



Select Board Meeting

Thursday, March 18, 2021 5:00 PM

Virtual Meeting Broadcast on Comcast Channel 22 Verizon Channel 45

I. Call to Order – 5:00 P.M.

II. Opening Ceremonies

A. Moment of Silence/Pledge of Allegiance

III. Regular Business

A. Select Board Candidate Interviews – (60 minutes)

Select Board to interview candidates to fill the vacancy on the Select Board through March 22, 2022.

5:05 PM Zachary Bergeron
5:15 PM Paul Salafia
5:25 PM Carlene Bell-Flanagan
5:35 PM Jose Albuquerque
5:45 PM Tracey Gauthier-Peters
5:55 PM Bonnie Zahorik

RECEIVED
TOWN CLERK'S OFFICE
2021 MAR 15 PM 3:56
TOWN OF ANDOVER, MASS

IV. Adjourn

Pursuant to Governor Baker's March 12, 2020 Order Suspending Certain Provisions of the Open Meeting Law, and the Governor's March 15, 2020 Order imposing strict limitation on the number of people that may gather in one place, this meeting of the Select Board will be conducted via remote participation to the greatest extent possible. For this meeting, members of the public who wish to watch the meeting may do so in the following manner: Andover TV COMCAST CHANNEL 22 AND VERIZON CHANNEL 45.

Every effort will be made to ensure that the public can adequately access the proceedings in real time, via technological means. In the event that we are unable to do so, despite best efforts, we will post on the Town's website an audio or video recording, transcript, or other comprehensive record of the proceedings as soon as possible after the meeting.

Zachary Bergeron

Town of Andover Select Board Application

This application is to express interest to fill a vacant seat on the Town of Andover Select Board. This interim appointment will last until a permanent successor is elected on March 22, 2022.

Please return a completed application and resume and/or CV electronically to Kathryn Forina (kforina@andoverma.gov) by Friday, March 12th at 4:30 PM. Interviews for interested candidates will be held on Wednesday, March 17th at 7:00 PM in a virtual public meeting.

1. Name	Zachary C. Bergeron
2. Address	18 Algonquin Ave. Andover, MA
3. Email Address	zacharycbergeron@gmail.com
4. Please provide a Statement of Interest as to why you are seeking appointment to the Select Board. <i>(Please limit response to one page.)</i>	As a member of the Planning Board for the past eight (8) years, I have had an opportunity to participate in the town's strategic growth. I would like to be considered for the highest level of community involvement in order to continue to help make Andover the best place to live and work.
5. Please list your prior Town Board /Committee experience.	Planning Board Chair - current November 2012 to present
6. Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts. <i>(Please limit response to one page.)</i>	I feel that my tenure with the Planning Board and my experience in construction management offer a perspective that may be helpful to the current Select Board. More specifically, the Town Yard Land Disposition and elementary school project initiatives are items I believe I can offer guidance on.
7. Do you understand that if appointed, you must resign from any Town Boards / Committees that you currently serve on?	I understand.

Should you require more space, please attach additional pages to this application, clearly marking which question you are answering.

Zachary C. Bergeron, CF-L1 Trainer

18 Algonquin Ave., Andover, MA 01810

(617) 963-9545

zacharycbergeron@gmail.com

OBJECTIVE: Integrity driven construction management professional seeking to fill the Town of Andover's Select Board vacancy. Interested in becoming a contributing member of the board to honor Andover's historic past while considering its future growth opportunities. My approach has always been to be fundamentally proficient, build relationships and have fun doing it. Core competencies include:

- Building prosperous relationships
- Reconciling on each project's behalf
- Incorporating sustainable practices
- Advising clients on project cost drivers
- Communicating and presenting
- Strategic sourcing of contracts

PROFESSIONAL EXPERIENCE:

Vermeulens
Associate, Construction Economist

Boston, MA
January 2015 - Present

- Member of company's leadership team specifically focused on Northeast operations, work acquisition and strategic recruiting
- Responsible for the direct management and oversight of approximately 30% of company operations
- Responsible for the business development and direct management of approximately 15% of company operations
- Reconcile approximately 25 projects a year ranging between \$10 million and \$1 billion in construction related costs
- Present at national conferences on the state of the construction economy
- Work exclusively in a remote setting

Suffolk Construction
Purchasing Manager

Boston, MA
January 2012 – January 2015

- Responsible for the procurement of all education, healthcare and science and technology business unit subcontractors and vendors totaling approximately \$300 million per year producing and average savings of 2% through negotiations and risk reduction
- Implemented central purchasing process where individual project managers formerly negotiated all contracts to where 20 project managers submit buy packages centrally
- Implemented prequalification metrics and subcontractor evaluations for pre-award and post-award considerations, respectively

Green Team Captain

April 2008 – January 2015

- Responsible for the development of national corporate sustainability vision and program as it relates to internal efforts and project-based goals
- Subject matter expert on sustainability and green building for internal and external learning development opportunities

Project Estimator

April 2008 – January 2012

- Served as preconstruction services client relationship manager for institutional and corporate clients in the Northeast
- Estimated projects up to \$75 million while maintaining the ability to maintain a commitment to assisting in the achievement of client goals while adhering to budget constraints

**OTHER
EXPERIENCE:**

Town of Andover – Planning Board
Chair

Andover, MA
November 2012 – Present

- Chair bi-monthly board meetings and sub-committee meetings
- Support the best interests of the community in concert with the rules and regulations of town laws and ordinances

Spark Fitness & Tennis Club – Andover CrossFit
CF-L1 Trainer

Andover, MA
September 2016 – Present

- Lead group classes adhering to proper progression and mechanics of foundational movements
- Cultivate positive community relationships by interacting with participants during and outside of class time

The Giving Circle
Board Member

Boston, MA
February 2012 – January 2015

- Managed a successful golf tournament for 180 golfers with a \$55,000 operating budget
- Increased golf tournament fundraising by 50% in two years

Various Coaching Positions

- Andover Hockey Association – current
- Andover Warriors Lacrosse – current
- YMCA – Basketball – former
- Andover Little League – former
- Andover Soccer Association – former

EDUCATION:

University of Massachusetts Lowell
Bachelor of Science: Civil & Environmental Engineering

June 2002

**COMPUTER
EXPERIENCE:**

Adobe, Bluebeam, Cosential, Microsoft Office, estimating, project management and scheduling software

INTERESTS:

Family, Reading, CrossFit, Outdoors

Paul Salafia

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1. Name	Paul J. Salafia
2. Address	283 SOUTH MAIN ST., ANDOVER
3. Email Address	psalafia@comcast.net
4. Please provide a Statement of Interest as to why you are seeking appointment to the Select Board. <i>(Please limit response to one page.)</i>	See attached. <div style="text-align: right; color: gray; font-size: small;">Type text here</div>
5. Please list your prior Town Board /Committee experience.	<ul style="list-style-type: none"> • Andover Planning Board. 17 years. 12 as chairman • Council On Aging. 2 years • Town Yard Task Force. 1 year as chairman • Merrimack Valley Planning Commissioner • Select Board. 3 terms/8years. 3 as chairman
6. Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts. <i>(Please limit response to one page.)</i>	See attached
7. Do you understand that if appointed, you must resign from any <u>Town</u> Boards / Committees that you currently serve on?	Yes.

