

# PUBLIC NOTICE POSTING REQUEST OFFICE OF THE LEICESTER TOWN CLERK

**ORGANIZATION:** Select Board

**MEETING:** X

**PUBLIC HEARING:**

**DATE:** July 18, 2022

**TIME:** 5:00pm

**LOCATION:** Select Board Conference Room, 3 Washburn Sq, Leicester – Hybrid Mtg

**REQUESTED BY:** Kristen L. Forsberg, Assistant Town Administrator

*Agenda packet and associated documents can be found at [www.leicesterma.org/bos](http://www.leicesterma.org/bos). This agenda lists all matters anticipated for discussion; some items may be passed over, and other items not listed may be brought up for discussion to the extent permitted by law. Select Board meetings are recorded by LCAC. Any member of the public planning to record the meeting must first notify the Chair. **PLEASE SILENCE ALL CELL PHONES DURING THE MEETING***

<https://meet.goto.com/leicesterselectboard>

(571) 317-3122; Access Code: 364-032-797

## CALL TO ORDER/OPENING

### 1. PUBLIC COMMENT PERIOD

### 2. CIVIC ANNOUNCEMENTS

- a. 2022 Concerts on the Common
  - Wednesday, July 20<sup>th</sup> – 6:30pm – Abraxas (Santana Tribute band)
  - Wednesday, July 27<sup>th</sup> – 6:30pm – Mickey Bones & The Boogaloo Swamis (Cajun & Zydeco music)
- b. 2022 Harvest Fair – Saturday, September 17<sup>th</sup> – 10am-4pm – Town Common

### 3. REPORTS

- a. Student Liaison Reports
- b. Report of the Town Administrator's Office
- c. Select Board Reports

### 4. OTHER BUSINESS

- a. Discuss/Vote on Creation of Becker Project Team
- b. Discuss/Vote on Guardian LED Lighting Upgrades to Town Buildings
- c. Discuss/Vote on Surplus Items from Former Becker Campus to the School Department
- d. Discuss/Vote on Assisting School Department with Cleaning & Moving to New Campus
- e. Fire & EMS Discussion

### 5. RESIGNATIONS & APPOINTMENTS

- a. Resignation – Truck Driver/Laborer – James Fleming
- b. Appointment – Moose Hill Water Commission – John Shocik
- c. Appointment – WRTA – Heather-Lyn Haley
- d. Appointment - Executive Assistant (Town Administrator's Office) – Maria Cataloni
- e. Appointment – Treasurer/Collector Department Assistant – Kaitlyn Cloutier

### 6. MINUTES

- a. June 30, 2022
- b. July 5, 2022
- c. July 11, 2022

**ADJOURN**



Town of Leicester  
**OFFICE OF THE TOWN ADMINISTRATOR**  
Town Hall, 3 Washburn Square  
Leicester, Massachusetts 01524  
Phone: (508) 892-7000 Fax: (508) 892-7070  
[www.leicesterma.org](http://www.leicesterma.org)

07/14/22

To: Select Board  
From: David Genereux, Town Administrator  
**RE: Report of the Town Administrator's Office**

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The following is a report on the general activities of the Town Administrator through July 14, 2022.

**Former Becker property**

- We have received a current survey line map on the Becker Properties south of the main campus. We are now examining potential divisions of property DG
- Signed a proposal for design and scope of work for fire alarm and suppression systems at the Borger building. DG
- Worked with Mass Save to have proposals for energy savings on the campus property for the Board's consideration. DG
- Signed an agreement with the Architect for an MAAB study at Borger, Swan, and March, which will pave the way for accessibility plans and specifications. DG
- Began adding public information sheets on the Becker project to the website DG KR
- Met with DAV to discuss RFP on the three dormitories, the staff house, and the Rte. 9 garage. DG
- Removed two Conex boxes from behind Borger and at the campus center DG KR
- Discussed turf field and scheduling issues with the RFO and Athletics Director KR
- Provided information to the Bark Park Committee regarding dog licensing and trash pickup KR

**Economic Development/Businesses**

- Worked with G&L Auto to relocate their used car sales business from 449 Main Street to 803 Main Street KR
- Met with department heads to discuss revisions to the permit licensing process. First interdepartmental permit licensing meeting to be held on 7/19. KR DG

**Citizen issues**

- Worked with a resident regarding town trees overhanging on to his property DG KR
- Worked with a resident regarding no trespassing signs on Mannville Street at Waite Pond KR

**Grants**

- Closed out the State earmark for the Historical Commission for Swan Tavern KR
- Worked with Linda Colby to write a grant for connecting the generator from the former fire station at 15 water street to the Town Hall DG KR
- Learned the Town was not successful in its DER culvert grant funding request due to an overwhelming number of applications and limited amount of funding

**Meetings**

- Conducted interviews for the Executive Assistant position in the TA office DG KR

### **Financial/Budgetary**

- Completed end of year closeout for the Highway Department including budget analysis, invoice processing, deposits, etc. KG
- Completed end of year closeout for the Town Admin Office including budget analysis, invoice processing, deposits, etc. KG
- Worked extensively with the School Superintendent on his presentation for the Select Board and School Committee. DG
- Working on Highway material and labor bids for road repair and reconstruction pursuant to the Chapter 90 program. DG
- Spoke with the Highway Foreman about the mechanics truck, which has a blown engine. Looking at other possibilities for replacement. DG
- Worked on the prospectus for the Becker BAN sale DG KR

### **Human Resources**

- Working on recruitments for TA Executive Assistant, Treasurer/Collector Dept. Assistant, Interim Town Clerk and Highway Truck Driver/Laborer. DG KR
- Started onboarding new Highway Department Assistant KR
- Spoke with the Town Clerk regarding obtaining an interim Clerk. DG
- Finalized remaining negotiations with the two PD unions. MOU's are ready for consideration by the Board in ES. DG

### **Misc.**

- Sent out FY23 board and committee reappointment letters KR
- Obtained opinions from Town Counsel regarding the use of Guides instead of warrants at Town Meeting, and procedure for appointing Advisory Committee members. DG
- Worked to address issues with trash at Community Field/Tarentino Park DG KR
- Worked with the Fire Chief on an insurance claim for a dead compressor in the server room at the Fire & EMS HQ resulting from a lightening strike KR

# **Town Of Leicester ENERGY EFFICIENCY SERVICES**



## **Leicester City Hall Lighting Upgrade**

**June 16, 2022**

# LIGHTING PROJECT ORDER FORM

June 16, 2022

Leicester City Hall  
David Genereux  
Town Of Leicester  
3 Washburn Square  
Leicester, MA 01524

**Project:** G-8184, Town of Leicester Town Hall LED OBR

**Energy Efficiency Specialist:** Patrick Mahoney, (913) 593-3305, patrick@guardian-energy.com

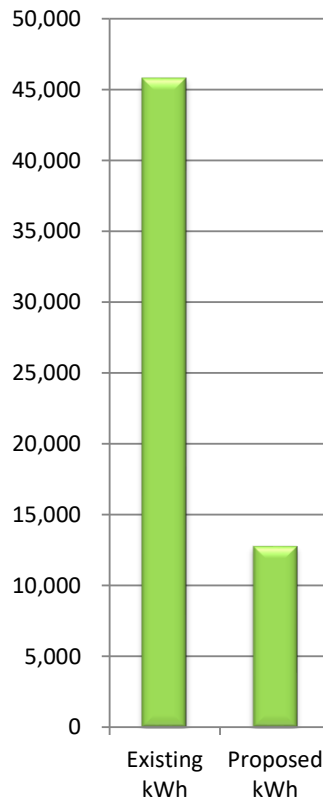
## Primary Benefits:

- \$5,652 estimated annual savings with a Return on Investment of 10.0%.
- 72% estimated reduction in lighting electrical usage resulting from proposed lighting system.
- LEDs offer reduced maintenance expenses due to longer equipment life cycles.
- Replaced fluorescent lights containing mercury will be removed and properly disposed of.
- Improved quality of light can improve working conditions and safety.

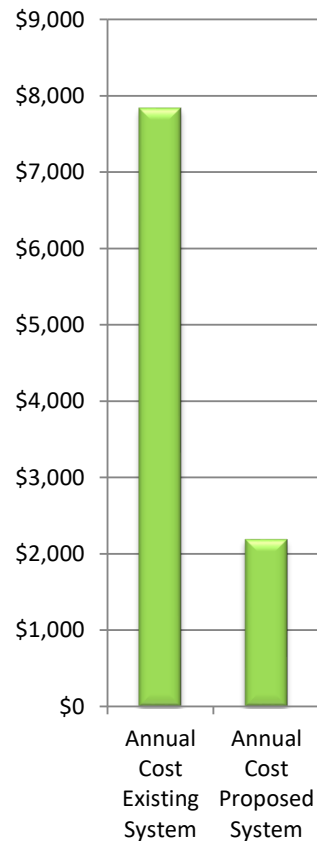
## FINANCIAL ANALYSIS

Project Pricing & Utility Incentives	
Proposed Project Cost	\$83,981
(less) Est. Utility Incentive*	(\$10,808)
<b>Estimated Final Cost</b>	<b>\$73,174</b>
Return on Investment Estimates	
Return on Investment Rate	10.0%
Payback Timeframe (years)	9.98
Ten Year Payback Scenario	\$142
Annual Cost Existing System	\$7,840
Annual Cost Proposed System	\$2,188
Est. Annual Cost Savings	\$5,652
Average Monthly Savings	\$471
Tons of CO2 Saved	25.12
Estimated Project Savings Summary	
Existing kWh	45,846
Proposed kWh	12,794
<b>Estimated kWh Saved</b>	<b>33,052</b>
Annual Electric Cost Savings	\$5,652
Annual Maintenance Savings	\$1,680
<b>Total Annual Retrofit Savings</b>	<b>\$7,332</b>

**Annual kWh Usage Comparison**



**Annual Operating Cost Comparison**



## STATEMENT OF WORK

The Scope of Work Detail contained in the attached Exhibit A provides an overview of the fixtures that will be replaced during the lighting retrofit process (unless noted as No Retro, or not noted in the document). This document also provides an overview of the estimated energy savings that each fixture will offer by comparing the existing lighting fixtures with the proposed retrofit fixtures.

## CUSTOMER REQUIREMENTS

- Customer will provide the most **current Prevailing Wage Rate** sheet to Guardian at the time the order is placed, with updated rates as required.
- Customer will provide Guardian with **ST-2 and ST-5C tax exemption documentation** at the time the order is placed.
- Customer will provide a point of contact and unimpeded access to the work site, as well as unobstructed access to all fixtures on the scheduled day(s) of installation. Customer delays related to the installation of the project may result in additional costs being addressed via a change order. A Guardian Project Manager will discuss scheduling and provide updates on an ongoing basis.
- Work to perform the project shall occur within typical working hours (6:00 a.m. - 6:00 p.m. Monday through Friday) in full-day continuous periods. Requests for labor to be performed outside of these hours should be made in advance so that Guardian may reprice the work accordingly or issue a change order.

## Exhibit A: Leicester City Hall - Job# G-8184

EXISTING LIGHTING SYSTEM							PROPOSED LIGHTING SYSTEM					
Measure #	Is Fixture Interior or Exterior?	Location	Qty.	Existing Fixture Description	Existing Wattage	Existing Hours	Proposed Qty.	Proposed Fixture Description	Fixture Type and Wattage	Add Occupancy Sensor?	Proposed Hours	Total kWh Reduction
1	Interior	Boiler Room	1	8' Strip	60	2,570	1	LED Bar Kits 2 4' & 20W Driver	20 WATT LED		2,570	206
2	Interior	Boiler Room	1	8' Wrap	112	2,570	1	8' LED Strip	44 WATT LED		2,570	175
3	Interior	Ground Floor Hall @ Offices	8	4' Wrap	60	3,120	8	4' LED Wrap	17 WATT LED		3,120	1,073
4	Interior	Employees Only Permitting Office Area	12	4' Wrap	60	2,600	12	4' LED Wrap	17 WATT LED		2,600	1,342
5	Interior	Planning Office	6	4' Wrap	60	2,600	6	4' LED Wrap	17 WATT LED		2,600	671
6	Interior	Board Of Health Office	14	4' Wrap	60	2,600	14	4' LED Wrap	17 WATT LED		2,600	1,565
7	Interior	Storage / Maintenance Office Area	9	4' Wrap	60	2,570	9	4' LED Wrap	17 WATT LED		2,570	995
8	Interior	2 Stairwells From Ground Floor Up To 3rd Floor	10	4' Wrap	60	3,120	10	4' LED Wrap	17 WATT LED		3,120	1,342
9	Interior	Hallway	9	4' Wrap	60	3,120	9	4' LED Wrap	17 WATT LED		3,120	1,207
10	Interior	Mens Bathroom	2	4' Wrap	60	3,120	2	4' LED Wrap	17 WATT LED		3,120	268
11	Interior	Womens Bathroom	3	4' Wrap	60	3,120	3	4' LED Wrap	17 WATT LED		3,120	402
12	Interior	Womens Bathroom	2	2' Wall Mount Wrap	37	3,120	2	LED Bar Kits 2 2' & 10W Driver	10 WATT LED		3,120	168
13	Interior	Town Clerk Office	16	4' Wrap	60	2,600	16	4' LED Wrap	17 WATT LED		2,600	1,789
14	Interior	Assessors Office	10	4' Wrap	60	2,600	10	4' LED Wrap	17 WATT LED		2,600	1,118
15	Interior	Accounting Office	10	4' Wrap	60	2,600	10	4' LED Wrap	17 WATT LED		2,600	
16	Interior	Tax Collectors Office	20	4' Wrap	60	2,600	20	4' LED Wrap	17 WATT LED		2,600	2,236
17	Interior	Foyer @ Gym / Meeting Hall Entrance	2	4' Wrap	60	3,120	2	4' LED Wrap	17 WATT LED		3,120	268
18	Interior	2 Storage / Office Rooms Near Foyer	8	4' Wrap	60	2,184	8	4' LED Wrap	17 WATT LED		2,184	751
19	Interior	Foyer @ Gym / Meeting Hall Entrance	4	4L Chandelier COULD NOT CONFIRM BASE TYPE	40	3,120	4	LED Screw In Carry E26 & E12	10 WATT LED		3,120	374
20	Interior	Hall @ Meeting Rooms	7	4' Wrap	60	3,120	7	4' LED Wrap	17 WATT LED		3,120	939
21	Interior	Meeting Room 3	14	4' Wrap	60	2,570	14	4' LED Wrap	17 WATT LED		2,570	1,547
22	Interior	Meeting Room 2	4	4' Wrap	60	2,570	4	4' LED Wrap	17 WATT LED		2,570	442
23	Interior	Leicester Aging Council Room	4	4' Wrap	60	2,570	4	4' LED Wrap	17 WATT LED		2,570	442
24	Interior	Custodial Room	1	4' Strip	60	2,184	1	LED Bar Kits 2 4' & 20W Driver	20 WATT LED		2,184	87
25	Interior	Hall @ Bathrooms	3	4' Wrap	60	3,120	3	4' LED Wrap	17 WATT LED		3,120	402
26	Interior	Mens Bathroom	1	4' Strip	60	2,570	1	4' LED Wrap	17 WATT LED		2,570	111
27	Interior	Womens Bathroom	3	4' Wrap	60	2,570	3	4' LED Wrap	17 WATT LED		2,570	332
28	Interior	Hall & Stair	5	4' Wrap	60	3,120	5	4' LED Wrap	17 WATT LED		3,120	671
29	Interior	Storages / Offices	16	4' Wrap	60	2,570	16	4' LED Wrap	17 WATT LED		2,570	1,768
30	Interior	Floor 3 Offices	44	4' Wrap	60	2,570	44	4' LED Wrap	17 WATT LED		2,570	4,862
31	Interior	Main Hallway	6	4' Wrap	60	3,120	6	4' LED Wrap	17 WATT LED		3,120	805
32	Interior	Records Office / Storage	11	4' Wrap	60	2,570	11	4' LED Wrap	17 WATT LED		2,570	1,216

## Exhibit A: Leicester City Hall - Job# G-8184

EXISTING LIGHTING SYSTEM							PROPOSED LIGHTING SYSTEM					
Measure #	Is Fixture Interior or Exterior?	Location	Qty.	Existing Fixture Description	Existing Wattage	Existing Hours	Proposed Qty.	Proposed Fixture Description	Fixture Type and Wattage	Add Occupancy Sensor?	Proposed Hours	Total kWh Reduction
33	Exterior	Exterior	9	Tall Wall Pack W/ PC	48	4,368	9	LED Mini Wall Pack W/ PC	8 WATT LED		4,368	1,572
34	Exterior	Exterior	2	HID Wall Pack	130	4,368	2	LED Wall Pack W/ PC	40 WATT LED		4,368	786
Totals			277				277					33,052



## ENERGY & COST SAVINGS BASIS

**LED Lighting Technology:** LED's consume less wattage as compared with the other lighting systems (fluorescent, metal halide, etc), but can typically offer comparable lighting levels. By reducing the wattage utilized per fixture, you can reduce energy usage for your lighting system.

