Authorize Superintendent of Schools Scott Morrison to submit a Statement of Interest for Fuller Meadow School roof repairs

7:00 pm 6. Follow up discussion on Operating Budget Saturday Meeting

7:20 pm 7. Declaration of Surplus: Council on Aging chairs (21 red without wheels, 9 blue without wheels, 13 burgandy with wheels and 8 blue with wheels)

7:25 pm 8. Board and Committee Appointments:

- a. COA Board (1): Margaret Alfonso; Joanne Plourde; Joseph Scott
- b. Cultural Council (2): Margaret Alfonso; Joanne Plourde
- c. ICDRC (1 member, 2 alt): Peter Graziani; Margaret Alfonso
- d. Recreation Commission (1): Laura Hillary
- e. Discuss scheduling a joint meeting for Planning Board alternate candidates

7:35 pm 9. Updates & Announcements

7:40 pm 10. Executive Session pursuant to G.L. c. 30A, s. 21(a)(2) to discuss strategy with respect to non-union personnel: Contract extension discusison for Police Chief

Upcoming Meetings:

February 20
March 3
March 5 and 19
March 28

Regular Select Board Meeting
Capital Budget Saturday Meeting at 8:30 am
Regular Select Board Meetings
Budget Hearing and Warrant Reading

The Board reserves the right to consider items on the agenda out of order. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.

MEETING MINUTES
MIDDLETON SELECT BOARD MEETING
FULLER MEADOW SCHOOL, NATHAN MEDIA CENTER
143 SOUTH MAIN STREET, MIDDLETON, MA 01949
TUESDAY JANUARY 9, 2024 at 6:00 PM

This meeting was in person, broadcast live and recorded by Civic Media.

Select Board Present: Acting Chair Rick Kassiotis, Clerk; Kosta Prentakis; Debbie Carbone
Not present: Chair Jeff Garber; Brian Cresta

Others Attending: Justin Sultzbach, Town Administrator (TA); Jackie Bresnahan, Assistant Town Administrator (ATA) /Human Resource Director; and others as noted.

The Board reserves the right to consider items on the agenda out of order. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.

With a quorum present, Acting Chair Kassiotis called the meeting to order at 6 pm.

1. Business

- a. **Warrant 2413 (12.28.23):** Payroll \$ 819,394; Bills payable \$ 1.6 M
- b. **Warrant 2414 (1.11.24):** Payroll \$ 842,127; Bills payable \$ 506,000 FP: 31: \$ 5,647

The Town Accountant/Finance Director Sarah Wood has reviewed the warrants and requested the Board's approval. Town Administrator Sultzbach provided a brief overview of the warrants presented for approval.

On a motion by Prentakis second by Carbone, the Select Board **voted unanimously to approve Warrant # 2413 & 2414 and FP: 31** as presented.

c. **Minutes**

On a motion by Prentakis second by Carbone, the Select Board voted unanimously to approve the meeting minutes of November 14, 2023; November 28, 2023; December 5, 2023; December 19, 2023; ES December 19, 2023.

d. **Acceptance of Donations - Middleton Food Pantry**

\$500 from George Dow; \$1000 from Torrice Family Charitable Trust; \$500 Gary Silacci Jr

On a motion by Prentakis, seconded by Kassiotis, the Board voted unanimously to accept the donations for the Middleton Food Pantry, with thanks.

e. **Town Administrator updates & Reports – J. Sultzbach**

- Thank you to our Public Works team for their hard work in response to Sunday's storm. We have a lot of new members and we appreciate the leadership of Superintendent Goodwin.
- As a reminder to Middleton residents, the winter on-street parking ban will be in effect December 1, 2023 through April 1, 2024. No person shall park a vehicle on any public street from midnight until 6:00 am from December 1st through April 1st. Any vehicle found parked in violation of the provisions of this

section may be fined and/or moved under the direction of an officer and at the expense of the owner to a place where parking is permitted.

- Last week we met with the contractor for the Municipal Complex project on site with members of the school department to walk through parking procedures for the spring semester.
- Our team has been meeting with departments over the past two weeks to review departmental needs. This includes a line by line review of every departmental budget.
- The Building Committee met last night to finalize some of the last aspects of the project prior to going out to bid. We have reviewed every inch of the design and made minor value-driven adjustments to assure we stay on budget.
- The Town Administrator met with the Library Board of Trustees last night, a huge thank you for their hospitality. He looks forward to working with them closely over the coming weeks.
- Early voting is set to take place again this year and will run from February 24th through March 1st, and will take place at Memorial Hall.
- The Town Administrator met with legal counsel today to continue conversations regarding the 40b Development Agreement. We anticipate to have a draft available some time in February.
- The Town Administrator met with our team in Planning, DPW, Zoning and Conservation today to discuss ongoing stormwater issues throughout town. We have reached out to contractor where applicable to ask they double check site conditions in advance of the upcoming storm.

K. Prentakis stated the Masconomet School Superintendent should be presenting his budget to School Committee next Wednesday, January 17.

2. Public Comment - There was none.

3. Department Head Updates: Human Resources - Jackie Bresnahan

J. Bresnahan provided the Board with an update on the Human Resource Department. In 2023, the Wellness Committee was reconstituted, and a wide variety of staff training was offered and will continue to be available in 2024.

Three of the collective bargaining units were settled; the Police Union, and call fire department negotiations continue. The merit pay program was instituted in 2023 and went well; a supplemental request will be submitted for this program to continue in 2024. The Collins Center was engaged to refresh the town's Comparison & Classification study; a classification of positions will continue for those positions not previously included. The Employee Handbook will be updated in 2024. A Benefits Fair will be held in April during open enrollment.

4. Locust Street Appraisal – Approve Funding from Annual Town Meeting (ATM) 2023

J. Sultzbach spoke on the Locust Street property, a large 40 acre piece of land owned by the Town, being considered for disposal and revenue. This is a complex including wetlands and 27 acres of upland.

The MINCO Corp will provide appraisal services to the town for the highest and best use of the property. The cost in the amount of \$4,000 was within the budget as approved at the 2023 ATM.

The release of these funds requires the vote of the Select Board.

On a motion by Prentakis, seconded by Carbone, the Board voted unanimously to approve \$4,000 in funding for the Locust Street town owned land appraisal agreement with MINCO Corporation .

5. Vote to update all Select Board rules, regulations & policies to gender neutral language within the Town Code – The previous vote in 2021 by the town did not include updating the zoning bylaws or codes.

On a motion by Prentakis, seconded, by Carbone, the Board voted unanimously to amend all rules regulations and policies to change all gender specific pronouns to gender neutral pronouns in a manner consistent with the example provided in the warrant for the annual town meeting in 2021.

6. Review Inter-Municipal Agreement between the Towns of Boxford, Topsfield, and Middleton for the Public Health Excellence grant – J. Bresnahan gave an overview of the Inter-Municipal Agreement to share staffing to improve health services i.e. oversite, programming, emergency preparedness etc. with Boxford and Topsfield to be funded via the Public Health Excellence grant. It has been agreed the Town of Middleton be the lead community this year. The grant is on a calendar cycle as opposed to the fiscal year and expires in 7-10 years, at which time the employee becomes a permanent employee of the Town of Middleton. Meetings between the towns are scheduled to work out the details. The Board supported the shared services as outlined in the agreement.

7. Declaration of surplus items from the Department of Public Works – A list of items to be auctioned was provided to the Board for review. The Board must vote these items surplus.

On a motion by Prentakis, seconded, by Carbone, the Board voted unanimously to declare the DPW items surplus as listed on the schedule as part of the packet.

8. Open Warrant for the Annual Town Meeting on May 14, 2024

On a motion by Prentakis, seconded by Carbone, the Board voted unanimously to open the Warrant for the Annual Town Meeting on May 14, 2024.

9. Update- on Scout Barn/Cabin – At the request of Tim Hooton, this update was deferred to the next meeting.

10. Updates & Announcements

Upcoming Meetings:

January 23 Regular Select Board Meeting

February 2- Saturday Joint Budget Meeting 8:30AM

Adjournment: *The board unanimously adjourned at 7:41 pm.*

Respectfully submitted by,

Catherine E. Tinsley

Catherine Tinsley, Recording Secretary

Rick Kassiotis, Select Board Clerk

Documents either distributed to the Select Board before the meeting in a packet or at the meeting:

- Agenda: January 9, 2024
- Warrants 2413 & 2414; FP 31
- Minutes- *November 14, 2023; November 28, 2023; December 5, 2023; December 19, 2023; ES December 19, 2023*
- Town Administrator Updates
- Middleton Food Pantry Donations – J. Smith to Select Board - 12.19.23; 1.2.24
- Letter J. Sultzbach to Select Board re Locust St. Appraisal dated 1.9.24
- MINCO Corporation Appraisal Agreement for Locust St. 12.15.23
- Locust St. Parcels Property Cards
- Memo J. Bresnahan to Select Board re Update to polices 1.5.24
- Name of Collaborative IMA for Public Health Excellence Shared Services Grant
- DPW Items to be Auctioned
- Budget / Town Meeting & Elections Calendar
- Troop 19 Scout Cabin renovations

MEETING MINUTES
MIDDLETON SELECT BOARD MEETING
FULLER MEADOW SCHOOL, NATHAN MEDIA CENTER
143 SOUTH MAIN STREET, MIDDLETON, MA 01949
TUESDAY JANUARY 23, 2024 at 6:00 PM

This meeting was in person, broadcast live and recorded by Civic Media.

Select Board Present: Chair Jeff Garber; Rick Kassiotis, Clerk; Brian Cresta; Kosta Prentakis; Debbie Carbone
Others Attending: Justin Sultzbach, Town Administrator (TA); Jackie Bresnahan, Assistant Town Administrator (ATA) /Human Resource Director; Catherine Tinsley, Recording Secretary and others as noted.