Should you require more space, please attach additional pages to this application, clearly marking which question you are answering.

Paul J. Salafia was born in Lawrence, Mass. July 8, 1947. He attended Lawrence public grammar schools, graduated Central Catholic High School in 1965 and received his BFA from Lesley University School of Art and Design. In 1973 Mr. Salafia founded Advertising Management Services, Inc., an advertising agency specializing in retail chain stores. He moved to Andover with his young family in 1976. Originally located in the Musgrove Building, Advertising Management later bought several buildings along Post Office Avenue in downtown Andover. Being a landlord and downtown business owner, Mr. Salafia became increasingly interested in municipal government and was appointed to the Andover Planning Board in 1993 where he served for 17 years. Much of the town's landscape was shaped during his Planning Board tenure where Andover experienced significant residential and industrial growth. Mr. Salafia also served as Andover's Commissioner to the Merrimack Valley Planning Commission, the Andover Council on Aging, The Town Yard Task Force, Service Club of Andover, Lawrence Boys and Girls Club, Northeastern University Advisory Board, Rotary Club of Andover, the Andover Chamber of Commerce and Ironstone Farm executive board. After his resignation from the Planning Board in 2010. Mr. Salafia successfully ran for the remaining two-year Selectman term vacated by Selectman Jerry Stabile and was subsequently elected to two additional terms. After serving three terms Mr. Salafia did not seek a fourth Selectman term. For the past 25 years, he and his family have resided on the former Walnuthurst Dairy Farm on South Main Street in Andover.

PAUL J. SALAFIA
STATEMENT OF INTEREST
TOWN OF ANDOVER
ADDENDUM TO SELECT BOARD APPLICATION

Looking to the year ahead, the Select Board is going to be challenged to make important and complex decisions in a wide range of issues, topics and concerns. The Select Board has a long history of doing the work to “get it right” no matter how small or large the matter before them. Given the sheer volume of work, each of the four remaining members of the Select Board will need to be focused and efficient. An additional experienced fifth member who can “hit the ground running” should have an immediate positive impact which should allow the Select Board to be more productive and effective.

Below is a partial list of projects, topics and concerns that I believe will likely come before the Select Board in the coming year:

- Disposition of the Town Yard property and the ongoing development of the HMD (Historic Mill District.)
- Immediate Town Meeting preparation:
 - Finalize Budget considerations
 - Finalize CIP priorities and departmental meetings
 - Warrant article meetings and approvals
- Long-Term Pension Liabilities and possible Proposition 2 ½ override
- West Elementary School building project and possible Proposition 2 ½ override
- Sustaining the ongoing efforts of Gemma Lambert and her newly formed department to ensure *Diversity, Equity and Inclusion* throughout the town departments and the community.
- COVID-19 policies and safe business re-openings
- Energy conservation
- Water quality/supply and ongoing infrastructure rebuild
- Town Governance Committee

At your March 1, 2021 meeting Chairwoman Gilbert stated:

“A priority is not to have a huge, steep learning curve and (the appointee) have relevant experience to bring to bear and add value to the important and immediate work that we have in front of us.”

This statement prompted me to offer my experience and expertise to the Select Board in the coming year. It has been a privilege to serve Andover on several boards and committees. I am well versed and experienced in many of the issues immediately facing the Select Board and can be instantly helpful with little or no learning curve. Having been elected three times to the Select Board, I have no long-term plans to run for another term at the March 22, 2022 election and my sole motivation in submitting this application is to offer my help to a community that has been so supportive of me and my family through the years.

Thank you for the opportunity to submit this application and I thank you in advance for your review and consideration.

My best,



Paul J. Salafia
QUESTION #6:

In my “statement of interest” I have listed several projects, topics and concerns that I expect will be coming before the Select Board in the coming year.

- Disposition of the Town Yard property and development of the HMD (Historic Mill District).
 - For decades as Planning Board Chair I have studied and helped form direction and policy on how the town yard might be rebuilt, moved, sold and redeveloped. As well, as a Select Board member and chair I worked with community groups, town boards and town departments to finally get the new Municipal Services Facility to become a reality. I assisted in the formation of the HMD that launched the community journey to accomplish the “next chapter” in the Historic Mill District. I bring decades of experience, from multiple points of view on the Town Yard and HMD.
- Budget/Finance:
 - Each year during Town Meeting preparations, we, as Select Board members, experience an intense, all inclusive, headlong dive into the town budget. Municipal finance is unique unto itself and is unlike any business or personal budget process. As such, it takes several budget cycles to truly begin to understand the nuances that are peculiar to municipal finance. As Select-Board Chair during three out of the eight years I served, I was responsible for representing the board at the “chairs meetings” and working directly with the Town Manager and School Superintendent on “all things budget.” This is a skill that requires years of experience and is an expertise that I can immediately bring to the board.
- Town Meeting Preparation:
 - Finalizing the budget
 - Meeting with town departments to approve CIP requests
 - Taking positions on all Town Meeting warrant articles

As past chair of the Planning Board and Select Board chair/member I have prepared for, and worked on, literally dozens of Annual Town Meetings. Whether it be zoning articles, budget proposals, CIP requests or more I am experienced on what it takes to get it ready for all that the voters might consider at Andover’s Annual Town Meeting.
- Water quality, supply and infrastructure are hot topics and I can speak from considerable experience whenever a proposal or concern may arise.
- Two Possible Proposition 2 ½ Overrides:
 - I was a Select Board Member when we proposed the Bancroft School to the community and can bring a voice of experience when the West Elementary School proposal is considered.
 - Andover’s Long-Term Pension Liabilities may give rise to a possible Proposition 2 ½ override. As a Select Board member we have been studying and considering multiple ways to manage our long-term pension liabilities. I will be able to draw on much of that past analysis to help guide future considerations that may come before the board in the coming year.
- DEI Diversity, Equity and Inclusion
- Support the efforts of Gemma Lambert and her newly formed department to welcome, embrace, and include all people to Andover no matter what race, color, religious or sexual orientation.
- I am ready and have the available time to serve if appointed.

Carlene Bell-Flanagan

Town of Andover Select Board Application

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1. Name	Carlene Bell-Flanagan
2. Address	9 Pleasant Street Andover, MA 01810
3. Email Address	carlenebell@msn.com
4. Please provide a Statement of Interest as to why you are seeking appointment to the Select Board. <i>(Please limit response to one page.)</i>	Please see attached
5. Please list your prior Town Board /Committee experience.	I have not previously officially served on a Town Board/Committee
6. Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts. <i>(Please limit response to one page.)</i>	please see attached
7. Do you understand that if appointed, you must resign from any Town Boards / Committees that you currently serve on?	Yes. this issue does not apply

Should you require more space, please attach additional pages to this application, clearly marking which question you are answering.