**Reduced Maintenance Expense:** The Department of Energy states that an "LED luminaires useful life is often described by the number of operating hours until the LED luminaire is emitting 70 percent of its initial light output." They also state that an LED can last more than 50,000 hours or more before being considered for replacement. By offering a longer life span than other lighting lamps/bulbs, LEDs are replaced less often and typically require a lower rate of replacement or repair, which can result in a lower lifetime cost of maintenance. To learn more about LEDs through the DOE, please click:

[DOE LED Basics](#)

## HOW ELSE MAY WE SERVE YOU?



### ENGINEERING

Energy Audits  
Steam System Evaluations  
Compressed Air Surveys



### MECHANICAL

Boilers  
Chillers  
Air Handlers  
Cooling Towers  
Pumps



### ELECTRICAL

Lighting Retrofits  
Back-up Generators  
EV Charging Stations  
VFDs  
Battery Storage



### CONTROLS & ANALYTICS

IOT Systems  
BMS Installations  
Retrocommissioning  
Analytics Services



### BUILDING MAINTENANCE SERVICES

Boiler Tune Ups  
DX Equipment Coil Cleaning  
Air Handling Units  
Cooling Tower Fill Cleaning  
Electrical Safety Inspections  
Chiller Startups & Shutdowns



### PROFESSIONAL SERVICES

Demand Response  
Energy Procurement  
Project Funding Options



Email:

**GUARDIAN ENERGY MANAGEMENT SOLUTIONS, LLC'S STANDARD  
TERMS AND CONDITIONS. THIS IS A CONTRACTUAL AGREEMENT. PLEASE READ CAREFULLY.  
THESE TERMS & CONDITIONS INCLUDES A RELEASE OF LIABILITY AND WAIVER OF CERTAIN  
RIGHTS.**

**Scope of Work:** Customer has retained Guardian Energy Management Solutions, LLC (hereinafter "Guardian") to provide energy efficiency solutions for customer. Customer has hired Guardian to perform the energy efficient project, identified in the Project Order Form (including any attached documents). The Project Scope of Work together with Guardian Energy Management Solutions, LLC's Standard Terms, and Conditions define the scope of work to be performed under this Agreement, (hereinafter "Project"). Any Terms and Conditions or other writings referenced, appended to and/or incorporated in any Purchase Order or Customer authorization to perform work shall not be integrated into this Agreement and are expressly waived.

**Customer Warranties:** Customer warrants that he/she/it owns or leases the real property at which the Project is being performed and has authority to allow Guardian to make alterations to the property appropriate for the work necessary to perform the Project, which may include without limitation drilling holes and installing hardware for use in the installation of the Project. Unless specifically identified in the Project Scope of Work, any painting or patching following the installation of equipment will be performed by Customer.

Customer warrants and affirms that it has conducted all necessary due diligence and that Customer has satisfied all formal procurement rules, regulations or laws required to enter into this Agreement with Guardian. Customer warrants and affirms that Customer has authority to bind Customer to this Agreement and Customer acknowledges that Guardian is relying upon Customer's representations as to its authority to enter this Agreement.

Customer acknowledges that upon receipt of a signed Order Form, Guardian may order goods, materials, and equipment for the Project. In the event that the Project is cancelled through no fault of Guardian, such goods, materials and equipment ordered for the Project may be subject to shipping charges and/or restocking charges. Customer agrees to pay for such charges. If any goods, materials, and equipment for the Project are special order or non-stock items such that the goods, materials, and equipment cannot be returned, Customer shall pay for all such non-returnable goods, materials, and equipment. Upon payment, Customer may take possession of such non-returnable goods, materials and equipment with Customer bearing the cost of delivery of such non-returnable goods, materials, and equipment to Customer.

**Permitting and Prevailing Wage:** Guardian is responsible to obtain and pay for any required permitting, as applicable to the Project. Guardian will provide licensed trades people, paid at Prevailing Wage Rates, as applicable, materials and equipment necessary to perform the Project. Guardian is not responsible for repairs or alteration of Customer property or equipment beyond that defined in the Energy Efficiency Project Scope of Work.

**Payment Terms:** All invoices are payable with Net30 payment terms, unless otherwise defined in the Project Scope of Work. A monthly fee of 1.5% will be assessed against past due amounts after Net30 days. Prior to commencement of any work, Customer shall provide Guardian with Tax Exempt forms, if applicable.

**Working Hours:** Work to perform the Project shall occur within typical working hours (6:00 a.m. - 6:00 p.m., Monday through Friday). In the event, Customer requires work to be performed during other time periods, Customer may incur addition charges, unless otherwise explicitly defined in the Energy Efficiency Project Order Form. Delays in Project completion beyond the control of Guardian may result in modifications to the Project schedule, Project scope, or Project price. Guardian will provide a broom clean construction site, during and upon completion of the Project.

**Site Access:** Customer is responsible to provide unimpeded site access, as well as unobstructed access to all areas necessary to perform the Project. Delays caused by obstructed access to work areas, may result in additional costs to customer.

**Delays:** Guardian shall not be liable for any delay in the performance of the work under this Agreement resulting from or attributable to acts or circumstances beyond Guardian's control, including, but not limited to, acts of God or the public acts of government, acts of terrorism, fire, floods, epidemics, freight embargoes, unusually severe weather, riots, strikes or labor disputes, conditions of the premises, acts or omissions of the Customer or other contractors, or delays caused by suppliers or subcontractors ("Force Majeure Event(s)"). In the event Guardian is delayed in manufacturing, shipping, delivery, or any other performance under this Agreement by a Force Majeure Event and without the fault or negligence of Guardian, Guardian agrees to notify Customer in writing as soon as practicable of the causes of such delay, and Guardian shall further be entitled to an extension of the time equivalent to the duration of any such delay and a reasonable time in which to recover from said delay to resume performance. In the event any materials or equipment to be provided by Guardian under this Agreement becomes permanently unavailable as a result of a Force Majeure Event, Guardian shall be excused from furnishing said materials or equipment.

**Termination for Convenience:** In the event Customer terminates this Agreement through no fault of Guardian or for Customer's convenience, Customer shall provide prior written notice of termination and agrees to pay Guardian for all material furnished, ordered, or manufactured, labor performed, and services provided up to the date of termination, all out of pocket costs (including but not limited to any restocking or other charges owed to any supplier) and including a reasonable profit.

**Customer Termination for Guardian Default:** Customer shall have the right to terminate this Agreement for Guardian's default provided Guardian fails to cure such default within 30 days after having been given prior written notice of the default.



Upon early termination or expiration of this Agreement, Guardian shall have free access to enter Customer locations to disconnect and remove any and all Guardian-owned parts, tools, and personal property. Additionally, Customer agrees to pay Guardian for all incurred but unamortized service costs performed by Guardian including overhead and a reasonable profit.

**Guardian Termination:** Guardian reserves the right to discontinue its service or performance under this Agreement any time payments have not been made as agreed or if alterations, additions, or repairs are made to Project during the term of this Agreement by others without prior agreement between Customer and Guardian. Should Customer fail to make payment in accordance with the terms of this Agreement and such failure continues without cure for a period of five (5) days following Customer's receipt of written notice of such payment default, Guardian may terminate this Agreement without liability.

**Site Conditions & Change Orders:** Guardian is not responsible for unknown site conditions that may affect the installation and/or performance of the systems installed in the Project. Customer accepts that unknown site conditions may result in a change in the scope and/or cost of the Project and Customer. After work is commenced, in the event that unknown site conditions are detected, which materially alter the scope of work necessary to perform the Project, Guardian will notify Customer of such unknown site condition(s) and will prepare a written Change Order, identifying the scope of additional work necessary to complete the Project. If an unknown site condition is identified, Guardian shall not be obligated to complete any further work on the Project, until Guardian and Customer sign the written change order, defining the scope of the additional work and materials necessary and identifying the additional charges and expenses necessitated to perform the Project. Guardian shall not be liable for any delay in performance under this Agreement resulting from unknown site conditions.

**Building Code Compliance:** Project work will be installed according to the applicable Codes and Regulations for the jurisdiction where the Project occurs. If during installation, as a result of an unknown site condition, Guardian identifies code violations, or equipment maintenance related issues during the Project, which must be performed to bring the Project into compliance with the applicable Codes and Regulations for the jurisdiction where the Project occurs, Guardian will notify Customer of such issues and will issue a written Change Order, under the process identified above, so that the Project can be completed in compliance with the applicable Codes and Regulations.

**Hazardous Materials:** If during the course of the Project, Guardian encounters any "Hazardous Materials" on the Customer's site, Guardian may cease all work on the Project until such time as Customer has remediated the Hazardous Material condition. Customer agrees to promptly remediate any Hazardous Material condition detected, to allow Guardian to complete its work on the Project. Customer, at its own cost, will be responsible to comply with all legal regulations regarding the removal and disposal of Hazardous Materials. "Hazardous Materials" means any substance commonly referred to, or defined in any law or regulation, as a hazardous material or substance, including but not limited to, chemicals, solvents, petroleum products, flammable materials, explosives, asbestos, urea formaldehyde, PCBs, chlorofluorocarbons, Freon, or radioactive materials. As defined in the scope of work in the Energy Efficiency Project Order Form, in compliance with applicable rules, bylaws, regulations and statutes, Guardian will recycle and/or dispose of any existing equipment to be removed from Customer's site as a result of the Project, including existing equipment that existing equipment contains "Hazardous Materials", to the extent such "Hazardous Materials" are identified in the Energy Efficiency Project Order Form.

**Emergency Services Work:** Any warranty related service calls are to be placed directly to Guardian. Upon receipt of any warranty related service call, at Customer's request, Guardian will inspect the property with Customer. If such inspection does not reveal any defects for which Guardian is liable under this Agreement, Guardian may assess Customer a service call fee.

**Limitation of Liability:** Under no circumstances shall Guardian be liable for any indirect, incidental, special or consequential damages, including loss of revenue, loss of use of equipment or facilities, loss of data, or economic damages howsoever arising. Guardian shall be liable for damage to property, other than equipment provided under this Agreement, and to persons, to the extent that Guardian's negligent acts or omissions directly contributed to such injury or property damage. To the extent permitted by law, Guardian's aggregate liability for any reason, whether in contract, tort (including negligence) or otherwise, will be limited to the value of the payments received by Guardian under this Agreement. The aggregate liability shall not limit the liability of Guardian for any injury to, or death of a person, caused by its gross negligence.

**Time of Presentment:** Any suits arising from the performance or nonperformance of this Agreement, whether based upon contract, negligence, strict liability or otherwise, shall be brought within one (1) year from the date the claim arose.

**Non-Solicitation:** Customer acknowledges that Guardian's employees are valuable assets to Guardian. During the term of this Agreement or one hundred eighty (180) days thereafter, if Customer hires a Guardian employee who worked directly or indirectly with Customer, Customer agrees to 1) pay Guardian an amount equal to twelve (12) months' salary for such Guardian employee and 2) reimburse Guardian for all costs associated with any training and/or licensing provided and/or paid for by Guardian for such employee.

**Miscellaneous and Severability:** Titles are for informational purposes only. If any provision of these Terms & Conditions is found to be invalid, illegal, or unenforceable, that term shall be deemed stricken and the remaining portions shall remain in full force and effect.

## WARRANTY

From the date of completion of the Project, Guardian provides a one (1) year labor warranty for workmanship in the installation performed by Guardian, running from the date of substantial completion of the Project. Material warranties are manufacture specific and will be transferred and assigned to Customer at the completion of the Project.

THE FOREGOING WORKMANSHIP WARRANTY TERMS ARE EXCLUSIVE AND IN LIEU OF ALL OTHER WARRANTIES AND GUARDIAN EXPRESSLY DISCLAIMS ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, RELATING DIRECTLY OR INDIRECTLY TO THE PROJECT, WHETHER ORAL OR WRITTEN, OR ARISING BY COURSE OF DEALING OR USAGE OF TRADE. GUARDIAN EXPRESSLY WAIVES ANY WARRANTIES OF MERCHANT LIABILITY OR FITNESS FOR A PARTICULAR PURPOSE.

For work that involves the installation of computer components, software, or networking systems, Guardian shall install computer components, software, or networking systems according to Manufacturer's specifications. Manufacturers of such components, software or networking systems are solely responsible for any costs or expenses related to any claims, repairs, or replacements associated with such components. Furthermore, Customer acknowledges that access to software associated with such components; or networking systems may be subject to the terms and conditions of an End-User license Agreement and warranty terms applicable to such software set forth therein. Guardian shall transfer and assign to Customer all licensing agreements and warranties associated with any computer components; software or networking systems installed by Guardian in the scope of the Project.

GUARDIAN ASSUMES NO LIABILITY AND CUSTOMER HEREBY WAIVES ALL CLAIMS AGAINST GUARDIAN ARISING OUT OF THE FAILURE OF ANY COMPUTER COMPONENTS, SOFTWARE, OR NETWORKING SYSTEMS INSTALLED BY GUARDIAN AS PART OF THE PROJECT. CUSTOMER'S SOLE REMEDY FOR THE FAILURE OF ANY COMPUTER COMPONENTS, SOFTWARE OR NETWORKING SYSTEMS INSTALLED BY GUARDIAN AS PART OF THE PROJECT SHALL BE THROUGH ANY MANUFACTURER'S WARRANTIES.

Customer acknowledges that it has retained Guardian to install computer components, software, or networking systems and that such computer components, software, or networking systems have the potential of being portals or access points by which third parties could potentially access Customer's computer systems and/ or networks. Customer acknowledges and accepts that Guardian shall bear no responsibility and assumes no liability for any claims or damages that may occur as a result of third parties accessing Customer's property and systems through any computer components, software or networking systems installed by Guardian. Furthermore, Customer hereby releases Guardian from any liability for any data loss which may occur or component failures or other issues that may arise as a result of the computer component, software, or networking systems install occurring during attempted installation, testing, or any other time. Guardian is not responsible for loss of profit or any direct, indirect, special, incidental, or consequential damage occurring during or after any computer services are performed.

