



City of Beverly

CITY COUNCIL

COUNCILOR-AT-LARGE

JULIE R. FLOWERS,
COUNCIL PRESIDENT
JOHN J. MULLADY
KEITH A. SONIA

WARD COUNCILORS

WARD 1 TODD C. ROTONDO
WARD 2 DANIELLE M. SPANG
WARD 3 STEVEN M. CROWLEY
WARD 4 SCOTT D. HOUSEMAN
WARD 5 KATHLEEN M. FELDMAN
WARD 6 MATTHEW J. ST. HILAIRE
COUNCIL VICE PRESIDENT

**Agenda
Special City Council Meeting**

Monday, October 26, 2026 — 7:15PM
175 Cabot Street, Beverly, MA 01915
First Floor Conference Room

2026 OCT 20 P 12:16
CITY OF BEVERLY
RECEIVED AND RECORDED
CITY CLERK'S OFFICE

1. Call to order
2. Roll Call
3. Receive Report of City Council Budget Analyst Screening Committee, including the committee's recommendation letter from Councilor Scott Houseman and packet of candidate résumés.
4. Interview Candidate— 7:30 PM Frederique Pierre-Lyne
5. Adjournment



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COUNCIL VICE PRESIDENT

October 19, 2026

President Flowers and City Councilors
Temporary Beverly City Hall
195 Cabot Street
Beverly, MA 01915

Dear Honorable Colleagues,

I respectfully submit this report on the work of the Preliminary Screening Committee for the Council Budget/Management Analyst position.

The Committee received over 40 applications, selected 11 individuals for interviews and, after some withdrawals, interviewed 8 applicants in executive session. We recommend for your consideration the following four individuals, in no particular order: Susan Carmel, Gary Frisch, Frederique Pierre-Lyne Phanor, and Katherine Foster. Their resumes are attached.

The Committee met seven times, September 14, 16, 24, and 28 and October 5, 6, and 14. At our first public meeting, we received a briefing and useful handouts from Mr. Perry, a copy of which is included herewith. Also included is a copy of the posted job description and written guidance from the solicitor's office about the screening process. To assist the full Council when preparing to interview the selected finalists, I am also providing herein some questions you may wish to consider when developing your own.

Along with my colleagues on the Committee, Councilors Spang and Rotondo, we hope the materials included with this filing will not simply be useful now, but also will create some institutional memory for the Council in the future. Two pieces of advice from Mr. Perry are worth noting here: first, the Council (probably through the Finance & Property Subcommittee) should have evaluated him and his work on some regular basis over the years and recommends we adopt this as a policy. Also, he suggests the Council consider and be open to how this position could function differently in the future, as he notes he essentially defined for himself the scope of the position, as he had no transitional hand-off from his predecessor.

In closing, the Committee wishes to thank Mr. Perry for his initial briefing in this process and his many years of exemplary service to the Council and the city.

Respectfully,

Scott Houseman

City Councilor, Ward 4

2026 OCT 20 P 12:10
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CITY CLERK'S OFFICE

Beverly City Council Budget/Management Analyst Salary History

Kathy Griffin Annual Compensation

2000 - \$28,462
2010 - \$42,130
2013 - \$43,560
2015 - \$42,460
2016 - \$32,560 (6 months only)

Gerry Perry Annual Compensation/Hours

2017 - \$15,588 Annual Hours = 346 (11 months only)
2018 - \$17,202 Annual Hours = 382
2019 - \$26,938 Annual Hours = 489
2020 - \$34,375 Annual Hours = 625 (additional work due to Covid issues)
2021 - \$30,745 Annual Hours = 559
2022 - \$35,502 Annual Hours = 645
2023 - \$44,681 Annual Hours = 638 (additional work due to Charter Review)
2024 - \$47,985 Annual Hours = 685 (additional work due to Charter Review)
2025 - \$42,490 Annual Hours = 607
2026 - \$25,500 Hours to Date = 300

FY23 Budget/Management Appropriation	\$66,500
FY24 Budget/Management Appropriation	\$69,825
FY25 Budget/Management Appropriation	\$74,700
FY26 Budget/Management Appropriation	\$77,169
FY27 Budget/Management Appropriation	\$59,000

Finance Director	\$164,000/yr.	\$90.10 hourly rate plus benefits
City Accountant	\$130,000/yr.	\$71.42 hourly rate plus benefits
City Council Budget/Management Analyst		\$85.00 hourly rate No benefits

Beverly City Council Budget/Management Analyst Sample of Work Product Accomplishments

- Review and recommended ten balanced budgets as submitted by the Mayor
- Review and recommend on the annual tax rate process
- In FY23 and FY23, recommend property tax relief due to conservative revenue projections
- Prepare quarterly budget to actual reports
- Prepare annual budget report
- Review annual capital improvement report
- Revamped the annual financial forecast report process and assist each year
- Review salary structure of staff employees
- Analyze annual balance sheet
- Provide strategy to ensure strong balance sheet position
- Analyze annual audit report
- Analyze annual audit report of SESD
- Analyze annual local aid distributions
- Review and recommend all collective bargaining agreements
- Recommend certain management personnel matters as needed
- Coordinated a new elected officials salary structure
- Review and recommend Beverly's pension position
- Review Beverly's Trust Fund positions
- Review and report on the annual Beverly grant position
- Provided recommendations during Covid to ensure financial stability
- Wrote the City's Financial Policies in 2017
- Approximately \$20M in city reserves to date, consistent with Beverly's financial policies
- OPEB trust fund financial position improved in the past several years
- Prepared ordinances regarding the City Clerk's annual salary process
- Review and assist on debt management
- Assisted in developing the financial strategy on a new police station
- Provided financial debt strategy on the renovation of City Hall
- Recommended re-funding on specific debt, saving the taxpayers money
- Two bond rating increases during my tenure
- Special Projects as requested by the City Council
- More in-person presence in City Hall and City Council meetings
- Provide financial and/or management strategy as requested by Councilors
- Reviewed and recommended management improvements at the Beverly Airport
- Available to any Councilor at any time for assistance via e-mail or phone

Note:

In some of these scenarios, my role was limited, as the Beverly Finance Director and his staff played a more significant role.

No, a municipal employee cannot get paid by two different communities for the exact same working hours.

Doing so is a direct violation of Massachusetts state ethics laws and is legally considered a form of fraud known as "double dipping."