Carlene Bell-Flanagan

4) Statement of Interest

I wish to express my interest in filling the one-year vacant seat on the Select Board. I am an active and enthusiastic member of the community. My husband and I chose to make Andover our home in 2009 and have never regretted our decision to build and raise our family here. In the years my family and I have lived in Andover, I have very much come to treasure being part of this community. I have made many lifelong friends and my children have benefited greatly from their experiences here. I currently have sons at the elementary, middle, and high school levels each of whom take full advantage of the many opportunities our community has to offer. Our children enjoy Clown Town, school trips to Canobie Lake or even Belize. My family enjoys events at the Cormier Youth Center, events through the recreation department such as flag football, the annual Tree lighting, fishing or swimming at Poms Pond, creating scarecrows for the festival each year, HoopTown, Andover Soccer, Little League, and observing or participating in various peaceful expressions of opinion on matters they care about. The list is endless, and this community has brought much joy and many friends into my family's life. Andover is a great place!

Still, Andover is not a perfect place because no place is perfect. These are complicated, difficult times for many in our community. It is in these times that citizens and their government either come together and thrive or come apart and divide. There are many projects in town that need attention. The budget is not limitless. I am hoping to draw from my experiences as a community member, mom, certified teacher, lawyer with an LLM in taxation, and advocate, to this board in the hopes of making our wonderful town a better place. As a member of the Kindness Collaborative, I have seen countless examples of the caring spirit here in Andover. If I am chosen to serve as a member of the Select Board, I hope to be able to galvanize that positive energy into more formal public service. It would be an honor to serve the community about which I care so much.

6) Relevant Experience

I have had the pleasure of guiding a significant capital project through the town process when I advocated for an access ramp to the playing fields at High Plain Elementary. There are current members of the Select Board, as well as the town manager, without whom the successful completion of this project would not have been possible. My son, and other students like him, will never forget that their town made such a significant investment in equity on their behalf.

During this process, I became intimately aware of some of the inner machinations of town government, budget, and process. I also had the learning experience that comes from detailed conversations with others who were similarly hoping to obtain a piece of the budget for projects they valued. As I look at the current issues in town and assess what contribution I might make to the Board in one year I think of many things. While one year on the Board may not seem like a long time, I appreciate that the impact of decisions made during that year lasts for many years and effect every resident. As we plan for the important development of the Historic Mill District and explore the repair or replacement of several school buildings, I believe it is important for the Board to choose an applicant who can listen to the various stakeholders and carefully weigh competing interests without polarizing the community or the Board. These are complex tasks and lofty goals worth pursuing. At the end of the day, while parties may disagree, we all live here, and we all want what is best for the Town of Andover. Visions of exactly what that looks like or how we get there are topics for deep exploration and robust debate but should not ever come on the backs of personal attack or deliberate divisiveness.

I have had the pleasure of speaking with, or presenting to, members of the finance board, school committee, and select board on several occasions. I possess a law degree, an LL.M in the laws of taxation. I am certified teacher. I have young children and an elderly parent. All of these things enable me to see issues from various vantage points and appreciate multiple perspectives. My advocacy skills and law degree inform me of the need to assess information while advancing decisions that have been made. My work experience, in town and elsewhere, coupled with my involvement in the community would make me a strong contributor to the analysis and discussions appearing on upcoming agenda. In closing, it would be my goal to use my knowledge gained through the High Plain Accessibility project to assess other important expenditures in town, do a cost benefit analysis of the various proposals, spend the taxpayer's money in a way that is responsible as well as responsive.

**Carlene Bell-Flanagan, JD, LLM
Andover, MA**

cbf2003@gmail.com • 978.866.0181 • [linkedin.com/in/government-education-advocacy](https://www.linkedin.com/in/government-education-advocacy)

PROFESSIONAL EXPERIENCE

Merrimack College, North Andover, MA

2017-Present

A higher-education, co-ed liberal arts institution with a 220-acre campus and approximately 4,000 enrolled students.

Accessibility Services Specialist, FYE Faculty, Academic Success Coach, Pioneer Scholars Program

- Direct planning and implementation of innovative services to empower people with a diagnosed disability.
- Collaborate with faculty and other staff to advocate for and assist in the delivery of course materials to students with visual, hearing, and physical limitations.
- Educate faculty and the college community regarding students with visual, hearing, and physical disabilities and limitations.
- Coordinate the formatting of course materials, arrange for student accommodations and engage with outside agencies and other stakeholders when necessary.
- Supervise the graduate fellow success coach and undergraduate student workers charged with formatting course materials.
- Maintain up to date expertise in adaptive and assistive technology.
- Contributor and representative for the All Abilities Awareness Week, new student orientations, open houses, and admitted students' days.
- Undergraduate guest lecturer within the social justice and psychology departments as subject matter expert for discrimination, universal design for disability, ableism, victim-witness first-report, and secondary trauma.

Law Office of Carlene Bell, Andover, MA

2004-2017

A law firm focused on advocacy, education, estate planning, and taxation.

Attorney

- Provided charitable giving, estate planning, and tax advice for clients.
- Drafted all necessary estate planning and ancillary documents for execution.
- Advised parents on how to maximize child development using service agencies, medical coordinators, and self-advocacy.
- Developed arguments to prepare parents for Individualized Education Plan (IEP) meetings, mediation, hearings, or trials.
- Pro Bono representation with deportation issues and international fertility matters, contracts, and family issues.

Bove and Langa, Boston, MA

2002-2004

A law firm focused on estate and cross-border planning, taxes, and asset protection cases.

Attorney

- Researched tax issues, prepared and filed tax returns and governmental reports in compliance with standards.
- Advised high-net-worth clients on asset management, wills, estate plans, trusts, and limited liability companies.
- Established client's charitable giving objectives and completed all documentation for probating estates.

Needham Public Schools, Needham, MA

1998-2001

A PreK-12 public school district with 5,700 enrolled students.

Lead Teacher, Spanish

- Instructed more than 120 middle school students through lectures, discussions, group activities, and demonstrations.
- Evaluated student progress, planned and supervised class projects, field trips, and guest speaker visits.
- Fostered meaningful relationships among students and empowered multi-cultural initiatives as a leader and instructor.
- Coached a highly successful mock-trial program for students, METCO mentor for Boston area students.

Weston Patrick, Boston, MA**1992-1994**

A law firm focused on general practice, civil litigation, and corporate law cases.

Victim Liaison, Law Clerk

- Researched and wrote memoranda for a class action civil suit against a prominent international organization.
- Conducted victim and witness interviews, provided support in preparation for litigation and settlement of sexual abuse case.

Hamden County, Springfield, MA**1991-1994**

Located in the Pioneer Valley of the Commonwealth of Massachusetts serving 466,000 residents with a \$727M budget.

Assistant District Attorney, 1993-1994

- Managed domestic violence cases from arrest and bail hearings until completion through bench trial and sentencing.
- Conducted and presented victim and witness interviews in preparation for prosecution at bench and jury trials.

Victim and Witness Advocate, 1991-1993

- Collaborated with the assistant district attorney assigned to the domestic violence unit.
- Provided support and legal explanations of proceedings to victims and witnesses.
- Provided case management support and communicated with service organizations, schools, and medical personnel.