The Board reserves the right to consider items on the agenda out of order. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.

With a quorum present Chair Garber called the meeting to order at 6 pm.

1. Business

a. Warrant 2415 : Payroll \$ 85,391; Bills payable \$ 1, 045,582; FP: 32 \$ 140,954

The Town Accountant/Finance Director Sarah Wood has reviewed the warrant and requested the Board's approval. Town Administrator Sultzbach provided a brief overview of the warrant presented for approval.

On a motion by Prentakis second by Cresta, the Select Board voted unanimously to approve Warrant # 2415 & FP: 32 as presented.

b. Minutes – None Available

c. Acceptance of Donations – Veteran's Memorial Spruce Tree

Coral Steiger spoke on the donation of a Balsam Fir to be planted to the left of the Veteran's Memorial at the cemetery. The intention is to use the tree as a memorial to veterans by having families fill out printed dog tags and hang them from the tree for i.e. Wreaths Across America ceremony.

On a motion by Prentakis, seconded by Cresta, the Board voted unanimously to accept the donation of the tree with thanks.

d. Town Administrator updates & Reports – J. Sultzbach

- Kenny Gibbons was recognized and thanked for his 36 years of service to the Town of Middleton. There will be a gathering to celebrate at the DPW this Friday at noon.
- The Planning Board has been exploring several zoning amendment proposals over the past year including MBTA Zoning, 2 Family by right, and Accessory Dwelling Units for single family dwellings by special permit. Input from the community is a crucial part of this. As such, a survey is available on the town website and we encourage feedback from the people of Middleton.
- The Locust Street appraisal is on its way, with consultants in town last week to view the properties in person; results are expected sometime in March.

- ATA Bresnahan and TA Sultzbach attended the annual MMA Conference in Boston late last week into the weekend. Thank you to this Board and the people of Middleton for their continued support of our teams professional development.
- Town Administrator met with Legal Counsel and representatives of Villebridge Middleton to discuss a rough draft of the development agreement for the proposed 40b project at the Angelica's site. We're hoping to have an early draft for distribution in the coming month.
- The "Stormwater Group" met again today to discuss ongoing flooding issues. We have solicited quotes from multiple engineers for a review of the site plans in question, but have only received one quote to date. We are striving to have that review underway by the end of January.
- We had a meeting with MassDOT and members of our State House delegation last week to provide updates on the Peabody Street Bridge. The contractor has signed on to our contract and is eager to begin work.
- We had a meeting with US Fish and Wildlife to finalize the particulars of site restrictions for the Municipal Building project. We are on track to go out to bid, with an early spring start date.
- Our team has been working to finalize the budget proposal for review by the Select Board and Finance Committee on Saturday, February 3rd. A huge thanks to Sarah Wood for all of her coordination and attention to detail as our team assembles these figures.

2. Public Comment - There was none.

3. Department Head Updates: Scott Fitzpatrick – Building Commissioner

S. Fitzpatrick was present and gave the board an update on the building department. He noted an increase in permitting in 2023, but at the FY halfway point there is a downward trend in permitting fees.

S. Fitzpatrick opined Middleton permitting fees (Residential fees: \$11 per \$1000/Commercial fees: \$13 per \$1000) were in line with other similar communities; a new comparison will be done.

The agenda was taken out of order with permission- 9. Review Preliminary List of Article for the Warrant for the annual Town Meeting on May 14, 2024

4. Vote on transfer of licenses (all alcohol, common victualler, and entertainment) from MMS Hospitality DBA Stefanelli's, 119 South Main Street to NG Group, Inc. DBA Crossroads Kitchen & Bar Manager Ganesh Bahadur Thapa.

On a motion by Cresta, seconded by Kassiotis, the Board voted unanimously to open hearing at 6:47pm.

Attorney Johnathan Rossi, Morris, Rossi & Hayes was present and represented the applicants, also present. Bar Manager Ganesh Bahadur Thapa spoke on the plans for this establishment as a contemporary American menu for the bar and restaurant with the expansion of brunch on the weekends.

The Board was concerned this establishment is in a residential neighborhood and reminded the applicant to be good neighbors and be mindful of noise and trash.

One a motion by Cresta, seconded by Carbone, the Board voted unanimously to transfer all alcohol, common victualler, and entertainment licenses from MMS Hospitality DBA Stefanelli's, 119 South Main Street to NG Group, Inc. DBA Crossroads Kitchen & Bar Manager Ganesh Bahadur Thapa.

5. Vote on transfer of common victualler license from Steffanelli Enterprises DBA Marco's Pizzeria, 119 South Main Street to GE Group, Inc. DBA LeMain Pizzeria, Manager Alma Vidal Garcia.

Alma Vidal Garcia was present represented by Attorney Rossi who corrected the spelling of the applicants name as LaMain; the paper work will be filed to correct the spelling.

On a motion by Cresta seconded by Prentakis the Board voted unanimously to approve the transfer of the common victualler license from Steffanelli's Enterprises DBA Marco's Pizzeria, 119 South Main Street to GE Group, Inc. DBA LaMain Pizzeria, Manager Alma Vidal Garcia.

6. Vote on change of Manager for RMS Group, Inc DBA Blue Fin Restaurant, 260 South Main Street from Ganesh Bahadur Thapa to Sandra Thapa.

On a motion by Cresta seconded by Prentakis the Board voted unanimously to approve the change of Manager for RMS Group, Inc DBA Blue Fin Restaurant, 260 South Main Street from Ganesh Bahadur Thapa to Sandra Thapa.

7. Vote on New Livery for Denis Rado LLC, 9 Pollock Drive

It was confirmed the livery vehicle will be registered at 9 Pollock Drive, Middleton.

On a motion by Prentakis, seconded by Carbone the Board voted unanimously to approve a new Livery for Denis Rado LLC, 9 Pollock Drive, Middleton.

8. Review & vote on contract for preconstruction survey vendor Hartford Structural Inspections (HSI for municipal complex project - Town Administrator Sultzbach

J. Sultzbach referenced the contract and asked for approval of the project in the amount of \$4600

On a motion by Cresta, seconded by Carbone, the Board voted unanimously to approve preconstruction survey in the amount of \$4,600 for a traffic engineering study .

9. Review Preliminary List of Articles for the Warrant for the Annual Town Meeting on May 14, 2024

J. Sultzbach gave an overview of the preliminary warrant articles for town meeting. Currently there are 25 articles. It was noted there may not be enough time to get zoning articles 22, 23, 24 on the warrant.

10. Memorial Hall feasibility study grant- Review & Approve scope of work for site study

J. Bresnahan gave an overview of the feasibility study for Memorial Hall, 48 & 48R South Main Street to provide three options for a new vision for reprogramming for potential use as assets for community activity, recreation and or affordable housing to be funded by a \$25,000 grant from One Stop for Growth Mass Development. The request was to authorize the Town Administrator to sign the agreement with Studio Luz Architect. The Board discussed including possible traffic mediation in the scope of work.

On a motion by Cresta, seconded by Kassiotis, the Board voted unanimously to authorize the Town Administrator to execute the Memorial Hall program contract with Studio Luz Architect.

11. Updates & Announcements

On behalf of the town, R. Kassiotis thanked officer Wade Marabito for his 20 years of service from 2003-2023 as a reserve officer for the town of Middleton.

12. Executive Sessions 7:16 pm

On a motion by Cresta, seconded by Kassiotis, the Board voted unanimously by roll call to enter into

Executive Session pursuant to **GLC 30A s. 21 (a) (2)** to discuss strategy with respect to non-union personnel: contract extension discussion for **Police Chief and Fire Chief** and pursuant to **GLC 30A s. 21 (a) (3)** to discuss strategy with respect to collective bargaining negotiations: **Police Union** and to return to open session.

The Board returned to open session at 8 pm.

Update on Scout Barn/Cabin - Tim Hooton, Liberty Street, was present and spoke on the expansion at the scout cabin. The existing septic was not able to be used and a full upgraded pump up system. Upon completion of the renovations, over \$250,000 will have been invested in the property; this is town owned land. Currently the Scouts are 11 years into a 25 year lease on the land.

Adjournment: *The Board unanimously adjourned at 8:15 pm.*

Upcoming Meetings:

February 3 - Budget Meeting

February 6 & 20 - Select Board Meeting:

Respectfully submitted by,

Catherine E. Tinsley

Catherine Tinsley, Recording Secretary

Rick Kassiotis, Select Board Clerk

Documents either distributed to the Select Board before the meeting in a packet or at the meeting:

- Agenda: January 23, 2024
- Warrant # 2415: FP31
- Email – B. LaRoche to J. Sultzbach re Warrant 32 Narrative 1.17.24
- Email – C. Steiger to J. Sultzbach re tree planting 1.10.2024
- Transfer of License application - NG Group, DBA Crossroads (Former Stefanellis) 1.11.24
- Common Victualler License Application– NG Group DBA Crossroads
- Application: Change of Manager Blue Fin Restaurant 1.10.24
- Legal Notice – Public Hearing NG application as published in the Salem News January 12, 2024
- Contract between the Town of Middleton & Hartford Structural Inspections, LLC
- May 14, 2024 Annual Town Meeting Articles -Preliminary List
- Studio Luz Limited Design Service Contract 12.12.23
- Memorandum of Agreement Mass Development Finance Agency and The Town of Middleton



Council on Aging
Old Town Hall
38 Maple Street
Middleton, MA. 01949
978-777-4067
www.townofmiddleton.org

1c

January 30, 2024

Board of Selectmen
48 South Main Street
Middleton, MA. 01949

Re: Middleton Food Bank Donation

Please add the following donation to your agenda for acceptance by the Board of Selectmen for the Middleton Food Pantry, and notify me when the check has been accepted so that it can then be deposited.