The explicit rules regarding this practice dictate that:

1. Theft of Time & Public Funds

If you are clocked in or collecting an hourly wage from Municipality A, you are legally required to be performing services for Municipality A. If you are simultaneously collecting hourly pay from Municipality B during those same exact hours, you are misrepresenting your time to at least one (if not both) of your employers. This can trigger an investigation by the Massachusetts Office of the Inspector General for fraud, waste, and abuse of public funds. [1]

2. Violating the Conflict of Interest Law (G.L. c. 268A, § 23)

Under Section 23 of the Massachusetts Conflict of Interest Law, public employees are strictly prohibited from using their official positions to secure "unwarranted privileges" of substantial value. Getting paid twice for a single hour of work is explicitly classified as an unwarranted privilege and can result in severe financial penalties from the State Ethics Commission. [1]

The Only Permissible Overlaps

You can only receive money from two different municipalities during the same calendar day if:

- **Distinct Shifts:** You work a defined shift for Town A (e.g., 7 AM to 3 PM) and a separate, non-overlapping shift for Town B (e.g., 4 PM to 8 PM).
- **Approved Paid Time Off (PTO):** You are physically working for Town B while on an approved, pre-planned vacation day

or personal day from Town A. (Note: You *cannot* do this while on paid sick leave from your primary job, as that implies you are too ill to work).

- **Stipend or Elected Roles:** One of the positions pays a flat annual stipend for an elected role or a board seat that does not tie pay directly to specific operational hours, though extreme caution and an official disclosure must still be filed to ensure no duties conflict.

Are you asking about a specific type of role, such as a **police officer working deta**

Possible Interview Questions

GENERAL

Can you commute to Beverly for day or evening meetings?

What restrictions does your current position (full-time or part-time, if applicable) have with filling the requirements of this position?

What is your availability to receive phone calls and emails from City Councilors?

Are you comfortable with public speaking before audiences and/or on cable access TV?

What is there about this position that appeals to you, and why?

MUNICIPAL FINANCE

Explain your knowledge and experience with Proposition 2½.

What is your experience preparing and evaluating long-range financial forecasts?

Explain the pros and cons of zero-based budgets compared to incrementally created budgets. Which is the better approach, and why?

Describe your experience with Massachusetts municipal finance, governmental accounting, GASB (Governmental Accounting Standards Board), Munis or similar municipal financial systems. What areas are you strongest in, and where would you need additional familiarization?

Please share your experience in explaining municipal finance in lay persons' terms. For example, walk us through the attached Tax Rate Recapitulation, and what that means in terms of free cash and how it could be spent according to a capital expenditure plan.

What do you know about Beverly's financial status presently? Do you have any thoughts about Beverly's current financial management and practices?

Suppose your analysis results in a recommendation that is strongly opposed by the Mayor, Finance Department, a department head, or even members of the City Council. How would you handle that situation?

Have you ever provided financial advice to a multiple-member board before? Please share how you approached that, handled strong personalities, etc.

DIVISION OF LOCAL SERVICES

CITY

BUREAU OF ACCOUNTS

TAX RATE RECAPITULATION

Fiscal Year 2026

I. TAX RATE SUMMARY

la. Total amount to be raised (from page 2, IIe)	\$ 200,881,053.61
lb. Total estimated receipts and other revenue sources (from page 2, IIIe)	65,482,941.90
lc. Tax Levy (Ia minus Ib)	\$ 135,398,111.71
ld. Distribution of Tax Rates and levies	

CLASS	(b) Levy percentage (from LA5)	(c) lc above times each percent in col (b)	(d) Valuation by class (from LA-5)	(e) Tax Rates (c) / (d) x 1000	(f) Levy by class (d) x (e) / 1000
Residential	79.741465	107,968,437.50	9,987,471,242.00	10.81	107,964,564.13
Net of Exempt					
Open Space	0.006856	9,282.61	858,675.00	10.81	9,282.28
Commercial	11.817214	16,000,284.39	762,752,372.00	20.98	16,002,544.76
Net of Exempt					
Industrial	3.734978	5,057,089.01	241,077,380.00	20.98	5,057,803.43
SUBTOTAL	95.300512		10,992,159,669.00		129,034,194.60
Personal	4.699488	6,363,018.20	303,332,560.00	20.98	6,363,917.11
TOTAL	100.000000		11,295,492,229.00		135,398,111.71

MUST EQUAL 1C

Signatures

Assessors

Francis J. Golden, Chief Assessor , Beverly , fgolden@somervillema.gov 978-605-2307 | 12/3/2025 9:33 AM

Comment:

Richard J. Scanlon, Assessor , Beverly , ptr701@comcast.net 978-605-2307 | 12/3/2025 10:34 AM

Comment:

Documents

No documents have been uploaded.

Do Not Write Below This Line --- For Department of Revenue Use Only

Reviewed By: Matthew Andre
 Date: 12/04/2025
 Approved: Jared Curtis
 Director of Accounts: Deborah A. Wagner

DIVISION OF LOCAL SERVICES

CITY

BUREAU OF ACCOUNTS

TAX RATE RECAPITULATION

Fiscal Year 2026

Deborah A. Wagner

DIVISION OF LOCAL SERVICES

CITY

BUREAU OF ACCOUNTS

TAX RATE RECAPITULATION

Fiscal Year 2026

II. Amounts to be raised

Ila. Appropriations (col.(b) through col.(g) from page 4)		197,085,609.90
Ilb. Other amounts to be raised		
1. Amounts certified for tax title purposes	0.00	
2. Debt and interest charges not included on page 4	0.00	
3. Final Awards	0.00	
4. Retained Earnings Deficit	0.00	
5. Total cherry sheet offsets (see cherry sheet 1-ER)	854,846.00	
6. Revenue deficits	0.00	
7. Offset receipts deficits Ch. 44, Sec. 53E	0.00	
8. CPA other unappropriated/unreserved	0.00	
9. Snow and ice deficit Ch. 44, Sec. 31D	0.00	
10. Other :	0.00	
TOTAL Ilb (Total lines 1 through 10)		854,846.00
Ilc. State and county cherry sheet charges (C.S. 1-EC)		2,466,754.00
Ild. Allowance for abatements and exemptions (overlay)		473,843.71
Ile. Total amount to be raised (Total Ila through Ild)		200,881,053.61

III. Estimated receipts and other revenue sources

IIla. Estimated receipts - State		
1. Cherry sheet estimated receipts (C.S. 1-ER Total)	24,632,195.00	
2. Massachusetts school building authority payments	0.00	
TOTAL IIIa		24,632,195.00
IIlb. Estimated receipts - Local		
1. Local receipts not allocated (page 3, col (b) Line 24)	12,473,622.00	
2. Offset Receipts (Schedule A-1)	0.00	
3. Enterprise Funds (Schedule A-2)	19,275,829.90	
4. Community Preservation Funds (See Schedule A-4)	2,302,814.00	
TOTAL IIlb		34,052,265.90
IIlc. Revenue sources appropriated for particular purposes		
1. Free cash (page 4, col (c))	5,806,581.00	
2. Other available funds (page 4, col (d))	991,900.00	
TOTAL IIlc		6,798,481.00
IIId. Other revenue sources appropriated specifically to reduce the tax rate		
1a. Free cash..appropriated on or before June 30, 2025	0.00	
1b. Free cash..appropriated on or after July 1, 2025	0.00	