EDUCATION

LLM, Masters in the Legal Letters of Taxation, Boston University School of Law, 2003

JD, Doctor of Law, Western New England University School of Law, 1994

BA, Bachelor of Arts, Communications, University of Massachusetts at Amherst, 1990

CERTIFICATIONS

Member, Massachusetts Bar

Massachusetts Teacher Certifications, K-5,6-8,9-12 Spanish & Social Studies

Notary Public, Commonwealth of Massachusetts

Community Involvement**High Plain/Wood Hill Accessibility Project, Andover, MA****2015 - 2017**

A \$600K+ town and school betterment project.

Issue Identification, Mobilization and Planning

- Monitored and assisted town leaders in obtaining the support for the funding request, approval, planning, and implementation of a \$620,000 betterment project for handicapped access to community facilities, parks, and sports fields.
- Advised Municipal Leader on regulations, necessary accommodations, and social values of the project.
- Advocated for a universal design project at two annual town meetings, multiple select boards, school committees and neighborhood group meetings to gain support and secure necessary votes for financing.
- Led presentations and workshops within the community for expanding universal design building projects.

PRESENTATIONS

- Speaker, New England Access Recreation Conference: Innovative Universal Design
- Panel Speaker, NEAR Conference: Adventure Education & Leadership Development Through Innovation Recreation.

Jose Albuquerque

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1. Name	Jose L. Albuquerque
2. Address	197 Greenwood Road
3. Email Address	jlalbuquerque@yahoo.com
4. Please provide a Statement of Interest as to why you are seeking appointment to the Select Board. <i>(Please limit response to one page.)</i>	See page 2
5. Please list your prior Town Board /Committee experience.	My Town Board/Committee experience is limited to being a private resident or part of advocacy group(s). Please note that I have attended many Select Board, Planning Board, Conservation Committee, Finance Committee, Zoning Board, Revenue & Expense Task Force Meetings as well as an active participant at Annual & Special Town Meetings for more than 6 years.
6. Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts. <i>(Please limit response to one page.)</i>	See page 2
7. Do you understand that if appointed, you must resign from any Town Boards / Committees that you currently serve on?	Not Applicable

Should you require more space, please attach additional pages to this application, clearly marking which question you are answering.

Please provide a Statement of Interest as to why you are seeking appointment to the Select Board.

My interest in seeking an appointment on the Select Board is to help residents, families, and businesses through the current public health emergency and shape the Town of Andover's future.

I am motivated by a desire to do more for the people of Andover. I have committed my professional life to helping others and giving back, values my parents taught me and my sister.

I can bring fiscal a strong degree of fiscal responsibility and accountability. Currently, our town faces challenges including new and renovated Town/school facilities along with significant pension obligations and expenses that are potentially exceeding our revenues. I would like to be a part of the solution to ensure Andover has a bright financial future.

I would work with other Select Board members and other officials to build consensus. In any group dynamic it is important to include all viewpoints when discussing an issue. The Town should also reach out to Town workers, residents and taxpayers to engage and involve them on these critical items for a better Andover. We are all in it together!

Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts.

A Northeastern University (NU) educated civil engineer with an MBA from Suffolk University, I worked for a decade on the Boston Central Artery Tunnel Project in construction management and operations.

Currently, I am the Interim Executive Director for the Department of Neurology and Strategic Operations Director at Brigham & Women's Hospital, where I have worked for the past twenty-two years. I work closely with academic and research staff, administration, facilities, public safety, family relations, marketing, public relations, and human resources personnel, on financial analysis, budgets, space renovations, leases, contracts, and organizational initiatives such as electronic health records and virtual patient visits.

Through my various roles from school environment, healthcare setting, construction and NU co-op work at Town of Smithfield, RI, I am equipped to handle ongoing work on the Town's long range financial planning and stability, capital improvement program ranging from Town/school projects to water/sewer infrastructure, along with reshaping Historic Mill District.

As someone, who believes in the principles of being a Green Community, I was fortunate to be involved in BWH's environmentally friendly Shapiro Cardiovascular Center, which received LEED Silver certification from the US Green Building Council. Furthermore, one of the factors of my family moving to Andover sixteen years ago was river and open space as we love hiking and kayaking. Through this lockdown and pandemic, we were able to explore many more hiking trails located in our Town.

One of the most important initiatives is the ongoing work on Diversity, Equity and Inclusion. BWH is leading DEI effort internally in our organization and I have been recently involved in implementing these new initiatives within the Department of Neurology.

Based on my skills and background, I have the experience, proven leadership, demonstrated commitment and knowledge to serve on the Select Board and needed to meet the challenges we face today.

JOSE A. L. ALBUQUERQUE

197 Greenwood Road, Andover, Massachusetts 01810 • (978) 470-8149 • jlalbuquerque@yahoo.com

- OBJECTIVE** Talented professional with proven technical, analytical, financial, leadership and interpersonal skills seeking a challenging executive level management opportunity.
- SKILLS** Healthcare/Hospital Management, Administration, Strategic Planning, Business Process Improvement, Operations and Project Management, Budgeting, Healthcare Information Technology
- EXPERIENCE**
- 11/20-Present **Brigham & Women’s Hospital** Boston, MA
Interim Executive Director, Department of Neurology (DON)
- The DON is a Harvard Medical School (HMS)-affiliated academic department with 147 faculty, 18 divisions, ~\$60 million in annual professional clinical charges, >125 residents and fellows, and \$60 million in annual research expenditures.
 - The DON is one of the largest academic departments of in the country, and supports a balanced portfolio of clinical services, biomedical research, and education. Serve as an institutional leader in all areas of this tripartite mission.
 - Function as the administrative leader for all matters related to clinical, research, education, and general administration for the DON’s central operations and its 18 divisions and 6 units, and within and as part of the structures of Brigham and Women’s Hospital (BWH), Brigham and Women’s Faulkner Hospital, and the Brigham and Women’s Physicians Organization.
 - In partnership with the Chair, determine the overall vision, mission, direction, goals, and objectives of the Department. Direct the strategic planning process, establishes and achieves long range goals, and ensures the implementation of strategic business plans that are aligned with Brigham Health’s vision, strategic plans, and goals.
 - In conjunction with the DON Vice Chair of Education and Mass General Brigham (MGB) Neurology Residency Co-Directors, direct the administration of the department’s residency program (~57 physicians), 9 sub-specialty fellowship programs (~30-40 physicians/year), HMS education programs, and continuing medical education programs.
 - Serve as the principal DON liaison to other MGB and BWH hospital departments and services such as: Patient Care Services; Network Development; Marketing; Office of General Counsel; Development; Public Affairs; Research Management; Research Ventures & Licensing; etc.
 - Supervise/mentor 11 individuals directly or jointly; ultimately administratively responsible for ~500 faculty and staff within the DON.
- 09/10-Present **Brigham & Women’s Physicians Organization, Inc. – Corporate** Brookline, MA
Director, Strategic Operations
- Support and manage Harbor Medical integrations, clinical space consolidation/renovations and new ambulatory building initiatives as part of Brigham Health’s Route 3 corridor strategy.
 - Direct Determination of Need application process for CT Services at proposed Braintree location.
 - Oversight of Faulkner and Network integrations and billing implementations including Anesthesia, Breast Center, Harbor Medical, Newborn Medicine (Steward), Psychiatry, Radiation Oncology in Milford, and Radiology to ensure business planning deliverables and timelines are achieved in Finance, IT, HR and Provider Services functions.
 - Serve as Brigham Health administrative lead on key organizational and/or federal mandated initiatives such as ICD-10, Meaningful Use and Nuance Dragon training to providers and allied health professionals.
 - Manage overall Pool B program including establishing annual goals and measures along with target benchmarks together with executive sponsors and operational resources.