ALL CLAIMS FOR LIABILITY AND/OR LOSS INCLUDING WITHOUT LIMITATION ANY INDIRECT, INCIDENTAL, OR CONSEQUENTIAL DAMAGES WHICH MAY OCCUR AS A RESULT OF GUARDIAN'S INSTALLATION OF SUCH COMPUTER COMPONENTS, SOFTWARE OR NETWORKING SYSTEMS ARE HEREBY EXPRESSLY WAIVED.

Town of  
Total

Leicester  
Becker Bldgs

7/11/2022

Location	Measure	App#	Total Project Cost (TPC)	NGRID Calculated kWh savings	Rate/ kWh	Maint. Savings	Calculated Energy Savings	Calculated Total Savings	Simple Payback	NGRID Incentive	Payback After Incentive	Incent. \$'s / Unit	Net Customer Cost After Incentive	100% of Net costs	OBR Amount of NPC	Customer Contribution	Months Financed	Monthly Payment	Monthly \$ Savings	Monthly Cash Flows
Swan Library	LED's	1.4E+07	\$32,277	22,858	0.200	\$ 642.00	\$4,571.60	\$ 5,213.60	6.19	\$5,328.00	5.17		\$26,949.00	1.00	\$26,949.00	\$0.00	60	\$449.15	\$434.47	-\$14.68
Marsh Hall	LED's	1.4E+07	\$22,721	11,017	0.200	\$ 488.00	\$2,203.40	\$ 2,691.40	8.44	\$2,548.00	7.50		\$20,173.00	1.00	\$20,173.00	\$0.00	60	\$336.22	\$224.28	-\$111.93
CC West	LED's	1.4E+07	\$54,094	30,377	0.200	\$ 1,094.00	\$6,075.40	\$ 7,169.40	7.55	\$7,064.00	6.56		\$47,030.00	1.00	\$47,030.00	\$0.00	60	\$783.83	\$597.45	-\$186.38
Fuller	LED's	1.4E+07	\$78,702	75,056	0.200	\$ 1,554.00	\$15,011.20	\$ 16,565.20	4.75	\$10,890.00	4.09		\$67,812.00	1.00	\$67,812.00	\$0.00	60	\$1,130.20	\$1,380.43	\$250.23
Borger	LED's	1.4E+07	\$99,954	54,282	0.200	\$ 2,094.00	\$10,856.40	\$ 12,950.40	7.72	\$14,557.00	6.59		\$85,397.00	1.00	\$85,397.00	\$0.00	60	\$1,423.28	\$1,079.20	-\$344.08
<b>Total OBR Prjs.</b>			<b>\$287,748</b>	<b>193,590</b>		<b>\$ 5,872.00</b>	<b>\$38,718.00</b>	<b>\$ 44,590.00</b>	6.45	<b>\$40,387.00</b>	5.55		<b>\$247,361.00</b>		<b>\$247,361.00</b>	<b>\$0.00</b>		\$4,122.68	\$3,715.83	-\$406.85

Prescriptive incentives



June 14, 2022

David Genereux  
TOWN OF LEICESTER  
3 Washburn Sq.  
Leicester , MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER, Leicester , MA 01524

Electric Account Number: 6610996002

Application Number: 13682411

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER, 3 Washburn Sq., Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER's facility, National Grid has determined that TOWN OF LEICESTER's project as set forth in the Application Town Of Leicester Town Hall Led Obr qualifies for incentive payments from National Grid that will total \$10,808.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$73,173.00. TOWN OF LEICESTER agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER's electric bill for the Facility in 60 consecutive monthly installments of \$1,219.55. Incentive check and authorized on-bill repayment will be made out to :INSTALLATION CONTRACTOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐

applicable



not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Dec-31-2022

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]



### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if the equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address \_\_\_\_\_  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



July 13, 2022

David Genereux  
TOWN OF LEICESTER SELECTME  
964 Main St  
Leicester , MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER SELECTMENS, Leicester , MA 01524

Electric Account Number: 9103388057

Application Number: 13708141

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER SELECTMENS, 964 Main St, Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER SELECTMENS's facility, National Grid has determined that TOWN OF LEICESTER SELECTMENS's project as set forth in the Application Town Of Leicester:Becker College Swan Library-Obr qualifies for incentive payments from National Grid that will total \$5,328.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER SELECTMENS qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$26,949.00. TOWN OF LEICESTER SELECTMENS agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER SELECTMENS's electric bill for the Facility in 60 consecutive monthly installments of \$449.15. Incentive check and authorized on-bill repayment will be made out to :INSTALLATION CONTRACTOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER SELECTMENS's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐

applicable



not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER SELECTMENS agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Jan-31-2023

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]

### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER SELECTMENS to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER SELECTMENS solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address sean.mcgloin@nationalgrid.com  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER SELECTMENS accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER SELECTMENS.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER SELECTMENS**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



July 13, 2022

David Genereux  
TOWN OF LEICESTER SELECTME  
964 Main St  
Leicester, MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER SELECTMENS, Leicester, MA 01524

Electric Account Number: 7856669029      Application Number: 13708144

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER SELECTMENS, 964 Main St, Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER SELECTMENS's facility, National Grid has determined that TOWN OF LEICESTER SELECTMENS's project as set forth in the Application Town Of Leicester: Becker College Marsh Hall Obr qualifies for incentive payments from National Grid that will total \$2,548.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER SELECTMENS qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$20,173.00. TOWN OF LEICESTER SELECTMENS agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER SELECTMENS's electric bill for the Facility in 60 consecutive monthly installments of \$336.22. Incentive check and authorized on-bill repayment will be made out to :INSTALLATION CONTRACTOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER SELECTMENS's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐ applicable      ☒ not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER SELECTMENS agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Jan-31-2023

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]

### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER SELECTMENS to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER SELECTMENS solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address [sean.mcgloin@nationalgrid.com](mailto:sean.mcgloin@nationalgrid.com)  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER SELECTMENS accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER SELECTMENS.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER SELECTMENS**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



July 13, 2022

David Genereux  
TOWN OF LEICESTER SELECTME  
964 Main St  
Leicester , MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER SELECTMENS, Leicester , MA 01524

Electric Account Number: 4121441043

Application Number: 13708447

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER SELECTMENS, 964 Main St, Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER SELECTMENS's facility, National Grid has determined that TOWN OF LEICESTER SELECTMENS's project as set forth in the Application Town Of Leicester: Becker Cc West Led Obr qualifies for incentive payments from National Grid that will total \$7,064.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER SELECTMENS qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$47,030.00. TOWN OF LEICESTER SELECTMENS agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER SELECTMENS's electric bill for the Facility in 60 consecutive monthly installments of \$783.83. Incentive check and authorized on-bill repayment will be made out to :INSTALLATION CONTRACTOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER SELECTMENS's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐ applicable

☒ not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER SELECTMENS agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Jan-31-2023

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]

### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER SELECTMENS to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER SELECTMENS solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address [sean.mcgloin@nationalgrid.com](mailto:sean.mcgloin@nationalgrid.com)  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER SELECTMENS accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER SELECTMENS.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER SELECTMENS**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



July 13, 2022

David Genereux  
TOWN OF LEICESTER SELECTME  
964 Main St  
Leicester , MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER SELECTMENS, Leicester , MA 01524

Electric Account Number: 3864840034

Application Number: 13709161

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER SELECTMENS, 964 Main St, Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER SELECTMENS's facility, National Grid has determined that TOWN OF LEICESTER SELECTMENS's project as set forth in the Application Town Of Leicester: Becker Fuller Led Obr qualifies for incentive payments from National Grid that will total \$10,890.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER SELECTMENS qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$67,812.00. TOWN OF LEICESTER SELECTMENS agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER SELECTMENS's electric bill for the Facility in 60 consecutive monthly installments of \$1,130.20. Incentive check and authorized on-bill repayment will be made out to :INSTALLATION CONTRACTOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER SELECTMENS's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐

applicable



not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER SELECTMENS agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Jan-31-2023

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]



### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER SELECTMENS to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER SELECTMENS solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address sean.mcgloin@nationalgrid.com  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER SELECTMENS accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER SELECTMENS.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER SELECTMENS**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



July 13, 2022

David Genereux  
TOWN OF LEICESTER SELECTME  
9 Washburn Sq  
Leicester , MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER SELECTMENS, Leicester , MA 01524

Electric Account Number: 6264127046

Application Number: 13724292

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER SELECTMENS, 9 Washburn Sq, Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER SELECTMENS's facility, National Grid has determined that TOWN OF LEICESTER SELECTMENS's project as set forth in the Application Town Of Leicester Becker Borger Building Phase 1 qualifies for incentive payments from National Grid that will total \$14,557.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER SELECTMENS qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$85,397.00. TOWN OF LEICESTER SELECTMENS agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER SELECTMENS's electric bill for the Facility in 60 consecutive monthly installments of \$1,423.28. Incentive check and authorized on-bill repayment will be made out to :PROJECT EXPEDITOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER SELECTMENS's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐

applicable



not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER SELECTMENS agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Jan-31-2023

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]

### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER SELECTMENS to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER SELECTMENS solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address sean.mcgloin@nationalgrid.com  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER SELECTMENS accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER SELECTMENS.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER SELECTMENS**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



June 14, 2022

David Genereux  
TOWN OF LEICESTER  
3 Washburn Sq.  
Leicester , MA 01524

RE: Energy Initiative Pre-approval with OBR for TOWN OF LEICESTER, Leicester , MA 01524

Electric Account Number: 6610996002

Application Number: 13682411

Dear David Genereux:

National Grid has pre-approved your incentive application for TOWN OF LEICESTER, 3 Washburn Sq., Leicester, MA 01524. After reviewing the Application and a pre-installation survey of TOWN OF LEICESTER's facility, National Grid has determined that TOWN OF LEICESTER's project as set forth in the Application Town Of Leicester Town Hall Led Obr qualifies for incentive payments from National Grid that will total \$10,808.00 if completed as planned and in accordance with applicable terms and conditions.

In addition, TOWN OF LEICESTER qualifies for National Grid's on-bill repayment option. Accordingly, National Grid will pay for the Project's Authorized on Bill Repayment amount \$73,173.00. TOWN OF LEICESTER agrees to pay back to National Grid the Authorized on Bill Repayment amount. On Bill Repayment to National Grid will be made through TOWN OF LEICESTER's electric bill for the Facility in 60 consecutive monthly installments of \$1,219.55. Incentive check and authorized on-bill repayment will be made out to :INSTALLATION CONTRACTOR. The on-bill Repayment will begin once the Project has been completed.

Please note that TOWN OF LEICESTER's participation in the Energy Initiative program and National Grid's payment of the Incentives and Authorized On Bill Repayments are subject to terms and conditions included in the Application and which are detailed in the customer report, as well as minimum requirements document:

☐

applicable



not applicable

(See Minimum Requirements Document dated \_\_\_\_\_ attached).

In addition to such terms and conditions, TOWN OF LEICESTER agrees to the following:

### 1. Project Completion:

To be eligible to receive the Incentives for this Application, the equipment must be installed by Dec-31-2022

### 2. Completed Application:

The application form must be completed including paid invoices (with material and labor costs and equipment discounts itemized) as well as other documentation for all installed measures must be attached.

\* ["National Grid" means [Massachusetts Electric Company d/b/a National Grid, Nantucket Electric Company d/b/a National Grid as applicable]

### 3. Post-Installation Verification –

A National Grid representative may conduct a post-installation verification of the newly installed equipment to ensure that the installation is consistent with the Application as pre-approved, represents sound engineering practices, and complies with the attached Minimum Requirements Document (if applicable).

### 4. Project Changes After Pre-approval –

This pre-approval commitment requires TOWN OF LEICESTER to notify National Grid prior to commencing construction if changes to the Project are necessary. National Grid will determine whether the proposed change(s) requires revisions to your Application or Incentive.

### 5. On-Bill Repayment Option –

Authorized On Bill Repayment will be used by TOWN OF LEICESTER solely in connection with the Project and in accordance with the Program's terms and conditions. The Authorized On Bill Repayment is subject to change in the event of any change in the Incentive amount or total cost of the Project. Further, if physical on-site construction has not begun or substantial procurement action has not been taken for the Project within sixty (60) days of the date of this pre-approval letter, and/or if the equipment has not been installed by the Program year end, the Authorized On Bill Repayment may be rescinded or reduced by National Grid at its sole discretion.

For On Bill Repayment amounts of \$250,000.00 and greater there is an extensive credit review process. This process may lengthen the On Bill Repayment approval process and the request may be denied or require a customer contribution.

Please sign below and send a signed copy back to me at the following address \_\_\_\_\_  
Your signature below confirms that (a) you have read this Pre-Approval Letter and TOWN OF LEICESTER accepts the above listed terms and conditions, (b) you are an authorized representative with the proper authority to sign on behalf of TOWN OF LEICESTER.

Please call me with questions. Thank you for participating in National Grid's Energy Efficiency Programs.

Sincerely,

Sean McGloin

**Sean.McGloin@nationalgrid.com**



**Acknowledged and Accepted:**

**TOWN OF LEICESTER**

By: \_\_\_\_\_

Print: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

From: James Fleming

Date: Jul 6, 2022 at 7:22:02 PM

To:

RECEIVED JUL 07 2022

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To whom may concern, 7/6/22

I James Fleming, will be resigning from the truck driver/laborer position at Leicester highway department. My last day will be on July 28th. Thank you for the opportunity to work for this town.



## TOWN OF LEICESTER CITIZEN VOLUNTEER FORM

From time to time vacancies/resignations occur on various town boards and committees. Should you be interested in volunteering to serve the Town in any capacity, please complete this form. Information received will be made available to boards, committees, and departments for their reference in filling vacancies.

NAME John Shocik HOME TEL. \_\_\_\_\_

ADDRESS: \_\_\_\_\_ WORK TEL. \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_

Are you a citizen? ☒ Yes ☐ No Are you a registered voter? ☒ Yes ☐ No

- |   |  |
|---|--|
| <input type="checkbox"/> Advisory/Finance Committee         | <input type="checkbox"/> Economic Development Committee                      |
| <input type="checkbox"/> Agricultural Commission            | <input type="checkbox"/> Historical Commission                               |
| <input type="checkbox"/> Arts Council                       | <input type="checkbox"/> Memorial Day Committee                              |
| <input type="checkbox"/> Bandstand Committee                | <input type="checkbox"/> Parks and Recreation Committee                      |
| <input type="checkbox"/> Burncoat Park Planning Committee   | <input type="checkbox"/> Recycling Committee                                 |
| <input type="checkbox"/> Bylaw Committee                    | <input type="checkbox"/> Road Conversion Committee                           |
| <input type="checkbox"/> Capital Improvement Planning Comm. | <input type="checkbox"/> Stormwater Committee                                |
| <input type="checkbox"/> Commission on Disabilities         | <input type="checkbox"/> Zoning Board of Appeals                             |
| <input type="checkbox"/> Conservation Commission            | <input checked="" type="checkbox"/> Other <u>Moose Hill Water Commission</u> |

### AVAILABILITY FOR MEETINGS

How many times per month are you available for meetings?