DIVISION OF LOCAL SERVICES

CITY

BUREAU OF ACCOUNTS

TAX RATE RECAPITULATION

Fiscal Year 2026

2. Municipal light surplus	0.00	
3. Other source :	0.00	
TOTAL IIId		<u>0.00</u>
IIe. Total estimated receipts and other revenue sources		<u>65,482,941.90</u>
(Total IIIa through IIId)		
IV. Summary of total amount to be raised and total receipts from all sources		
a. Total amount to be raised (from IIe)		<u>200,881,053.61</u>
b. Total estimated receipts and other revenue sources (from IIe)	<u>65,482,941.90</u>	
c. Total real and personal property tax levy (from Ic)	<u>135,398,111.71</u>	
d. Total receipts from all sources (total IVb plus IVc)		<u>200,881,053.61</u>

DIVISION OF LOCAL SERVICES

CITY

BUREAU OF ACCOUNTS

TAX RATE RECAPITULATION

Fiscal Year 2026

LOCAL RECEIPTS NOT ALLOCATED *

	Receipt Type Description	(a) Actual Receipts Fiscal 2025	(b) Estimated Receipts Fiscal 2026	Percentage Change
==>	1. MOTOR VEHICLE EXCISE	6,169,476.55	5,341,402.00	-13.42
	2. OTHER EXCISE			
==>	a.Meals	1,302,563.88	1,050,000.00	-19.39
==>	b.Room	495,654.88	400,000.00	-19.30
==>	c.Other	15,396.32	13,000.00	-15.56
==>	d.Cannabis	280,482.66	225,000.00	-19.78
==>	3. PENALTIES AND INTEREST ON TAXES AND EXCISES	359,439.94	350,000.00	-2.63
	4. PAYMENTS IN LIEU OF TAXES			
==>	a.Solar Payment in Lieu of Taxes	42,049.50	40,000.00	-4.87
==>	b.All Other Payment in Lieu of Taxes	184,204.06	210,000.00	14.00
	5. CHARGES FOR SERVICES - WATER	0.00	0.00	0.00
	6. CHARGES FOR SERVICES - SEWER	0.00	0.00	0.00
	7. CHARGES FOR SERVICES - HOSPITAL	0.00	0.00	0.00
	8. CHARGES FOR SERVICES - SOLID WASTE FEES	0.00	0.00	0.00
	9. OTHER CHARGES FOR SERVICES	17,312.20	7,500.00	-56.68
	10. FEES			
	a.Cannabis Impact Fee	0.00	0.00	0.00
	b.Community Impact Fee Short Term Rentals	0.00	0.00	0.00
	c.Other Fees	670,494.03	569,250.00	-15.10
	11. RENTALS	330,541.36	320,000.00	-3.19
	12. DEPARTMENTAL REVENUE - SCHOOLS	0.00	0.00	0.00
	13. DEPARTMENTAL REVENUE - LIBRARIES	0.00	0.00	0.00
	14. DEPARTMENTAL REVENUE - CEMETERIES	127,350.00	90,000.00	-29.33
	15. DEPARTMENTAL REVENUE - RECREATION	0.00	0.00	0.00
	16. OTHER DEPARTMENTAL REVENUE	283,257.60	248,600.00	-12.24
	17. LICENSES AND PERMITS			
	a.Building Permits	2,347,911.00	1,850,000.00	-21.21
	b.Other licenses and permits	334,978.09	316,870.00	-5.41
	18. SPECIAL ASSESSMENTS	0.00	0.00	0.00
==>	19. FINES AND FORFEITS	30,272.12	22,000.00	-27.33
==>	20. INVESTMENT INCOME	1,673,045.09	900,000.00	-46.21
==>	21. MEDICAID REIMBURSEMENT	395,985.18	375,000.00	-5.30
==>	22. MISCELLANEOUS RECURRING	454,140.80	145,000.00	-68.07

DIVISION OF LOCAL SERVICES
BUREAU OF ACCOUNTS

CITY

TAX RATE RECAPITULATION
Fiscal Year 2026

	Receipt Type Description	(a) Actual Receipts Fiscal 2025	(b) Estimated Receipts Fiscal 2026	Percentage Change
23.	MISCELLANEOUS NON-RECURRING	111,805.33	0.00	-100.00
24.	Totals	15,626,360.59	12,473,622.00	-20.18

Signatures

Accounting Officer

I hereby certify that the actual receipts as shown in column (a) are, to the best of my knowledge correct and complete, and I further certify that I have examined the entries made on page 4 of the above-indicated fiscal year tax rate recapitulation form by the City / Town / District Clerk and hereby acknowledge that such entries correctly reflect the appropriations made and the sources from which such appropriations are to be met.

Carol Augulewicz, Accountant , Beverly , caugulewicz@beverlyma.gov 978-605-2301 | 12/2/2025 9:49 AM

Comment:

Documents

No documents have been uploaded.

* Do not include receipts in columns (a) or (b) that were voted by the City / Town / District Council or Town Meeting as offset receipts on Schedule A-1, enterprise funds on Schedule A-2, or departmental revolving funds per Chapter 44, Section 53E 1/2. The Recap Page 3 Support form must be submitted to support increases / decreases of estimated receipts to actual receipts.

==> The Recap Page 3 Support form must be submitted to support increases/ decreases of FY 2026 estimated receipts to FY 2025 estimated receipts to be used in calculating the Municipal Revenue Growth Factor (MRGF). The Recap Page 3 Support form must be submitted to list each receipt type included in rows 22 and 23, Miscellaneous Recurring and Non-Recurring.

TAX RATE RECAPITULATION
Fiscal Year 2026

APPROPRIATIONS										AUTHORIZATIONS		
City/Town Council or Town Meeting Dates	FY*	(a) Total Appropriations Of Each Meeting	(b) From Raise and Appropriate	(c) From Free Cash (See B-1)	(d) From Other Available Funds (See B-2)	(e) From Offset Receipts (See A-1)	(f) From Enterprise Funds (See A-2)	(g) From Community Preservation Funds (See A-4)	(h) *** Departmental Revolving Funds	MEMO ONLY		
										(i) Borrowing Authorization (Other)		
01/21/2025	2025	58,212.00	0.00	58,212.00	0.00	0.00	0.00	0.00	0.00		0.00	
03/17/2025	2025	2,648,369.00	0.00	2,648,369.00	0.00	0.00	0.00	0.00	0.00		0.00	
06/16/2025	2025	3,100,000.00	0.00	3,100,000.00	0.00	0.00	0.00	0.00	0.00		0.00	
06/23/2025	2026	188,976,214.90	170,257,759.00	0.00	991,900.00	0.00	17,726,555.90	0.00	0.00		0.00	
12/16/2024	2025	385,885.00	0.00	0.00	0.00	0.00	0.00	385,885.00	0.00		0.00	
04/22/2025	2025	636,859.00	0.00	0.00	0.00	0.00	0.00	636,859.00	0.00		0.00	
10/20/2025	2026	1,280,070.00	0.00	0.00	0.00	0.00	0.00	1,280,070.00	0.00		0.00	
Total		197,085,609.90	170,257,759.00	5,806,581.00	991,900.00	0.00	17,726,555.90	2,302,814.00				

* Enter the fiscal year to which the appropriation relates.