- Co-led the Department Administrator transition in Newborn Medicine as well as Network operational activities with Steward Health Care.
- Provide business support for the conversion to a single NPI centralized BWPO model and manage non-clinical monitor upgrade prior to Go Live for Epic project.
- Supervise eCare training process for BWPO and billing groups to ensure successful completion of required classroom and eLearning trainings by all employees prior to Epic Go Live.
- Responsible for BWPO corporate space planning and facilities operations including conversion of spaces into additional workstations, major building renovation to relocate Provider Services functions, and other improvement capital projects such as LCD installations and video conferencing.
- Establish and refine BWPO guidelines related to parking, facilities operations, and security with the addition of designated rally points and hide locations in the event of active shooter situation.

12/07- 09/10

Brigham and Women's Hospital – Division of Cardiac Surgery

Boston, MA

Administrative Director

- Direct all aspects of day to day operations including financial, budget, research management, space, ambulatory practices, strategic planning, resource allocation, Faculty appointments and credentialing.
- Responsible for management of BWH campus offices and satellite offices at Cape Cod Hospital and Foxborough, which consists of 12 Faculty, 13 physician assistants, 2 clinical registered nurses, 12 administrative support staff, and 9 research support staff plus 1,500 operative procedures.
- Manage and control professional clinical income and expense budgets, currently totaling \$29 million in charges and \$9.3 million in revenues. Management includes analysis of financial reports, projections, budget and financial comparisons, variance explanations, accounts receivable/reimbursement analysis and analyzing utilization/resources and needs assessment.
- Conduct financial and operational modeling for existing and new programs and services.
- Participated in Cardiovascular Center Leadership Group Meeting and IT Steering Committee.
- Develop and maintain strategies, policies and procedures to enhance the efficient and cost-effective operations of the integrated multi-disciplinary Watkins Ambulatory Clinic practice in the Carl J. and Ruth Shapiro Cardiovascular Center.
- Responsible for the planning, allocation, negotiation and operation of all research, administrative and clinical space. This involves coordinating the Division's planning process, addressing safety and security issues, determining timetables and monitoring new construction/renovation processes.

01/06- 11/07

Brigham and Women's Hospital – Division of Thoracic Surgery

Boston, MA

Administrator /Administrative Director

- Responsible for management of BWH campus offices and ambulatory center consisting of 12 surgeons and 2 independent researchers at the PhD level as well as 6 satellite offices including Carney Hospital, Dana Farber Cancer Institute, Faulkner Hospital, Metrowest Medical Center, South Shore Hospital, and West Roxbury Veteran's Hospital.
- Oversee preparation, submission, management and control of the professional clinical income and operating budgets, totaling \$24 million in charges and \$6 million in revenues.
- In collaboration with Division Chief, responsible for the profit and loss statements of the Division of Thoracic Surgery and the International Mesothelioma Program, this consists developing strategies to maintain/improve performance and authorizing expenditures via operating, capital and research funds.
- Responsible for comprehensive administrative management for divisional clinical, research and educational programs which includes 12 administrative support staff, 23 research support staff, and 26 clinical support staff members.
- Direct and implement administrative aspects of the clinical and research settings, provide leadership and develop detailed fiscal budgets and multi-year plans.

- Manage the Division's delivery systems, which include patient access, organizational processes, payroll, performance standards and other related activities.
- Responsible for quality assurance which includes compliance with all quality standards and guidelines for clinical and research operations and ensuring that the Division is following the Joint Commission, Federal and State guidelines.
- Implement and maintain team model organizational structure for effective work unit, fostering communication, teamwork, respect, diversity and cooperation.

10/03-12/05 **Brigham and Women's Hospital – Department of Surgery Administration** Boston, MA
Senior Project Manager/Financial Analyst

- Oversee planning of Dana Farber Brigham Women's Cancer Center's Mesothelioma clinic.
- Develop materials program including patient and information session packets for newly created Brigham and Women's/Faulkner Hospital Program for Weight Loss Surgery.
- Manage successful LMR (electronic medical record), IDX (scheduling), and PatientKeeper (handheld) system implementations in the Division of Thoracic Surgery.
- Support submittal of Determination of Need application for Pancreas Transplantation.
- Coordinate and implement administrative, clinical and research space planning and design.
- Provide financial analysis and prepare complex business plans for program development (i.e. lap band procedure) and systems improvement initiatives.
- Direct and manage projects on behalf of the Directors and other management staff.
- Assist Directors in financial and strategic planning for the Department and divisions as needed, including developing budgets for proposed recruitments.

07/00-09/03 **Brigham & Women's Physicians Organization, Inc. – Department of Surgery** Brookline, MA
Compensation & Budget Manager
03/99-06/00 Compensation/Financial Analyst

- Responsible for direct management of 1 to 2 employees and supervision of 4 to 5 employees on important departmental projects, including payroll, retirement and budget conversions.
- Ensured proper administration of physician compensation and incentive programs.
- Interpreted and communicate applicable compensation policies and financial data to individual physicians, Surgery management, Compensation Committee, and other appropriate parties.
- Coordinated activities among BWPO and BWH to ensure that newly hired surgeons are properly reflected within the appropriate payroll, billing and financial systems per contract agreements.
- Provided analytical support and direction regarding benefits, payroll, deferred compensation, pensions and related systems and processes.
- Coordinated preparation of final practice Department budgets totaling in \$95 million in charges and \$32 million in revenues for Partners Finance and Division Chiefs' approval.

09/98-01/99 **Suffolk University** Boston, MA
Budget Analyst, Tutor, Class Assistant

- Created a budget and payroll database system in excel for university's learning center.
- Reconciled center's budget and payroll system with monthly university bank statements.
- Trained staff in payroll policies and procedures for processing and reporting.

09/95-05/98 **Bechtel/Parsons Brinckerhoff – Central Artery/Tunnel Project** Boston, MA
Office Engineer, Assistant Office Engineer
01/92-08/95 Geotechnical Instrumentation Engineer, Assistant Geotechnical Engineer

- Supervised secretarial and engineering staff on administrative, contractual, and technical issues.
- Advised project management, engineers and contractors on issues of strategy and implementation.