☐ Four ☒ Two ☐ One ☐ Less than one

Are you available for evening meetings?

☐ Monday ☒ Tuesday ☐ Wednesday ☒ Thursday

Are you available throughout the year for committee meetings?

☒ Yes ☐ No

If not, when are you **NOT** available?

☐ Winter ☐ Spring ☐ Summer ☐ Autumn

EDUCATION: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

(Please complete reverse side)

**EMPLOYMENT EXPERIENCE:**

*Town of Leicester:* Are you currently or have you ever been employed by the Town? ☒ Yes ☐ No

If yes, state position(s) and date(s): Selectboard Member 2019-2022

*Other Experience:* Start with present or last job (include title) and military service assignments.  
Exclude organizations' names which indicate race, religion, sex, or national origin.

CVSD Moderator 1991-1993

CVRWD Moderator 2021-2022

**COMMENTS:** Please tell us why you are interested in serving on the committees noted and any additional comments you may have: \_\_\_\_\_

My time on selectboard allowed me to gain knowledge I believe is important to the MHWC.

***Sometimes there is a short-term need for special background skills.***

Please indicate your field(s) of training or experience below, as appropriate. Your application will be added to the list of residents who have expressed an interest in serving in similar capacities.

***I possess the following training or experience:***

- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Architecture             | <input type="checkbox"/> Communications            | <input type="checkbox"/> Computer Technology      |
| <input checked="" type="checkbox"/> Construction  | <input type="checkbox"/> Economics                 | <input type="checkbox"/> Education                |
| <input type="checkbox"/> Engineering, Civil       | <input type="checkbox"/> Engineering, Electronic   | <input type="checkbox"/> Engineering, Mechanical  |
| <input type="checkbox"/> Financial Administration | <input type="checkbox"/> Fine Arts                 | <input type="checkbox"/> Government Contracts     |
| <input type="checkbox"/> Health Care              | <input type="checkbox"/> Historic Activities       | <input type="checkbox"/> Human Services           |
| <input type="checkbox"/> Insurance                | <input type="checkbox"/> Land Use Planning         | <input type="checkbox"/> Grant Writing            |
| <input type="checkbox"/> Law                      | <input type="checkbox"/> Management                | <input type="checkbox"/> Personnel Administration |
| <input type="checkbox"/> Property Appraisal       | <input type="checkbox"/> Public Relations          | <input type="checkbox"/> Real Estate              |
| <input type="checkbox"/> Science                  | <input type="checkbox"/> Statistics                | <input type="checkbox"/> Survey Research          |
| <input type="checkbox"/> Systems Analysis         | <input checked="" type="checkbox"/> Transportation |   |

Other Skills & Interests: \_\_\_\_\_

**Government or Community Volunteer Experience (Leicester or Elsewhere)**

<b>Position/Activity</b>	<b>Date(s)</b>	<b>City or Town</b>
Listed above		
_____	_____	_____
_____	_____	_____
_____	_____	_____

<div style="border: 1px solid black; padding: 5px; display: inline-block;"><small>eSigned via SeamlessDocs.com</small> <i>John Shocik</i> <small>Key: cb5a1d93b8d05a9db6e2b633b76e2f6ca</small></div>		06/21/2022
<b>Signature of Applicant</b>		<b>Date</b>

*Thank you for your interest in serving the Town of Leicester*



**From:** [Genereux, David](#)  
**To:** [Rubin, Kristen](#)  
**Subject:** Fw: WRTA Advisory Board  
**Date:** Friday, July 8, 2022 10:26:27 PM  
**Attachments:** [HaleyHeather-Lyn\\_FullCV\\_013122.pdf](#)

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Sent using OWA for iPhone

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**From:** Haley, Heather-Lyn  
**Sent:** Friday, July 8, 2022 2:54:51 PM  
**To:** Genereux, David  
**Subject:** WRTA Advisory Board

Hello! I am a Cherry Valley resident and public health professional who cares about access to public transportation, and I am a rider on the WRTA. I would like to serve as a riders' advisory board "Rider Community Population" representative. They've been looking for some time now for a representative of the surrounding towns, and having moved back to Cherry Valley after many years in the city, I qualify. I'm often at these meetings anyway in my role as program director for community health at UMass Chan. I'll attach my CV for your reference. I had spoken in mid-May with Adam Thielker, the chair, and he'd like to welcome me to the committee officially. I believe you and I have both heard from David LeBoeuf about the matter, as referenced below. This morning I got a call from committee member Anne Bureau suggesting I call your office to connect so I just left you a message. I think they'd really like to get me on board before the mid-July meeting. I'd be happy to report back what I learn if there's a structure in place where it would be appropriate to do so - perhaps through the new Leicester Regional Public Health Coalition? This is an appointed position, and requires nomination by the town as outlined at <https://www.therta.com/public-notice/2021/11/wрта-advisory-board-looking-to-fill-ridership-disabled-commuter-positions/> Anne Bureau suggested this could be accomplished via email to Dennis J Lipka, WRTA Administrator, 508-453-3403, [admin@therta.com](mailto:admin@therta.com) and Gary Rosen – Advisory Board Chair, [rosengary@gmail.com](mailto:rosengary@gmail.com). Please let me know what questions you have, and if you'd be willing to have me serve in this position. Thank you!

Heather-Lyn Haley PhD (she,her)  
Assistant Professor and Program Director  
Family Medicine and Community Health, UMass Chan Medical School, Worcester, MA 01655

**From:** Haley, Heather-Lyn

**Sent:** Tuesday, May 31, 2022 3:46 PM

**To:** 'genereuxd@leicesterma.org' <[genereuxd@leicesterma.org](mailto:genereuxd@leicesterma.org)>

**Subject:** WRTA Advisory Board

Good afternoon. Access to public transportation is a community public health issue. I am a Cherry Valley resident and public health professional who cares about access to public transportation, and I am a rider on the WRTA. I would like to serve as a riders' advisory board "Rider Community Population" representative. They've been looking for some time now for a representative of the surrounding towns, and having moved back to Cherry Valley after many years in the city, I qualify. This is an appointed position, and requires nomination by the town as outlined at <https://www.therta.com/public-notice/2021/11/wrta-advisory-board-looking-to-fill-ridership-disabled-commuter-positions/>. The deadline has passed but the position is still open. I've spoken with Adam Thielker, the chair, and he'd like to welcome me to the committee. I'd be happy to report back what I learn if there's a structure in place where it would be appropriate to do so - perhaps through the new Leicester Regional Public Health Coalition? Please let me know what questions you have, and if you'd be willing to have me serve in this position. Thank you!

**Heather-Lyn Haley, Ph.D.**  
Cherry Valley, MA 01611

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**Education**

Ph.D., Sociology, University of Massachusetts, Amherst MA Thesis Title: The Impact of Child Care Choices on the Social Networks of Working-Class Couples Across the Transition to Parenthood Advisor: Suzanne Model PhD	09/2003
M.A., Sociology (Family and Social Networks), University of Massachusetts, Amherst MA	05/2001
B.A., English Literature (Journalism), Worcester State College, Worcester MA	12/1988

**Academic Appointments**

Assistant Professor Department of Family Medicine and Community Health, UMass Chan Medical School, Worcester, MA	11/2009– current
Assistant Professor Department of Medicine, UMass Chan Medical School, Worcester, MA	11/2009-current
Instructor Department of Family Medicine and Community Health, University of Massachusetts Medical School, Worcester, MA	11/2003–11/2009

**Other Positions and Employment**

<b>UMass Chan/ University of Massachusetts Medical School, Worcester, MA</b>	<b>02/2002–current &amp; 9/1980-8/1995</b>
Project Manager for Diversity, Representation and Inclusion for Value in Education (DRIVE), Office of Undergraduate Medical Education	02/2020-current
Project Manager for Collaboratory Community Engagement Data Initiative, Office for Community and Government Relations	09/2020-current
Project Manager for Institutional Recognition as a Community-Engaged Campus through Carnegie Classification, Office for Community and Government Relations	10/2013-04/2014
Project Manager for Community Engagement, Center for Health Equity Intervention Research	2012-2014
Project Manager for Community Health, Department of Family Medicine and Community Health	11/2009-current
Site Coordinator, Building on the Promise, Learn and Serve America Grant	2009-2012
Evaluator, Center for Clinical Communication and Performance Outcomes	2006-2009
Consultant, Office of Medical History and Archives, Lamar Soutter Library	2006-2007
Evaluator, Department of Medicine Educational Research Group	2004-2009
Director of Evaluation and Research, Community Faculty Development Center	2003-2009
Special Project Assistant, Community Faculty Development Center	2002-2003
Database Coordinator, Dept of Cell Biology, Jeanne Lawrence Lab	1993-1995
Community Discharge Specialist, Dept of Social Work	1992-1993
Research Assistant, Office of the Curriculum Dean	1989-1992

**Updated: May 8, 2021**

Data Entry Clerk, Patient Accounts (evening supervisor 1985-89)	1980-1989
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**Honors and Awards**

Excellence in Education Award, Family Medicine and Community Health (UMMS)	2021, 2016
Community Service Award, Women's Faculty Committee (UMMS)	2017
Phi Kappa Phi Honor Society	1995-1997
Avon Scholarship for Representatives Award	1996

**Educational Activities****Educational Leadership, Administration and Service**

Faculty Advisor, Student Coalition for Advocacy, Diversity and Inclusion (SCADI)	2019-2020
Faculty Advisor, Optional Enrichment Elective, Case Management in the Free Clinics	2019-2021
Faculty Sponsor/Supervisor, Flexible Clinical Experience (FCE3006), Exploring Patient Racism Toward Health Care Providers, student Robert Gakwaya	2016
Faculty Sponsor/Supervisor, Flexible Clinical Experience (FCE3006), Reflection on the Tombstone Exhibit, student Solange Bayard	2015
Director, Interprofessional Population Health Clerkship/ Determinants of Health FM210/N603	2013-current
Director, Summer Service Learning/ Community Health Assistantship	2012-current
Faculty advisor, Optional Enrichment Elective Faculty, Worcester – The Bigger Picture	2011-2012, 2016-2019
Faculty, Medical Student Third Year Multiculturalism/Demographic Challenges Interclerkship	2009-2019

**Teaching Activities in Programs and Courses**

<b>University of Massachusetts Medical School</b>	2003-current
Interprofessional Population Health Clerkship (FM210/N603a)	2013-current
Director of Centralized Core Online Curriculum in Population and Community Health. 14 guest presentations over 10 days (20 hrs/yr)	2020
Academic co-leader for "See It My Way: Worcester's VIPs (Visually Impaired Population)" 7 medical students (80 hrs/yr)	2020-current
Academic co-leader for "Worcester's Black Families" 3 medical students (80 hrs/yr)	2020
Academic co-leader for "LUV (Listening to Unheard Voices): Making Opioid Interventions More Effective by Humanizing Addiction" 6 medical and graduate nursing students (80 hrs/yr)	2016-2018, 2020
Academic co-leader for "Worcester Public School students: Improving uptake at flu clinics" 6-12 medical students (80 hrs/yr)	2015-2019
Academic co-leader for "The Worcester LGBT Community: Progress made and work still to be done" 5 medical students (80 hrs/yr)	2015
Academic co-leader for "Racism in Health" 4 medical students (80 hrs/yr)	2015
Academic co-leader for "Rainbow of Healthy Babies: Worcester Healthy Baby Collaborative" 4 medical students (80 hrs/yr)	2015
Academic co-leader for "Refugee Health in Worcester" 3 medical and graduate nursing students (80 hrs/yr)	2015

Primary faculty author and presenter for “Race, Power and Privilege in Clinic and Community” optional intensive workshop for 25-50 medical and graduate nursing students (3-5 hrs/yr)	2014-2019
Academic co-leader for “Complementary and Alternative Medicine for Wellness: Burnout Prevention for Ourselves and our Community- 2016” and for “Enriching the Medical Curriculum: Empowering Women through Health, Education and Wellness-2015” “YWCA Central MA Community Care Worker Challenges-2014” 4-6 medical and graduate nursing students (80 hrs/yr)	2014-2016
Academic co-leader for “Reducing Readmission Rates to the Harrington Hospital Emergency Room after Acute Asthma Exacerbation-2015” & “Asthma in Southern Worcester County: Impact and Interventions-2014” 4-6 medical and graduate nursing students (80 hrs/yr)	2014-2015
Academic co-leader for “Medical Legal Partnership” 6 medical students (80 hrs/yr)	2013-2019
Academic co-leader for “How Do I Feed my Family Tonight? Food Insecurity in Worcester County” 6 medical and graduate nursing students (80 hrs/yr)	2012-2015
Academic co-leader for “Faces and Places of Worcester – Family Health Center of Worcester” 8 medical students (80 hrs/yr)	2011-2012
Summer Service Learning/ Community Health Assistantship	2013-current
Academic advisor/supervisor for 8-20 rising second-year medical students placed with community partners for a variety of service projects (avg 15 students/133 hrs yr)	
Includes leading 4 sessions on: Building a Cohort of Community-Engaged Learners; Exploring the Mission Statements of Host Organizations; Thinking Long Term- Continuity of Community Projects; and Pre-Poster Session Peer Review Potluck (6 hrs/yr)	
Summer Enrichment Programs (High School Health Careers and Undergrad Enrichment)	2014-current
“Improving the Health of a Community” (3 hrs/yr)	2014-current
“Who Gets a Flu Shot?” (3 hrs/yr, with Kelly Cakert and Nogoy Bah)	2016-2017
<b>Worcester State University</b> , Chandler St, Worcester, Dept of Sociology, Adjunct Faculty Introduction to Sociology, fall 2001-2002	2001-2002
<b>University of Massachusetts at Amherst</b> , Dept of Sociology, Teaching Assistant	1994-1998
Writing in Sociology, Sue Model, Spring 1998	1998
Age, Sex and Kinship, Al Chevan, Fall 1997	1997
The Family, Naomi Gerstel, Spring 1997	1997
Deviance and Social Order, Rob Faulkner, Spring 96, Fall 1996	1996
Self, Society and Interpersonal Relationships, Rick Tessler, Fall 95	1995
Social Problems, Myrna Hewitt, Spring 95	1995
Sexuality and Society, Arlene Dallalfar, Fall 94	1994
<b>Clinical Education</b>	
Worcester Family Medicine Residency Program	2017-current
Community Health Swing, with Suzanne Cashman and Jay Broadhurst. Half-day community immersion for first year family medicine residents to introduce social determinants of health and services available at local resource providers.	2018-current

Structures to Orient Us in the Quest to Adequately Address Race, Power and Privilege in Clinical Settings. With Ivonne Maclean and Stacy Potts. UMass Family Medicine Residency Retreat, Ski Ward, Shrewsbury MA.	January 23, 2017
FMCH Academic Development: Organize, administer and evaluate departmental retreats with sessions on education, clinical service, community health and research. Taught sessions:	2002-2018
Addressing Race, Power and Privilege in Clinical Settings, Fall Faculty Retreat, Bolton MA	Sept 16, 2016
Implicit Bias and Allyship, with Stacy Potts, Ivonne McLean and Lucy Candib, Fall Faculty Retreat, Bolton MA	Sept 16, 2016
Race, Power and Privilege in Clinical Care, Teaching and Research, Spring Faculty Retreat, West Boylston MA	May 16, 2015
Advocacy in Primary Care, Spring Faculty Retreat, Bolton MA	March 10, 2012
Community Health Toolkit with Warren Ferguson and Suzanne Cashman. Fall Faculty Retreat, South St Amphitheatre.	October 23, 2010
Increasing Scholarly Activity Through Educational Research. with Mark Quirk, Faculty Workshop I: Practice of the Future: Making Changes Based on Best Evidence and Evaluating Their Impact. The New England Center, UNH, Durham, NH	February 11-12, 2005