Thank you,

Jillian Smith

Jillian Smith
COA Director

A donation has been made payable to the Middleton Food Pantry:

Date: 1/10/24

Name: Eagle Bank

Donation: \$500.00

Check Number 46538

This donor would like to remain anonymous

Yes

xx No

Boba Tea & Snow Ice
House 4

Town of Middleton

- REDACTED -

Check list of items to return for Common Victualler License

Common Victualler Application signed and completed

Copy of required liability insurance certificate

Revenue Enforcement and Protection Certification (REAP) – signed and completed

Copy of Lease or Proof of Ownership of Building

Business Certificate

Proof of Citizenship (if necessary)

MA Drivers License on file *dm*

Building and Fire Inspection Certificate

2/1/24 - PENDING

Health Inspection Certificate

Check made payable to Town of Middleton for all applicable fees - \$100

UniPay 1/31/24
\$100⁰⁰ *dm*





Town of Middleton
Memorial Hall
48 South Main Street
Middleton, Massachusetts
01949-2253
978-777-3617
www.middletonma.gov

Common Victualler/General License Application

ALL QUESTIONS MUST BE ANSWERED AND A TELEPHONE NUMBER PROVIDED

1. Licensee Name: Srey Pich Chat
2. Name of Manager: Srey Pich Chat
3. Social Security Number/FID Number:
4. Business Address: 248 South Main St, Middleton, MA 01949
5. Home Address:
6. Telephone Numbers (Please provide all numbers by which you can be reached):
Business Phone:
Cell Phone: 781-299-5793
Home Phone:
7. Email Address: chatsreypich100@gmail.com
8. Registered Voter? Yes No
9. Are you a U.S. Citizen? Yes No
10. Court and Date of Naturalization (if applicable) N/A
(Submit proof of citizenship and/or naturalization such as Voter's Certificate, Birth Certificate or Naturalization Papers)
- 10a. Where? N/A
11. Identify your criminal record: (Massachusetts/Any other state/Federal): Have you had any arrests or appearance in a criminal court or have you been charged with a criminal offense regardless of final disposition; (Must check either Yes or No)
 Yes No

If yes, please describe offense(s) specific charge and disposition (fine, penalty, etc.)

N/A

12. Prior experience in the restaurant/food establishment industry: Yes _____ No
If yes, please describe:

Multiple years of experience is Boba Tea establishments in Lynn, MA and in Cambodia.

13. List all employment for the last five years:

Two years of experience in Boba Tea shop in Lynn, MA.

3 years of experience in Boba Tea shop in Cambodia.

14. Hours per week to be spent on the licensed premises: _____ 40

15. Days and Hours of Operation: _____ Monday - Sunday - 11am - 9pm

16. Seating Capacity: _____ 0

17. Do you own or lease premises? _____ Own _____ X _____ Lease

17a. If Leased, From Whom? McHoll Realty Trust

17b. Terms of Lease? Term 5 years and 5 year option

(Please provide a copy of lease agreement)

Licenses Fees: Common Victualler licensing fees are \$100 and then \$100 for annual renewal every November.

I hereby swear under the pains and penalties of perjury that the information I have given in this application is true to the best of my knowledge and belief.

SreyPich chat

Printed Name of Owner

By: SreyPich chat (Jan 30, 2024 16:23 EST)
(Signature)

Date: 01/30/2024

Town of Middleton, Massachusetts
Revenue Enforcement and Protection Certification (REAP)

Pursuant to Massachusetts General Laws, Chapter 62C, Section 49A, I hereby certify under the penalties of perjury that I to my best knowledge and belief, have filed all State tax returns and paid all state taxes required by law.

Name of Company: Boba Tea & Snow Ice House

Address: 248 South Main St, Middleton, MA 01949

Title of Person Signing: Srey Pich Chat

Signature of Individual or Corporate Name: Srey Pich Chat (Jan 30, 2024 16:23 EST)

Printed Name of Above: Srey Pich Chat

Contact Telephone Number: 781-299-5793

Date: 01/30/2024

Social Security Number or Federal Identification Number: _____

Email Address: chatsreypich100@gmail.com



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/31/2024

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		CONTACT NAME: Peter Lim
Friendly Insurance Agency 471 WESTERN AVE		PHONE (A/C. No. Ext.): (781) 593-4344
		E-MAIL (A/C. No.): Peter@friendlyins.com
LYNN		INSURER(S) AFFORDING COVERAGE
MA 01904-3317		INSURER A: MARKEL INSURANCE
INSURED		INSURER B: MARKEL INSURANCE
SREY PICH CHAT DBA BOBA TEA & SNOW ICE HOUSE 248 S Main St Middleton MA 01949		INSURER C: INSURER D: INSURER E: INSURER F:
		NAIC # 22616

COVERAGES CERTIFICATE NUMBER: 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 SUBR INSD WWD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	COMMERCIAL GENERAL LIABILITY					EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 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 \$	
	CLAIMS-MADE <input type="checkbox"/> OCCUR		BOM0034197-01	01/31/2024	01/31/2025		
	GEN'L AGGREGATE LIMIT APPLIES PER:						
	POLICY <input type="checkbox"/> PRO- JECT <input type="checkbox"/> LOC						
	OTHER:						
	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$	
ANY AUTO							
OWNED AUTOS ONLY	<input type="checkbox"/> SCHEDULED AUTOS						
Hired AUTOS ONLY	<input type="checkbox"/> NON-OWNED AUTOS ONLY						
UMBRELLA LIAB	OCCUR				EACH OCCURRENCE \$ AGGREGATE \$		
EXCESS LIAB	CLAIMS-MADE						
DED	RETENTION \$						
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	<input type="checkbox"/> Y/N				X PER STATUTE OTHER	
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	<input type="checkbox"/>	N/A	MWC0222139-01	01/30/2024	01/30/2025	E.L. EACH ACCIDENT \$ 100,000 E.L. DISEASE - EA EMPLOYEE \$ 100,000 E.L. DISEASE - POLICY LIMIT \$ 500,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						

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

CERTIFICATE HOLDER	CANCELLATION
MIDDLETON TOWN HALL 48 S MAIN ST	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
MIDDLETON MA 01949	AUTHORIZED REPRESENTATIVE PETER LIM

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THIS INDENTURE

Made the 1st day of June in the year two thousand and three between

McHoll Realty Trust
41 Woodland South
Lynn, MA 01904
Phone: (781) 593-6076

(hereinafter called the Lessor which expression shall include heirs and assigns where the context so admits) of the one part, and

Boba Tea and Snow House
248 South Main Street
Middleton Ma. 01949

Store:
Phone:(cell)

Chat Srey Pich

(hereinafter called the Lessee which expression shall include executors, administrators and assigns where the context so admits) of the other part, WITNESSETH, That in consideration of the rent and covenants herein reserved and contained on the part of the Lessee to be paid, performed and observed, the Lessor do hereby demise and lease unto the Lessee:

June 1, 2023 May, 31, 2024 - \$2550 per month
Increase \$60 per year for four years after 1st year
Free 2 Months Rent. Term 5 Years & 5 Years Option
Security deposit \$2550 at signing

TO HAVE AND TO HOLD the premises hereby demised unto the Lessee, the term of (see above schedule) beginning with the First day of

in the year two thousand and three

YIELDING AND PAYING therefor the rent of \$2550 dollars per month for the first term due on the first day of each month for the first term ending May 31 2024,

The first monthly payment to be made on the First day of August next, and also at the legal determination of this lease a proportionate part of the said rent for any part of an agreement then unexpired. And the lessee do hereby, both individually and as a firm, covenant with the Lessor that the Lessee during the said term and for such further time as or any other person or persons claiming under this agreement shall hold the said premises or any part thereof, will pay unto the Lessor the said rent at the times, and in the manner aforesaid (except as hereinafter provided), and will keep all the singular the said premises in such repair, order and condition as the same are in at the commencement of said term, or may be put in during the continuance thereof, damage by fire or other unavoidable casualty only excepted. (see Appendix "A")

and will pay all charges for water; and will not assign this Lease nor underlet the whole or any part of the said premises without first obtaining on each occasion the consent in writing of the Lessor and will not permit any hole to be drilled or made in the stone or brickwork of the said building or any placard or sign to be placed upon the building, except such and in such place and manner as shall have first been approved in writing by the Lessor; and will keep good, with glass of the same kind and quality as that which may be injured or broken, all the glass now or hereafter in the premises, unless the same shall be broken by fire, acknowledging that the premises are now in good order and the glass whole; and will defray all the expenses of emptying and cleaning the drains and cesspools, and will have the same empty; (SEE APPENDIX "A") and at the expiration of the said term will remove all goods and effects and those of all persons claiming under, and will peaceably yield up to the Lessor the said premises, and all erections and additions made to or upon the same, in good repair, order and condition in all respects, damage by fire or other unavoidable casualty excepted; and during the said term, and such further time as aforesaid, and said premises shall not be overloaded, damaged or defaced; and no trade or occupation shall be carried on upon the said premises or use made thereof which shall be unlawful, improper, noisy or offensive, or contrary to any law of the Commonwealth or ordinance or by-law for the time being in force, of the city or town in which the premises are situated, or injurious to any person or property; and no act or thing shall be done upon the said premises which may make void or avoidable any insurance of the said premises or

CA

SP

building against fire, or may render any increased or extra premium payable for any such insurance; and no addition or alteration to or upon the said premises shall be made without the consent in writing of the Lessor; and the Lessor or agents may during the said term, at reasonable times, enter to view the said premises, and may remove placards and signs not approved and affixed as herein provided, and may make repairs and alterations to LESSOR shall elect so to do, and may show the said premises and building to others, and at any time within three months next before the expiration of the said term may affix to any suitable part of the said premises a notice for letting or selling the said premises or building, and keep the same so affixed without hindrance or molestation; and any notice from the Lessor to the Lessee relating to the demised premises, or the occupancy thereof, shall be deemed duly served if left at the demised premises addressed to the Lessee.