- Conducted employee training in project procedures and responsibilities.
- Controlled accounts payable and receivable for \$160 and \$180 million construction contracts.
- Negotiated quantities billed against pay ledger accounts and resolved discrepancies.
- Participated in financial analysis of cost and credit proposals, modifications, and claims.

AWARDS

- 2018 Partners in Excellence Award for Dragon Implementation in the Department of Pathology
- 2018 Partners in Excellence Award for Dragon Medical One Upgrade Team Implementation
- 2014 Partners in Excellence Award for Inpatient Certification Workgroup
- 2012 Partners in Excellence Award for BWFH's Radiology Billing
- 2012 Partners in Excellence Award for Meaningful Use
- 2008 Partners in Excellence Award for Electronic Signature Initiative Team
- 2007 Partners in Excellence Award for DF/BWCC Mesothelioma Clinic Planning Team
- 2006 Partners in Excellence Award for Student Success Jobs Program Mentors

SOFTWARE

Microsoft Outlook, Excel, PowerPoint, Word Very Good

EDUCATION

09/96-05/99 **Suffolk University** Boston, MA
Master's Degree in Business Administration

09/88-06/93 **Northeastern University** Boston, MA
Bachelor of Science in Civil Engineering

ACTIVITIES

- Candidate, Select Board for the Town of Andover from January to March 2018
- BWH Student Success Jobs Program Mentor from 2006 to 2008
- Alumni Executive Board, Beta Gamma Epsilon Engineering/Science Fraternity from 1993 to 1995
- Enjoy the outdoors, biking, hiking, sports and travelling

REFERENCES Available upon request

Tracey Gauthier-Peters

Town of Andover Select Board Application

This application is to express interest to fill a vacant seat on the Town of Andover Select Board. This interim appointment will last until a permanent successor is elected on March 22, 2022.

Please return a completed application and resume and/or CV electronically to Kathryn Forina (kforina@andoverma.gov) by Friday, March 12th at 4:30 PM. Interviews for interested candidates will be held on Wednesday, March 17th at 7:00 PM in a virtual public meeting.

1. Name	Tracey Gauthier-Peters
2. Address	22 Avon Street Andover, Ma 01810
3. Email Address	TraceyGPeters@gmail.com
<p>4. Please provide a Statement of Interest as to why you are seeking appointment to the Select Board.</p> <p><i>(Please limit response to one page.)</i></p>	<p>Growing up in North Andover I spent significant time in both Andovers before moving to the west coast. Moving back east several years ago I ended up settling in Andover. Keeping the history, charm and quality of Andover while continuing to move forward is important to me as a citizen of Andover. My long -term perspective as and Andover resident as well as the outlook I have of someone who has left and came back only enhances my desire to make sure we move forward in a thoughtful and collaborative way. My neighborhood in Huntington Beach was designed to look like a replica of an Andover like town with wide streets and a neighborhood park and eastern type houses. The beauty of Andover is in its downtown and outdoor space. The strength of Andover is in its school district and its people. As a resident I want to see that continue while making sure that the tax dollars are spent effectively. We need to make sure that Andover continues to attract business to increase the revenue base without impeding on the quaintness of the downtown charm. Projects like 11 Lewis street and increases outdoor dining can enhance Andover’s reputation as a dining destination. Increasing eco-friendly and outdoor recreation projects will also seek to increase Andover’s reputation. All these things are important to me and are why I have submitted my application for the open select Board seat.</p>
<p>5. Please list your prior Town Board /Committee experience.</p>	<p>When I lived in Huntington Beach California, I served as Vice President, on the Seagate Community Association Board of Directors from November 2006 until August of 2011. As a board member I approved or denied and updates to the outside of homes both hardscape and softscape and well as any changes to the community as a whole.</p> <p>I am also on the Board of Andona in Andover as Ways and Means Chairman and am on the Scholarship Board for the North Andover Woman’s Club,</p>

<p>6. Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts.</p> <p><i>(Please limit response to one page.)</i></p>	<p>As you will see by my resume, I am a healthcare Revenue Cycle IT Sales and Consulting Executive. What that means is that I have spent my career transforming, selling and implementation healthcare solutions, processes, and systems across the country. In doing this I have negotiated and administered large contracts, streamlined business processes, and managed implementations of systems including managing to large budgets. This translates to the select board in the understanding of budgets, contracts, financial management and the review and approval of processes permitting. Also, in my work with Andona I have worked with several of the business in Andover building up sponsorship for Clowntown and with the health and safety department at the town hall helping to secure permits for the event.</p> <p>I also spent several years as the vice president of a large homeowners' board in Huntington Beach California where we oversaw the management of a development of over 200 homes inclusive of streets, parks budgets, homeowner dues, and approvals of all home improvement projects and mediation of all homeowner grievances.</p> <p>As a manager and as a person I am also very up to date on diversity training. I was also very affected by the events of the last year and have done my part to better understand the historical significance of those events. It is my feeling that everyone can do their part to make every environment one of safety and inclusion for all residents and visitors.</p> <p>I look forward to the opportunity to speak with the board next Wednesday March 17.</p>
<p>7. Do you understand that if appointed, you must resign from any Town Boards / Committees that you currently serve on?</p>	<p>Yes, I am not currently on any town boards, but I am currently a board member for Andona.</p>

Should you require more space, please attach additional pages to this application, clearly marking which question you are answering.

TRACEY GAUTHIER-PETERS

Andover, MA • (657) 464 – 0072 • TraceyGPeters@gmail.com • <https://www.linkedin.com/in/traceygauthierpeters/>

SUMMARY

Proven healthcare executive with broad based healthcare solutions, client management, sales, consulting and project management experience. Passionate about helping client maximizing their use of technology for improving revenue cycle processes and increase payments in both the ambulatory and inpatient settings. Long track record of providing responsive client service for both clients and prospects.

- Health System and Ambulatory software solutions
- Hospital and Laboratory Revenue Cycle
- Healthcare Software Sales specializing in ERP & Revenue Cycle and Coding
- C-Level Presentation and Stakeholder Engagement
- SaaS Based Solutions
- Business Development and C-Level Relationship Building
- Large Enterprise Sales and Account Management
- Healthcare Consulting and Project Management

PROFESSIONAL EXPERIENCE

Ettain, Charlotte, NC

2020 - Current

Tufts Medical Center, Interim Manager of Revenue Cycle and ERP Applications

- Consulting project to provide management service for Tufts Medical Center during EPIC install
- COVID vaccine process engineering
- Manage team of Application specialists for the Revenue Cycle, HIM and ERP applications
- Technical lead for the XIFIN laboratory implementation
- Coordinates Tufts Medical Center Integration as part of Wellforce

Optum360, Eden Prairie, MN

2016 – 2020

Senior Director – Revenue Cycle Transformation

- As part of the leadership team for the Quest Diagnostic Strategic Partnership, developed and implemented strategy for meeting Quest client contractual obligations
- Leader and Project Manager for several projects within the scope of lab/physician revenue cycle
- Managed a team of consulting analysts on large multi-year full-service revenue cycle transformation project responsible for increasing revenue and collections.
- Collected \$20M additional cash by reducing missing information by 15% over a 1-year period through process re-engineering across the organization including:
 - Digital Enablement of Physician Billing Information Project Rollout – website creation and design, client marketing and education program development, rollout and IT enhancement definition and rollout management
 - Physician Medicare Limited Coverage Project – requirement gathering, IT configuration, testing and rollout
 - Physician Client In-Office Phlebotomist Worklist Project – Pilot test of new process enhancement
 - Oversaw the technology process for upgrade of new billing application enhancements
- Program and Project Management for Offshore workstream outsourcing in India and Puerto Rico
 - Developed staffing, cost models and workplan templates for workstreams including Revenue Cycle Front-End processing
 - Front-End Missing Information Collection Process and Third-Party Billing Follow-Up using PEGA management workflow tools

XIFIN – XIFIN delivers SaaS-based revenue cycle management solutions for Laboratories

2012 - 2016

Account Executive

- Responsible for new business SaaS software solution sales to diagnostic providers for a national territory.