### Research Education

UMMS Family Medicine and Community Health Research Forum:	
Between Two Worlds: A Qualitative Analysis of Student Reflections on Entering the Medical Profession.	March 28, 2008
The Impact of Child Care Choices on the Social Networks of Working-Class Couples Across the Transition to Parenthood.	May 16, 2003
HRSA Faculty Development Fellowship, Community Faculty Development Center, FMCH, UMMS. Supported fellow research projects and taught sessions:	2002-2006
Evaluation and Research in Medical Education, with D Keller Nov 16, 2005	2005
Evaluation, with D Keller, Jan 26, 2005	2005
Evaluation, with D Keller, April 27, 2004	2004
Looking at your Data: How to Answer Your Project Question, with J Savageau, March 26, 2003	2003
Member, Mentor and Evaluator, Medicine Dept Educational Research Group (MERG)	2004-2009

### External Educational Activities

HRSA Faculty Development Regional Workshop Series: Teaching of Tomorrow. Conducted evaluation and research, and taught session: Introduction to Data Analysis	Feb 13, 2003
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### Education for the Public/Community Education

I Am Not Your Negro Film Discussion Panel, Invited by SMILE Coalition (Students Making an Inclusive Learning Environment). Estabrook Hall, Clark University.	November 29, 2018
Witnessing Whiteness Racial Identity Development Community Education Group. Ten monthly educational sessions reviewing chapters of Shelly Tochluk book and conducting interactive exercises, culminating with visit from the author. Worcester MA.	Sept 2015-June 23, 2016

Assessing the Continuing Education Needs of the Residents of Martha's Vineyard. Press conference, West Tisbury Public Library, Martha's Vineyard.	September 29, 2015
Improving the Process of Colorectal Cancer Screening Among Low-Income Diverse Populations. Oral presentation at Common Pathways MassCONNECT in Worcester Working Group, Dept of Public Health, Worcester MA.	April 4, 2011

### **Educational Development: Curricular and Educational Materials**

Collaboratory Community Engagement Online Resource: Responsible for initial population of fields and implementation across campus. UMass Campus User Documentation Guide, in development. UMass Medical School, Worcester MA.	2021-current
Transitions, Themes and Threads (T3) Longitudinal Content Curriculum Committee charged with oversight and management of longitudinal threads, themes and transitions across the entire medical school experience including combined degree programs, the pathways program, the 3-year MD program as they relate to educational policy and curriculum, reporting to EPC, UMass Medical School, Worcester MA.	2021-current
Monday Lunch Spring 2021 Diversity Discussion Series: Developed and led a weekly series of sessions that were 1/3 deep introductions, 1/3 guest lecture content on diversity topics and 1/3 conversation in small groups. 3/1/21-5/10/21	2021
DRIVE Initiative: Diversity, Representation and Inclusion for Value in Education. Worked with institutional team to develop curriculum appraisal tool, online materials, and integrated learning module, UMass Medical School, Worcester MA.	2020-current
Population Health Clerkship: Adapted and reimagined syllabus and guides for students, academic and community partner faculty. Developed sessions on Race, Power and Privilege 2014-, and shared calendar of guest speaker sessions for 2020 COVID adaptation.	2013-current

### **Advising and Mentoring**

#### **Students**

Elaine Flynn, UMass Medical School, Capstone Advisor Current: 3 <sup>rd</sup> year medical student, UMass Medical School	2020-current
Sam Lauffer, UMass Medical School, Capstone Advisor Current: 4 <sup>th</sup> year medical student, UMass Medical School	2019-current
Timothy Kelley, UMass Medical School, Capstone Advisor Current: Resident in Orthopedic Surgery, UMMS	2018-2019
Nogoy Fatoumata Bah, UMass Medical School, Capstone advisor Current: Resident in Anesthesiology, NY	2017-2020
Kathryn Czepiel, UMass Medical School, Capstone Advisor Current: Resident in Pediatrics, Mass General, MA	2016-2018
Robert Gakwaya, UMass Medical School, Advisor Current: MD, Resident in Pediatrics, UMass Medical School	2016-2018
Kevin Abraham, UMass Medical School, Capstone Advisor Current: Family Medicine Physician at Baylor Scott & White Health, TX	2013-2016
Ashley Ferullo, UMass Medical School, Methods Advisor on Oral Health, H. Silk, advisor	2009
Ellen Green, UMass Medical School, Methods Advisor on Breastfeeding attitudes, S. Shields, advisor	2008
Emily Joseph, UMass Medical School, Methods Advisor on Oral Health, H. Silk, advisor	2008

Beth DeFrino, Dept of Clinical Psychology, Antioch New England Graduate School, 2006  
 Statistical Advisor  
 Current: PsyD, Private Practice Psychologist, Newton MA

### Faculty

Joshua Singer PhD, UMMS Committee on Equal Opp & Diversity, Diversity Mentor 2020-current  
 Current: retired Professor of Microbiology and Physiological Systems, UMMS; Mature Workforce Committee chair

Susan Buchholz, Population Health Clerkship faculty and Executive Director, Joint 2017-current  
 Coalition on Health in North Central MA, Education Mentor  
 Current: Bloomberg fellow and community partner, applying for faculty appointment in 2021

Jennifer Bradford MD MPH, FMCH Primary Care Physician and Assistant Professor of 2017-current  
 Preventive Medicine, Diversity Mentor  
 Current: Director of Inclusion and Social Justice, FMCH; Medical Director, Community HealthLink

Lucy Candib MD, FMCH Diversity Task Force, Diversity Mentor 2017-current  
 Current: Professor Emeritus, FMCH; Retired Family Physician, Family Health Center Worcester

Tina Grosowsky, Population Health Clerkship faculty and outreach coordinator for the 2017-2020  
 Central MA Tobacco-Free Partnership, Dept of Psychiatry, Education Mentor  
 Current: Retired from UMMS, Community Climate Advocate

Lana Sargent and Miguel Olmedo, nurse practitioners, FHCW/ UMMS FMCH, 2009  
 Research Methods Mentor for nurse practitioner online survey.  
 Current: nurse practitioners, Family Health Center Worcester

Melissa Fischer MD MEd, UMMS Dept of Internal Medicine:  
 Research Methods Mentor, Multi-site clerkship essay vs. blog analysis. 2008-2009  
 Research Methods Mentor, Multi-site clerkship reflective essay analysis. 2007-2008  
 Current: Professor of Medicine and Associate Dean for Undergraduate Medical Education, Curriculum Innovation & The Interprofessional Center for Experiential Learning and Simulation

Amit Garg MD, UMMS Dept of Internal Medicine, Research Methods Mentor, Dermatology 2008  
 curriculum evaluation

Valerie Pietry MD, UMMS FMCH, Research Methods Mentor on Latino parents' attitudes 2007-2008  
 about ADHD, focus groups

**Please note that there is no category for recognition of mentoring our staff.**

### Investigation

#### Leadership Positions

Director of Evaluation and Research, Community Faculty Development Center 2003-2009  
 University of Massachusetts Medical School, Worcester MA.

Senior Research Assistant, Work-Family Transitions Project, Maureen Perry-Jenkins, PI; 1996-2001  
 University of Massachusetts at Amherst MA.

### Grants

#### Completed

- ☒ Consultant to the Academic Health Collaborative of Worcester. City of 2017  
 Worcester Division of Public Health. Greater Worcester Community  
 Foundation grant \$60,000 for one year.
- 2016



- ☒ Addressing Patient Racism as a Barrier to Care. PI: Jennifer Bradford, Heather-Lyn Haley and Ivonne McLean. UMass Public Service grant. \$8000 for one year.

2016
- ☒ Implementing A Community Engagement Model for Reducing Hispanic Infant Mortality. PI: Heather-Lyn Haley, with Sara Shields, Worcester Healthy Baby Collaborative. March of Dimes. \$20,000 for one year.

2013-2014
- ☒ Understanding the Legal Needs of Refugees. Co-PIs: Heather-Lyn Haley, Valerie Zolezzi-Wyndham, Community Legal Aid. Clinical and Translational Science Award Pilot Project Mini-grant, UMass Medical School. \$12,000 for one year.

2012- 2013
- ☒ Center for Health Equity Intervention Research. PIs: Milagros Rosal, Jeroan Allison. National Institute on Minority Health and Health Disparities (NIMHD). Project Manager for Community Engagement Core, 50% effort. \$6, 700, 000 for five years.

2011-2012
- ☒ Primary Prevention for Resettled Refugees from Burma: Where to Begin? PI: Suzanne Cashman, co-PI Heather-Lyn Haley, with Clara Savage, Common Pathways. Worcester County Prevention Research Center. \$10,000 for one year.

2009-2011
- ☒ Learn and Serve UMass: Building on the Promise. PIs: Suzanne Cashman with Matthew Roy, UMDartmouth as Lead PI. Corporation for National and Community Service. Site coordinator, 50% effort. \$70170 per year for three years.

2008-2009
- ☒ Reflection: A Comparison of Facilitated Face-to-Face Discussion and Blog Entries to Enhance Student Learning. PIs: Melissa Fischer with Katherine Chretien, George Washington University. Funded by University of Massachusetts Information Technology Council Subcommittee on Academic Technology Grant for Enhancing Learning Through the Use of Technology. Evaluator 15% effort. \$15,000 for one year.

2006-2008
- ☒ Creation of a Multi-Site, Ambulatory Treatment and Research Network to Facilitate and Evaluate Buprenorphine Treatment for Latinos and Other Underserved Populations. PI: Jeffrey Baxter. Commonwealth Medicine Mini-Grant 2006-2007. Evaluator. \$40, 133.

2005-2006  
2004-2005
- ☒ Identification of the Unique Features of a Caring Attitude. Arthur Vining Davis Foundation. 2005-2006. Evaluator, 25% effort. \$170,075.

2003-2006
- ☒ Primary Care Management of Gastro-Esophageal Reflux Disease. PI: Mark Quirk. Commonwealth Medicine Mini-Grant 2004-2005. Evaluator and Research Coordinator 25% effort. \$48, 493.

2003-2006
- ☒ Title VII Grant for Faculty Development. Community Faculty Development Center, University of Massachusetts Medical School. Health Resources and Services Administration, 2003. Evaluator and research coordinator 100% effort. \$800,754.00 for three years.

## **Population Health and Public Policy**

### **Activities**

- Science Journal Radio Reading Program for Worcester residents with print disabilities. Participate in weekly science reading program with students, faculty and staff readers.

2005-current

### **Projects in Population Health and Public Policy**

- “Assessing the Continuing Education Needs of the Residents of Martha’s Vineyard.” Project with Martha’s Vineyard Adult Education included development and implementation of pre-survey needs assessment, survey development, administration, analysis and reporting, culminating in press conference, West Tisbury Public Library, Martha’s Vineyard, MA.

“Understanding the Legal Needs of Refugees.” Grant-funded focus groups with refugee-serving social service professionals, culminating in several community educational sessions including audiences with:

2014- 2015

Worcester Division of Public Health Lunch and Learn Series, Worcester MA.	August 5, 2015
Refugee Welcoming Network Quarterly Meeting, Clark University, Worcester MA.	August 5, 2015
"Primary Prevention for Refugees; Taking on the Burden of Choice." Grant-funded community-based participatory research with recently resettled refugees in Worcester, culminating in several community educational sessions including audiences with:	
Common Pathways Legislators' Breakfast, Boys & Girls Club of Central MA	December 10, 2013
Common Pathways Public Health and Medical Services Steering Committee, Dept of Public Health, Worcester MA.	July 12, 2012.
"Improving the Process of Colorectal Cancer Screening Among Low-Income Diverse Populations." Sharing outcomes of research in FMCH through oral presentation at Common Pathways MassCONNECT in Worcester Working Group, Dept of Public Health, Worcester MA	April 4, 2011.

**Scholarship****h-index=20; i10 index=25****Peer-reviewed publications - Links available at <https://profiles.umassmed.edu/display/130163>**

1. Hale JF, **Haley H-L**, Jones J, Brewer A. 2015. Academic/Correctional Health Partnerships: Preparing the Correctional Health Workforce for the Changing Landscape – Focus Group Research Results. *J Correct Health Care*. Jan 21(1):70-81.
2. **Haley H-L**, Walsh M, Maung N, Savage C, Cashman S. 2014. Primary Prevention for Resettled Refugees from Burma: Where to Begin? *Journal of Community Health* 39:1-10.
3. Potts SE, Deligiannidis KE, Cashman SB, Caggiano ME, Carter LH, **Haley H-L**, Ferguson WJ. 2011. Weaving Public Health Education Into the Fabric of a Family Medicine Residency. *Am J Prev Med* 41(4S3): S256-S263.
4. Sullivan, Mary, Ferguson, Warren, Sullivan, Kate, Philbin, Mary, **Haley, Heather-Lyn**, Kedian, Tracy, Quirk, Mark. 2011. Expert Communication Training for Providers in Community Health Centers. *Journal of Health Care for the Poor and Underserved*. 22(4): 1358-1368.
5. Fischer, M.A., **Haley, H. -L.**, Saarinen, C. Chretien, K.C 2010. Comparison of Blogs and Written Reflections in Two Medicine Clerkships. *Medical Education*. 45:166-175.
6. Larkin AC, Cahan MA, Whalen G, Hatem D, Starr S, **Haley H-L**, Litwin D, Sullivan K, Quirk M. 2010. Human emotion and response in surgery (HEARS): A simulation-based curriculum for communication skills, systems-based practice, and professionalism in surgical residency training. *J Am Coll Surg* 211:285–292.
7. Garg, Amit, **Haley, Heather-Lyn**, Hatem, David. 2010. Modern Moulage: Evaluating the Use of 3-Dimensional Prosthetic Mimics in a Dermatology Teaching Program for Second-Year Medical Students. *Arch Dermatol* 146(2): 143-146.
8. Cahan M, Larkin A, Starr S, Wellman S, **Haley HL**, Sullivan K, Shah S, Hirsch M, Litwin D, Quirk M. 2010. A Human Factors Curriculum for Surgical Clerkship Students. *Archives of Surgery* 145(12): 1151-1157.
9. **Haley, Heather-Lyn**, Hale, Janet, Brewer, Arthur, Ferguson, Warren J.. 2009. Correctional Health Curriculum Enhancement through Focus Groups. *Teaching and Learning in Medicine* 21(4): 310-317.
10. Fischer, Melissa A., Harrel, Heather E., **Haley, Heather-Lyn**, Cifu, Adam S., Alper, Eric, Johnson, Krista M., Hatem, David. 2008. Between Two Worlds: A Multi-Institutional Qualitative Analysis of Students' Reflections on Joining the Medical Profession. *J Gen Intern Med* 23(7): 958-963.
11. Haidet, Paul, Hatem, David, Fecile, Mary Lynn, Stein, Howard, **Haley, Heather-Lyn**, Kimmel, Barbara, Mossbarger, David, Inui, Thomas. 2008. The Role of Relationships in the Professional Formation of Physicians: Case Report and Illustration of an Elicitation Technique. *Patient Education and Counseling* 72(3):382-387.
12. Quirk, Mark, Mazor, Kathleen, **Haley, Heather-Lyn**, Philbin, Mary, Fischer, Melissa, Sullivan, Kate, Hatem. David. 2008. How Patients Perceive a Doctor's Caring Attitude. *Patient Education and Counseling*

72(3): 359-366.

