



DATE POSTED:

Town Clerk Use Only

2021 SEP -4 PM 3:01

AMENDED AGENDA

POSTED IN ACCORDANCE WITH THE PROVISIONS OF MGL 30A § 20 Act relative to extending certain COVID-19 measures adopted during the state of emergency

Marblehead School Committee

Name of Board or Committee

Address: Marblehead High School Library 2 Humphrey Street Marblehead MA 01945
ORZoom Conference: [https://marbleheadschoo-
org.zoom.us/j/97886762817?pwd=5hT6kswajICtbJVaC2uYOnIpdv7fE.1](https://marbleheadschoo-
org.zoom.us/j/97886762817?pwd=5hT6kswajICtbJVaC2uYOnIpdv7fE.1)

Meeting ID: 978 8676 2817

Password: 610612

Dial in Phone +1 646 931 3860 US

Thursday	September	4	2025	6pm
Day of Week	Month	Date	Year	Time

Agenda or Topics to be discussed listed below (That the chair reasonably anticipates will be discussed)

- I. Initial Business: Call to Order
 - a. Pledge of Allegiance
 - b. Commendations
 - c. Public Comment
 - d. Student Representative
- II. District Updates – Supt. John Robidoux
 - a. Superintendent John Robidoux Update
 - b. ~~Financial Update and FY2025 Close Out Review: Michael Pfifferling~~
- III. Consent Action and Agenda Items
 - a. Schedule of Bills (vote)
 - b. Meeting Minutes: (8/21/2025) (vote)
- IV. School Committee Communication and Discussion Items
 - a. High School Roof Project Members (vote)
Michael Pfifferling, Todd Bloodgood, Eileena Long (Left Field), Gene Raymond (RDA)
Ralph Wallace, Sam Altreuter, Karima Maloney, Sara Pouladian, Michael Smith, Pete Kessel
Marc Leibman, Devin McGlynn, Brian Serafin
 - b. Consider instant recap email: Henry (vote)
 - c. ILD Policy approval (vote)
(Student Submission to Educational Surveys and Research)
 - d. Update on Academic Integrity: Julia Ferreira

- e. Textbook Disposition: Julia Ferreira (vote)
- f. Lake Placid Hockey Trip (vote)
- g. Updated Piper Field Light Proposal (vote)
- h. Sub-Committee and Liaison Updates

V. Closing Business

- a. New Business
- b. Correspondence

VI. Motion and vote to meet in executive session for the following reasons:

Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss strategy with respect to collective bargaining with Unit A of the Marblehead Teachers Association, as an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares without intent to return to open session.

Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss litigation, Marblehead School Committee and Marblehead Teachers Association, MUP-25-11555, as an open meeting may have a detrimental effect on the litigating position of the School Committee and the Chair so declares.

Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss litigation, Ferretti, Kelley, et. al. v. Marblehead Public Schools, et. al., Docket Number 2577CV00904, as an open meeting may have a detrimental effect on the litigating position of the School Committee and the Chair so declares.

Chair's Statement following roll call vote on the motion:

The Committee will now be meeting in Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss strategy with respect to collective bargaining with Unit A of the Marblehead Teachers Association, as an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares without intent to return to open session.

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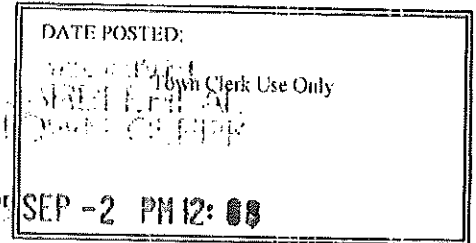
VII. Executive Session

Adjournment

Hybrid Meeting Notice: Members of the public are welcome to attend this in-person at 2 Humphrey Street Marblehead MA 01945 or by the remote zoom connection provided. Please note that the in-person meeting will not be suspended or terminated if technological problems interrupt the remote connection.

THIS AGENDA IS SUBJECT TO CHANGE

Chairperson:	<u>Al Williams</u>
Posted by:	<u>Al Williams</u>
Date:	<u>9/4/25</u>



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Marblehead School Committee

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<https://marbleheadschoools-org.zoom.us/j/97886762817?pwd=5hT6kswajlCtbJVAC2uYOnIpdiv7fE.1>

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Ralph Wallace, Sam Altreuter, Karima Maloney, Sara Pouladian, Michael Smith, Pete Kessel
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 - c. ILD Policy approval (vote)
(Student Submission to Educational Surveys and Research)
 - d. Update on Academic Integrity: Julia Ferreira
 - e. Textbook Disposition: Julia Ferreira (vote)
 - f. Lake Placid Hockey Trip (vote)

- g. Updated Piper Field Light Proposal
- h. Sub-Committee and Liaison Updates

(vote)

V. Closing Business

- a. New Business
- b. Correspondence

VI. Motion and vote to meet in executive session for the following reasons:

Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss strategy with respect to collective bargaining with Unit A of the Marblehead Teachers Association, as an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares without intent to return to open session.

Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss litigation, Marblehead School Committee and Marblehead Teachers Association, MUP-25-11555, as an open meeting may have a detrimental effect on the litigating position of the School Committee and the Chair so declares.

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Chair's Statement following roll call vote on the motion:

The Committee will now be meeting in Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss strategy with respect to collective bargaining with Unit A of the Marblehead Teachers Association, as an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares without intent to return to open session.

We will also be meeting in Executive session pursuant to Chapter 30A, Section 21(a)(3), "Purpose 3", to discuss litigation, Marblehead School Committee and Marblehead Teachers Association, MUP-25-11555, as an open meeting may have a detrimental effect on the litigating position of the School Committee and the Chair so declares.

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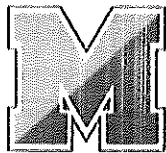
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THIS AGENDA IS SUBJECT TO CHANGE

Chairperson: Al Williams
Posted by: Al Williams
Date: 9/2/25



Marblehead Public Schools

9 Widger Road
Marblehead, Massachusetts 01945
Phone: (781) 639-3140

John Robidoux
Superintendent of Schools

Julia Ferreira
*Assistant Superintendent of
Teaching & Learning*

LisaMarie Ippolito
*Assistant Superintendent of
Student Services*

Michael Pfifferling
*Assistant Superintendent of
Finance & Operations*

MEMORANDUM

TO: Marblehead School Committee
FROM: Michael Pfifferling, Assistant Superintendent of Finance and Operations
DATE: September 4, 2025
RE: Schedule of Bills for Approval

Included in this packet are the following Schedules of Bills for your consideration. The schedules and invoices have been uploaded to the shared drive.