- Secured key wins for recurring account business with Renaissance RX, LabPro, Applied Proteomics, Human Longevity, and Fry Labs
- 2015 – 105% of \$1M quota
- 2014 – 100% of \$1M quota
- 2013 – 110% of \$1M quota
- Identify, work and close new business clients for Strong Relationship building and management including strong listening skills and the ability to determine a prospect's needs to drive the opportunity to successful closure
- Strong leader of internal resources and working with practice leads in complex sales opportunities to move to close business

Anthelio Healthcare (now Atos)

2009-2012

Account Executive

- Client sales role, responsible for client sales and client satisfaction.
- Generated more than \$10M in sales over tenure
- 2001 – 93% of \$1.5M quota
- 2000 – 120% of \$2M quota
- 1999 – 130% of \$2M quota
- 1998 – 110% of \$2M quota

FTP Consulting -

2008 - 2009

Owner/Principal

- Developed and led sales and marketing efforts for medium and small business
- Provided Systems Project Management, Implementation, and services consulting for new Human Resources implementation
- Clients included Advanced Computer Consultants, One Command and Sun Healthcare

Thomson Healthcare (formerly Medstat), Advanced analytics provider

2004 –2007

Director, Sales Western Region

- Contributed over \$3M to Medstat Episode Grouper Product Sales
- Strategic win for Medstat Episode Grouper (MEG) over Ingenix ETG at IHA for use in statewide P4P initiative for efficiency measurement. Set the stage for key company win at CMS
- Strategic win at the Blue Cross Blue Shield Association (BCBSA) for MEG over Ingenix ETG for use in their 80 Million life Blue Health Initiative (BHI) Nationwide Benchmarking database
- Strong competitive market penetration through client relationships and understanding the prospects needs and problems and turning them into an opportunity and sale
- Integral in making the Medical Episode Grouper (MEG) a strong market alternative to Ingenix Episode treatment Groups (ETGs).

Onyx Software, CRM vendor

2002-2003

Senior Account Executive, CRM sales

- Responsible for new business \$2.5 Million in sales annually
- Responsible for CRM sales in the general market vertical
- Expanded ONYX CRM market presence in Southern California

Lawson Software, (now Infor) - ERP Vendor

1998 - 2002

Senior Account Executive/Account Executive – Healthcare ERP sales

- Secured Key new opportunities in named accounts such as Cedars Sinai Medical Center, Motion Picture Television Fund Hospital, PMI Delta Dental, Washoe Health System, Baylor Healthcare, Scripps Health and Clinic, Sun Healthcare Group, NM, and Sun Health System, AZ, Regence BC
- Generated more than \$10M in sales over tenure
- 2001 – 93% of \$1.5M quota

- 2000 – 120% of \$2M quota
- 1999 – 130% Of \$2M quota
- 1998 – 110% Of \$2M quota

Shared Medical Systems, (now Cerner), HIS vendor

1985 - 1998

Account Executive/ERP Sales Rep

- 1996 SMS pride in Performance Award recipient.
- Obtained \$4M competitive renewal.
- Developed customized customer care programs to promote increased customer satisfaction.
- Responsible for maintaining customer relationships and sales for existing accounts
- Sold the Peoplesoft General Financials and Human Resource product to both the SMS client base and new business prospects for both Western and National Accounts.
- Secured key \$4 Million win at Daughters of Charity Health Systems in Evanston Illinois for Peoplesoft Solution

Marketing Product Specialist – Financial Systems

- 1992 SMS Superstar Award
- 1992 SMS Pride in Performance Award
- 1990 SMS pride in Performance Award
- Provide national product and subject expertise and marketing support for the SMS Revenue Cycle and Financial Suite of products
- Led National Marketing efforts for sales of the Receivable Management Workstation

Installation Director (ID)

- 1989 Outstanding Installation Achievement Award
- 1988 SMS Pride in Performance Award
- 1986 Outstanding FMS Implementation Director
- Multi-year Annual Installation Achievement Conference Attendee
- Provided new project management, implementation and customer support for the Revenue Cycle and ERP products for the New England regional client base
- Implemented the SMS Revenue Cycle and Financial Suite of products in New England regional accounts - Projects include NEMC (Tufts), North Shore Medical Center (MGH), Miriam Hospital (Lifespan), Nashua Hospital (Southern New Hampshire Health, Danbury Hospital (Western CT Health Network), and Cheshire Medical Center (Dartmouth Hitchcock)
- Provided Sales support to the Regional Account Executives
- Provided Corporate Client and Field Education for the SMS Financial products

EDUCATION

University of Massachusetts, Amherst, MA

Bachelor of Scient (B.S.), Finance

CERTIFICATIONS

Lean Six Sigma

PROFESSIONAL AFFILIATIONS

-
- Andona – Ways and Means Chairman, North Andover Women’s Club – Scholarship Committee Chair

References Furnished upon Request

Bonnie Zahorik

Town of Andover Select Board Application

This application is to express interest to fill a vacant seat on the Town of Andover Select Board. This interim appointment will last until a permanent successor is elected on March 22, 2022.

Please return a completed application and resume and/or CV electronically to Kathryn Forina (kforina@andoverma.gov) by Friday, March 12th at 4:30 PM. Interviews for interested candidates will be held on Wednesday, March 17th at 7:00 PM in a virtual public meeting.

1. Name	Bonnie Zahorik
2. Address	172 North Main St. Andover, MA 01810
3. Email Address	bzahorik@gmail.com
4. Please provide a Statement of Interest as to why you are seeking appointment to the Select Board. <i>(Please limit response to one page.)</i>	See next page.
5. Please list your prior Town Board /Committee experience.	<u>Finance Committee - 5 years, 2014 – 2019</u> Liaison to the following departments: <ul style="list-style-type: none"> - Facilities - DPW - IT - Library - Permanent Town Building Advisory Committee - IT Advisory Committee (when in existence)
6. Given the major projects and initiatives that will come before the Select Board in the next year, please describe your relevant experience and how it will support these efforts. <i>(Please limit response to one page.)</i>	See next page.
7. Do you understand that if appointed, you must resign from any Town Boards / Committees that you currently serve on?	Yes, does not apply.