13. Mazor, Kathleen M., **Haley, Heather-Lyn**, Sullivan, Kate, Quirk, Mark. 2007. The Video-based Test of Communication Skills: Description, Development and Preliminary Findings. *Teaching and Learning in Medicine* 19(2), 162-167.
14. Starr, Susan, **Haley, Heather-Lyn**, Mazor, Kathleen, Philbin, Mary, Ferguson, Warren J., Quirk, Mark. 2006. Development and Testing of an Instrument to Measure Teacher Identity in Physicians. *Teaching and Learning in Medicine* 18(2): 117-125.
15. Mazor, Kathleen, Fischer, Melissa, **Haley, Heather-Lyn**, Hatem, David, Rogers, H. Jane, Quirk, Mark. 2005. Factors Influencing Preceptors' Responses to Medical Errors: A Factorial Survey. *Academic Medicine* 80:S88-S92.
16. Quirk, Mark, Mazor, Kathleen, **Haley, Heather-Lyn**, Wellman, Scott, Keller, David, Hatem, David, Keller, Lisa A.. 2005. Reliability and Validity of Checklists and Global Ratings by Standardized Students, Trained Raters and Faculty Raters in an Objective Structured Teaching Exercise (OSTE). *Teaching & Learning in Medicine* 17:202-209.
17. Mazor, Kathleen M, Fischer, Melissa A, **Haley, Heather-Lyn**, Hatem, David, Quirk, Mark E. 2005. Teaching and medical errors: primary care preceptors' views. *Medical Education* 39:982-990.
18. Quirk, Mark, **Haley, Heather-Lyn**, Hatem, David, Starr, Susan, Philbin, Mary. 2005. Primary Care Renewal: Regional Faculty Development and Organizational Change. *Family Medicine* 37(3):211-218.
19. Ferguson, Warren J., Keller, David, **Haley, Heather-Lyn**, Quirk, Mark. 2003. Developing Culturally Competent Community Faculty: A Faculty Development Model. *Academic Medicine* December 78:1221-1228.
20. Starr, Susan, Ferguson, Warren J., **Haley, Heather-Lyn**, Mark Quirk. 2003. Community Preceptors' Views of Their Identities as Teachers. *Academic Medicine* 78:820-825.
21. Norcini, J.J., Stillman, P.L., Regan, M.B., **Haley, H.-L.**, Sutnick, A.I., Williams, R.G., Friedman, M. 1993. Scoring and Standard Setting with Standardized Patients. *Evaluation and the Health Professions*
22. Stillman, P.L., Regan, M.B., **Haley, H.-L.**, Norcini, J.J., Friedman, M., Sutnick, A.I. 1992. The Use of a Patient Note to Evaluate Clinical Skills of First Year Residents Who Are Graduates of Foreign Medical Schools. *Academic Medicine*, 67:10, S57 S59.
23. Stillman, P.L., Regan, M.B., Swanson, D.B., **Haley, H.-L.** 1992. Sequence Effect in a Multiple Station Examination Using Standardized Patients. *International Ottawa Conference Proceedings, Congress Centre, Ottawa, Canada 7 10 July, 1990.* 396 404.
24. Stillman, P.L., Regan, M.B., Swanson, D.B., **Haley, H.-L.** 1992. Does Gender Affect Clinical Skills as Measured by an Examination Using Standardized Patients? *International Ottawa Conference Proceedings, Congress Centre, Ottawa, Canada 7 10 July, 1990.* 390 395.
25. Stillman, P.L., **Haley, H.-L.**, Sutnick, A.I., Philbin, M.M., Smith, S.R., O'Donnell, J., Pohl, H. 1991. Is Test Security an Issue in a Multi Station Clinical Assessment? A Preliminary Study. *Academic Medicine*, 66:9, S25 S27.
26. Stillman, P.L., **Haley, H.-L.**, Regan, M.B., Philbin, M.M. 1991. Positive Effects of a Clinical Performance Assessment Program. *Academic Medicine*, 66:8, 481 483.
27. Stillman, P.L., Philbin, M., Regan, M.B., Nelson, D.V., **Haley, H.-L.** 1990. Use of Standardized Patients to Teach Second Year Medical Students About Alcoholism and Substance Abuse. *Substance Abuse*, 11:3, 151 158.
28. Stillman, P.L., Regan, M.B., **Haley, H.-L.**, Philbin, M.M., O'Donnell, J., Pohl, H., Smith, S.A. 1990. Comparison of Free Response and Cued Response Diagnosis Scores in an Evaluation of Clinical Competence Utilizing Standardized Patients. *Academic Medicine*, 65:9, S27 S28.
29. Stillman, P.L., Regan, M.B., Philbin, M., **Haley, H.-L.** 1990. Results of a Survey on the Use of Standardized Patients to Teach and Evaluate Clinical Skills. *Academic Medicine*, 65:288 292.

## Books & Chapters

1. **Haley, Heather-Lyn A.** 2003. The Impact of Child Care Choices on the Social Networks of Working-Class Couples Across the Transition to Parenthood. Dissertation, Sociology, University of Massachusetts, Amherst.
2. **Haley, Heather-Lyn**, Perry-Jenkins, Maureen, Armenia, Amy. 2001. Workplace policies and the psychological well-being of first-time parents: The case of working-class families. Pp. 227-250 in Working Families: The Transformation of the American Home, edited by R. Hertz and N. L. Marshall. Berkeley: University of California Press.
3. **Haley, Heather-Lyn.** 2001. Working-class women's depression across the transition to parenthood and the return to work: Modeling the effects of informal and formal supports. Masters' Thesis, Department of Sociology, University of Massachusetts, Amherst, MA.

### Policy Statements, White Papers, Reports

1. Shields, S., Gagnet, T., **Haley, H.-L.**, Travis, A., Gebel, C. 2016. Infant Mortality Update: A Baby's Health is a City's Wealth. Worcester Healthy Baby Collaborative Report to the Worcester City Council, City Manager and Commissioner of Health and Human Services. <http://www.worcesterhealthybaby.org/reports/>
2. **Haley, H.-L.**, Doubeni, C., Fields, T.S. 2011. Improving the Process of Cancer Screening for Low Income Diverse Populations. Community Networks Program Pilot Project Final Report: National Cancer Institute Center to Reduce Cancer Health Disparities.
3. Quirk, Mark, **Haley, Heather-Lyn**, Sullivan, Kate. 2009. Investigation of Wellness Behaviors and Disease Prevention Activities Among MassHealth members and Providers. Focus Group Project Final Report for MassHealth Wellness Program, Center for Clinical Communication and Performance Outcomes.

### Non-peer-reviewed publications

1. Levin, Len L.; Cashman, Suzanne B.; **Haley, Heather-Lyn**; Caggiano, Marie; Deligiannidis, Konstantinos; Nordberg, Judith M.; Potts, Stacy; and Ferguson, Warren J. 2010. Multi-Disciplinary Experts Supporting Graduate Medical Education through Participation in COMPLETE Chart Rounds. Library Publications and Presentations. Paper 114. [http://escholarship.umassmed.edu/lib\\_articles/114](http://escholarship.umassmed.edu/lib_articles/114)
2. **Haley, H.-L.** 2017. Academic Health Collaborative of Worcester Standard Operating Procedures. City of Worcester Department of Health and Human Services, Division of Public Health.

### Non-print / Online materials

1. More, Ellen, **Haley, Heather-Lyn**, Vander Hart, Robert. 2008. The People's Medicine Comes to Massachusetts: Establishing a Family Medicine Residency at UMass Medical School. Web exhibit. Lamar Soutter Library Office of Medical History and Archives. <http://library.umassmed.edu/omha/fmch/index.cfm>

### Invited Presentations

#### National

- |  |                |
|--|----------------|
| 1. Addressing Race, Power and Privilege in Clinical Settings, Extra-ordinary Care for Diverse Patients by Care Providers Series. Invited Visiting Professor at Penn State Health, Hershey PA   | April 5, 2018  |
| 2. Addressing Race, Power and Privilege in Clinical Settings. for the Association of Clinicians for the Underserved Excellence in Team-Based Care for the Underserved Webinar Series. <a href="http://clinicians.org/acu-2017-webinar-series/">http://clinicians.org/acu-2017-webinar-series/</a> Tuesday, March 21, | March 21, 2017 |

#### Regional

- |   |             |
|---|-------------|
| 1. Race, Power and Privilege in Clinic and Community. Invited lecture with J Bradford to the second year class at University of New England College of Medicine, Biddeford, Maine | Feb 1, 2019 |
|---|-------------|

**Local**

1. Race, Power and Privilege in Clinical Settings. with Jennifer Bradford. Invited talk for the UMMS Geriatrics Division Continuing Education Series. Oct 9, 2019
2. Race, Power and Privilege in Clinical Settings with Jennifer Bradford. Invited talk for the UMass Medical School Internal Medicine Residency Program's Primary Care Leadership Pathway. (w/ early June needs assessment) June 14, 2019

**Other Presentations, Posters & Abstracts****International**

1. Bradford J, **Haley H-L**, Kulkarni M, Candib L, Ferguson W. Mclean I. 2019. Shifting Department Culture Through Faculty-Led Antiracism Initiatives . STFM Spring Conference, Toronto, CA. April 29, 2019
2. Green, E., Shields, S., Savageau, J., and **Haley, H-L**. 2008. Survey about breastfeeding messages at a Community Health Center serving diverse urban families. Oral presentation at North American Primary Care Research Group Annual Meeting. Puerto Rico. November 2008
3. Haidet, P., Hatem, D.S., Stein, H., Fecile, M.L., **Haley, H.A.**, Kimmel, B., Mossbarger, D.L., Inui, T.S. 2007. The Role of Relationships in the Professional Formation of Physicians. Oral presentation at Society for General Internal Medicine 30<sup>th</sup> Annual Meeting, Toronto, ON, Canada, April 27, 2007.

**National**

1. Hatem D, Fournier P, Fan PY, Bailey K, Evan Browning E, Omer Z, **Haley HL**. 2016. A fourth year teaching elective increases teacher identity in one learning community. Learning Communities Institute National Meeting, Seattle, WA. November 2016
2. **Haley, Heather-Lyn**. 2016. Addressing Race, Power and Privilege in Clinical Settings. Association of Clinicians for the Underserved. Washington DC. August 1, 2016
3. Guild, Alexis; **Haley, Heather-Lyn**; and Zolezzi-Wyndham, Valerie. 2014. Aligning Individual and System Advocacy for Special Populations. 2014 Medical-Legal Partnership Summit: MLP in the Era of Healthcare Reform., Seattle WA. April 11, 2014
4. Walsh, M., **Haley, H-L.**, Cashman, C., Godkin, M, Maung, N.H., Tracy, S., Lim, T., Savage, C., Madson, JW. 2012. Eat Walk Sleep Discuss: Building a Participatory Relationship Using Many Small Steps. Roundtable presentation at American Public Health Association, San Francisco, CA. October 27, 2012
5. Levin, L., Nordberg, J., **Haley, H-L**. 2011. Being there, there and there: using research methodology to evaluate the effectiveness of librarians embedded in chart rounds within a multi-center Family Medicine residency program. *MLA '11 Rethink* Medical Library Association annual meeting, Minneapolis Convention Center in Minneapolis, MN. Presentation available through *Library Publications and Presentations*. Paper 131. [http://escholarship.umassmed.edu/lib\\_articles/131](http://escholarship.umassmed.edu/lib_articles/131) May 13-18, 2011
6. Cashman, S., Levin, L., Ferguson, W., Deligiannidis, K., **Haley, H-L.**, Potts, Stacy. 2011. Chart Rounds: An Interprofessional Approach to Teaching Population Health. Presentation at Society for Teachers of Family Medicine Annual Spring Conference, New Orleans, LA. April 27 - May 1, 2011
7. Hatem, D. Fischer, M. **Haley, H-L.**. 2010. Writing a Life, Writing a Curriculum, (W)righting the Organization: Using Reflective Writing at Multiple Levels in an Organization. The Examined Life: Writing and the Art of Medicine Conference, Iowa City, IA. April 29, 2010

8. Ferguson, W.F., Godkin, M., Lindholm, M., **Haley, H.-L.**, Philbin, M. 2009. Evaluating Impact of a Multicultural Interclerkship on Students' Skills, Knowledge and Awareness. Lecture- Discussion at Society of Teachers of Family Medicine 42<sup>nd</sup> Annual Spring Conference, Denver, CO. April 30, 2009.
9. Hale, J., **Haley, H.-L.**, Brennan, A. 2009. You Get to See it All: Correctional Health Care Providers' Insights into Recruitment and Retention. Oral presentation at the 3<sup>rd</sup> Annual Academic and Health Policy Conference on Correctional Health, Fort Lauderdale, FL. December 3-4, 2009
10. Green, E., Shields, S., Savageau, J., and **Haley, H.-L.** 2008. Survey about breastfeeding messages at a Community Health Center serving diverse urban families. Oral presentation at Society of Teachers of Family Medicine Annual Meeting. Baltimore, MD. April 2008
11. Ferguson, W., **Haley, H.-L.**, Hale, J. F., Brewer, A. 2008. Building A Unique Curriculum for a Unique Setting: Correctional Health Professional Education. 2008. . Oral presentation at the 2<sup>nd</sup> Annual Academic and Health Policy Conference on Correctional Health, Quincy, MA, March 27, 2008
12. Haidet, P., Hatem, D.S., Stein, H., Fecile, M.L., **Haley, H.A.**, Kimmel, B., Mossbarger, D.L., Inui, T.S. 2007. The Role of Relationships in the Professional Formation of Physicians. Podium presentation at Eighth Annual Advances in Teaching and Learning Regional Conference, University of Texas School of Health Information Sciences at Houston, TX. June 2007
13. **Haley, H. -L.** Developing Culturally Competent Community Faculty: A Faculty Development Model. Medical Sociology Refereed Roundtable. American Sociological Association Annual Meeting, Atlanta, GA. August 18, 2003
14. **Haley, H.-L.**, Perry-Jenkins, M., Armenia, A. Social Support, Maternity Leave and Working Class Women's Depression Following the Transition to Parenthood. National Council on Family Relations 63rd Annual Conference, Rochester, NY. November 10, 2001
15. **Haley, H.-L.**, Perry-Jenkins, M. Employer Supports for Working-Class Families: Well-Being Across the Transition to Parenthood. Alfred P. Sloan Foundation, The Business and Professional Women's Association, and Wellesley College Center for Research on Women co-sponsored conference: Work and Family: Today's Realities and Tomorrow's Visions. November 6, 1998