** Appropriations included in column (b) must not be reduced by local receipts or any other funding source.

Appropriations must be entered gross to avoid a duplication in the use of estimated or other sources of receipts.

*** Include only revolving funds pursuant to Chapter 44, Section 53 E 1/2.

Clerk	Signatures
I hereby certify that the appropriations correctly reflect the votes taken by City / Town / District Council. Lisa E. Kent, City Clerk / Clerk of Council , Beverly , lkent@beverlyma.gov 978-605-2325 12/3/2025 9:06 AM Comment:	

Documents
No documents have been uploaded.

GUIDANCE TO PUBLIC BODIES RESPONSIBLE FOR HIRING AN EMPLOYEE

(Prepared by Solicitor's Office and Review by KP Law January 2020))

The purpose of this guidance is to advise on compliance with the Open Meeting Law when a public body is responsible for hiring an employee. This memo does not cover HR functions such as creating a job description, advertising, collection of resumes, etc.

A. *A Public Body may Establish a Subcommittee for the "Preliminary Screening" of Applicants, which Committee is Subject to All of the Requirements of the Open Meeting Law*

A "Preliminary screening" is defined as: "the initial stage of screening applicants conducted by a committee or subcommittee of a public body solely for the purpose of providing to the public body a list of those applicants qualified for further consideration or interview." MGL ch. 30A, section 18. **The Preliminary Screening Committee must be comprised of less than a quorum of the appointing authority.**

The Preliminary Screening Committee must post in accordance with the Open Meeting Law notice of all meetings, or of meetings when two or more members are authorized by the Committee to act collectively. The notice must list, with specificity, the matters to be addressed by the Committee, such that a person reading the notice who is unfamiliar with the issue can reasonably anticipate the subject matter of the discussion.

There is a presumption under the Open Meeting Law that all meetings will be held in open session, unless an executive session is noticed and held in accordance with the Open Meeting Law. For that reason, a Preliminary Screening Committee may meet in executive session only, "To consider or interview applicants for employment or appointment by a preliminary screening committee if the chair declares that an open meeting will have a detrimental effect in obtaining qualified applicants." Although this process may include review of resumes and then one or more rounds of interviews, **this exception does not apply once applicants have passed the preliminary screening.** MGL ch. 30A, section 21(a)(8). **Therefore, once the screening committee has identified finalists to present to the appointing authority, it can no longer meet in executive session to discuss the same.**

Detailed minutes must be taken in executive session. While a transcript of the meeting need not be made, the minutes must provide, with specificity, an outline of the conversations had and the actions taken, including questions asked and answers given. Such minutes must be approved timely (three weeks or three meetings, whichever is later), and then preserved as permanent records. Be aware that candidates at the beginning of a hiring process typically have a higher degree of privacy than those identified as finalists. For that reason, consultation should be had with the City Solicitor's office prior to responding to a public records request for the same.

B. *Detailed Steps for Proceeding with a Preliminary Screening/Hiring Committee if the Public Body So Chooses*

- 1) The Public Body establishes Preliminary Screening/Hiring subcommittee, **which must include fewer than a quorum of the Public Body's membership**, and may include persons not part of the Public Body.
- 2) Subcommittee posts initial meeting. Such posting must occur 48 hours before any meeting (not including Saturdays, Sundays or holidays), listing with specificity the matters to be discussed. Similar notice of all subsequent meetings must be posted as well.
- 3) The notice for the first meeting should include, but not be limited to the following:
 - a. Organization – elect Chair, Vice Chair and Clerk
 - b. Establish overall process – including, at a minimum the number of candidates to be recommended to the appointing authority as finalists (typically no less than three)
 - c. Consider establishing protocols for maintaining privacy of applicants and or applicant materials
 - d. Consider establishing uniform questions to be asked of applicants
- 4) Minutes of all discussions in open and executive session must be taken and approved timely. To enter executive session, the Public Body must take a roll call vote after specifically identifying the purpose for the executive session (which purpose must also be included in the meeting notice); all votes in executive session must also be taken by roll call vote.
- 5) Resumes for applicants may be distributed to the subcommittee outside of a meeting, but no deliberation may occur. To avoid potential violations of the Open Meeting Law, no member of the Preliminary Screening Committee should “reply to all” on any e-mails forwarding such information. Remember, as well, that candidates, particularly at the beginning of a hiring process, have a significant privacy interest in the fact of their candidacy. For that reason, any such materials must be maintained in a confidential manner.
- 6) Once resumes are available (at first meeting, or at a future meeting), when the Preliminary Screening Committee wishes to discuss the resumes, the Committee should/may enter into executive session. All meetings, however, must start in an open session and a roll call vote must be made in order to go into executive session. The Chair should announce whether or not the group will reconvene in open session.
- 7) If the Preliminary Screening Committee anticipates going into executive session, an item for such purposes must be included on any meeting notice. The purpose of the executive session must be stated in each case. For a Preliminary Screening Committee, the notice would say something similar to the following: **To consider or interview applicants for employment or appointment by a preliminary screening committee if the chair declares that an open meeting will have a detrimental effect in obtaining qualified applicants in accord with M.G.L. ch. 30A, section 21(a)(8), and particularly, for [reviewing initial resumes] [conducting interviews] [identifying finalists] [or something similar].**
- 8) During executive session, the Preliminary Screening Committee may discuss particular candidates and identify individuals to call in to interview.