PROVIDED ALWAYS, that in case the said premises, or any part thereof, or the whole or any part of the building of which they are a part, shall be taken for any street or other public use, or shall be destroyed or damaged by fire or other unavoidable casualty, or by the action of the city or other authorities, or shall receive any direct or consequential damage for which the Lessor or the Lessee shall be entitled to compensation by reason of anything lawfully done in pursuance of any public authority, after the execution hereof and before the expiration of the said term, then this Lease and the said term shall terminate at the election of the Lessor, and such election may be made in case of any such taking, notwithstanding the entire interest of the Lessor may have been divested by such taking, and if LESSOR shall not so elect, then in case of any such taking or destruction of, or damage to, the demised premises, rendering the same or any part thereof unfit for use and occupation, a just proportion of the rent herein before reserved, according to the nature and extent of the injury sustained by the demised premises, shall be suspended or abated until the demised premises, or in case of such taking, what may remain thereof, shall have been put in proper condition for use and occupation.

PROVIDED ALSO, and these presents are upon this condition, that if the Lessee shall neglect or fail to perform or observe any of the covenants contained in these presents, and on part to be performed or observed

or if the estate hereby created shall be taken on execution, or by other process of law, or if the Lessee shall be declared bankrupt or insolvent according to law, or if any assignment shall be made of real property for the benefit of creditors, then, and in any of the said cases (notwithstanding any license of any former breach of covenant or waiver of the benefit hereof or consent in a former instance), the Lessor lawfully may, immediately, or at any time thereafter, and without demand or notice, enter into and upon the said premises or any part thereof in the name of the whole, and repossess the same as of former estate, and expel the Lessee and those claiming through or under AGREEMENT and remove ALL effects (forcibly, if necessary) without being deemed guilty of any manner of trespass, and without prejudice to any remedies which might otherwise be used for arrears of rent or preceding breach of covenant, and upon entry as aforesaid this Lease shall determine; and the Lessee covenant that in case of such termination will indemnify the Lessor against all loss of rent and other payment which may incur by reason of such termination during the residue of the time first above specified for the duration of the said term.

Edward F. Halland

McHoll Realty Trust

Pich

Chat Srey Pich

ELX

SP

APPENDIX "A"

Additional conditions of Lease between McHoll Realty Trust dated June 1, 2023 and Chat Srey Pichs, Boba Tea and Snow House

1. The premise is to be delivered in a condition of "As Is" with unfinished walls, bathroom in working condition but unpainted. The gas-heating unit has been serviced by landlord and the electric service present and working. Tenant to put all utilities in their name upon acceptance of keys.
2. Any subdivision of the premises, or additions or improvements, or the adding of divider walls shall be only with the written permission of the landlord.
3. The landlord is providing water for personal and usual uses, exclusive of any use relating to the operation of equipment, for processing of food, or providing service or product to the general public. Any such additional uses may be charged back to the tenant, and upon receipt of such back charge, tenant shall pay said amount for non-personal uses of water to landlord, provided such allocation is reasonable.
4. The parking lot shall be maintained with reasonable care by landlord; however, landlord shall not be responsible for any loss due to inaccessibility of the parking area for causes beyond his control, such as blocked drains, or extraordinary snow and ice conditions.
5. The tenant shall not be prohibited from selling, assigning or subletting the leased premise to a franchisee, subsidiary or business. Landlord must approve any sale. No assignment or subletting of the leased premises shall limit the obligations herein contained to the landlord by the tenant.
6. Tenant shall, each year during the term of this lease or extension hereof pay an amount equal (12 1/2 percent of the real estate tax to the Town of Middleton, or to be paid, during the fiscal year on the total future and present buildings on South Main Street, Middleton, Massachusetts. The tax apportionment shall be based on the square footage proration in relation to the whole building. Taxes will be sent to McHoll Realty Trust at 41 Woodland South Lynn Ma. 01904
7. The tenant shall carry comprehensive coverage public liability insurance in minimum limits of \$100,000 to \$300,000 on personal injury and \$10,000 for property damage, with the landlord named as one of the insured, and landlord shall be provided with a certificate of insurance, and carry contents and glass breakage coverage.
8. Up to sixty (60) days prior to the termination of this Lease, tenant shall have the first refusal to extend this Lease for an additional five (5)-year period. Such notice of exercise of such option shall be in writing and delivered to the landlord at lease sixty (60) days prior to the termination of this Lease. If exercised, the terms during the extension period shall be upon the same terms and conditions as contained during the original Lease period, except as to the rent. The rent during each year of the five (5) year extension period shall be determined annually as follows: Rent determined by landlord based on current rates on similar businesses at time of original five (5) year Lease termination, or as approved by landlord.
9. Tenant shall maintain all heating and air-conditioning equipment, to the extent that such equipment is presently in place, in good repair, and all service, replacement parts and replacement of units or elements shall be at the exclusive expense of the tenant. Heating & Air Conditioning unit must be serviced in spring and fall with copy of service call going to landlord. Tenant shall pay all gas and electrical energy costs.

CH

SP

10. Landlord shall maintain the septic system, except that if there is a coggage of the sewer pipe because of hair or other foreign substances put into the system by tenant, the tenant shall be responsible for any costs of repair.

11. Taxes are due quarterly on February 1st, May 1st, August 1st and Nov 1st of each year. Any payments after those dates are subject to a 5% penalty per month of unpaid taxes.

12. Rent is due on the 1st of each month, and is considered late if not paid by the 10th of each month. A penalty of 5% may be added to each late payment. Additionally, any late payments that cause Landlord additional costs, or any Bank returned check costs, these costs to be borne by tenant.

13. Tenant shall pay on demand the landlord's expenses, including reasonable attorneys fees, incurred in enforcing any obligation of the Tenant under this lease.

14. Tenant shall not sell Ice Cream.

McHoll Realty Trust

Trustee

Edward Holland

Assignee:

Chat Srey Pich

WCh

CH

SP



Town of Middleton

Business Certificate

In conformity with the provisions of Chapter 110, Section 5 of the Massachusetts General Laws as amended, the undersigned hereby declare(s) that a business is conducted under the title of

Name of Business: Boba Tea & Snow Ice House

Business Address: 248 South Main Street Middleton, MA 01949

Business Phone: 781-299-5793 Email Address charlesreyrich101@gmail.com

Nature of Business Tea, beverage

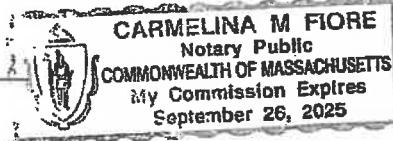
By the following named person(s):(include corporate name and title, if corporate officer)

1. Srey Rich Chat Lynn MA 01905
Owner/Corporate Officer Name Residential Address City, State, Zip

2.
Owner/Corporate Officer Name Residential Address City, State, Zip

The signatories below acknowledge this certificate is not proof of conformity to Zoning Bylaws or Board of Health regulations. It is the responsibility of the applicant to contact the Building Commissioner and the Health Agent in order to comply with Town Bylaws, rules and regulations.

Signatures: 1. charlesreyrich



2.

On January 23, 2024 the above-named person(s) personally appeared before me and made oath that the forgoing statement is true.

Seal

Carmelina M. Fiore
Notary Public/Town Clerk Signature

1. Identification presented: Driver's License # Other _____
2. Identification presented: Driver's License # Other _____

In accordance with the provisions of Chapter 337 of the Acts of 1985 and Chapter 110, Section 5 of MGL, business certificates shall be in effect for four (4) years from the date of issue and shall be renewed each four years thereafter. A statement under oath must be filed with the Town Clerk upon discontinuing, retiring or withdrawing from such business or partnership. Copies of such certificates shall be available at the address at which such business is conducted and shall be furnished on request during regular business hours to any person who has purchased goods or services from such business.

Violations are subject to a fine of not more than three hundred (\$300.00) for each month during which such violation continues.

Certificate Number 14-12 Date Processed January 23, 2024

Certificate Expiration January 23, 2028 New Renewal



Transaction Detail

Town of Middleton - Select Board

01/25/2024 - 01/31/2024

License Application						
License Type	Business Name	Owner's Name	Business Address	Post Time	Confirmation	Tender Type
Common Victualler \$100.00	Boba Tea & Snow Ice House	Srey Pich Chat	248 S Main Street.	Jan 31 2024 12:28PM	20240131169777	Credit Card

	Quick Pay	Chargeback	CC Type	Amount
Mastercard				\$100.00
Credit Card				
Gross Payments:				\$100.00
Total Chargebacks:				\$0.00
Net Payments:				\$100.00

Grand Total Gross Payments:

Grand Total Chargebacks:

Grand Total Net Payments:

TOWN OF MIDDLETON

OFFICE OF THE TOWN ADMINISTRATOR

48 South Main Street, Middleton, MA 01949

Telephone (978) 777-3617
justin.sultzbach@middletonma.gov

TO: Select Board

FROM: Justin Sultzbach, Town Administrator

DATE: February 6th, 2024

RE: MSBA Vote – Fuller Meadow Roof Authorization

Board Members,

As referenced in a recent Town Administrator update, the Tri-Town School Union has expressed interest in pursuing Massachusetts School Building Authority (MSBA) funding to partially cover the cost of a partial roof replacement at the Fuller Meadow School for sections that qualify. The process can be rather lengthy, and would kick off with the submission of a Statement of Interest (SOI).