Schedule	Amount
A26-7	\$299,481.19
A26-7	\$163,503.07
26930	\$159,692.41
A26-7a	\$825.50
A26-8	\$76,080.80
585	\$28,703.19
26.8 ss	\$55,510.33
26938	\$200,480.09
A26-8-DW-KFM	\$6,196.73
Total	\$990,473.31

Suggested Motion:

Motion to approve the identified schedules of bills totaling \$990,473.31

DRAFT

Marblehead School Committee Minutes

Date: 8/21/25

Time: 6:00 PM

Location: Brown School Library, 40 Baldwin Rd, Marblehead, MA, 01945

Members Present:

Al Williams

Jennifer Schaeffner

Kate Schmeckpeper

Henry Gwazda

Members Joining Remotely: none

Members Absent: none

Minutes Created By: Henry Gwazda

Agenda Link:

<https://marbleheadma.gov/wp-content/uploads/2025/08/Marblehead-School-Committee-AMEND-ED-Agenda-8-21-25.pdf>

Video Link:

https://www.youtube.com/watch?v=PpbUq8Sw0_M

Meeting Summary:

I. Initial Business and Public Comment:

The meeting began with a moment of silence to honor an 8th-grade student who passed away. Sarah Fox raised concerns about the potential reopening of collective bargaining without proper public session and emphasized the need for transparency and adherence to ethical processes. Fox also highlighted the alarming youth behavior risk survey results, urging the community to address the issue collectively and not sweep it under the rug. Tom McMahon expressed skepticism about the accuracy of the survey results and stressed that the problem is a cultural issue in Marblehead, requiring a comprehensive approach involving schools, parents, and local authorities.

II. District Updates (00:10:00–00:14:00)

A. Interim Superintendent expressed condolences to Savannah's family and reported counselors positioned at Veterans Middle School and high school to support students, staff, and community partners

B. Facilities upgrades nearing completion:

1. Glover Elementary HVAC system installed and being tested
2. Playground completion delayed due to equipment delivery issues
3. Veterans Middle School auditorium renovations completed
4. Village School scoreboard installed
5. District painting, floor refinishing, and exterior landscaping completed

C. District acquired first electric van for fleet alignment with green Marblehead initiatives; staff preparation activities scheduled for the week with student return on Wednesday

III. Consent Action and Agenda Items (00:14:00–00:16:00)

- A. A motion was made by Kate Schmeckpeper and seconded by Henry Gwazda to approve the identified schedules of bills totaling \$918,034.58
 - 1. The motion passed 4–0, with votes in favor: Jennifer Schaeffner, Henry Gwazda, Kate Schmeckpeper, Al Williams
- B. A motion was made by Kate Schmeckpeper and seconded by Henry Gwazda to approve the meeting minutes of August 4th and August 7th of the school committee
 - 1. Jennifer Schaeffner noted edits needed regarding open meeting law requirements including meeting location and documents used
 - 2. The motion passed 4–0, with votes in favor: Jennifer Schaeffner, Henry Gwazda, Kate Schmeckpeper, Al Williams
- C. Chair clarified building subcommittee meeting minutes are approved by the subcommittee itself rather than the school committee, acknowledging placing them on the agenda was an error

IV. School Committee Communication and Discussion Items

A. **Handbook Updates and Bullying Prevention Plan (00:17:00–00:35:00)**

- 1. Handbook language updated regarding student surveys and parental consent
 - a) Changed from "notify parents" to "obtain consent from parents and guardians" to operationalize policy ILD
 - b) District would align with NASC guidelines requiring family consent with opt-out options
 - c) Provides blanket consent through handbook acknowledgment while maintaining individual survey opt-out rights
- 2. Committee concerns and approval
 - a) Jennifer Schaeffner objected to blanket consent approach and questioned its legality
 - b) Concerns raised about policy ILD not being formally approved yet and timing with school starting Wednesday
 - c) A motion was made by Kate Schmeckpeper and seconded by Henry Gwazda to approve the proposed updates to the NPS handbooks regarding Notification of Rights under the Protection of Pupil Rights Amendment
 - d) The motion passed 3–1 with one abstention, with votes in favor: Henry Gwazda, Kate Schmeckpeper, Al Williams, abstained: Jenn Shaeffner.
- 3. Bullying prevention plan updates and approval
 - a) Plan reviewed by attorney Matt McAvoy with mostly grammatical changes
 - b) Language updated: "perpetrator" to "aggressor" and "victim" to "target" per Massachusetts statute

- c) Professional development training added through ARCs ED training and building presentations
- d) Correction noted that parents would be notified before investigations begin, not after completion
- e) A motion was made by Kate Schneckpeper and seconded by Henry Gwazda to accept the proposed updates with the discussed edit to the MPS bullying intervention and prevention plan
- f) The motion passed 4–0, with votes in favor: Jennifer Schaeffner, Henry Gwazda, Kate Schneckpeper, Al Williams

B. High School Roof Project Committee Formation (00:35:00–00:44:00)

- 1. Chair proposed appointing Ralph Wallace and Sam Altruiter as community members to high school roof subcommittee with Henry Gwazda as chair per policy PDE
- 2. Jennifer Schaeffner raised concerns about appointment process:
 - a) No public advertising seen for positions
 - b) No background information on proposed appointees in committee materials
 - c) Emphasized need for robust community solicitation and advance candidate review
- 3. Henry Gwazda explained notice was placed in newspapers with only two respondents expressing interest; offered to provide appointee qualifications
- 4. Timeline concerns discussed:
 - a) Pre-bid documentation due August 28th
 - b) Building subcommittee can continue project progress until roof committee fully formed
 - c) Pre-qualified bidders submit applications demonstrating qualifications, past projects, financial backing
 - d) Committee input needed during bidding phase for roof repair versus replacement decisions
- 5. Chair withdrew motion to appoint community members:
 - a) Committee agreed to conduct wider announcement of positions
 - b) All members to be in place for September 4th meeting vote
 - c) Timeline allows project to proceed without significant delays

C. Charter Committee Review (00:44:00–00:47:00)

- 1. Amy Drinker, charter committee chair, requested feedback on draft B charter Article 6, Section 8 regarding school committee establishment and functions by Monday, October 6th

2. Kate Schmeckpeper designated to review charter section and provide feedback on behalf of committee

D. MASC Conference Discussion (00:47:00–00:51:00)

1. Joint MASS and MASC conference November 12th-14th for school committees and administrators
 - a) School committees decide individually who attends
 - b) Budget available for all members to attend
 - c) Members contact Lisa Manning for registration and hotel bookings
 - d) Various attendance options: full conference, single days, or day-only without overnight stays
2. Conference requires delegate appointment to vote on legislative and policy items
 - a) Delegate must be empowered by committee to cast votes
 - b) Committee should discuss issues beforehand to provide guidance
 - c) Committee agreed to handle delegate appointment at future meeting closer to conference date

E. Donation Acceptance (00:51:00–00:52:00)

1. Interim Superintendent presented \$500 donation from Making Ends Meet Incorporated Foundation to Brown School
 - a) Initially listed as "blanket donation" causing confusion about purpose
 - b) Clarified via email with Mary Maxwell as general donation, not for blankets
2. A motion was made by Kate Schmeckpeper and seconded by Henry Gwazda to accept the donation from Making Ends Meet Foundation
3. The motion passed 4–0, with votes in favor: Jennifer Schaeffner, Henry Gwazda, Kate Schmeckpeper, Al Williams

F. Anti Discrimination Committee Discussion (00:53:00–01:08:00)

1. Jennifer Schaeffner proposed restructuring the anti-discrimination committee from superintendent's committee to school committee advisory committee for better accountability and measurable deliverables after two years of difficult district experiences
2. Interim Superintendent preferred maintaining current structure to preserve safe spaces for sharing lived experiences without public scrutiny
 - a) Acknowledged limited progress with only 3-4 meetings previous year
 - b) Committed to monthly meetings, better structure, clearer deliverables, and regular school committee reporting