Should you require more space, please attach additional pages to this application, clearly marking which question you are answering.

4. Statement of Interest

I am applying to serve my community as an appointed member of the Andover Select Board because I believe Andover is facing both opportunity and challenges that require pragmatic vision. Our community is facing key decisions about projects that have been under development for a very long time. I'd like to be of service to help move this important work forward.

At the same time, we have significant operational needs on which we must continue to focus. Maintaining our infrastructure, replacing miles of water mains, delivering ongoing services to our residents and fostering a positive environment for business will always be important. Through my work on the Finance Committee, I have developed great appreciation for the high caliber of employee we have serving our Town. If I can help to ensure they have what they need to be successful in serving our community, I'd like to do so.

In the years that I've lived in Andover, my interest and understanding of how our Town government works has grown from a simple desire to understand what I was voting on at Town Meeting, to a solid understanding of how services are delivered through the Town budget. I've also learned about the important role that planning and community development play in our future. I understand our revenue sources and appreciate how we must fund our budget largely through taxation.

With respect to my qualifications, the breadth in my background as a business executive and consultant is extremely helpful when evaluating both long term strategy and near term actions. I have established strategy, proposed and managed budgets, transformed departments to increase scale and efficiency, and developed staff. This background allows me to better understand how decisions made can impact an entire "system". During my career it has been critical to work collaboratively across departments and leverage the expertise that everyone brings to the table. I think this experience will allow me to understand the complexities of the decisions being made and also to work effectively and collaboratively with other board members.

While the focus of the application seemed to be on large initiatives, I would also want to encourage continued priority on 2 areas of recent focus: (1) diversity and inclusion, and (2) sustainability. These are the issues of our time and our Select Board must lead the way.

It would be an honor to serve my community on the Select Board for this one-year appointment.

6. Relevant experience to major projects and initiatives in the coming year

During my years on the Finance Committee, the initiatives facing key decisions by the Select Board and voters in the coming year were actively discussed in depth.

The Finance Committee's focus on the need to address our long term pension and OPEB liabilities has been consistently evident in the Finance Committee Report. I have an understanding of the history, the drivers underlying these liabilities and implications of the options on the table currently - as well as the implications of inaction.

As liaison to the Facilities department, I came to understand the importance of maintaining our facilities and the need to move large-scale projects like West Elementary forward. And I know there is more than we must address. As liaison to PTBAC, I grew to understand the factors that

go into these large building projects. I have also toured our buildings and understand that we have a responsibility to maintain them in the near term.

Even more exciting is the opportunity that the Lewis St. property sale and development presents. The future development of the Historic Mill District will be a key part of building a future for Andover as a vibrant town with even more to offer our residents than we have today. It is not enough to exist. We must make investments in smart growth in order to thrive.

BONNIE ZAHORIK

Andover, MA ♦ 978-888-8681 ♦ bzahorik@gmail.com

S U M M A R Y

Collaborative executive adept at leading change with a strong marketing, operational and IT background that enables successful partnerships with marketing, sales, technology and channel leaders. History of implementing insight-driven programs to acquire and deepen customer relationships, drive business impact, increase scale and improve efficiency. Proven abilities in developing teams, cross-functional program management, and translating strategy into actionable plans that deliver measurable results.

E X P E R I E N C E

MERKLE, INC., Columbia, MD - A Performance Marketing Agency

Consultant and Strategy Director - Financial Services, Wealth Management and Retirement planning

Specialized in transforming organizations to customer centric marketing to increase engagement and cultivate relationships that drive current customer value and develop future opportunity. Designed and delivered data driven omni-channel people based marketing programs. Clients included Nationwide Financial, Edward Jones, CUNA Mutual and Citizens Bank.

Strategist and Client Delivery Lead for a \$3MM retirement plan participant engagement program designed to generate incremental AUM and revenue through guidance interactions, increased contributions, asset consolidation and retention, managed account adoption, and improved plan acquisition and retention.

- Facilitated collaborative sessions with marketing, website, sales and service leaders to develop a future vision for the participant experience and designed a high level customer journey across the life cycle.
- Designed integrated people-based campaigns leveraging direct mail, email, addressable display/social and remarketing. Partnered with client's internal agency and research organizations to develop the value proposition, creative concept and design guidelines consistent with brand standards.
- Drove \$79MM in incremental assets over six months (1H/2016) exceeding ROI benchmark; delivered 38% lift in representative interactions and more than 30% lift in contribution increases and asset consolidation.

Other client engagements included: customer journey development and experience design; customer portfolio analysis, customer centric transformation; integrated omni-channel campaigns.

FIDELITY INVESTMENTS, Boston, MA

VP and Director level positions in Segment Management, Marketing, Distribution and IT

Vice President – Customer Development, Mass Market Segment Management

Strategy, business planning and program management role in the mass market segment group responsible for development of integrated customer development strategies, opportunity analysis and business planning. Focus was on development of profitable retail customer relationships and integration of strategies with workplace plan participant marketing. Worked with other marketing and distribution partners to translate segment strategy into

supporting programs and tactics.

- Developed data-driven customer segmentation strategy to focus resources on development of key opportunities within the 17.4M customer base, including the acquisition of retail relationships with workplace participants.
- Identified high propensity hidden value and future value households. Integrated strategic segmentation with tactical behavioral segmentation and modeling work.
- Created a cross-segment Life Stage Programs strategy to deepen relationships through meaningful dialog that addresses customer needs and provides solutions to increase engagement and take-action rates.
- Collaborated with Defined Contribution business to integrate B2C segmentation into employer segmentation.

Vice President – Customer Knowledge Center

Multiple strategic leadership roles in this database marketing and analytics group during a time of business transformation. Held positions with wide-ranging responsibilities including Acquisition Direct Marketing, Campaign Management and Operations, DM analysis, campaign design and segmentation. Led teams of 8 – 20 campaign managers and analysts.

- Established best practice direct marketing measurement and implemented new process and marketing automation to transform campaign execution and increase capacity 500% from 300 to 1450 campaigns/year while maintaining reputation for flawless execution.
- Implemented scalable acquisition marketing engine, leveraging models and measurement to improve targeting and leverage proven tactics. Improved cost per household by 70%.
- Successfully implemented marketing automation software, dramatically increased efficiency and scale, and established a new partnership with FMR (Fidelity) India.
- Provided account management and consulting for the Insurance and Charitable Gift Fund organizations.

Technology Planning, Desktop/CRM Strategy and Systems Development

Multiple positions over 10 years at Fidelity Investments at the VP and Director level including technology planning and budget management across the retail organization, CRM strategy, program management, call center management and systems development. Prior to Fidelity, five years of operational management and systems development at IDS/American Express in Minneapolis, MN.

E D U C A T I O N

Boston University Master of Business Administration (MBA)

University of Wisconsin, Madison Bachelor of Business Administration, Marketing & Management

V O L U N T E E R A C T I V I T I E S

Board Member, Executive Committee - A Better Chance of Andover

Town of Andover, MA Finance Committee – Appointed for 2 terms (5 years) 2014 – 2019