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I was interim SBA in Swampscott (2018) and Marblehead (2019) after I retired. I'm not looking to work on a regular basis, but I'd be willing to be a **mentor to a finance official or SBA**.

I've pitched this idea to Superintendents, as they could hire a less experienced SBA. With a mentor available this would help avoid missteps and elevate performance. There wasn't much interest when I tried it a couple of years ago, but maybe it's different now. I might be able to do the same in Town Hall depending on the position and community size. Also, with Zoom capabilities, geography is not a concern like it was a couple of years ago.

For background my SBA license is still in force. I'd probably be strongest in areas like management, communication, presentations, strategic planning, etc. but could assist with day to day items as well.

I've attached my resume and selected achievements. Please note I'm interested in mentoring, not filling a position on an interim basis.

Thanks,

Evan

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Award-winning school business administrator who has achieved state and national recognition for innovative and service delivery. Executes sound management and budget strategies to deliver quality educational and support services, balancing political and fiscal constraints with statutory requirements. Provides team-based leadership for financial operations, support services and employee/retiree benefits.

2015 to 2018 **SCHOOL BUSINESS ADMINISTRATOR, SWAMPSCOTT, MA**
Restored credibility and leadership to highly visible Central Office position for new Superintendent

- Led collaborative budget process with School Dept., Town Hall and community.
- Provided financial leadership in collective bargaining to improve control of labor costs.
- Monitored expenses and revenue to provide actionable budget information to Supt. and School Committee.
- Managed/supported high impact operations: K-12 Building Task Force, enrollment projections, new facilities director position, food service and non-budget funds --- revolving, grants and special revenue

2011 to 2015 **FINANCE DIRECTOR, AYER SHIRLEY REGIONAL SCHOOL DISTRICT, AYER, MA**
Provided central office leadership for first new PK-12 regional school district in Mass. in the technology era.

- Planned and implemented Business Office start-up during region integration; included budget, payroll, risk management, food service, transportation, and facilities programs.
- Managed finance and facilities planning of \$56 million high school addition/renovation project as member of School Building Committee.
- Managed grants, financial controls and independent audits; generated clean internal and external reports.
- Worked with Dept. of Elementary and Secondary Education and Department of Revenue to resolve transitional issues for new district and meet requirements of financial oversight and reporting.
- Managed procurement services as Massachusetts Certified Public Purchasing Official.

2007 to 2011 **BUSINESS MANAGER, SHIRLEY SCHOOL DISTRICT, SHIRLEY, MA**
Provided CFO leadership in fiscally challenging transitional period during regionalization with Ayer schools.

- Monitored shifting state and federal aid programs to adjust services during economic recession.
- Applied student cohort survival analysis to manage staff reductions and minimize service impact.
- Managed energy conservation program that reduced electricity/gas use by more than one-third.
- Recovered \$527,000 in unclaimed state school building reimbursements from MSBA.

2005 to 2007 **BUSINESS ADMINISTRATOR, ANDOVER PUBLIC SCHOOLS, ANDOVER, MA**
Prepared operating and capital budgets, and managed financial services/controls, food service, and transportation programs for ten-school, 6000-student, high performing district.

- Prepared and presented for School Committee \$61 million annual budget and \$1+ million capital budget.
- Coordinated with two municipal/school departments, Plant and Facilities and Human Resources, to ensure shared goals were met.
- Replaced food service director and began program turnaround with 50% increase in lunch participation.