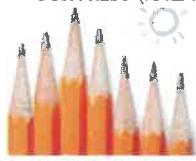
I have been working with the schools to narrow down a scope of work and potential cost. They will be proposing this as part of the Capital Planning Process. A full proposal should be available to the Select Board and Finance Committee at your upcoming Saturday March 2nd, 2024 Capital Budget Summit.

Until then, we have received word that the MSBA has officially opened the SOI window as of Friday, January 12th. Superintendent Morrison has expressed that an official vote must be taken by the School Committee and Select Board authorizing him to submit the SOI. The language is included in a recommended motion below. (The School Committee will have voted on Monday the 5th of February)

Recommended Motion (Blanks to be filled on Tuesday) : Having convened in an open meeting on _____, prior to the SOI submission closing date, the [City Council/Board of Aldermen, Board of Selectmen/Equivalent Governing Body/ School Committee] of [City/Town/District], in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest Form dated [Month] 2024 for the [Name of School(s)] located at [Address] which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future [Insert a description of the priority(s) checked off on the Statement of Interest Form and a brief description of the deficiency described therein for each priority]

_____; and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building Authority, or commits the [City/Town/Regional School District] to filing an application for funding with the Massachusetts School Building Authority.





Massachusetts School Building Authority

Funding Affordable, Sustainable, and Efficient Schools in Partnership with Local Communities

Search

https://www.massschoolbuildings.org/building/SOIs/SOI_FAQs

English



[About Us \(/index.php/about\)](#)

[Working With Us \(/index.php/Working_With_Us/Getting_Started\)](#)

[Building With Us \(/index.php/building\)](#)

[Policies, Forms & Guidelines \(/index.php/guidelines\)](#)

[Our Programs & Initiatives \(/index.php/programs\)](#)

[Your School \(/index.php/district-map/all\)](#)

[News & Events \(/index.php/news-events\)](#)

[Public Records Requests \(/index.php/public_records_requests\)](#)

[Employment Opportunities \(/index.php/employmentopportunities\)](#)

 **MSBA APPLICATIONS**
<https://systems.massschoolbuildings.org/>

[Enrollment Projection \(/systems.massschoolbuildings.org\)](#)

[In How does the pre-population option work?](#)

[Maintenance and Capital Planning \(/systems.massschoolbuildings.org\)](#)

[that are filing an SOI for a school facility that was the subject of](#)

[OPM Report \(/systems.massschoolbuildings.org\)](#)

[the previous year, the district can opt to recall the data that was](#)

[Pro-Pay Reimbursements \(/systems.massschoolbuildings.org\)](#)

[previously submitted and pre-populate the current year's SOI with that data. The](#)

[and update the information to reflect current conditions prior to](#)

[submitting the current year's SOI for consideration. The Superintendent and those](#)

[assigned to complete the SOI will be able to self-select the "pre-population" option](#)

[when entering the "New SOI". Further instruction is provided in the \[SOI User Guide\]\(#\)](#)



[Statement of Interest Frequently Asked Questions: 2024 | Massachusetts School Building Authority \(/sites/default/files/edit-contentfiles/Documents/User_Guides/Statement_of_Interest_User_Guide.pdf\).](https://sites/default/files/edit-contentfiles/Documents/User_Guides/Statement_of_Interest_User_Guide.pdf)

Please note there have been changes to the MSBA's SOI template that will be in effect for the 2024 SOI filing period. If the district submitted a Core Program SOI in 2023 and intends to refile its SOI(s) in 2024, there have been changes to the SOI template, which may impact the responses to certain questions.

If the district intends to pre-populate one or more of its 2023 SOI(s), please note that the district must:

1. Select Program Type
2. Reselect the Statutory Priorities

Once the Statutory Priorities have been reselected, the district will be able to see its 2023 SOI data throughout the 2024 SOI.

Q: How many SOIs can a District submit?

A: The MSBA does not limit the number of SOIs that the district can submit. However, an SOI should only be filed for a facility where the district has the financial ability to proceed with a construction project at the time of submission. The district is only allowed to submit one SOI per school facility and should detail all of the facility's deficiencies in that one SOI. If the district submits an SOI for more than one facility under the Core Program, it will be required to select one SOI as the "District's Priority SOI" for consideration and due diligence efforts by the MSBA. If the district already has an active Core Program SOI in the MSBA's Capital Pipeline, then that SOI is the district's Priority SOI for 2024 and will continue to be considered the district's Priority SOI until the time of project completion. *Please note, if applicable, districts may express the need for multiple accelerated repair projects (generally projects for the partial or full replacement of roofs and windows) and selection of a Priority school facility is not required.*

Q: Should the SOI propose a solution to the deficiencies cited?

A: The purpose of the SOI is for the district to identify perceived deficiencies within a school facility. The MSBA and the district would then work in partnership to identify possible solutions if/when the district is invited by the MSBA Board of Directors into the Capital Pipeline (Core Program or Accelerated Repair Program). If the district is invited into the Capital Pipeline, the MSBA and the district will begin collaboration to determine the most educationally appropriate and cost-effective solution to the deficiencies in a building. The district should indicate in the Program Type drop-down menu if the project is a Core Project or Accelerated Repair. If the district selects Accelerated Repair for the Program Type, then the Potential Project Scope is Accelerated Repair and they can choose Roof and/or Windows/Doors, as applicable.

If selecting a Core Program project from the "Program Type" drop down menu, the district should then indicate using the Potential Project Scope drop-down menu its perceived solution; these options include: potential new school, addition/renovation, or repair project (major repair to a facility. The district then must indicate if a potential consolidation is being considered; if the district selects "yes" to the consolidation question listed on the first page of the SOI, the district should specify which facility(ies) the district is interested in consolidating and file an SOI for that/those facility(ies).

Q: What is the Accelerated Repair Program and how does a District file an SOI for the Accelerated Repair Program?

A: The [Accelerated Repair Program](https://www.massschoolbuildings.org/programs/Accelerated_Repair) (https://www.massschoolbuildings.org/programs/Accelerated_Repair) (ARP) is for the partial or full replacement of roofs and/or windows/doors, with the potential to include additional systems, as may be determined by the MSBA, contingent upon available funding and capacity in the Capital Pipeline. The Accelerated Repair Program focuses on the preservation of existing assets by performing energy-efficient and cost-saving upgrades, which will result in direct operational savings for districts.

Q: Does the Accelerated Repair Program have specific requirements?

A: Yes. SOIs that are invited into the Accelerated Repair Program will be required to use pre-qualified OPMs and designers and adhere to other requirements that are unique to this Program, such as implementing an accelerated project schedule. Districts that are ultimately invited by a vote of the MSBA Board of Directors into the Accelerated Repair Program may be able to undertake multiple projects simultaneously but must be

able to evidence the ability to obtain necessary funding in a timely manner. Further information regarding the SOI review process and the applicability of scope can be found on the Accelerated Repair Program webpage under "[Accelerated Repair Program Overview](https://www.massschoolbuildings.org/programs/Accelerated_Repair)" (https://www.massschoolbuildings.org/programs/Accelerated_Repair).

Q: Does the District need to use the MSBA tool to submit student enrollment information along with its SOI?

A: No. In the past, districts were required to provide limited enrollment-related information when submitting an SOI based on enrollment factors (Statutory Priorities 2, 4, and 6). Due to the MSBA's redesigned Enrollment Projection System, districts are no longer required to submit enrollment information at the time of filing an SOI. However, districts will engage in enrollment discussions with the MSBA upon invitation to the Capital Pipeline for the MSBA's Core Program. Specifically, the enrollment projection collaboration now occurs when the district is invited into the Eligibility Period.

Q: If the district is interested in a consolidation with one or more facilities in the district, should this information be included in the Priority SOI?

A: Yes, if the district is submitting an SOI for the Core Program, the district should select "yes" when answering the consolidation question on page 1 of the SOI and describe the proposed consolidation and/or grade reconfiguration where prompted. The district should also submit an SOI(s) for the facility(ies) the district is interested in consolidating with the Priority SOI.

Q: Why is it necessary to have votes authorizing submission of an SOI?

A: In order to show the support of the district's local officials for the submission of an SOI, the MSBA requires current votes from the local school committee and, except in the case of a regional school district, the local governing body (e.g., City Council/Aldermen/Board of Selectmen) authorizing the Superintendent of Schools or the district user authorized by the Superintendent to submit an SOI.

Q: Is there a required text for the votes authorizing an SOI?

A: Yes. The votes of the local governing body and the School Committee must use substantially the same wording that is set forth in the [Form of Vote](https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Building_With_Us/SOIs/Vote/SOI_Vote_Template.doc) ([/sites/default/files/edit-contentfiles/Building_With_Us/SOIs/Vote/SOI_Vote_Template.doc](https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Building_With_Us/SOIs/Vote/SOI_Vote_Template.doc)) that is detailed in the SOI. The text of the motions voted must reference the school name and the deficiencies that have been identified in the SOI. The deficiencies can be listed in the text of the vote as the numerical Statutory Priorities and the descriptions that were selected on the second page of the SOI by the district. For the vote of the City Council/Aldermen/Board of Selectmen, a copy of the text of the vote must be submitted electronically on letterhead with a certification of the City/Town Clerk that the vote was duly taken and recorded. The date of the vote must be provided. For the vote of the School Committee, a copy of the text of the vote must be submitted electronically on letterhead with the signature of the School Committee Chairperson. All votes must be uploaded within the Vote Tab of the MSBA's SOI system prior to submitting an SOI for consideration.