- 9) The Preliminary Screening Committee should, either at the end of the executive session if the Chair indicates that the Committee will reconvene, or at the next meeting, report in open session in open session that it has identified candidates for interviews, and has set a meeting date for the interviews (if such date has been selected at that time).
- 10) A meeting notice should be posted indicating that there will be an executive session to consider and interview applicants, such as the following: **To consider or interview applicants for employment or appointment by a preliminary screening committee if the chair declares that an open meeting will have a detrimental effect in obtaining qualified applicants in accord with M.G.L. ch. 30A, section 21(a)(8), and particularly, for conducting interviews.** Again, to the extent that the only action to be taken by the Public Body at a meeting is to meet in executive session, the words "Open Session" or "Convene the Meeting in Open Session" should appear as the first "item" on the meeting notice.
- 11) **The interviews of candidates not identified as finalists should be conducted in executive session to protect the privacy interests of such candidates.** Detailed minutes of the interviews should be taken, including questions asked, by who, and answers provided. Such minutes must be approved within the three next meetings, or three weeks, whichever occurs later. Any votes taken in executive session must be taken by roll call vote (recording that a vote was "unanimous" does not meet the requirement for a "roll call" vote).
- 12) Following the interviews, whether at the same meeting or at a meeting called for the particular purpose, the Preliminary Screening Committee may continue to discuss the applicants in executive session.
- 13) Ultimately the Preliminary Screening Committee must identify a list of finalists to present to the Public Body for its consideration. Typically, as a courtesy before the names of persons identified as finalists are released, the finalists are notified of this fact and given the opportunity to withdraw. If a person withdraws, and the Committee has identified a particular number of finalists that it will recommend, it may meet in executive session to identify another finalist or finalists. Once the Committee identifies the finalists, it can no longer meet in executive session to discuss the same. **Note: Two or more finalists must be presented to the Public Body for its consideration in order to ensure compliance with the Open Meeting Law.**

C. *Consideration by Quorum of Public Body After Review by Screening Committee*

- 1) The Public Body must post a meeting at which it will consider the finalists. The meeting notice should list the names of the finalists to be interviewed, as well as identify the position for which they are being considered. The interviews and any discussion of the finalists may only be held in open session. If resumes of the finalists are made available, they should be redacted to withhold private information such as home address, home telephone number and private e-mail address.
- 2) To ensure that the Public Body, and the public, understand the process used by the Preliminary Screening Committee, it is often useful to include an item on the meeting notice specifically for such purposes.

- 3) The Public Body may interview candidates, and or discuss the candidates, at one or more open meetings. There is no limit on the number of times a candidate may be interviewed in open session.
- 4) Particularly when the decision making is spread over more than one meeting, the meeting at which a decision to appoint or hire will be made should include the words "Votes may be taken", to ensure that the public understands that a vote may occur.

D. *If a Public Body Chooses to Not Form a Screening Committee*

If a screening committee is **not** used, a public body may **not** go into executive session in reliance on M.G.L. ch. 30A, section 21(a)(8) "to consider or interview applicants for employment or appointment".

Exemption (7), however, allows a body to meet in executive session to comply with "the provisions of any general or special law or federal grant-in-aid requirements." Massachusetts General Laws ch. 214, section 1B, provides a right against "an unreasonable, substantial or serious interference with" personal privacy. Thus, a Public Body may meet in executive session pursuant to exemption (7) to consider the resumes of all applicants and decide who it may want to interview. Such persons are known as "semi-finalists", and must be interviewed in open session. As indicated above, there is no limit to the number of times a person may be interviewed in open session.

To ensure that a Public Body properly invokes this exemption, each and every applicant should confirm that they would not be willing to participate in the process if their name was disclosed prior to being named as a semi-finalist.



CITY OF BEVERLY

Job Posting (Vacancy)

Department: City Council
Position: Budget/Management Analyst
Hours: Part-Time, variable hours
Salary Range: Up to \$75.00 per hour, paid on a per diem basis
Job Description: Provided

Interested applicants should submit resume, cover letter and three references to jobs@beverlyma.gov or mail to City of Beverly, Human Resources, 191 Cabot Street, Beverly, MA 01915.

At the City of Beverly, we embrace building a more diverse workforce. We strive to attract, develop and retain a workforce that is as diverse as the residents we serve and to foster an inclusive work environment that embraces the strength of cultures and individuals. We are committed to fair recruitment, retention, advancement and compensation, and we administer all of our practices and programs without discrimination on the basis of race, ancestry, place of origin, color, ethnic origin, citizenship, religion or religious beliefs, creed, sex (including pregnancy and pregnancy-related conditions), sexual orientation, genetic characteristics, veteran status, gender identity, gender expression, age, marital status, family status, disability, or any other ground protected by applicable law.

It is our priority to remove barriers to provide equal access to employment. A Human Resources representative will work with applicants who request a reasonable accommodation during the application process. All information shared during the accommodation request process will be stored and used in a manner that is consistent with applicable laws and City of Beverly policies. To request a reasonable accommodation in the application process, contact City of Beverly, Human Resources Department.

Posted August 25, 2026

City of Beverly
MASSACHUSETTS

JOB DESCRIPTION

Title: City Council Budget/Management Analyst

Reports To: Beverly City Council President and Beverly City Council

Appointment: Elected by the City Council for a three-year term and until a successor is elected and qualified in accordance with the Beverly Home Rule Charter

FLSA Status: Non-Exempt

Union: No

Position Summary

The Budget/Management Analyst performs a legislative oversight and a post-audit function and is not involved in the day-to-day administrative detail of the financial operations of the city. The budget/management analyst shall have free access to all books, accounts, bills and vouchers of the city and shall continuously review and examine the same. The budget/management analyst shall make periodic reports thereon to the city council, with such frequency as the city council by ordinance, by rule or by other vote may direct, but not less frequently than quarterly. All officials of the city shall cooperate with the budget/management analyst in the performance of this oversight function. The budget/management analyst may have other powers and duties as may be provided by the City Charter of the City of Beverly, or by ordinance or by other vote of the City Council. The position supports the City Council in carrying out its legislative responsibilities while remaining independent of the City's day-to-day financial administration.

The Analyst provides objective financial analysis and recommendations regarding the annual operating budget, capital improvement program, appropriations, financial forecasts, internal controls, and other fiscal matters.

Essential Duties and Responsibilities:

Include the following; other duties may be assigned.

Budget and Financial Analysis

- From time to time throughout the year examine, or cause to be examined, the books and accounts of all City agencies which are entrusted with the receipt, custody or expenditure of money, including original bills on which money has

been paid from the City treasury, the documentation submitted by the agency requesting payment of any such bills supporting such payment, the warrants for the payments of bills and the canceled checks on file in the office of the City Treasurer.

- At least once in every year verify, or cause to be verified, the cash balance of each such City agency by the actual count of the cash on hand and by reconciliation of bank balances.

Reporting and Advisory Services

- Keep the City Council President fully informed as to the results of this activity and, not less frequently than quarterly, shall make a detailed report summarizing the results of this overview to the City Council Standing Committee on Finance and Property.
- All reports to the full City Council shall be made through the City Council Standing Committee on Finance and Property.
- Review each request which is made to the City Council by the Mayor, as provided in Beverly Home Rule Charter Section 6-7, for the transfer of funds or for a supplementary appropriation, and shall make a report to the City Council Standing Committee on Finance and Property, including a recommendation as to the action to be taken by the City Council, before the City Council acts on the matter.
- When the proposed capital improvement program is submitted to the City Council by the Mayor, as required by Beverly Home Rule Charter Section 6-8, the Budget/Management Analyst shall review the proposed capital improvement program and shall, before the same is submitted to the City Council for any action, make a report, including specific recommendations for actions to be taken by the City Council concerning the capital improvement program as seem necessary, desirable or expedient.
- When the proposed annual operating budget is submitted to the City Council by the Mayor, as provided in Beverly Home Rule Charter Section 6-3, the Budget/Management Analyst shall review the proposed annual operating budget and shall, before the proposed operating budget is submitted to the City Council for any action, make a report, including recommendations of specific actions to be

taken by the City Council concerning the annual operating budget and any part or parts thereof as seem necessary, desirable or expedient.