- 2004 to 2005 **CHIEF OPERATING OFFICER, MA HEALTH DATA CONSORTIUM, WALTHAM, MA**
 Managed operations of nationally recognized regional health information organization, with the mission to improve the Massachusetts and New England health care delivery system.
- 1998 to 2004 **SCHOOL BUSINESS MANAGER/FINANCE DIRECTOR, HARVARD, MA**
 Prepared the operating budget and managed risk, food service, procurement and transportation programs. Assisted with personnel management, information technology and facilities operations. Also served as town Finance Director managing financial operations and controls for accounting, assessing, collections, treasury functions and health insurance, pension and benefits programs. Chairman of multi-employer health plan Board of Directors for 14 public employers insuring 6000 members.
- Received two state awards for consolidated town/school finance departments and food service program.
 - Prepared and presented annual budget; applied cutback management in consecutive years.
 - Member of building committee overseeing \$17.5 million high school renovation and addition.
 - Chair of health plan board that managed self-insured employee and retiree health plans with consultant; set premium, obtained reinsurance, tracked claims, managed communications.
- 1995 to 1998 **CHIEF BUDGET OFFICER, CITY OF NEWTON, MA**
 Budget officer to the Mayor. Prepared \$200 million operating and capital budgets and financial forecast.
- Managed self-insured health plan for employees and retirees with consultant assistance; set premiums, obtained reinsurance, tracked claims, managed subscriber communications.
 - Wrote major speeches, managed media relations and appeared regularly on CATV and radio.
 - Recommended major project debt and cash financing strategies to maintain AAA bond rating.
- 1988 to 1995 **FINANCE DIRECTOR/CITY AUDITOR, CITY OF MEDFORD, MA**
 City's first Chief Financial Officer under new charter. Managed all municipal financial operations and ensured accounting and internal and external reporting compliance.
- Plan administrator for national award-winning health plan. Expanded benefits, shifted cost sharing and reduced budget for city and subscribers.
 - As retirement board member set investment and operating policies; managed \$50 million in assets.
 - Received national and state awards for a new health plan based on labor/management cooperation
- 1986 to 1988 **ADMINISTRATIVE ASSISTANT, TOWN OF GROTON, MA**
 Recommended policy options, coordinated service delivery for Selectmen with department heads and boards. Also managed contracts, grants, legal services and media relations.
- 1983 to 1986 **PROGRAM MGR., DEPT. OF REVENUE, DIV. OF LOCAL SERVICES, BOSTON, MA**
 Participated in development of new state bureau to provide financial management assistance to Mass. communities. Conducted financial reviews and recommended financial management improvements.
- 1982 to 1983 **PLANNING INTERN, PLANNING BOARD, WELLESLEY, MA**
- 1980 to 1981 **LEGISLATIVE AIDE, HOUSE OF REPRESENTATIVES, BOSTON, MA**
- 1980 **DIRECTOR, COMMITTEE FOR THE RESPONSIBLE (TAX) LIMIT, BOSTON, MA**
- 1978 to 1979 **REPORTER, THE WALPOLE TIMES, WALPOLE, MA**
- EDUCATION** **John F. Kennedy School of Government, Harvard University, Cambridge, MA**
 Master's in City and Regional Planning
- Colby College, Waterville, Maine**
 Bachelor of Arts in Psychology

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PROFESSIONAL PROFILE, SELECTED RECOGNITION AND LEADERSHIP

Award-winning school business administrator who has achieved state and national recognition for innovative service delivery. Executes sound management and budget strategies to deliver quality educational and support services, balancing political and fiscal constraints with statutory requirements. Provides team-based leadership for financial operations and controls, accounting and grants.

- 2014 Board of Directors, Mass. Association of Regional Schools, appointed 2013
- 2010 Board of Directors, Mass. Government Finance Officers Association (MGFOA); appointed 2008
- 2008 Recipient, Leading By Example Award for Shirley School District for energy conservation by Office of Energy & Environmental Affairs
- 2004 President, Mass. Government Finance Officers Association; appointed to Board in 2001
Member, Health Insurance Committee, Mass. Municipal Association; Chair and Member 1992-96
Board of Directors, Mass. Healthcare Purchaser Group; appointed in 2002
Tufts Health Plan Client Advisory Council; appointed in 2002
- 2001 Discussion Leader, "Is Your Health Insurance Making You Sick?" GFOA* Annual Conference
Committee on Retirement and Benefits Administration, GFOA; appointed in 1995
- 2000 Recipient, Mass. Municipal Assoc. Innovation Award, Harvard Public Schools Food Service Program
- 1999 Recipient, Mass. Municipal Assoc. Innovation Award, Town of Harvard Consolidated Finance Dept.
- 1998 Speaker, "Consolidating Municipal and School Financial Operations." MGFOA Meeting
Selectman, Town of Groton; elected in 1995
- 1997 Speaker, "New Strategies in Controlling Health Care Costs," GFOA Annual Conference
Faculty, "Employee Benefits Management Strategies," GFOA Training Seminar
- 1995 On-Site Finance Consultant, U.S. Agency For International Development, Kyrgyzstan, Central Asia
- 1994 Panelist, "Retiree Health Care Issues," GFOA Annual Conference
Author, "Solving the Health Insurance Problem: A Recipe For Success," GFOA Quarterly
- 1993 Recipient, Award For Excellence, GFOA, for City of Medford health plan.
Panelist, "Will Your Employees Support Managed Care?" Healthmart '93
Panelist, "Plan Design," Massachusetts Municipal Association Health Care Conference
Speaker, "Managing Health Care Costs and Coverage," GFOA Annual Conference
- 1992 Recipient, Mass. Municipal Association Innovation Award, for City of Medford health plan
- 1991 Speaker, "New Initiatives in Health Care Cost Containment," Municipal Managers Conference
- 1990 Named, "A 1980s Mover and Shaker" by The Groton Herald for local government achievement
- 1989 Member, Fiscal Policy Committee, Mass. Municipal Association; appointed 1987.
- 1980 Second Prize, Spot News Reporting, National Newspaper Association

* Government Finance Officers Association of the United States and Canada