Q: If my district is ready to take the required local votes to submit an SOI and we do not yet know the SOI date (the date the SOI will be submitted online) to use in the vote language, what should I do?

A: If the district does not know the date the SOI will be submitted online (the SOI date) but is ready to take the required local votes to submit the SOI, the district should reference the month and year in which the SOI will be submitted. The district must have [current votes](https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Building_With_Us/SOIs/Vote/SOI_Vote_Template.doc) ([/sites/default/files/edit-contentfiles/Building_With_Us/SOIs/Vote/SOI_Vote_Template.doc](https://www.massschoolbuildings.org/sites/default/files/edit-contentfiles/Building_With_Us/SOIs/Vote/SOI_Vote_Template.doc)) to submit an SOI for consideration in 2024 and should not re-submit a vote taken to submit an SOI from a previous year.

Q: Who signs off on the SOI submittal?

A: The Superintendent, the Local Chief Executive Officer, and the School Committee Chairperson will need to sign the SOI electronically before it is submitted. The MSBA online SOI System allows the Superintendent or the district user authorized by the Superintendent to electronically send the SOI to the required signatories for their electronic signature. There are detailed instructions in the SOI "Signature" tab and in the SOI User Guide regarding this process. In some instances, the same local official

may be a signatory for multiple roles. For example, a Mayor may also be a School Committee Chairperson.

Q: Who is the Local Chief Executive Officer?

A: In a City or Town with a manager form of government, the manager of the municipality is the Local Chief Executive Officer. In other cities, the Mayor is the Local Chief Executive Officer, and in other towns, the Board of Selectmen is the Local Chief Executive Officer unless, in a city or town, some other municipal office is designated as the Chief Executive office under the provisions of a local charter. The district should determine who fills this role at the local level and should consult with local counsel if necessary.

Q: Should a District seek professional assistance to complete an SOI?

A: No. Districts should not seek professional assistance to complete an SOI. The SOI affords the district the opportunity to articulate its thoughts about deficiencies that may exist in a local school facility. The MSBA expects that the SOI can be completed at no cost to the district. Districts will NOT be reimbursed for any expenses that may be incurred in connection with the completion and submission of an SOI. The process of completing and submitting an SOI will require dedicated time from the district. The MSBA recommends that the district plan ahead and allocate sufficient time to answer the questions posed in the SOI, secure the appropriate signatures, and take the required local votes.

Q: What happens after the MSBA receives the SOI?

A: The information provided in the SOI will play an important role in helping the MSBA understand the needs at a particular school facility and to decide whether to move forward with the district for further assessment of a facility. Once an SOI has been submitted and reviewed, the MSBA will work with districts to validate the deficiencies identified in the SOI and, if appropriate, collaborate on potential solutions. The MSBA will notify districts of any actions necessary during the due diligence period; after all SOIs are on file and the filing period has closed.

Q: How long will the process take once in the MSBA grant process?

A: The length of time depends on several factors, including but not limited to: the extent and urgency of the problems described in the SOI; the extent and urgency of the problems relative to other SOIs that have been filed; the number of potential solutions that may need to be explored with the district; the amount of time required for the MSBA and the district to agree upon an educationally appropriate and financially sound solution; and, the ability of the district to fund its portion of the agreed-upon solution.

The MSBA remains committed to working as diligently as possible to review all SOI submissions and to collaborating with districts that are invited to move forward in the process through all phases of project approval, design, and construction.

Q: Does the MSBA work with Districts on a "first come, first served" basis?

A: No. Our grant program is based on comprehensive due diligence that considers the urgency and need of all SOIs, consistent with the statutory funding criteria set forth in the MSBA's statute, and not according to the time of the SOI submission. Please consult this link [Core Program SOI Overview](#) (https://www.massschoolbuildings.org/building/SOIs/CP_Process_Overview) for more detailed information about the selection process.

Q: Where can I find out more about filing an SOI?

A: If you have any questions about the 2024 SOI process, please [click here](#) (https://systems.massschoolbuildings.org/Website_Content_Request_Form/Public/ContactUsForm.aspx/SOI) or call [617-720-4466](tel:617-720-4466) (tel:617-720-4466).

Justin Sultzbach

From: Scott Morrison <smorrison@tritownschoolunion.com>
Sent: Monday, January 29, 2024 10:49 AM
To: Steve Clifford; Steven Greenberg; Matt Coogan; Justin Sultzbach
Subject: MSBA - SOI - Vote Needed

[CAUTION:] This message was sent from outside of the Town of Middleton. Please do not click links or open attachments unless you recognize the source of this email and know the content is safe.

All - see below. With the SOI due on 3/1/24, I will need to gather SC votes in Boxford and Middleton at the February round of meetings. BOS votes will also need to be recorded.

Steve C - I will need language to include in the blurb below and will need that prior to next Monday which is when I have the MSC meeting. See all the highlighted language below.

REQUIRED FORM OF VOTE TO SUBMIT A STATEMENT OF INTEREST

SOI VOTE REQUIREMENTS:

- Current vote documentation is required with all SOI submissions.
- All required vote documentation must be uploaded in the SOI system in order to submit an SOI.
- Vote documentation should be in the format set forth below under “FORM OF VOTE”.

Cities and Towns must submit the following vote documentation:

1. Vote of the municipal governing body (i.e. City Council/Board of Aldermen/Board of Selectmen/equivalent governing body) authorizing the Superintendent of Schools to submit the SOI.
2. Vote of the School Committee authorizing the Superintendent of Schools to submit the SOI.

Regional School Districts must submit the following vote documentation:

1. Vote of the Regional School Committee authorizing the Superintendent of Schools to submit the SOI.

FORM OF VOTE:

Please use the text below to prepare the required votes for the municipal governing body and the school committee.

Resolved: Having convened in an open meeting on _____, prior to the SOI submission closing date, the ___[City Council/Board of Aldermen, Board of Selectmen/Equivalent Governing Body/ School Committee]___ of ___[City/Town/District]___, in accordance with its charter, by-laws, and ordinances, has voted to authorize the Superintendent to submit to the Massachusetts School Building Authority the Statement of Interest Form dated ___[Month]___ 2024 for the ___[Name of School(s)]___ located at ___[Address]___ which describes and explains the following deficiencies and the priority category(s) for which an application may be submitted to the Massachusetts School Building Authority in the future ___ [Insert a description of the priority(s) checked off on the Statement of Interest Form and a brief description of the deficiency described therein for each priority]

_____; and hereby further specifically acknowledges that by submitting this Statement of Interest Form, the Massachusetts School Building Authority in no way guarantees the acceptance or the approval of an application, the awarding of a grant or any other funding commitment from the Massachusetts School Building

Authority, or commits the [City/Town/Regional School District] to filing an application for funding with the Massachusetts School Building Authority.

***Please be sure that the priorities in the vote match the priorities for which the SOI will be submitted.**

DOCUMENTATION OF VOTE:

Documentation of each vote **must be uploaded separately** as follows:

1. For the vote of the City Council/Board of Aldermen/Board of Selectmen/Equivalent governing body, a certification, including a copy of the text of the vote that was taken, must be submitted on letterhead **with the City/Town seal and signed by the City/Town Clerk**, with the date that the vote was taken.
2. For the vote of the School Committee, a certification, including a copy of the text of the vote that was taken, must be submitted on school committee letterhead, **signed by the Chair of the School Committee**, with the date that the vote was taken.

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Town of Middleton
Memorial Hall
48 South Main Street
Middleton, Massachusetts
01949-2253
978-774-3589
www.middletonma.gov

TOWN OF MIDDLETON TALENT BANK APPLICATION

The Select Board maintains a Talent Bank of names of citizens of Middleton willing to serve on boards, commissions and committees. Names in this file are available for use by all Town Departments.

Names: Margaret Alfonso Telephone: 978-578-1388

Address: 86 Fuller Pond Rd Bus. Telephone: _____

Email Address: Margaretalfonso63@gmail.com

Occupation: Retired - formally Project Management

Background Experience: Project Management, primarily in the financial service industry.

Excellent communication, organization, negotiation and budgeting skills

I am interested in serving on Town Boards and Committees involved in the following areas:
(Please check all that apply. The Board encourages you to attach a recent resume if available.)

Board of Health	Recreation Commission
<input checked="" type="checkbox"/> Council on Aging	<input type="checkbox"/> Historical Commission
<input checked="" type="checkbox"/> Finance Committee	<input type="checkbox"/> Planning Board
Board of Appeals	<input type="checkbox"/> Industrial Commercial Development Review Committee
Conservation Commission	<input type="checkbox"/> Zoning Bylaw Review Committee
<input checked="" type="checkbox"/> Cultural Council	Other: _____
Other: _____	Other: _____

Amount of Time Available: 5 -10 hours a week

Are you available year round for committee meetings? Yes X No
If not, when are you available?

 Winter Spring Summer Autumn

Are there any Boards or Committees in which you are particularly interested?

Margaret E. Alfonso

12/29/2023

Signature

Please submit all responses to the Town Administrator's Office via the mailing address above or via email at:
jackie.bresnahan@middletonma.gov

Date

Margaret E. Alfonso
86 Fuller Pond Rd
Middleton Ma 01949
978-578-1388
Margaretalfonso63@gmail.com

Summary

Excellent organizational, leadership, teambuilding, and communication skills. History of implementing technology and process improvements to increase efficiency, heighten service delivery level and mitigate risk.