Records Access and Other Duties

- Shall have the power and authority to call upon any agency of the City government to submit for inspection by them the agency's books and vouchers, and to furnish any information pertaining to the financial conduct of the departments.
- Shall be appointed as an ex-officio member of the Financial Forecasting Committee.
- May have other powers and duties as may be provided by the City Charter of the City of Beverly, or by ordinance or by other vote of the City Council.
- Work cooperatively with City departments, especially the finance department, while maintaining independence and objectivity.
- Maintain confidentiality of sensitive information.

Minimum Qualifications:

Education and Experience

- Bachelor's degree in Finance, Accounting, Public Administration, Business Administration, Economics, or a related field.
- Three to five years of progressively responsible experience in governmental finance, budgeting, accounting, auditing, or municipal administration.
- Municipal government experience preferred.
- Equivalent combinations of education and experience may be considered.

Knowledge, Skills, and Abilities:

Knowledge of

- Governmental accounting (GAAP/GASB), municipal budgeting, auditing, and internal controls.

- Public finance, capital planning, debt management, and Massachusetts municipal finance laws.
- Financial reporting, public administration, and municipal financial systems (MUNIS or similar).
- Microsoft Office, particularly Excel and Word.

Ability to

- Analyze complex financial data and develop sound recommendations.
- Interpret financial statements, budgets, and applicable laws.
- Prepare clear written reports and present information effectively.
- Manage multiple priorities, exercise independent judgment, and maintain confidentiality.
- Build effective working relationships with elected officials, employees, auditors, and the public.
- Strong Oral and Communications Skills

Work Environment and Schedule

- This is a part-time position with variable hours based on operational needs.
- Approximately 75% of the work may be performed remotely, with the remaining time spent at City Hall or other City locations as required.
- Attendance at evening City Council meetings and other meetings is expected.
- Work is performed primarily in an office environment and requires prolonged periods of sitting, frequent computer use, and occasional lifting of up to 10 pounds.

SUSAN M. CARMEL

MUNICIPAL FINANCE LEADER

EXECUTIVE PROFILE

Senior municipal finance executive with extensive Massachusetts local-government experience spanning the Town of Nantucket, Town of Great Barrington, City of Pittsfield, and Town of Lenox. Progressive leadership background encompassing Deputy Finance Director, Finance Director/Town Accountant, Director of Finance & Administration/City Treasurer, City Accountant, and Town Accountant roles. Deep expertise in municipal budgeting, governmental accounting, fiscal oversight, capital planning, treasury and cash management, assessing and tax collection, financial controls, statutory compliance, forecasting, and cross-department financial leadership. Trusted advisor to municipal leadership and department heads with experience overseeing major finance functions and complex operating and capital budgets.

LEADERSHIP SNAPSHOT

Municipal Finance	Budget Scale	Leadership Scope	Credential
20+ years	\$140M+ city budget \$140M+ town budget	Accounting • Budgeting • Assessing Treasury • Capital • Purchasing • Payroll	Massachusetts Certified Governmental Accountant

CORE MUNICIPAL FINANCE COMPETENCIES

Municipal Financial Management • Operating & Capital Budgets • Governmental Accounting • Fiscal Compliance • Treasury & Cash Management • Financial Forecasting • Internal Controls • Assessing & Tax Collection • Capital Borrowing • Invoice Warrants & General Ledger • Departmental Oversight • Staff Leadership

PROFESSIONAL EXPERIENCE

Deputy Director of Municipal Finance | Town of Nantucket

May 2025 – Present

- Provide senior finance leadership and oversight for the Finance Department's Accounting, Budgeting, Assessing, and Capital functions.
- Support the Town's overall fiscal management, budget development, financial planning, controls, and coordination of core municipal finance operations.
- Advise municipal leadership and departments on financial matters and help align finance operations with the Town's fiscal priorities and requirements.
- Coordinate multiple interrelated finance functions to promote accurate financial information, sound internal practices, and effective municipal decision-making.

Assistant Finance Director | Town of Nantucket

September 2022 – May 2025

- Provided senior-level support for municipal accounting, budgeting, assessing, and capital functions within the Finance Department.
- Supported financial analysis, budget processes, fiscal oversight, reporting, and finance operations across Town departments.
- Worked collaboratively with municipal staff to strengthen financial procedures, controls, reporting, and cross-department coordination.

Finance Director / Town Accountant | Town of Great Barrington

January 2018 – September 2022

- Directed fiscal oversight of the Town's \$33.7 million budget and ensured compliance with applicable state and federal statutes, regulations, and mandates.
- Managed all Town accounts and led operating and capital budget preparation, invoice warrant processing, general ledger maintenance, and internal control procedures.
- Advised department heads and staff on municipal financial procedures and requirements.
- Oversaw and supervised the Assessing and Treasurer/Collector Offices, providing broad finance leadership across key municipal revenue and treasury functions.

Director of Finance & Administration / City Treasurer | City of Pittsfield

April 2008 – January 2016

- Led development and administration of an annual operating budget exceeding \$140 million and provided comprehensive financial leadership for city government.
- Oversaw Assessors, Accounting, Tax Collector, Purchasing, Payroll, and Information Technology functions.
- Developed financial forecasts, strategies, and plans to support city goals and long-term fiscal decision-making.
- Managed financial responsibilities involving Workers' Compensation, Unemployment Claims, and Police/Fire Injured on Duty.
- Participated in collective bargaining negotiations involving more than seven bargaining units, with responsibility for compensation structure and related personnel processes.
- As City Treasurer, managed employee benefits, cash investments, all city funds, and capital, short-term, and long-term borrowing.

City Accountant | City of Pittsfield

April 2005 – April 2008

- Managed the Accounting Department and ensured compliance with statutory requirements under Massachusetts General Law.
- Directed fiscal management of city accounts, invoice warrants, general ledger balancing and maintenance, and internal control procedures.
- Advised department heads and staff on municipal financial procedures.

Program Engineer / Analyst | General Dynamics Mission Systems

October 2016 – January 2018

- Served as Control Account Manager for the Shipboard Electronic Repair Facility program, tracking financial performance and expenditures weekly.
- Monitored financial results, worked with program and technical leadership to mitigate issues, and coordinated monthly and quarterly review packages.
- Supported workload forecasting and financial planning with technical leads and management.