- c) Confirmed 100% of benefit would be lost if meetings became public as participants wouldn't speak openly
- 3. Committee agreed to maintain current structure with enhanced accountability
 - a) Quarterly reporting with students and adults presenting perspectives directly to school committee
 - b) Anti-discrimination work incorporated into district improvement plan and superintendent evaluation goals
 - c) Option retained to restructure if progress unsatisfactory

G. Planning and Committee Updates (01:08:00–01:15:00)

- 1. Kate Schmeckpeper proposed developing a year-long agenda for the school committee following MASC recommendations as a full committee effort with community publication, providing three district examples (Lexington, Andover, Greenfield) for review
- 2. Jennifer Schaeffner noted the committee already had a yearly calendar focusing on time-sensitive items like budget votes and warrant articles, but it was not publicized or available on the website
- 3. Committee agreed to make their existing yearly calendar available to the community on the website using a format similar to the examples reviewed
 - a) Al Williams preferred month-by-month box format over graphical approaches
 - b) Jennifer Schaeffner supported simple bullet point format
- 4. Al Williams requested subcommittee updates and noted monthly updates would be easier when the committee had a new member and all committees were fully staffed
 - a) Kate Schmeckpeper reported policy subcommittee meeting scheduled for following week

V. Closing Business

- A. Jennifer Schaeffner proposed adopting state anti-Semitism recommendations for K-12 schools locally in Marblehead
 - 1. Full committee and Anti-Discrimination Committee will review recommendations
 - 2. Jennifer Schaeffner will facilitate discussion at next meeting
- B. Jennifer Schaeffner proposed multi-board leadership group to address youth substance abuse and safety issues following recent community tragedy
 - 1. Group would include School Committee, Select Board, Board of Health, Parks and Recreation, first responders, police, parents, and potentially clergy
 - 2. Meetings structured to avoid quorum issues and open meeting law requirements

3. Al Williams authorized her to represent school committee in initial conversations with other board chairs
 4. Will report back at September 4th meeting
- C. Committee requested condolence letter for Savannah Getel family
1. Henry Gwazda will draft letter following home visit
 2. Letter will be signed by committee chair per standard protocol

VI. Executive Session Motion and Adjournment (01:25:00–01:28:00)

- A. Al Williams requested motion to meet in executive session for two purposes:
1. Discuss strategy with respect to collective bargaining with Unit A of the Marblehead Teachers Association pursuant to Chapter 38, Section 21A3, Purpose 3, as open meeting may have detrimental effect on bargaining position
 2. Discuss litigation Kelly Ferretti et al vs. Marblehead Public Schools, John Robideaux and Al Williams, Essex Superior Court, pursuant to Chapter 38, Section 21A3, Purpose 3, as open meeting may have detrimental effect on litigating position
 3. Chair declared no intent to return to open session
- B. Motion made by Kate Schmeckpeper and seconded by Henry Gwazda to enter executive session for stated purposes. Roll call vote passed 4–0, with votes in favor: Jennifer Schaeffner, Henry Gwazda, Kate Schmeckpeper, Al Williams.
- C. Committee relocated to another room for executive session



MARBLEHEAD HIGH SCHOOL
Athletic Department
2 Humphrey Street
Marblehead, MA 01945



2025-2026 Boys Ice Hockey Lake Placid Games vs Winthrop High School
Friday 12/12/25 – Saturday 12/13/25

The Boys Varsity Ice Hockey team has been invited to play a 2-game series against Winthrop High School at the Herb Brooks 1980 Arena in Lake Placid, NY on Friday evening 12/12/25 and Saturday 12/13/25.

The Herb Brooks 1980 Arena was the site of the 1980 Winter Olympics the year the underdog US Men's Hockey Team upset the highly favored USSR team and went on to win the gold medal. This upset is known as one of the greatest upsets in sports and was chronicled in the movie "Miracle".

The two games vs. Winthrop High School would count as our Northeast Conference League games. These games are within the MIAA guidelines and were approved by the MIAA's Keith Brouillard, should we decide to move forward.

The educational focus of the trip would be:

1. The teams will be able to play in the same arena that hosted the 1980 Winter Olympics.
2. The 1980 US Olympic Team Captain Mike Eruzione, a Winthrop High School alum, will speak to the team about the 1980 Gold Medal experience and provide a behind-the-scenes tour of the Olympic facility.

Funding for two-day trip:

- One night hotel accommodation (Friday 12/12) at High Peaks Resort-Lake Placid, NY
- Round-trip bus transportation
- Six Meals
- ✓ Covered through team fundraising. We have set aside \$2000 for the hotel deposit.

Regular Game Day Expenses:

- Ice Time Rental
- Police Detail
- Game Officials
- Timekeeper/Scoreboard Operator
- Athletic Trainer
- Game Day Staff
- ✓ These expenses have already been budgeted as part of the regular season costs



MARBLEHEAD HIGH SCHOOL
Athletic Department
2 Humphrey Street
Marblehead, MA 01945



Lake Placid Itinerary

Friday, December 12, 2025

10:00 AM Depart MHS by rental motor coach
12:00 PM Box Lunch
4:00 PM Arrive & Check-in at High Peaks Resort-Lake Placid, NY
5:00 PM Team Meeting and Light Pre-Game Dinner
6:15 PM Depart hotel walk to Herb Brooks Arena
7:30 PM Game #1 vs Winthrop HS
9:30 PM Post Game Dinner
11:00 PM Lights Out

Saturday, December 13, 2025

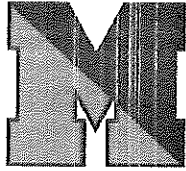
7:00 AM Wake up call light jog and stretch
8:00 AM Team meeting and breakfast at hotel
9:00 AM Hotel Check Out
10:00 AM Meet with Mike Eruzione for 1980 Presentation and Tour
11:30 AM Lunch
12:15 PM Walk to Herb Brooks Arena
1:30 PM Game #2 vs Winthrop HS
3:30 PM Post Game Dinner
4:00 PM Depart Lake Placid, NY by rented motor coach
10:00 PM Arrive back at MHS



Marblehead Public Schools
Request - Items to Declare Surplus

September 2025

Item (Book Title/Publisher)	Quantity	Note (why are we declaring this surplus?)
National Geographic Inside books and teacher manuals (Grades 7-8)	25 books/ manuals	New EL curriculum was recently adopted, and this old curriculum does not meet updated learning standards.
National Geographic Edge textbooks: Reading, Writing, & Language. Level Common Core, A, B, and C (Grades 6-12)	30	New EL curriculum was recently adopted, and this old curriculum does not meet updated learning standards.
Units of Study in Reading or Writing Kits	30	Not aligned to the latest research on teaching reading. New Curriculum was adopted 3 years ago (Wit & Wisdom) to replace these resources
Developmental Reading Assessment (DRA-2) Kits	2	Not aligned to the latest research on teaching reading
Grades K-3 Science Text Books (roughly 50 per classroom)	1,500 thin hardcover or paperback books	New science curriculum was adopted and textbooks do not cover all K-3 Mass standards.
Grades 4-6 Holt Science Textbooks Grades 4-6 Foss Science Textbooks	Total of 700 hardcover books (4 Units)	Old textbooks from 2004 do not cover all the new Next Generation Standards, and some information is outdated.
Grades 7-8 Holt Science Textbooks	1,500 hardcover textbooks (4 books for each set)	Old textbooks do not cover all the new Next Generation Standards, and some information is outdated.