### Regional

1. Fischer M, Haley HL, DeMarco D, Evans R, Peterson K, Whitehouse A. DRIVE: Diversity, Representation and Inclusion for Value in Education. Interactive workshop at Teaching of Tomorrow Regional Faculty Development Workshop. November 13, 2020
2. Haley, H.-L. Race, Power and Privilege in Clinic and Community. Central MA Substance Addictions Association, online. March 25, 2020
3. Bradford JS, Ferguson W. Haley HL, Maclean I. Learning to Address Racism and Unconscious Bias as Clinical Teachers. Interactive workshop at Teaching of Tomorrow Regional Faculty Development Workshop. March 30, 2019
4. **Haley H.-L.**, LaTulippe, K., Bayard, S., Khubchandani, J., Powell, L. 2015. Race, Power and Privilege: Breaking the Silence. Family Medicine Education Consortium Annual Meeting. Danvers, MA. November 1, 2015
5. Saarinen, C.; Haley, H.-L., Fischer, M. Reflection: A Comparison of Facilitated Face-to-Face Discussion and Blog Entries. Oral presentation at Teaching, Technology and Scholarship: Extending the UMass Learning Community Conference., Marlborough. October 2, 2009

**Local**

1. **Haley H.-L.**, Ferguson W, Cashman S, Hogan S, Hale J, Carson-Sasso V. Teaching about Population and Community Health. Family Medicine and Community Health Grand Rounds. March 30, 2021
2. Fischer M, **Haley HL**, Evans R, MacGinnis C, Cashman S, Taweh O, Whitehouse A. DRIVE: Diversity, Representation and Inclusion for Value in Education. Endocrinology Grand Rounds. January 26, 2021
3. Fischer M, **Haley HL**. DRIVE: Diversity, Representation and Inclusion for Value in Education. Interactive workshop with the Junior Faculty Development Program. December 10, 2020
4. Fischer M, **Haley HL**, Evans R. DRIVE: Diversity, Representation and Inclusion for Value in Education. GME Directors' Retreat. October 2, 2020
5. Fischer M, **Haley HL**, MacGinnis C, Dhaliwal S. DRIVE: Diversity, Representation and Inclusion for Value in Education. Plastic Surgery Grand Rounds. October 7, 2020
6. Fischer M, **Haley HL**, MacGinnis C, Groover M. DRIVE: Diversity, Representation and Inclusion for Value in Education. Interactive workshop for Organs, Systems and Disease small group facilitators. . October 6, 2020
7. Fischer M, **Haley HL**, Evans R, Carter Y. DRIVE: Diversity, Representation and Inclusion for Value in Education. Geriatrics Grand Rounds. September 9, 2020
8. Fischer M, **Haley HL**, Evans R, Kilham J. DRIVE: Diversity, Representation and Inclusion for Value in Education. Urology Department Grand Rounds. August 5, 2020
9. Bradford J, **Haley H.-L.** Race, Power and Privilege in Clinical Settings. Invited talk for the UMass Medical School Internal Medicine Residency Program's Primary Care Leadership Pathway. (w/ early June needs assessment) June 14, 2019
10. Jennifer Bradford, MD, MPH, Lucy Candib, MD, Warren Ferguson, MD, **Heather-Lyn Haley, PhD**, Mukti Kulkarni, MD, MPH, Ivonne McLean, MD, Stacy Potts, MD, MEd. Creating a Conscious Environment. Family Medicine and Community Health All-Faculty Compulsory Professional Development Workshop V2: Advanced level. January 11, 2018 and June 5, 2018
11. Jennifer Bradford, MD, MPH, Lucy Candib, MD, Warren Ferguson, MD, **Heather-Lyn Haley, PhD**, Judy Hsu, MD, Mukti Kulkarni, MD, MPH, Bency Louidor-Paulynice, MD, Ivonne McLean, MD, Stacy Potts, MD, MEd. Challenging Racism & Unconscious Bias in Medicine. Family Medicine and Community Health All-Faculty Compulsory Professional Development Workshop V1: Introductory level November 14, 2017 and Mach 1, 2018
12. McLean, I., **Haley, H.-L.** 2017. Reducing Health Care Disparities: Unconscious Bias and Allyship. UMass Medical School Chief Resident Retreat, UMass Medical Sherman Center May 19, 2017

**Academic Service****Internal Administration and Service****Department of Family Medicine and Community Health**

- |  |              |
|--|--------------|
| Academic Development Committee (member), FMCH        | 2002-2018    |
| Diversity and Health Equity QI Team (Co-owner), FMCH | 2016-current |

**School**

- |  |                      |
|--|----------------------|
| Admissions Committee (Interviewer), UMMS | 2006-2007, 2008-2012 |
|--|----------------------|

**University**

Council on Equal Opportunity and Diversity	2009-2014, 2020-current
Minority Academic Advancement Committee (member, chair 2020-2021)	2020-2021
CEOD Executive Committee (member)	2011-2013
Mature Workforce Committee (member, chair 2012-2013)	2011-2014
Civility Committee (member)	2009-2011
Faculty Council (member)	2006-2019
Rules Committee (member)	2009-2013
Nominations/Committee on Committees (member)	2008-2018
Community Engagement Committee (member)	2009-2021
Founding director, MLK Semester of Service Student Awards	2011-current
Humanities in Medicine Committee (member)	2004-2013
Women's Faculty Committee (member)	2004-2011
Library and Learning Resources (member)	2004-2007

**Professional Memberships and Activities**

American Sociological Association	2005-18, 2019-current
International Network for Social Network Analysis	2000-2006
MA Public Health Association	2014-current

**Editorial Responsibilities**

Journal of Healthcare for the Poor and Underserved, reviewer	2014-current
Patient Education and Counseling, reviewer	2005-current
Family Medicine, reviewer	2010-2018

**External Professional Service****Regional**

Community Engagement Committee (member), Higher Education Collaborative for Central MA	2016-current
Community Engagement Committee (member, cochair 2012-13), Colleges of Worcester Consortium	2009-2013
Central MA Higher Education Network for Community Engagement (HENCE)	2014-2015
Common Pathways (CHNA8)	2009-2014
Research to Practice Committee, 2013-2014	2013-2014
MassCONNECT Community Research Committee	2009-2013
Public Health and Social Services Committee	2009-2013
Mental Health and Services Committee	2009-2013
Summer Conversation Series Working Group	2010-2012
Worcester Health Equity Partnership	2010-2014
Worcester Partnership for Racial and Ethnic Health Equity (member, co-chair 2016-2018, Evaluation Committee chair 2014-2017)	2014-2018
Coalition for a Healthy Greater Worcester (CHNA8)	2014-2019



Community Engagement Committee (co-chair 2017-2019)	2014-2019
Evaluation and Research Committee (member)	2014-2015
Racism and Discrimination Working Group (member, cochair 2016-2018)	2014-2018
Community Health Network Area 9 (CHNA9) (member)	2017- current
Racial Justice Working Group (member)	2017- 2020
Healthy Eating and Active Living Working Group (member)	2017-2020
Mental Health and Substance Use Working Group (member)	2017-2020
Transportation and Access Working Group (member)	2017-2019
Safe and Healthy Relationships Working Group (member)	2017- current

### Professional Development

March of Dimes Implicit Bias Training: Breaking Through Bias in Maternal Health Care (March of Dimes with Rahni Jenkins) 3.5 hour interprofessional learning with maternal healthcare community specific to racial disparities in birth outcomes. May 7, 2021.	2021
Interrupting Racism Level 3: Institutional (Human in Common, Western MA with Deborah Cohen) 2 day/ 14 hour interactive training examining policies and practices that are promoters and inhibitors of racial equity in employment.	2021
Family Health Center Worcester Culture Rounds, weekly exploration of locally-represented cultures through interviews with staff. Worcester MA	2021-
Cultural Humility (Women of Color Health Equity Collective, Springfield MA with Dayna Campbell and Jenise Katalina) 2 day/12 hour comprehensive series on cultural humility and power dynamics in community settings based on the work of M Tervalon. See Cultural humility versus cultural competence: A critical distinction in defining physician training outcomes in multicultural education. Tervalon& Murray-Garcia, Journal of Health Care for the Poor and Underserved; May 1998; 9, 2; Research Library pg. 117	2019
Structural Inequalities Spring Intensive (Campus-Community Partnerships for Health with Alan Richmond) 2 day/ 12 hour educational experience, Chapel Hill NC incl:	2018
Groundwater Training (Racial Equity Institute- with Jennifer Schaal and Terrence Young)	
Strategies for Leadership Transformation and Equity: Using the Tools of the Community-Based Participatory Research Approach (with Alexandra Lightfoot, EdD and Kristin Black, PhD)	
Dismantling Structural Inequalities Through Authentic Partnerships (with Alan Richmond, MSW; Melvin Jackson, MSPH; Millicent Robinson, MSW, MPH)	
Y Women Speak (YWCA Central MA/ YWCA USA with Maritza Cruz, Amy Ebbeson and Judy Ockene) 8 week/24 hour multiracial women's learning community with readings and intentional racial caucusing, Worcester MA	2017
Unmasking Whiteness Institute (AWARE-LA with Shelly Tochluk), 5-day intensive on white racial identity development and dynamics, Los Angeles, CA	2017
Latino Challenges Toward Racial Justice (c-INTEGRAL, with Raúl Quiñones-Rosado and María I. Reinat-Pumarejo), 2-day/12 hour intensive on political history of US involvement in Latin America and Latino challenges in contemporary US; Boston, Worcester	2016, 2017
Everyday Bias Workshop for Healthcare Professions at the Association of American Medical Colleges (Cook Ross Associates, with Howard Ross) Focus on implicit bias, personally-mediated racism and hiring practices, Washington DC	2016

Undoing Racism (People's Institute for Survival and Beyond), Three day/20-hour interactive workshop on racial identity development and the history of black-white racism in US; Worcester

2012, 2013,  
2014, 2015

# Maria E. Cataloni

## Summary of Qualifications

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- Highly motivated Office Manager eager to provide an excellent employee experience
- Maintains focus in fast-paced, high stress environment
- Excellent attendance and time management to complete all tasks and goals with punctuality
- Works well independently and with teams to complete projects by specified deadlines
- Able to learn and quickly adapt to new concepts and responsibilities
- Experienced in Microsoft & Google applications
- Meticulous record-keeping
- Notary Public

## Education

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**Framingham State University**, Framingham, Massachusetts

Bachelor of Science in Consumer Sciences; Concentration in Apparel Design & Minor in Art

## Experience

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**Blue Hills Recovery** – Office Manager, Worcester, MA

03/2022 – present

- Processing new hires:
  - Offer Letters sent via DocuSign
  - Ordering Background Check and Drug screening (Certiphi)
  - Coordinate with IT & HR department to get email and payroll access created
  - Create accounts for EMR site (Kipu) and Compliance site (Hatch), then monitor compliance on a continuing basis
- Other HR functions:
  - Employee file maintenance via paper and in ADP
  - PAFs, Termination paperwork/ Off-boarding
  - Setting up fingerprinting appointments with Identogo (for NJ Office)
  - Maintain current CPR certifications of staff
  - Oversee addition and removal of drivers on company insurance
- Finance functions:
  - Order company cards (Pex) and monitor employee spend
  - Import and match card transactions into Quickbooks
  - Categorize transactions
- Office Manager functions:
  - Order office supplies, medical supplies, uniforms, and groceries (patient housing)
  - Order client lunches daily, mindful of dietary restrictions

Platinum Enterprises – Office Manager, Hopkinton, MA

03/2021 – 02/2022

- Recruiting of Staff
- Conducting interviews (in-person and remote) and sending offers/rejections
- Inputting New Employee information into Cloud system (Salesforce)
- E-Verify
- Onboarding of New Hires
- Daily posting in Quickbooks
- Reconciling Credit Disbursements with Completed Revenue Report
- Paying monthly bills and others as they come up
- Invoicing and Collections
- iSolved HCM/Payroll Software
- Assisting with bi-weekly payroll processing
- Small Claims Court Filings and Trial Appearances for delinquent accounts
- Filing Workers Comp Claims
- Responding to Unemployment Claims/Appeals
- Monitoring employee credit card purchases
- Managing all personnel files/data
- Sending email Campaigns via Salesforce

Unibank for Savings – Teller, Whitinsville, MA

03/2021 – Present

Upon acceptance of my Office Manager position, I continued to work at Unibank on Saturdays as a Teller. Prior to that, the bank had been my full-time employment.

Unibank for Savings – Relationship Banker II & ATM Custodian, Sutton, MA

09/2018 – 02/2021

- Build and nurture customer relationships while utilizing CRM system
- Daily balancing and weekly loading of ATM cash along with bi-monthly audits
- Make sales calls to existing customers to ensure they have the best available product
- Accurately process all cash and check transactions
- Manage necessary supply orders to ensure efficient Branch operations
- Compliance with State and Federal guidelines to maintain privacy of customer information
- Answer phones in a prompt and courteous manner
- Executing monthly Recap to ensure compliance with yearly audits

Sephora, LVMH Companies – Assistant Manager, *Client Service* Millbury, MA

11/2007 – 09/2018

- Book client appointments via Online Reservation software system
- Sales floor inventory management
- Handle all POS transactions: cash, credit, check in addition to refunds/exchanges
- Maintain proper petty cash funds by placing weekly change orders
- Track daily/weekly/monthly metrics and reports related to sales, client service, and promotions

- Plan store events with outside Account Managers and/or Freelancers
- Interviewing and Onboarding
- Breakdown and set up of store displays

#### Accomplishments, Sephora

- Multiple promotions; cashier up to management role
- Conducted training of new employees, many of whom are still within the company
- Drove sales to help attain highest bonus payout at final store location

# Kaitlyn Cloutier

**Summary:** Hands-on, client-oriented banking professional implement investment strategies such as CDs and other products. Process daily banking and financial transactions, including but not limited cashing check, money handling, creating accounts and assist in applying for loans. Train new employees as needed. Use of business computer programs and operate related business equipment.

## Skills:

- Time Management
  - Payment Processing
  - Teller Transactions
  - Account Maintenance
  - Notary Public
- Flexible schedule
  - Cash Management
  - Schedule and timelines planning
  - Analytical thinking
  - Employee Trainer

## Work Experience:

### **Berkshire Bank: Universal Financial Service Representative: Worcester MA: August 2021-Present**

Delivered informational sales presentations to potential investors to build symbiotic client relationships.  
Received and posted payments to loan accounts.  
Ordering checks placed stop payment orders and conducted additional special services for customers.  
Trained employees on cash drawer operation.  
Balanced daily cash deposits and vault inventory with zero error rate.  
Established new accounts and created memberships, resulting in increased loans

### **Berkshire Bank: Customer Service Associate: Worcester MA: April 2021- August 2021**

Examined checks for identification and endorsement's  
Verified amounts and integrity of every check or funds transfer.  
Offered every customer exceptional service level by remaining friendly and professional during every transaction.  
Researched and resolved customer issues on personal savings, checking and lines of credit accounts.  
Directed specific questions to appropriate branch personnel.

### **Teds Package Store: Customer Service Associate Charlton MA: March 2016-April 2021**

Moved items to designated warehouse areas.  
Operated tracking scanners to update and maintain accurate inventory information.  
Basic cashier transactions  
Collected money for games and provided customers with tokens, tickets and correct change.  
Scanned winning tickets to calculate payouts.  
Verifying Id's to making sure that they are the proper age for lottery, alcohol, etc.  
Organizing and stocking the shelves

### **Michael's Arts and Crafts: Cashier/Stocker Sturbridge MA September 2015-December 2017**

Accepted cash and credit card payments issued receipts and provided change.  
Processed sales transactions to prevent long customer wait times.  
Processed refunds for worn damaged and broken merchandise.  
Stocked shelves with new merchandise and checked for outdated or damaged items.  
Helped unload the truck from delivery and restocked the store

## Education:

### **Quinsigamond Community College: Business Administration Worcester MA 2015- Present**

Currently enrolled in fall 2022. Earned 39 credits.