Professional Experience

Charles River, Burlington, MA

2020 - 2023

Project Manager – Charles River IMS Implementation

- Specialize in the Project Management for implementations of the Charles River Investment Management System
- Manage multiple small – medium sized projects simultaneously
- Provide guidance and support to Implementation Team members across multiple locations/time zones
- Proactively identify risks and issues for mitigation and/or resolution
- Provide support to testers and end users during UAT and Go-Live
- Engage with Client resources to manage escalations and ensure transparency

Whitridge Associates, Boston, MA

2014 -2020

Consultant - Project Manager

- Contract Project Management primarily in the Financial Services Industry.
 - Representative projects include:
 - Project Manager - Execution Management System Selection*
 - Testing Manager – Transaction Messaging*

IMP Consulting, Boston, MA

2004 - 2014

Consultant – Project Manager

- Contract Project Management primarily in the Financial Services Industry.
 - Representative project include:
 - Project Manager - Compliance System Outsourcing*
 - Project Manager, Charles River IMS Implementation*
 - Testing Manager, Outsourced Accounting System Integration*
 - Senior Analyst, Compliance System Conversion, Charles River > LineData Compliance*

Other Experience

JP Morgan Investor Services, Boston Ma

Vice President – Fund Accounting

Fidelity Investments, Boston MA

Transfer Agency Accounting Manager

Scudder, Stevens & Clark, Boston MA

Réconciliation Manager – Transfer Agency

Boston Financial Data Services, Quincy MA

Operations Analyst – Transfer Agency

VOLUNTEER ACTIVITY

Board of Directors – Sacred Heart Schools, Kingston, MA.

EDUCATION

University of Massachusetts Lowell, Lowell, MA; Bachelor of Science: Business Administration

CERTIFICATIONS

Project Management Institute; Project Management Professional (PMP) Certification

TECHNICAL SKILLS

BlackRock Aladdin, Charles River IMS, FlexTrader , LineData Compliance (LDC), Portware as well as Jira, HP Quality Center, SQL and Microsoft Office products.

Deb Mahoney

From: noreply@civicplus.com
Sent: Monday, July 24, 2023 5:08 PM
To: Jackie Bresnahan; Deb Mahoney
Subject: Online Form Submittal: Appointment Form 2023 (New and Reappointment)

[CAUTION:] This message was sent from outside of the Town of Middleton. Please do not click links or open attachments unless you recognize the source of this email and know the content is safe.

Appointment Form 2023 (New and Reappointment)

First Name	Peter
Last Name	Graziani
Board/Commission/Committee	Industrial and Commercial Design Review Committee
Response	I would like to be newly appointed
Email Address	Grazianipeter@gmail.com
Best Contact Phone Number	6175801111
Address	221 N Main St
City	Middleton
State	MA
Zip Code	01949
Resume Upload for New Applicants	<i>Field not completed.</i>
Electronic Signature Agreement	I agree.
Electronic Signature	Peter Graziani

Email not displaying correctly? [View it in your browser.](#)

From: noreply@civicplus.com
To: [Jackie Bresnahan](mailto:Jackie.Bresnahan@middletonma.gov); [Deb Mahoney](mailto:Deb.Mahoney@middletonma.gov)
Subject: Online Form Submittal: Appointment Form 2023 (New and Reappointment)
Date: Tuesday, January 30, 2024 12:59:58 PM

[CAUTION:] This message was sent from outside of the Town of Middleton. Please do not click links or open attachments unless you recognize the source of this email and know the content is safe.

Appointment Form 2023 (New and Reappointment)

First Name	Laura
Last Name	Hillery
Board/Commission/Committee	Recreation Commission
Response	I would like to be newly appointed
Email Address	laura.hillery@gmail.com
Best Contact Phone Number	781-820-8675
Address	2 Sheldon Circle
City	Middleton
State	MA
Zip Code	01949
Resume Upload for New Applicants	L. Hillery Resume.pdf
Electronic Signature Agreement	I agree.
Electronic Signature	Laura E. Hillery

Email not displaying correctly? [View it in your browser.](#)

LAURA HILLERY

CONTACT

(781) 820-8675
[laura.hillary@gmail.com](mailto:laura.hillery@gmail.com)
2 Sheldon Circle
Middleton, MA

PROFESSIONAL EXPERIENCE

Human Resources and Administrative Manager

Ipswich Public Schools- Ipswich, MA

October 2023-Present

- Coordinates a uniform hiring processes and supports staff recruitment including updating and maintaining a database of job descriptions, maintaining updated hiring documents, routine maintenance of job boards and review of salary information
- Manages employee resignations, terminations, and leaves, including communication to relevant parties, creating and maintaining an exit process to include an exit interview and system for obtaining district equipment and disabling accounts
- Conducts district-level training sessions and creates/maintains the personnel handbook, HR procedures and processes, and district policies to ensure compliance. This includes, but is not limited to, presenting various topics in group training sessions, recommending, implementing, and updating procedures to ensure compliance with applicable laws.
- Oversees the course approval/reimbursement process as outlined in the collective bargaining agreement
- Responsible for all aspects of Workers Compensation, working closely with various external parties
- Coordinates and prepares all assurance letters and contracts
- Monitors certification and licensure of staff members to ensure they are up to date
- Assists the Superintendent, Director of Finance and Operations, and School Committee in negotiations with certified bargaining units and collects data used for negotiations including wage and fringe benefit comparisons and comparative contract language.
- Oversees the School Choice Program and administers Feoffees Grant Program in conjunction with the Business Office.
- Ensures the District website/Human Resources website is kept up to date.
- Posts meetings and public hearings on behalf of the School Committee and their subcommittee/working groups in accordance with Open Meeting Law.
- Prepares and distributes agendas and backup information for all School Committee and subcommittee/working group meetings.
- Maintains records related to School Committee and subcommittee meetings and issues.
- Maintains the Official Policy Manual, tracking readings, changes, and updates the policy manual as needed. Ensures the online policy manual is up to date on the district website.

Confidential Executive Assistant to the Superintendent

Ipswich Public Schools- Ipswich, MA

August 2017- Present

- Support the Superintendent of Schools with a range of administrative and operational tasks including complex calendar management, preparation of meeting materials, preparing reports and presentations, travel arrangements, budget oversight, and general correspondence
- Prioritize inquiries and requests to the Office of the Superintendent, as well as troubleshooting conflict or concerns
- Create and maintain training materials for central administration policies and procedures; review and evaluate procedures for effectiveness, efficiency, and to ensure they remain current
- Source agenda topics, prepare materials and provide meeting support for all administrative leadership meetings

- Complete management of the new student registration process from gathering census data to kindergarten roundup, planning information nights, scheduling screening appointments, ongoing caregiver communication and all other pertinent details ending with the school placement of each child
- Responsible for the coordination and execution of large scale, district-wide events from location/meeting logistics, event communication, catering, vendor set-up, payment, day-of details as needed, and post-event follow-up
- As the School Committee secretary, act as a liaison between the Office of the Superintendent and the School Committee, focusing on the scheduling and timely posting of all meetings, agenda planning and creation, facilitating meeting set-up, coordination with other boards, committees or presenters and the distribution of all School Committee communication through newsletters, social media posts, updates to the district website, and district-wide email
- Act as the district's Public Records Officer, as well as maintain all pertinent school records as required by the Secretary of State and Department of Elementary and Secondary Education
- Share important and/or time sensitive information, district initiatives, surveys, announcements, etc. through social media, direct email communication and updates to the website
- Maintain the utmost confidentiality with regard to student and employee information

Childcare Director

J.W. Hayden Recreation Centre- Lexington, MA

September 2015- August 2017

- Responsible for the programming, staffing, training, and overall operations of a licensed large-group after school program, pre-school and multiple vacation camps
- Maintain all staff and student records as required by the Department of Early Education and Care (EEC)
- Plan and implement after school and pre-school program design and curriculum for students in grades PreK-5
- Communicate regularly with parents/guardians on program updates, student needs, changes to programming and registration
- Schedule, supervise and evaluate all program staff members and ensure that EEC required student-to-staff ratios were being met at all times
- Work in collaboration with parent/caregivers to maintain and update individual daily transportation, class and program schedules of all students
- Track daily enrollment and maintain program waitlists to ensure that programs remain full and are accommodating as many participants as allowed under out Department of Early Education and Care (EEC) license
- Process registration, billing and payments for all registered participants
- Attend regular professional development courses to remain current on initiatives, programs, and trends in the childcare field
- Promote all childcare programming through flyers, newsletters, email and partnerships with community organizations such as Lexington's Five and Under Network and the Preschool Association of Lexington

Assistant Aquatics Director

J.W. Hayden Recreation Centre- Lexington, MA

July 2013- August 2015

- Plan, implement and promote aquatic programming on the foundations of safety and overall health and well-being, and in line with current standards, initiatives, and general community interest
- Directly hire, train, schedule and supervise staff members to assist with the facilitation of programing
- As Head Swim Coach for the recreational team, responsible for the development of workouts, scheduling of meets, all practice and event communication, and fostering a sense of healthy competition and camaraderie amongst teammates



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TOWN OF MIDDLETON TALENT BANK APPLICATION

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Name: Joanne Plourde Telephone: _____
Address: 13 Belleview Ave Cell phone: 978-828-7883
Email Address: jplourde23@verizon.net
Occupation: CDO at Northeast Arc

Background Experience: Working in Human Services providing services and supports to people with ID/DD, from birth to end of life, advocate for elderly with my family & Husbands Family. (resume attached)
I am interested in serving on Town Boards and Committees involved in the following areas:

(Please check all that apply. The Board encourages you to attach a recent resume if available.)