Town Accountant | Town of Lenox

September 1988 – November 1992

- Managed fiscal control of a \$10 million municipal budget, including day-to-day financial records, payroll, accounts payable, and the annual budget process.
- Administered the Town's in-house computer system supporting financial operations.

Senior Staff Accountant / Auditor | Smith Watson & Company, LLP

January 2005 – April 2005

- Performed outside audits for businesses of varying sizes and prepared individual income tax returns.

Business Manager | Pete's Ford Inc.

October 2002 – October 2003

- Managed customer financing, negotiated rates and terms with financial institutions, processed credit applications, and ensured financing documentation was complete.

Corporate Finance & Operations Roles | KB Toys Corporate Headquarters

November 1992 – October 2002

- Progressive roles in Accounts Payable, Lease Administration, Vendor Relations, and Purchasing/Merchandising, including staff supervision and process improvement.
- Audited lease charges for more than 1,100 locations and helped save the company more than \$1 million.
- Developed vendor-compliance reporting that strengthened fiscal control and contributed approximately \$1 million in net income.

EDUCATION & PROFESSIONAL CREDENTIALS

Master of Business Administration — Western New England College, Springfield, Massachusetts

Bachelor of Arts, Business/Finance — Saint Anselm College, Manchester, New Hampshire

Massachusetts Certified Governmental Accountant — 2008

PROFESSIONAL ASSOCIATIONS & DEVELOPMENT

Massachusetts Collectors and Treasurers Association • Berkshire County Collectors and Treasurers Association • Massachusetts Municipal Auditors' & Accountants' Association • Western Massachusetts Auditors & Accountants Association • Massachusetts Association of Contributory Retirement Systems. Professional development includes municipal law, Open Meeting Law, Conflict of Interest Law, retirement systems, municipal auditing/earnings, investment fees, and legislative process.

Susan M. Carmel | Municipal Finance Leadership

SELECTED BOARD & COMMUNITY LEADERSHIP

Former Ex-Officio Member, Pittsfield Contributory Retirement Board • Former Ex-Officio Member, City of Pittsfield Personnel Review Board • Former Ex-Officio Member, Berkshire Athenaeum Trustees • Former Treasurer, Berkshire Innovation Center Board of Directors • Town of Great Barrington Police Chief Search Committee.

Katharine Foster, MPA

PROFILE

High-performing and dedicated public servant with over seven years of extensive experience in local government. An innovator, seeking to improve government processes and services in an intentional, community-driven way. A strong, effective communicator with experience leading organizational and community-wide initiatives.

SKILLS AND AREAS OF EXPERTISE

Verbal and written communication, project and program management, budgeting, labor negotiations, human resources management, conflict resolution, problem-solving, collaboration, community engagement, team building, Microsoft Suite, Vadar and Munis Software experience.

EDUCATION

University of New Hampshire – Manchester, NH	Aug. 2017 – May 2019
<i>Master of Public Administration</i>	
Houghton University – Houghton, NY	Sept. 2011– May 2015
<i>Bachelor of Arts in Political Science; International Development</i>	

WORK EXPERIENCE

Assistant Town Manager/Finance Director	March 2025 – July 2026
Town of Dracut, MA	

- Identified cost-saving and revenue generating opportunities for the Town due to increased budgetary pressures and anticipated deficits
- Engaged with various consultants and state officials to identify opportunities to improve financial management and processes, and worked with staff to implement recommendations
- Spearheaded, alongside the Town Manager, the operating and capital budget process, as well as leading a new Zero-Based Budgeting process for the Fiscal 2027 budget
- Oversaw preparation of annual financial reports and grant reporting, including the Annual Audit, GASB Statements 74 & 75 (OPEB), ARPA State and Local Recovery funds, and the statewide opioid settlement funds
- Prepared and submits the annual Tax Recap sheet, and oversees the submission of Schedule A and Balance Sheet
- Supported the Finance Committee and Community Preservation Committee by ensuring compliance with Town Bylaws and providing the necessary data and information required to successfully complete their charge
- Collaborated with elected officials and town staff to communicate, educate and implement new or increased fees, such as a new Trash Fee beginning in Fiscal Year 2026
- Reviewed payroll and vendor warrants, and department budgets to compare actual expending to approved budgets

Assistant Town Manager	April 2023 – March 2025
Town of Tyngsborough, MA	

- Assisted the Town Manager in the administration of all town functions and special projects
- Oversaw the capital budget process and management of the five-year capital plan
- Assisted in procurement management and developing purchasing requests as required under Mass General Law
- Managed Town grants and programs, including Green Communities and the Statewide Opioid Settlement

- Worked with the Town Manager and Human Resources Director in confidential preparations for negotiations with multiple collective bargaining units

Budget Officer

June 2022 – April 2023

Town of Lexington, MA

- Managed and oversaw the development of the municipal annual operating and capital budgets, adhering to a strict schedule
- Collaborated with the Town Manager, Deputy Town Manager and Senior Managers to review department budgets and capital projects and prepare Town Meeting articles
- Performed budget management and monitoring tasks, such as quarterly revenue and expenses reports
- Completed regular and ad hoc financial analysis and financial projections, including benefits and payroll projections
- Supported the work of town finance committees and departments, providing financial data to generate town reports and other statutory requirements

Management Analyst

Dec. 2021 –June 2022

Town of Lexington, MA

- Assisted with the development of personnel policies, including a Remote Work Policy, Mobile Communication Policy, and Return to Work Policy following the initial COVID-19 surge in 2020
- Managed complex Town-wide and department-specific programs and projects, including a Community Needs Assessment, a review of all Town boards and committees, and a new business plan for the Liberty Ride Tour of Historic Lexington
- Created and recommended improvement in workflows and procedures, specifically using existing systems and technology for efficiency
- Supported various working groups and committees in carrying out their charge and to ensure compliance with the Open Meeting Law
- Conducted a variety of analytical and operational studies, including fee surveys and new funding models at the Town and department level
- Oversaw the Town's \$9 million allotment of American Rescue Plan Act funds, working with the Town Manager, Select Board, and the public to determine how the funds will be spent

ICMA Local Government Management Fellow

June 2019 – Dec. 2021

Town of Lexington, MA

- Coordinated professional development opportunities for Town employees, including lunch & learn sessions, training programs, and Employees' Academy
- Assisted the Deputy Town Manager and staff prepare and develop articles, presentations, and related content for Town Meeting, which involved extensive coordination with Town Counsel, elected officials, and citizens.
- Administers compensation studies as part of labor negotiations and collective bargaining with the Town.
- Prepared and presented operating budgets and program improvement requests for the Town Manager's Office, Human Resource department, and Town boards and committees.