Marblehead Public Schools

9 Widger Road
Marblehead, Massachusetts 01945
Phone: (781) 639-3140

John Robidoux
Superintendent of Schools

Julia Ferreira
*Asst. Superintendent of
Teaching & Learning*

LisaMarie Ippolito
*Asst. Superintendent of
Student Services*

Michael Pfifferling
*Asst. Superintendent of
Finance & Operations*

September 4, 2025

Dear Marblehead Planning Board,

As a follow up to the August 12th Planning Board meeting, the district is resubmitting its proposal seeking relief from the planning board's 2013 decision regarding the use of the lights and the public announcement system (PA) at Piper Field, 2 Humphrey Street, Marblehead, MA.

Subsequent to the August 12th meeting, I met with representatives from the abutting neighborhood to hear their concerns. I also met with representatives from youth sports and our Athletic Director to try and determine the realistic usage of Piper Field that would provide access to our high school and town athletics. It is abundantly clear that the field is significantly underutilized and that maximizing the usage is beneficial to the youth of our town.

The updated proposal is to utilize the lights until 9:00 PM from mid-August through November and then again from mid-March through May. This usage will encompass Fall and Spring athletic seasons as there is no need for the lights to be used during the winter or in the summer. The lights will only be turned on when needed and will be turned off at the end of the athletic contests, thereby minimizing the impact to the greatest extent possible. It should be noted that the 9:00 PM timeframe will align with the usage for the other town fields.

In regard to the use of the PA, we are seeking usage only for MIAA sanctioned high school contests. This usage is minimal and we will ensure that the volume of the PA system is reasonably controlled. With the exception of the National Anthem, the PA is not used to broadcast music.

The Marblehead School Committee approved the initial relief proposal on May 1, 2025. This proposal has been modified from that request in response to the feedback that has been received and approved by the committee on September 4, 2025. We are hopeful that the planning board will be amenable to this request for the benefit of the youth of Marblehead.

Thank you for your time and consideration.

Respectfully,

John J. Robidoux
Superintendent of Schools

Roger "Sam" Altreuter

[REDACTED]
Marblehead, MA 01945
[REDACTED]

Marblehead resident since 1981, married, three children, four grandchildren

Education

Tufts University, B.S. Civil Engineering, 1976

Wharton School, University of Pennsylvania, MBA, Finance and Accounting 1979

Work Experience

Hood Sailmakers, Marblehead, MA 1976-1977. Sail design and production.

Raytheon Data Systems, 1979-1980

Spaulding and Slye, 1980-1987. Project manager in an office building development business in Eastern Massachusetts

Altreuter Peabody, Inc. 1987-1992. Co-founder of this investment and development business.

CB Richard Ellis, 1992-2003. Real estate consulting, investment, management and brokerage.

Farley White Interests 1997-2022. Co-founder and Co-CEO of this real estate investment and development business. This raised capital for the acquisition or construction of 35 office and industrial buildings in Massachusetts, New Hampshire and Florida. Our staff grew to over 60 people. Half of our staff were managerial and half were technicians. We focused on creating above market returns by superior management. Our first focus was revenue, mostly achieved by maximizing occupancy. Our second focus was controlling expenses and capital expenditures by optimized purchasing methods, preventative maintenance, and life-cycle optimization.

Today I am a managing member of about 35 limited liability companies that own a roughly equal number of buildings. I am retired from day-to-day property management.

I am emailing because I am interested in volunteering for the subcommittee. Professionally I am a Senior Project Manager (and CPA) at F.L. Caulfield & Sons, Inc., a union general contractor that primarily does hospital work in Boston. The overwhelming majority of my day-to-day work is at MGH where we have an office, with other various projects usually going on at either MGH satellites or other hospitals in Longwood. I work on capital projects that range from multi-year phased projects within the hospital to infrastructure upgrades including chiller plants, steel dunnage and air handler replacements, all of which require roofing systems repair or replacement. As it relates to the immediate needs of MHS, my experience is very much geared towards the pre-construction (permitting, submittals, procurement, pricing, etc.), construction and closeout processes of such a project. In working at MGH when it comes to roofing, there is a very strict and standardized process in place regarding the product and the work that produces the necessary predictable outcome that they need due to the nature of what is going on below all of their roofs (ie, operating rooms, research labs, millions of dollars of sensitive equipment, etc.). I do recognize that MHS is in a different situation in that it has to place the future roof work within the reality of the State's, "lowest responsible bidder" statutes; and I will be very forthright in saying that I have had limited exposure to *municipal* construction, but enough to understand how projects are pursued by contractors who do public work.

Pete Kessel

- >Graduated Swampscott High School 1976
- >Graduated Florida Atlantic University 1980 (Boca Raton, FL)
- >Have a State of Florida Roofing & Building Contracting license since 1980.
- >Own and currently operate Atlas Roofing since 1980
- >Directly involved in roofing several million square feet of all types of buildings and roof systems.
- >Set up with most major roofing manufacturers to install NDL (no dollar limit) warranties for over 40 years.
- >Reroofed many schools, city, state & federal buildings, high rises, commercial warehouses and multifamily properties.

My daughter Hayley Martin lives in Marblehead, and her daughter just started 1st grade at Brown.

I live in South Florida but visit Marblehead maybe 8 times a year and can easily coordinate a job site visit and / or meeting with a little notice.

Marc Liebman:

MHS graduate and life long Marblehead resident. I was the first class to do 4 years in the current high school building and I am extremely familiar with the building and its systems (can elaborate if desired).

Vested interest: my 2 kids will attend MHS when they are older

Volunteering: I volunteered at MHS for 3 years in the technical arts department as a construction expert to help with the construction of 2 tiny houses and 1 Marblehead Fire Department renovation.

Qualifications: I hold a Massachusetts unrestricted (commercial) Construction Supervisor License. I have been in the construction industry since my senior year of highschool including my senior project. All through college I continued to work in the field and since graduating I have been in the industry.

I grew up in a manufacturing family and spent much of my childhood maintaining factories and warehouses. These buildings have the same roof systems and HVAC equipment as a school.

Additionally, I have been involved professionally in over 100 roofing projects both commercial and residential. I currently maintain several properties with flat membrane roofs. I have extensive knowledge and experience with flat roofs, rooftop HVAC systems, and topcoating products.

My background as a general contractor gives me great insight in understanding, leveling, and explaining proposals and methods. Also a huge component is contractor selection which is a process enhanced by experience.

I am an alternate member on the Marblehead Zoning Board Of Appeals and I am extremely active on the board. I attend approximately half of the meetings in this capacity.

I am a full member of the Marblehead Planning Board.

I am experienced working on a team for the benefit of our town and it's residents.