<u>1. <input checked="" type="checkbox"/></u>	Board of Health	Recreation Commission
<u>1. <input checked="" type="checkbox"/></u>	Council on Aging	Historical Commission
<u>1. <input type="checkbox"/></u>	Finance Committee	<u>1. <input checked="" type="checkbox"/></u> Planning Board
<u>1. <input type="checkbox"/></u>	Zoning Board of Appeals	Industrial Commercial Development Review Committee
<u>1. <input type="checkbox"/></u>	Conservation Commission	Zoning Bylaw Review Committee
<u>3. <input checked="" type="checkbox"/></u>	Cultural Council	Other: _____
<u>1. <input type="checkbox"/></u>	Other: _____	Other: _____

Amount of Time Available: Mon-Thurs after 5:00, also Flexible

Are you available year round for committee meetings? Yes ✓ No _____
If not, when are you available?

_____ Winter _____ Spring _____ Summer _____ Autumn

Are there any Boards or Committees in which you are particularly interested?

Council on Aging

Joanne Plourde

Signature

Please submit all responses to the Town Administrator's Office via the mailing address above or via email at:
deb.mahoney@middletonma.gov

Revised 9/28/23

10.18.2023

Date

JOANNE PLOURDE

13 Bellevue Ave
Middleton, MA 01949
jplourde23@verizon.net
978-828-7883

PROFESSIONAL EXPERIENCE

7/2012-present Northeast Arc, Danvers, Ma
Chief Operating Officer
Supports Northeast Arc's mission by providing executive level administrative management of all service lines, budget development and monitoring, administrative function including Quality Assurance, Compliance, Office Management, Facilities, and Information Technology. Acts as a member of the Executive and Senior Leadership Teams and is responsible for executive and senior level planning, decision-making and implementation of policies and initiatives. Lead development and implementation of Strategic Plan.

11/01-7/2012 Northeast Arc, Danvers, MA
Division Director
Responsible for overseeing the administration, management, and operations of the day services division inclusive of Work Supports, Day Habilitation services, and transportation Management and clinical supervision of Program Directors. Develop and monitor agency budgets and service contracts. Ensure compliance with applicable licensing and regulatory standards. Ensure compliance with national accreditation (CARF) Member of senior management team. Actively participate in agency strategic planning, policy development and expansion.

3/99-11/01 North Shore ARC, Heritage Industries, Danvers, MA
Assistant Division Director
Assist with management and supervision of vocational services. Develop and monitor agency budgets and service contracts. Ensure compliance with applicable licensing and regulatory standards. Ensure compliance with national accreditation (CARF). Active participant in agency strategic management team.

11/92-3/99 United Cerebral Palsy Association of MetroBoston Inc., Watertown, MA.
Associate Director for Program Services
Responsible for overseeing the administration, management, and operation of UCP programs including Supported Employment, Personal Care Attendant Program, Day Habilitation, Family Support, and Residential Services. Management and clinical supervision of program staff. Develop and monitor agency budgets. Assist with Coordination of human resources, recruiting, hiring, and training. Ensure compliance with applicable licensing and regulatory standards, UCP policies, procedures, and national accreditation standards (CARF). Agency's Human Rights Coordinator. Chairperson of Massachusetts Day Habilitation Coalition January 1997 through January 1999.

9/88 – 11/92 United Cerebral Palsy Association of MetroBoston Inc., Watertown, MA
Day Habilitation Director
Responsible for the daily operations of the Day Habilitation Program. Developed and managed individual service plans and therapeutic treatment plans. Hire, train and supervise professional, paraprofessional staff, students, and volunteers. Designed and implemented agency policies and procedures. Monitor compliance with licensing standards. Experience with DMR/DMA. In-service training committee.

EDUCATION

Suffolk University, Boston, MA
MPA (Masters of Public Administration)

University of Lowell, Lowell MA.
Bachelor of Arts, Psychology

REFERENCE

Furnished upon request.



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TOWN OF MIDDLETON TALENT BANK APPLICATION

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Name: JOSEPA Scott Telephone: ✓
Address: 31 STONEY BROOK LANE Cell phone: 978-697-5035
Email Address: jscott710@comcast.net
Occupation: Director of Senior Move Management
Background Experience: 30+ years Financial Services; post-retirement
experience in Senior move management

I am interested in serving on Town Boards and Committees involved in the following areas:
(Please check all that apply. The Board encourages you to attach a recent resume if available.)

<input type="checkbox"/> Board of Health	<input type="checkbox"/> Recreation Commission
<input checked="" type="checkbox"/> Council on Aging	<input type="checkbox"/> Historical Commission
<input type="checkbox"/> Finance Committee	<input type="checkbox"/> Planning Board
<input type="checkbox"/> Zoning Board of Appeals	<input type="checkbox"/> Industrial Commercial Development Review Committee
<input type="checkbox"/> Conservation Commission	<input type="checkbox"/> Zoning Bylaw Review Committee
<input type="checkbox"/> Cultural Council	<input type="checkbox"/> Other: _____
<input type="checkbox"/> Other: _____	<input type="checkbox"/> Other: _____

Amount of Time Available: 3 Hours/ week

Are you available year round for committee meetings? Yes X No _____

_____ Winter _____ Spring _____ Summer _____ Autumn

Are there any Boards or Committees in which you are particularly interested?

Council on Aging

Josepa Scott
Signature

Oct. 6, 2023

Date

Please submit all responses to the Town Administrator's Office via the mailing address above or via email at:
deb.mahoney@middletonma.gov

CONFIDENTIAL RESUME OF
JOSEPH W. SCOTT
31 Stoney Brook Lane, Middleton, MA 02149 • Mobile: (978) 697-5035 •
jscott1961@comcast.net

PROFESSIONAL EXPERIENCE

DOVETAIL COMPANIES, WILMINGTON, MA (2021 – PRESENT)

Director of Senior Move Management, Certified Senior Move Manager

Providing a single point of contact for older adults in transition, Dovetail Companies provides all services to clients moving from their long-time home to assisted and independent living retirement communities.

- Established the move management team providing services to older adults.
- Identified, implemented, and trained systems, policies and procedures for a team of 28.
- Presented capabilities at continuing care retirement communities and senior centers.
- Met with older adults to identify need and developed move plans to ensure a successful transition.

WAYFORTH, INC (formerly Home Transition Resource). BOSTON, MA (2019 – Present)

Project Manager – Move Management and Property Staging

- Plan, direct and budget all activities related to client downsizing, home transition and home staging projects.
- Initiate and maintain communication with clients and their families, senior living communities, realtors and vendors in executing all project activities.
- Maintain accurate client expenses, staff time allocation and supply usage to produce accurate client invoices.
- Prepared data from CRM database, scheduling software and QuickBooks for import to new systems (SMMWARE and Vonigo).
- Analyzed and normalized data, categorized contact types and resolved hundreds of duplicate records.
- Posted QuickBook transactions to invoices, prepared and distributed invoices for payment.
- Developed and delivered related training to 35 employees.

SS&C TECHNOLOGIES, INC., BOSTON, MA (2018 – 2019)

Administrative Director, Global Real Asset Services

Reporting to Global Head of Real Asset Services, provide management and oversight of administrative, marketing and strategic initiatives to assist in achieving business unit goals.

- Developed and implemented solutions for centralization of investor and treasury services supporting clients across five service locations.
- Introduced and implemented talent assessment tools for senior management team.
- Led marketing efforts for newly established Real Assets division. Developed new and updated existing web pages on corporate website, managed blog and whitepaper agenda, developed and updated sales brochures, RFP responses and other marketing collateral. Oversaw industry conference agenda including identify attendees, developing scripts for panel discussions and determining sponsorship opportunities.

JOSEPH W. SCOTT

Page 2

STATE STREET GLOBAL SERVICES – ALTERNATIVE INVESTMENT SOLUTIONS, BOSTON, MA (2006 - 2017)

Managing Director, Chief Administrative Officer, (2008 – 2017)

Reported to Global Head of Private Equity and Real Estate Fund Services in providing all administrative, risk/compliance and strategic planning activities in support of the global business. Member of management team responsible for more than 1,600 employees servicing more than 210 clients with total annual revenue of \$299 million.

- Participated on firm and division-wide committees and served as secretary on two legal entity boards; and led several work streams as part of an Operational Excellence initiative. Liaised with Risk Management, Compliance, Human Resources, Finance and Facilities departments as well as Internal and External Auditors.
- Partnered with executive team in preparing operational budgets and implementing strategic and operational strategies globally. Coordinated talent reviews and succession planning as well as global employee engagement programs, including town halls, communication forums and division events.

Highlights

- Led development of standard operational control procedures and established self-audit program to monitor compliance. Oversaw the development of the first Private Equity Type II SAS 70 report and subsequently managed the conversion to SOC1 standard.
- Provided senior leadership for Investor Services and Anti-Money Laundering (AML) screening in all locations.
- In coordination with Finance, led effort to produce client profit & loss statements.
- Established *Business Processing Outsourcing* center in Hangzhou, China.

STATE STREET GLOBAL SERVICES – ALTERNATIVE INVESTMENT SOLUTIONS, BOSTON, MA (2006 TO PRESENT)

Vice President, Director of Private Equity Partnership Operations, (2006-2008)

Responsible for fund accounting, custody and reporting for more than 90 private equity partnership funds for large global asset manager representing 5,000 investors and \$6B in assets under administration and \$12 million in annual revenue.

PUTNAM INVESTMENTS, BOSTON, MA (1991 – 2005)

Senior Vice President – Plan Sponsor Services, Andover and Norwood, MA, (2002-2004)

Responsible for 401(k) defined contribution operations teams, division employee development and compliance testing units.

Various Administrative and Operations Management Roles (1991 – 2004) including Director of Executive Dining and Conferences and Administrative Manager – Institutional Marketing

EDUCATION

SUFFOLK UNIVERSITY, BOSTON, MA

B.S. - Business Administration, Concentration: Computer Information Systems