### **Bay Path RVTHS 2012-2015**

High School Diploma  
Business Certificate

**SELECT BOARD/SCHOOL COMMITTEE MEETING MINUTES**  
**JUNE 30, 2022 AT 6:00PM**  
**TOWN HALL, SELECT BOARD CONFERENCE ROOM**

**CALL TO ORDER/OPENING**

Select Board Chair Allen Phillips called the meeting to order at 6:01pm. Chair Allen Phillips, Second Vice Chair Dianna Provencher, Selectman Herb Duggan Jr., Selectman John Bujak, Town Administrator David Genereux and Assistant Town Administrator Kristen Rubin were in attendance. Vice Chair Rick Antanavica was absent.

School Committee Chair Donna McCance called the meeting to order at 6:01pm. Chair Donna McCance, Vice Chair Scott Weikel, Secretary Dylan Lambert, Nate Hagglund, Jonathan Boisjolie, Superintendent Brett Kustigian, and Interim Finance Director William Frangiamore.

Mr. Phillips stated that the Board reorganized at their goaling workshop meeting on June 22, 2022. Allen Phillips is Chair, Rick Antanavica is Vice Chair and Dianna Provencher is Second Vice Chair.

Mr. Phillips stated the purpose of this meeting is to have a workshop to discuss concerns about middle school. This will be a solutions-based meeting and the Select Board and School Committee might not take questions from the public. Mr. Phillips noted the Select Board and School Committee just did a walkthrough of the Middle School, including the gym, classrooms and systems to get a better understanding of building issues.

Mr. Phillips asked Mr. Genereux to provide an update on the redevelopment of the former Becker campus. Mr. Genereux stated that the Becker campus faces challenges due to the requirement to reclassify buildings from business to education. This change requires the installation of sprinkler systems, alarm systems, converting bathrooms to meet ADA standards and putting in lifts at Borger and Swan Library. All work is pending the availability of architects and engineers, both of which have been difficult to come by. Currently, an engineer is working to design the fire alarm/suppression system for Borger and the specs are expected in a few weeks. The Town is hoping to have an architect under contract within a few weeks as well. Once every modification is designed, they will need to be put out to bid then the work will need to be scheduled. As of now, the only building considered useable and up to code is the campus center although the elevators have failed inspection because there is not currently a phone system for the emergency call app. The campus center is not large enough to contain the high school, however, without having Borger online as well.

Mr. Phillips pointed out that the original plan was to open the campus as a decentralized high school in two years. Due to the conditions at the Middle School, the Town tried to move up the timeline but there is a hold up on materials and contractors and it is important to get the renovations done properly in accordance with all State regulations to ensure the safety of the students and faculty.

Ms. McCance introduced new school superintendent Dr. Brett Kustigian. Dr. Kustigian noted he grew up in Leicester and it is great to be back home. He stated there are some bumps in the road in the short term, but the new Becker high school campus will be envied by everyone in central mass once complete. Tomorrow is his first official day, and he will send out an announcement with his contact information. He encouraged the public to contact him with their thoughts and ideas. Dr. Kustigian added that the safety of our children and staff is number one and will not be compromised. He will be providing periodic updates and will hold town hall style meetings for faculty and parents to try and be as open and transparent as possible.

Select Board and School Committee members expressed concerns regarding the conditions at the Middle School including ants, stagnant water, lengthy extension cords crossing rooms, lack of ventilation, odors, cases of

headaches and dizziness reported at a much higher rate than at the other schools in town, issue that have persisted for decades, mold, the importance of not putting children in an unsafe environment but also listening to what the experts have to say regarding building conditions, a tree growing up in the library, leaks in the building when it rains, the cost to replace the duct work alone just to make the air quality safe in a failing building and wasting funds by repairing a bad building. The SEC report which showed no asbestos within the duct work at the Middle School was discussed along with a mold and indoor air quality assessment done by WEA, LLC through the Mass Teachers Association. The report by WEA states that the SEC report is not based in adequate scientific health-based evidence to assess indoor air quality for human health and should be discounted. Further, WEA states that the assertion that the school may be occupied as normal poses as continuous public health, risk to educators and students at the school, and potentially to the community along with creating potential legal liability for the Leicester School Committee.

There was consensus that a new location must be found for the Middle School children prior to the start of school in the fall. Potential locations discussed including the Library (which may not be allowed due to stipulations in the State grant that was used to renovate and expand the library), Memorial School (which would require \$250K in mold remediation). Double session sat the high school, area churches and the Town Hall. Mr. Genereux noted that there are former classrooms at Town Hall, but they have been converted to offices, there is no cafeteria, and there is not enough time to relocate Town Hall functions before school begins in August. The possibility of using modulars were discussed.

Mr. Genereux noted that the temporary Elementary School move to Becker last year was an emergency situation. No one said anything about the code issues because the inspectional departments and the State were not aware of them at the time. When discussing a permanent move, the State Fire Marshall gets involved. No occupancy is allowed in any of those buildings for any reason right now. The Town received a benefit they should not have gotten last year.

The need for a Becker project coordinator was discussed along with supply chain issues and funding constraints which are requiring the project to be piecemealed and done by volunteers. This item will be discussed further on a future Select Board agenda.

The School Committee discussed having the new Superintendent review the configuration for grades 7-12 as his first order of business, working on the assumption that the kids are not going back to the Middle School this fall.

The groups agreed to reconvene on July 13, 2022, at 6:00pm in Meeting Room 3 at Town Hall to discuss this matter further.

Kim Ferdella representing the teachers' union stated the town is on a great path and teachers, parents and nurses feel a sense of relief now that kids won't be returning to the Middle School. Ms. Ferdella asked that a formal vote to this effect be taken on a future posted agenda.

**Motion 063022-1:** A motion to adjourn was made by Dylan Lambert and seconded by Nate Hagglund at 7:35pm. Motion carried 5:0:0.

**Motion 063022-2:** A motion to adjourn was made by Dianna Provencher and seconded by John Bujak at 7:35pm. Motion carried 4:0:0.



**SELECT BOARD MEETING MINUTES  
JULY 5, 2022 AT 5:00PM  
TOWN HALL, SELECT BOARD CONFERENCE ROOM**

**CALL TO ORDER/OPENING**

Chair Allen Phillips called the meeting to order at 5:00pm. Chair Allen Phillips, Vice Chair Rick Antanavica, Second Vice Chair Dianna Provencher, Selectman Herb Duggan Jr., Selectman John Bujak, Town Administrator David Genereux and Assistant Town Administrator Kristen Rubin were in attendance.

**1. PUBLIC COMMENT PERIOD**

No members of the public provided comment.

**2. REPORTS & ANNOUNCEMENTS**

**a. Student Liaison Reports**

Students are off for the summer.

**b. Report of the Town Administrator's Office**

The Town Administrator presented highlights from the written report of the office.

**c. Select Board Reports**

The Select Board discussed various topics including Burncoat Park Sports Planning Commission \$5,000 grant from the Leicester Savings Bank, WooSox Leicester night on Friday July 8<sup>th</sup> where Deja New is the nonprofit of the night, Leicester Concerts on the Common kick off tomorrow, July 6<sup>th</sup> at 6:30pm, kudos to highway on all of their hard work under current working conditions, highway was the top conversation at the farmers market where people said the town is looking nice and clean, and adding an announcement section on future agendas.

**3. RESIGNATIONS & APPOINTMENTS**

**a. Resignation – Advisory Committee – Bonita Keefe-Layden**

**Motion 070522-3a:** A motion was made by Mr. Antanavica and seconded by Ms. Provencher to accept the resignation of Bonita Keefe-Layden from the Advisory Committee. Motion carries 5:0:0.

**b. Resignation – Assistant to the Town Administrator – Janine Drake**

**Motion 070522-3b:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to accept the resignation of Janine Drake from the position of Assistant to the Town Administrator. Motion carries 5:0:0.

**c. Retirement – Police Lieutenant – Paul Doray (effective July 10, 2022)**

**Motion 070522-3c:** A motion was made by Mr. Antanavica and seconded by Ms. Provencher to accept the retirement of Police Lieutenant Paul Doray effective July 10, 2022. Motion carries 5:0:0.

**d. Appointment – Special Police Officer – Lt. Paul Doray (effective July 25, 2022)**

**Motion 070522-3d:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to appoint Police Lieutenant Paul Doray to the position of Special Police Officer effective July 25, 2022. Motion carries 5:0:0.

**e. FY23 Board & Committee Reappointments**

**Motion 070522-3e:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to approve the FY23 Board & Committee reappointments as listed. Motion carries 5:0:0.

f. **FY23 Select Board Board/Committee & Liaison Positions**

**Motion 070522-3f:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to approve the Select Board voting and liaison positions to Boards & Committees as listed. Motion carries 5:0:0.

**4. OTHER BUSINESS**

a. **Accept Senior Center Donation**

**Motion 070522-4a:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to accept a \$100 donation to the Senior Center from Everlast Nursery. Motion carries 5:0:0.

b. **Discuss/Vote Use of School-Designated Becker Buildings by Outside Groups**

Mr. Genereux stated that Joe Fontaine has been receiving last minute requests to use Becker facilities including from the State Police for K9 training. Mr. Genereux wants to make sure the Board is apprised of all events taking place on the campus in a timely manner. Concerns discussed included projecting items in the building including furniture and artifacts, insurance policies which name the Town as additional insured and potential damage to assets.

**Motion 070522-4b:** A motion was made by Mr. Antanavica and seconded by Ms. Provencher to ban training in any buildings to be used by the school except Knight Hall; and Marsh Hall which is to be used by the Board of Health and any decision regarding further training can be made between the Board Chair and the Town Administrator's office.

c. **Discuss/Vote on Surplus Becker Items – Ballerina Statues (Historical Commission Request)**

Joe Lennerton with the Leicester Historical Commission noted that the Swan Tavern museum contains many items related to Leicester Junior College but very few items from Becker College. The four ballerina statues were created by a Becker alum and were on display at the Becker campus for many years so they are very memorable items.

**Motion 070522-4c:** A motion was made by Mr. Duggan and seconded by Mr. Bujak to authorize the Historical Commission to take possession of the four ballerina statues at Becker. Motion carries 5:0:0.

d. **Discuss/Vote on Procedure for Town Departments to Remove Becker Items**

Mr. Genereux stated he would like to give the departments at least a two-week window to select items, create a list and bring the list back to the Board to declare the remaining items as surplus. Peter Cusolito expressed concerns about using Becker computers on our town networks due to spyware and old software on these aged computers.

**Motion 070522-4d:** A motion was made by Mr. Duggan and seconded by Mr. Antanavica to give Town departments 60 days to select items they would like to take from Becker. Motion carries 5:0:0.

e. **Discuss/Vote on Permitting Parking on Washburn Square for Town Meetings, Town Elections and Concerts on the Common**

**Motion 070522-4e:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to permit parking on Washburn Square for Town Meetings, Town Elections and Concerts on the Common by right. Motion carries 5:0:0.

**5. MINUTES**

a. **June 21, 2022**

**Motion 070522-5a:** A motion was made by Mr. Duggan and seconded by Mr. Bujak to approve the minutes of June 21, 2022. Motion carries 5:0:0.

b. **June 22, 2022**

**Motion 070522-5b:** A motion was made by Mr. Antanavica and seconded by Mr. Bujak to approve the minutes of June 22, 2022. Motion carries 5:0:0.

c. **June 30, 2022**

This item was passed over.

**Motion 070522-6:** A motion to adjourn was made by Ms. Provencher and seconded by Mr. Bujak at 5:48pm. Motion carries 5:0:0.

**SELECT BOARD MEETING MINUTES  
JULY 11, 2022 AT 5:00PM  
TOWN HALL, SELECT BOARD CONFERENCE ROOM**

**CALL TO ORDER/OPENING**

Chair Allen Phillips called the meeting to order at 5:03pm. Chair Allen Phillips, Vice Chair Rick Antanavica, Second Vice Chair Dianna Provencher, Selectman Herb Duggan Jr., Selectman John Bujak, Town Administrator David Genereux and Assistant Town Administrator Kristen Rubin were in attendance.

**1. Retirement – Town Clerk – Deborah Davis**

**Motion 071122-1:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to accept, with a letter of thank you, the retirement of Town Clerk Deborah Davis. Motion carries 5:0:0.

**2. Appointment – Highway Department Assistant – Deborah Rosebrooks**

**Motion 071122-2:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to appoint Deborah Rosebrooks to the position of Highway Department Assistant. Motion carries 5:0:0.

**3. Discuss/Vote on End of Year Transfer – EMS Department**

Mr. Genereux presented an end of year transfer in the amount of \$40,000 from the employee benefits line to EMS payroll due to an expected shortfall as a result of starting the Vibra contract at the end of FY22. End of year transfers require sign offs by both the Select Board and Advisory Committees in accordance with our bylaws. Mr. Bujak asked if a monthly report on Vibra contract and an overall budget report showing budget vs expenditures could be provided to the Board.

**Motion 071122-3:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to approve the end of year transfer to the EMS department from employee benefits in the amount of \$40,000. Motion carries 5:0:0.

**4. Discuss/Vote on Town Administrator COLA**

**Motion 071122-4:** A motion was made by Ms. Provencher and seconded by Mr. Bujak to approve a 2% COLA for FY23 for Town Administrator David Genereux. Under discussion, the Board discussed putting a policy in place that automatically gives the Town Administrator the same annual COLA as all other employees. Motion carries 5:0:0.

**5. Discuss Becker Project Manager Position**

Mr. Genereux noted that Mr. Bujak asked that this item be put on the agenda for discussion. Mr. Bujak stated he feels this is a necessary position due to occurrences such as the water issues in the colonials, the work that David and Rick are doing themselves to get the buildings up to code, the fact that the schools can't move to Becker this fall, the need to lease out properties to bring in revenue. Mr. Bujak believed these issues are costing the Town money above and beyond the cost of a project manager and felt that there needs to be a professional to oversee the project to ensure everything is done correctly. Mr. Antanavica stated the delays are due to contractors and professional services not being available and recommended waiting to get a project manager until the Town is able to move forward with these renovations. Ideas discussed included hiring a buildings and grounds professional to oversee all Town buildings and help with project management at Beck, using funds from the highway superintendent position to pay for a DPW director position that also oversees school buildings, better utilizing volunteers, sharing a maintenance person with another Town who could do some of the Becker work, discussing this matter with the School Committee and developing a facilities maintenance plan. Mr. Genereux noted he will still have to be responsible for all procurement and disposition even with a project manager. The cost of a project manager was estimated to be between \$100K-\$200K. The Board discussed

sharing a maintenance person with another town and creating a volunteer Becker project team that looks at both the Becker acquisition and develops a maintenance plan to save the Town money. The volunteer team could consist of volunteers from the Becker subcommittees and the Advisory Committee. This will be discussed further at the next Board meeting. It was noted that the initial plan was to move the school to Becker in two years.

**Motion 071122-5:** A motion to adjourn was made by Mr. Antanavica and seconded by Ms. Provencher at 8:55pm. Motion carries 5:0:0.