This list demonstrates just a small snapshot of my knowledge, skills, and abilities that would be an asset on this subcommittee. Please reach out if you have any additional questions or would like to have a conversation about the project.

Thank you for your consideration!

Sincerely,
Marc Liebman

Karima Maloney

Marblehead, Massachusetts 01945

Accomplished, conscientious individual working as a project executive with 17 years of experience in the construction management industry specializing in science & technology, healthcare, and education projects. Very effective communicator with strong planning, detail management and presentation skills. Effective in fast-paced environments requiring multi-tasking abilities and continuous learning. Skilled relationship manager. Proven ability to absorb training rapidly; advanced degree.

PROFESSIONAL EXPERIENCE

Suffolk Construction – Boston, MA

Project Executive (2021 – Present)

- Pursuit and management of construction projects within the health care and life science industries. This includes developing budgets and schedules to achieve profitability objectives, managing all project resources from schedule, budget, contracts, cash management, and buyout. I also manage risk, work performance and quality, and subcontractor and owner relations for every project.

Project Experience:

Foundation Medicine (Value \$160,000,000)

- 580,000 gsf build-out of 16 floors of the new 400 Summer St tower for new office and lab spaces. The building has labs and office spaces, innovation and workspaces, a conference center, and additional amenities.

Vertex – Kilo Lab/Kardex (Value \$10,000,000)

- Renovation of lab and office space to create new Kilo Labs, including new rooftop equipment and new MEPs in existing cGMP space for owner equipment

Harvard Medical School – Goldenson Paulsson Laboratory Expansion (Value \$2,000,000)

- Renovations to two existing lab suites including installation of a new fume hood and ISO-6 modular cleanroom system; MEP/FP modifications, relocation of existing TECAN

Shawmut Construction – Boston, MA

Senior Project Manager (2019 – 2021)

Project Experience:

Beth Israel Deaconess Medical Center Unit 08 Renovation

- 13,448 gsf renovation to create a new 26 bed Medical Surgical/Bone Marrow Transplant Unit at Beth Israel Deaconess Medical Center. The unit is comprised of protective environmental patient rooms, intermediate care patient rooms, airborne infection isolation rooms, on-call rooms etc. The plumbing scope on 8th floor required coring in phases at every patient room into the active, fully operational Class IV BMT floor below. This coring work required coordination with the hospital and trade partners, and implementation of stringent containment plans to ensure the safety of all patients and staff located on the 7th floor.

Brigham and Women's Hospital MRI Replacement

- Replacement of an existing MRI scanner and renovations to the MRI room and support rooms. This project required rigging in and out the MRI from in front of the building (over 5 stories) into a central courtyard during two separate mobilizations. Removal and replacement of existing chiller.

Brigham and Women's Hospital Pharmacy Renovation

- Full gut renovation of an existing retail pharmacy and ancillary space to double the size of the existing pharmacy.

Brigham and Women's Hospital OBC 4th Floor Renovation

- 38,000 sf gut renovation of the existing office space on Level 4 of the One Brigham Circle building. The construction, which is being completed in three phases, will provide offices, conference rooms, training rooms, and a large amphitheater.

Vermeulens – Boston, MA

Senior Project Manager (2016 – 2019)

- Responsible for overseeing large projects primarily within the health care, higher education, and science and technology industries.

Project Experience:

Northeastern University - Coastal Sustainability Institute (Value \$60,000,000)

- 60,449 square-foot, new marine research facility being built on top of a bunker that includes research laboratories, teaching spaces, and office and support space. The project also includes renovation of the existing bunker, geothermal system for heating and cooling, and aquatics/seawater wet labs.

Des Moines Federal Courthouse (Value \$105,700,000)

- 231,787 square-foot, federal courthouse that will house judiciary and court-related agencies, as well as below ground parking.

Pharmaceutical Research Building in Cambridge, MA – Tenant Fit-out (Value \$24,000,000)

- 40,536 square-foot, fit-out of a core/shell building that is a mix between laboratory spaces (biological and vivarium) and office spaces. The lab spaces include radioactive, BSL2, cell culture & holding.

Boston University College of Fine Arts (Value \$28,000,000)

- 42,178 square-foot, renovation project including extensive exterior façade restoration, exterior envelope replacement, renovated gallery, studio, and classroom spaces, and ADA upgrades throughout.

Suffolk Construction – Boston, MA

Construction Project Manager (2008 – 2016)

- Responsible for coordinating and managing all necessary resources throughout the entire construction project, from start-up through closeout with the design team, owner, and subcontractors. This includes managing budget, cost, schedule, risk management, insurances, general work performance and quality, and overall progress against the plan.

Project Experience:

Broad Institute – 75 Ames Street Research Building (Value \$173,000,000)

- 375,000 square-foot, 15 story biomedical research facility including laboratories, office space, bio-safety laboratories, and a vivarium. The project also features a six-story connector, tie-ins to an existing garage, and 4000 square feet of retail space in an urban setting.

Massachusetts Institute of Technology – MIT Building 66 Capital Chemical Engineering (Value \$27,000,000)

- Multi-phased renovation in an occupied building housing MIT's Chemical Engineering Department. Project includes extensive infrastructure upgrades and facility improvements to 50 percent of the building including wet and dry labs as well as support space.

Boston Medical Center – Carl J. and Ruth Shapiro Ambulatory Care Center (Value \$160,000,000)

- This 280,000 square-foot, nine-story ambulatory care facility replaces the existing ambulatory space with a state-of-the-art facility with multiple department tenants.

Massachusetts Institute of Technology – Building W70 (Value \$8,800,000)

- Gut renovation of MIT's New House located at 471 Memorial Drive. Project scope includes removal of existing finishes and installation of new drywall systems, toilet rooms, kitchens, and MEP systems to correct damage that resulted from a water leak.

Amgen Site Redevelopment (Value \$100,000,000)

- IPD project consisting of a 210,000 sf site redevelopment plan to renovate 7 floors into highly flexible next generation laboratories, lab support areas, and office space. The scope also included the installation of 500 disposable-technology based cGMP pilot development labs.

EDUCATION

University of Massachusetts - Amherst, MA

Bachelor of Science in Civil and Environmental Engineering; Mathematics Minor (1998-2002)

Master of Education in Secondary Education (2003-2005)

PROFESSIONAL REGISTRATIONS

LEED Green Associate

30 Hour OSHA Certification

Professional Experience

Premier Mechanical LLC, Boston, Massachusetts

Owner, October 2015 – Present

- Own and manage a mechanical contracting/service business which yields \$30M annual revenue

Limbach Company, Wilmington, Massachusetts

Account/Sales Manager, March 2012 – October 2015

- Managed team in Special Projects Division, where we averaged \$20M revenue construction sales
- Oversaw existing customer accounts, generating new sales and gaining new customers

Pinnacle Piping and Service, Weymouth, Massachusetts

Project Manager, May 2010 – February 2012

- Generated project leads, estimated, sold and managed \$4M of construction projects annually
- Kept projects under budget and delivered on time under an accelerated construction schedule

Refrigeration Engineering Contracting Company (RECCO), Woburn, Massachusetts

Project Manager, October 2009 – April 2010

- Helped design several custom refrigeration testing chambers for a government client
- Managed the installation and operation of several refrigeration projects
- Kept projects under budget and delivered on time under an accelerated construction schedule

M. J. Flaherty Company, Newton, Massachusetts

Project Manager, January 2003 – September 2009

- Delivered projects on time and under budget for beneficial use by the client while maintaining profitable results and strong relationships with all project team members
- Developed and maintained dynamic project schedules, acquired approvals for all equipment and materials, created schedule of values, tracked job costs and progress, and developed Requests for Information (RFI's)
- Estimated, compiled and negotiated change orders with owners, engineers, architects, general contractors, subcontractors and vendors
- Managed major subcontractors in all aspects of projects including Sheet Metal, Controls, Electrical, Insulation, Balancing, Commissioning, Facilities, Maintenance, and Plumbing
- Served as primary decision maker and contact point on all projects
- Representative project list includes:
 - South Shore Hospital New Cancer Treatment Center, Weymouth, MA (2008 – 2009)
\$9.1M mechanical contract; 90,000 square feet of designated hospital use
 - Stonehill College New Science Center, Easton, MA (2008 – 2009)
\$4.9M mechanical contract; 89,000 square feet of science labs and classrooms
 - Renaissance Boston Waterfront Hotel, Boston, MA (2006 – 2008)
\$11.1M mechanical contract; 350,000 square feet of hotel rooms and meeting space
 - Institute of Contemporary Art, Boston, MA (2004 – 2006)
\$4.5M mechanical contract; 60,000 square feet of a highly specialized museum building
 - Boston Convention and Exhibition Center, Boston, MA (2001 – 2004)
\$47M mechanical contract; 1M square feet of exhibition hall, conference and meeting rooms

Project Engineer, August 2001 – December 2002

- Participated in project meetings with subcontractors, general contractors and all project disciplines
- Reviewed and distributed project addenda, change directives, and RFI's

Education

Babson Executive Education – Wellesley, Massachusetts

Advanced Leadership Institute

Rochester Institute of Technology – Rochester, New York

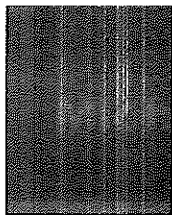
Bachelor of Science in Mechanical Engineering Technology – May, 2001

Certifications

- New England Mechanical Contractors Association (NEMCA) Project Manager Certification
- OSHA 10-Hour Construction Training
- Introduction to Ammonia Refrigeration Systems, University of Wisconsin-Madison



Michael D. Smith, PE, CCM - Project Manager



Education

BS, Civil Engineering, University of Massachusetts, Lowell

BA, Applied Physics, Saint Anselm College

Registrations/Licenses

Professional Engineer (PE) - MA,
No. 53492

Certified Construction Manager - CMCI
ID #5233

Training/Certifications

OSHA 40-hour HAZWOPER

OSHA 10-hour Construction Safety
Certification

Confined Space Entry Certified

MCPPO - Massachusetts Certified
Public Purchasing Officer

CPR, First Aid and AED

Affiliations

American Society of Civil Engineers
(ASCE), Member

New England Water Environment
Association (NEWFA), Member

Construction Management Association
of America (CMAA), Member

Office Location

Boston, MA

Years of Experience

MWH: 8

Total: 15

Mr. Smith is a project manager with experience in civil and environmental engineering and construction management for water and wastewater projects. His project experience includes owner's representation, project management, and construction inspection on a wide variety of projects.

Project Experience

Resident Engineer, Alewife Brook Pump Station Rehabilitation, MWRA
Contract No. 6797, Somerville, MA

Michael provided resident engineering services and oversight for the \$13M existing sewer pumping station rehabilitation and system electrical and mechanical upgrade of the 90 MGD station. He is responsible for field inspection and resident engineering for all on site activity including a 90MGD sewer bypass system, mechanically cleaned bar screens, sewage grinders, 200HP electric motors, diesel engine generator and vertical non-clog wastewater pumps. Responsibilities also include facilitating partial payment requests, reviewing progress schedules, monitoring stored material, construction advice interpretation, change order assistance, coordinating checkout, testing and startup of systems as well as establishing and maintaining a project punchlist and final payment.

Chief Resident Engineer, Contract 9 Concord Ave Sewer Separation Project, Cambridge Department of Public Works, Cambridge, MA

Mr. Smith is dedicated to managing the third phase (Contract 9) of the project involving a sewer separation and stormwater management project area covering approximately half of a square mile. His responsibilities include coordinating the contract initiation, leading weekly construction progress meetings, scheduling review and coordination, providing contract document interpretations, issuing instructions from the client, and performing quality review of CCDs. He also works with the project's traffic coordinator to support traffic and detour management, manages the resident engineers and coordinates coverage for field observation, and works with the community relations coordinator to respond to and follow-up on all resident concerns and complaints. He reviews submitted contractor work plans, schedules, sequencing plans, shop drawings and responds to request for information (RFIs), administers field changes, coordinates design changes, and reviews and approves monthly payment requisitions. Mr. Smith provides documentation of the work to include daily field reports, time and material tracking, record drawings, photo documentation, punch list items, daily quantity tracking sheets and the preparation of quality control documents, initiates and executes project closeout to include startup and testing, substantial completion, and a review of O&M manuals.

Resident Engineer, MWRA CSO North Dorchester Bay Project,
Massachusetts Water Resource Authority, Boston, MA



This project included the installation of a 17-ft diameter two mile long sewer storage tank, ventilation building, wastewater pumping station, and a 24-in. forced sewer main to help eliminate CSO discharges to the beaches of Boston for up to a 25-year storm. Acting as the owner's representative, Mr. Smith was assigned the lead resident engineer for the construction of the underground ventilation building, as well as assisting with the oversight of the wastewater pumping station. Mr. Smith reviewed and approved of contract changes, conducted meetings, managed the contract staff activities, performed field inspection duties, monitored the implementation of the contractor's quality program and monitored the environmental compliance activities. He reviewed and prepared responses to RFIs and submittals, established and maintained the construction documentation and records for contract and program compliance, and processed the application for payment, reviewed schedules, costs, and change orders.

Resident Engineer, Rehabilitation of Water Pumping Stations, Massachusetts Water Resources Authority, Arlington, MA

MWRA rehabilitation to five existing water pumping stations in Boston, Brookline, Belmont, and Arlington, MA. The three year phased project included the installation of centrifugal pumps, AFDs, MCCs, extensive forced water piping for eight inch to forty inch water mains, engine generators, underground meter vaults, HVAC improvements, SCADA systems, architectural restoration of historic buildings, and abatement of PCBs. Acting as the owner's representative, Mr. Smith was assigned the resident engineer for the rehabilitation of three of the pumping stations and was responsible for overall supervision and quality of the preparation of detailed and complex engineering plans, specifications and documentation and ensuring that all appropriate field records are maintained. Mr. Smith also reported on job progress and cost and compliance with the contract. Mr. Smith reviewed payment requisitions, responses to RFIs, submittals and contract changes.

Project Manager, Consultant to the Massachusetts School Building Authority, Boston, MA

Mr. Smith provided project management services and oversight for the assigned public school projects within the Commonwealth. Mr. Smith was responsible for the management and oversight of 15 school projects totaling \$850M in state funding. His other responsibilities included coordination with owner's project managers (OPM) and district representatives, architects and engineers and commissioning agents from pre-design through the construction closeout. He also reviewed construction document submissions throughout the design phase and established and monitored the total project budget, reimbursement requests, change orders, construction schedule and OPM monthly reports.

Field Engineer/Assistant Superintendent, Payton Construction Corporation, Boston, MA

Mr. Smith supported the superintendent on project implementation and progress. His responsibilities included monitoring the construction schedule, coordinating subcontractors, controlling costs and field layout, as well as implementing the safety program.

Publications and Presentations

WEFTEC, 2015 Annual Conference, Effectively Executing Private Property Inflow Removal

Ralph M. Wallace

Marblehead, Massachusetts 01945

PROFESSIONAL EXPERIENCE

Program manager with over 45 years of experience in the planning, design, finance, and construction of large-scale capital projects. Demonstrated success in managing program and project delivery teams. Experienced in all phases of project implementation, with emphasis on strategic planning, feasibility analysis, capital financing and budgeting, project controls, procurement, change control/claims management, contract administration, and dispute resolution.

KEVILLE ENTERPRISES, Boston, Massachusetts

2016-Present

Senior Program Manager

Staff consultant to the Massachusetts School Building Authority (MSBA) responsible for development and implementation of a program to collect construction bid data for core school projects partially funded with MSBA grants. Since 2022 have captured bid data on over 90 school projects. Capture information on procurement of Chapter 149A construction managers, general contractor bids and filed sub-bid trade bids. Perform periodic analysis of bid data as requested by MSBA staff.

Management consultant to the University of Massachusetts Building Authority with overall responsibility for managing the design, construction and start-up of a \$650 million capital program at the University of Massachusetts Boston campus. Projects in the capital program included:

- \$260 million Utility Corridor and Roadway Replacement project to install new utility infrastructure, a roadway system and landscaping to support the 25-year campus master plan.
- \$137 million, 1,000 bed student housing and dining facility developed through a public-private partnership.
- \$70 million, 1,440 space precast concrete parking garage.
- \$45 million project to renovate spaces in existing academic buildings
- \$140 million Substructure Demolition and Quadrangle Development project to demolish the original Science Center and parking structure/plaza to create a new central quadrangle. Used project-generated demolition debris and existing soil stockpiles from prior projects to create the new quadrangle.

Responsibilities included providing oversight and direction to project teams implementing each project, managing project budgets, overseeing compliance with extensive regulatory requirements and coordinating project schedules to permit complex construction sequence to proceed in a highly constrained urban campus. Due to the widespread presence of asbestos containing soils, work was performed under complex release abatement measures (RAM) and excavated materials management plans.

BETH ISRAEL DEACONESS MEDICAL CENTER, Boston, Massachusetts
Director of Facilities Program Controls

2008-2016

Responsible for developing and maintaining the procedures, systems and tools required to effectively manage the planning, design, construction and commissioning of \$50+ million in capital projects annually at a large academic medical center. Manage team responsible for procurement, administration and close out of design, construction and support services contracts. Direct BIDMC involvement in district combined heat and power plant serving the Longwood area and manage procurement of competitive energy supply contracts. Key responsibilities include:

- Develop and manage systems for project controls in the areas of scheduling, cost estimating, cost monitoring, contract administration, and progress reporting. Managed competitive procurement of a web-based project management software application (PMWeb) to replace an internally developed Access-based application. New system is currently being implemented.
- Develop and update, in conjunction with the Legal and Contracting departments, templates for the procurement and ongoing administration of professional services and construction contractors including RFQs, RFPs, standard professional services agreements, lump-sum and GMP construction, amendments, task orders and change orders. Previously the medical center had no standard contracts or procurement documents for design and construction services.
- Managed a competitive selection process for pre-qualification of a pool of MEP engineers resulting in execution of shelf contracts which established key contract terms and conditions for a three-year period.
- Prepare executive monthly progress reports for senior management that track project and program costs.
- Established and maintain program-wide document control system and procedures.
- Developed a training program for Capital Facilities and Engineering staff teaching industry-standard project management procedures, as well as specific knowledge of in-house procedures and systems.
- Key participant in development of long-range Master Plan to guide major campus expansion.
- Direct BIDMC involvement in the Medical Area Total Energy Plant (MATEP) energy supply agreement, including participation in development of electricity and natural gas hedging strategies under the MATEP agreement and execution of energy hedges.
- Develop and implement a program to hedge electricity and natural gas supply to BIDMC off-site locations in the competitive energy markets.
- Serve on the working group supporting the BIDMC's annual capital budgeting process and provide decision support on the prioritization of the annual BIDMC capital budget.
- Key participant in successful negotiation of a settlement agreement with the U.S. Department of Justice related to non-compliance with ADA standards. Agreement resulted in a five-year program to bring BIDMC into compliance with ADA which was completed in October 2014.
- Develop standardized scope and workflow for the implementation of Lean process improvement techniques in the pre-work, planning, programming and schematic design of facility projects.

MASSACHUSETTS SCHOOL BUILDING AUTHORITY, Boston, Massachusetts
Director of Capital Planning

2007-2008

Responsible for managing planning, design and construction oversight functions of program providing \$500 million per year in grants to Massachusetts cities and towns for the construction and renovation of public schools. Program is funded with a dedicated earmark from the State sales tax. Program responsibilities include -

- Evaluation and prioritization of statements of interest submitted by school districts seeking MSBA funding
- Perform facility assessments to determine the condition of school buildings and their capacity to support the required education program
- Enrollment forecasting
- Assist school districts in the procurement of designers and owner's project managers, including development of standard scopes and contract terms, and provide oversight of consultant performance
- Approve study scopes and evaluate feasibility studies and designs developed by school districts to insure development of cost effective solutions that conform with MSBA design guidelines and cost standards
- Monitor progress during design and construction and approve progress payments to school districts
- Support audit and project closeout

MASSACHUSETTS WATER RESOURCES AUTHORITY, Boston, Massachusetts
Treasurer, 2006-2007

1994-2007

Managed \$5.6 billion in outstanding debt and \$600 million in cash and investments. Debt portfolio included fixed rate, unhedged variable rate, synthetic fixed rate, State Revolving Loan fund obligations, and commercial paper. Debt service accounted for over 60% of Authority's \$500 million annual operating budget.

Implemented long-term rates management strategy to mitigate impact of financing Authority's massive capital program on ratepayers. Restructured \$675 million of existing debt to provide \$425 million in rate relief over ten years. Blended restructuring with issuance of new money to generate \$5 million in net present value savings. Restructuring also initiated process of amending Authority's bond resolution which will make debt service reserves available to retire debt when amendments become effective in eight to ten years. Presented restructuring plan to Fitch, Moody's and Standard & Poor's with all affirming the Authority's credit rating.

Directed procurement of competitive electricity supply contracts and forecast Authority's energy budgets.

Director, CSO Program/Energy 2003-2006

Directed \$800 million combined sewer overflow program. Managed environmental permitting, regulatory approval, planning, capital programming and detailed design of a comprehensive program to reduce and treat CSO discharges into Boston Harbor and its tributaries. Program includes an innovative plan to eliminate CSO discharges and most storm water discharges to South Boston swimming beaches by construction of a \$250 million soft-ground storage tunnel.

Negotiated the scope and implementation schedule for long-term CSO control plan with U.S. Department of Justice and U.S. Environmental Protection Agency resulting in a landmark comprehensive agreement establishing the Authority's CSO obligations through 2020. Agreement was incorporated into the Boston Harbor Case by the U.S. District Court in April 2006.

Directed innovative economic affordability analysis challenging U.S. EPA's CSO affordability guidelines and supporting Authority's recommended control plan.

Directed Authority's energy management initiatives, including the competitive procurement of energy supply, sale of renewable energy credits, implementation of demand side management initiatives and development of self-generation assets.

Director, Program Management, 1999-2003

Directed the implementation of \$3.6 billion Boston Harbor Project, the largest enforcement action in the history of the Clean Water Act. Completed construction of secondary wastewater treatment facilities serving the Boston metropolitan region. Managed all aspects of design, construction, and program control and administration. Successfully completed construction and startup of over \$600 million in new facilities. Resolved over \$140 million in contractor claims and litigation and recovered \$8 million in affirmative litigation.

Deputy Director, Program Management, 1994-1999

Managed all program control, financial and administrative functions of the Boston Harbor Project. Areas of responsibility included:

- Change order administration
- Claims and litigation management
- Project scheduling and cost estimating
- Document control and information systems
- Capital and current expense budgeting
- External reporting and public information
- Insurance and risk management

RALPH WALLACE CONSULTING, Durham, North Carolina

1991-1994

Principal

Independent consultant engaged in strategic planning, economic and financial feasibility analysis, capital programming, and policy development. Project experience included:

Principal in preparation of North Carolina's first strategic economic development plan. Compiled a comprehensive economic and demographic profile of the state's 100 counties. Formulated major policy recommendations related to state funding of infrastructure, workforce training, technology deployment, and industrial recruitment incentives.

Principal in preparation of a strategic plan for the Tampa Port Authority. Projected cargo and cruise passenger volumes, estimated existing port capacity, and developed a \$195 million capital plan. Created an asset inventory database and business planning model that for the first time provided pro forma analysis of the Port's economic and financial performance by facility, allowing senior managers to analyze revenues, operating expenses, net income and return on assets by individual facility and market segment. Business plan also included projections of cargo and cruise traffic and generated forecasts of the port's operating performance to support debt issuance.

Prepared a financial feasibility analysis of a \$3.0 billion expansion plan for the Port of Kaohsiung, Taiwan, one of the world's largest container cargo ports.

FREDERIC R. HARRIS, INC., New York, New York

1986-1991

Senior Economist

Senior consultant with international engineering firm engaged in large-scale infrastructure development projects. Project experience included:

Directed a comprehensive feasibility study of a \$250 million steam coal and petroleum coke export terminal at the Port of Los Angeles. Analyzed all elements of the coal production and transportation chain from western U.S. coal mines to Pacific Rim power plants demonstrating the terminal's financial feasibility.

Principal planner for a \$250 million development program for Port Everglades, Florida. Prepared a financial feasibility study for a complex \$170 million revenue bond issue that funded the first phases of the development program.

Principal planner for environmental impact assessments of infrastructure projects, including a \$100 million medium-security correctional facility in Suffield, Connecticut and seven major highway improvement projects for the New Jersey Department of Transportation.

**NEW YORK CITY DEPARTMENT OF PORTS, INTERNATIONAL TRADE
AND COMMERCE, New York, New York**

1982-1986

Director of Port Planning, 1984 - 1986

Managed implementation of major port and industrial development projects. Analyzed and negotiated lease agreements to develop waterfront real estate. Negotiated a lease agreement with the Port Authority of New York and New Jersey and a major shipping line to finance a \$100 million expansion of the Howland Hook Marine Terminal.

Project Manager, 1982 - 1984

Directed a study of the Port of New York and New Jersey funded by the U.S. Maritime Administration. Projected cargo volumes, estimated capacity of existing marine terminals, and evaluated transportation infrastructure serving the port. Defined a \$200 million program to guide the City's investment in port facilities and related infrastructure.

NEW YORK CITY PUBLIC DEVELOPMENT CORPORATION, New York, N.Y.

1980-1982

Project Manager

Responsible for area studies, land use surveys, and database development as part of a major industrial development program to revitalize manufacturing centers within New York City. Created and maintained a 170,000-firm database used in business outreach and policy development. Performed land use studies and surveys of manufacturing firms. Managed site development and demolition contracts.

EDUCATION

UNIVERSITY OF NORTH CAROLINA AT CHAPEL HILL, Chapel Hill, North Carolina

M.R.P. (Master of Regional Planning) Land Use and Real Estate Development

FLORIDA STATE UNIVERSITY, Tallahassee, Florida

B.S. Major in Sociology and Minor in Economics

CERTIFICATIONS

OSHA 10-hour Construction Safety

File: ILD - STUDENT SUBMISSION TO EDUCATIONAL SURVEYS AND RESEARCH

In this policy, "surveys, analyses, or evaluations" refer to methods of gathering data for research purposes.

Without the prior written consent of the student's parent/guardian, or of the student if they are at least 18 years of age, no student shall be required as part of any program wholly or partially funded by the U.S. Department of Education to submit to any survey, analyses, or evaluation that reveals information concerning:

1. Political affiliations or beliefs of the student or student's parent/guardian;
2. Mental or psychological problems of the student or student's family;
3. Sex behavior or attitudes;
4. Illegal, anti-social, self-incriminating, or demeaning behavior;
5. Critical appraisals of others with whom respondents have close family relationships;
6. Legally recognized privileged relationships, such as with lawyers, doctors, or ministers;
7. Religious practices, affiliations, or beliefs of the student or parents/guardian; or
8. Income, other than as required by law to determine eligibility for school programs or for receiving financial assistance under such program.

All instructional materials, including teachers' manuals, films, tapes, or other supplementary material which will be used in connection with any such survey, analysis, or evaluation shall be available upon request for inspection by the student's parent/guardian. For the purpose of this policy, "instructional material" does not include academic tests or assessments.

A parent/guardian may inspect, upon request, a survey created by a third party before the survey is administered or distributed to a student.

The Superintendent or designee will be responsible for implementing any procedures necessary to protect the privacy of participating students and to provide parents/guardians with access to surveys within a reasonable time before administration or distribution.

The School District will notify parents/guardians of this policy at least annually at the beginning of the school year and within a reasonable time of any substantive change in policy.

The District will directly notify parents/guardians annually at the beginning of the school year, and during the school year, when surveys, analyses, or evaluations are scheduled or anticipated. Parents/guardians shall have the opportunity to opt their child out of participation in any survey, analysis, or evaluation. Students who are 18 years of age or older may opt out of such surveys, analyses, or evaluations.

Parents/guardians or eligible students who believe their rights have been violated may file a complaint with the Family Policy Compliance Office of the U.S. Department of Education.

LEGAL REF.: Protection of Pupil Rights Amendment, 20 U.S.C. § 1232h

CROSS REF.: JRA, Student Records

SOURCE: MASC Updated 2023