Community Development and Planning Intern

June 2017- Sept. 2019

Town of Salem, NH

- Coauthored NH DOT Congestion Mitigation & Air Quality Grant and was awarded \$680,000 to mitigate congestion and expand the Town's bike trail
- Researched and contributed to the Population & Housing, Natural Resources, Transportation, and Economic Development Chapters of the Town's 2017 Master Plan Addendum, including interviewing stakeholders • Utilized ArcGis software to design land use, quality of life maps, and Story Maps for the Town

PROFESSIONAL CERTIFICATES

- Associate MCPPO status
- Massachusetts Municipal Association Finance Seminar, Suffolk University
- Human Resource Management Certificate Program, Michigan State University
- ICMA High Performance Leadership Academy Certificate Program

Gary Frisch

Chief Finance Officer Public Schools

Willing to relocate: Anywhere

Work experience

Chief Financial Officer

GLOUCESTER PUBLIC SCHOOLS | Gloucester, MA

July 2018 to February 2026

Financial Leadership

Financial Planning

Budget Development and Administration

Facilities Planning

Grant planning and administration

Assistant Superintendent for Finance/School Business Administrator

Lowell Public Schools | Lowell, MA

February 2016 to July 2018

Enrollment 15,600

Finance Director

Village of Broadview | Broadview, IL

July 2015 to January 2016

Assistant Superintendent of Business and Operations

Community Consolidated School District | Burr Ridge, IL

July 2012 to June 2015

Refunding Bonds to lower the debt service by \$7.4 million present value dollars

Reduced telecommunication costs by \$150,000

Implemented new board policy on fund balance limits

Led the health insurance committee to redesign plan benefits to lower premiums by \$240,000

Enrollment 5,000

Adjunct Professor

Concordia University | River Forest, IL

January 2006 to May 2014

Teaching School Finance and School Ethics in the graduate school for the School Leadership Program

Chief Financial Officer

Barrington Community School District | Barrington, IL

July 2006 to June 2012

Provides leadership for all the business and financial operations of a large unit school district with a \$120 million budget

Raised credit rating from AA to AAA (Standard and Poor's)

Managed major construction projects - new athletic stadium, middle school renovation and new early learning center

Received the Meritorious Budget Award (Association of School Business Officials)

Enrollment 11,000

Assistant Superintendent of Finance and Operations

Glenbard Township High Schools | Glen Ellyn, IL

January 1997 to June 2006

Provides leadership for all business and financial operations of a large suburban school district with a \$100 million budget; key participant in the negotiations of three union contracts covering one thousand employees. Implemented financing for a \$50 million construction project. Initiated and planned the improvements in the district's telecommunications and data processing systems.
Enrollment 9,000

Director of Business Operations

Thornton Township High Schools | Harvey, IL

July 1993 to December 1996

Managed the business operations for a large suburban school district in an efficient manner
Received the Certificate of Excellence award from the Association of School Business Officials in financial reporting
Restructured debt obligations to reduce financing costs by \$1.5 million
Enrollment 7,000

Comptroller

Thornton Township High Schools | Harvey, IL

July 1988 to June 1993

Managed the accounting and budgeting functions of a \$50 million dollar school budget. Supervised a staff of five employees within the accounting and payroll office

Accounting Supervisor

Thornton Township High Schools | Harvey, IL

August 1987 to June 1988

Education

Education (Master of Science)

Northern Illinois University | DeKalb, IL

June 1993

Business Administration (Bachelor of Science)

Illinois State University | Normal, IL

August 1980

Skills

Microsoft Excel	Microsoft Office	School experience	Organizational skills	Leadership
Microsoft PowerPoint	Communication skills	Operations planning	Operational management	
Fiscal management	Management	Analysis skills	Supervising experience	Board relations
GAAP	Accounting	Regulatory compliance	Budgeting	

Frederique Pierre-Lyne Phanor

Details

Areas of Expertise

Microsoft Office

Outlook

Word

Excel

Teams

Access

PowerPoint

Munis

Quickbooks

peoplesoft (Atlas)

Webpass

Cognos

Deltek

MOSAIC

Languages

English

French

Haitian Creole

Professional Summary

Strategic Finance & Administrative Executive with more than 25 years of experience leading financial operations, budgeting, grants management, and organizational administration across state government, higher education, nonprofit, and international organizations. Proven success directing multimillion-dollar budgets, strengthening internal controls, improving financial processes, leading high-performing teams, and partnering with executive leadership to support organizational growth and compliance. Recognized for transforming complex financial operations into efficient, accountable, and results-driven functions.

EXPERIENCE

Fiscal Director at EOHL

2024 - JUNE 2024

- Directed financial management for a portfolio exceeding \$300M in federal and state grants, including LIHEAP, Weatherization, CSBG, HUD, and DOE programs.
- Rebuilt fiscal operations following staffing shortages by implementing standardized reconciliation processes, spending plans, and financial monitoring tools that improved accountability and reporting accuracy.
- Led cross-functional collaboration with executive leadership, program managers, and finance teams to resolve complex funding, compliance, and budget issues while supporting timely grant execution.
- Strengthened internal controls and financial oversight by redesigning grant monitoring practices and improving fiscal procedures across multiple programs.
- Managed budget development, payroll allocations, grant amendments, and cash flow planning while ensuring compliance with federal and state regulations.
- Coached and supervised fiscal staff, improving workflow prioritization and technical knowledge during a period of significant organizational transition.

Fiscal Manager at EOHL

2023 - 2024

- Managed the fiscal administration of multimillion-dollar federal, state, and capital-funded programs, including LIHEAP, Home Weatherization Assistance Program (HWAP), and Community Services Block Grant (CSBG), ensuring compliance with grant requirements and state financial policies.
- Developed and managed annual spending plans, program budgets, and budget amendments, supporting effective allocation of resources and timely expenditure of grant funds.
- Served as the primary fiscal liaison between program staff and the Office of Administration and Finance (OAF), resolving financial issues, improving communication, and ensuring accurate financial documentation.
- Strengthened financial oversight by reviewing grantee expenditures, evaluating fiscal compliance, and identifying potential risks to promote timely and appropriate use of grant funding.
- Provided technical guidance to program managers and staff on grant management, procurement, travel reimbursements, and financial policies, improving consistency and compliance across the division.
- Managed grant disbursements, encumbrances, and payment processing through MMARS and the Community Software Group (CSG) Grant Management System, ensuring accurate and timely financial transactions.
- Supported continuous improvement of fiscal operations by resolving complex accounting issues, interpreting state and federal policies, and enhancing financial management practices.

Budget Analyst at MBTA

2021 – 2023

- Supported development and monitoring of the MBTA Capital Investment Plan by providing financial analysis, cash-flow forecasting, and budget recommendations for multimillion-dollar infrastructure projects.
- Produced executive-level financial reports and variance analyses that improved visibility into project spending and informed budget decisions.
- Partnered with project managers and finance leadership to identify cost risks and improve financial controls across capital projects.
- Assist with all data collection, input and updating for financial, statistical and performance data.
- Participate in meetings with both internal and external financial staff regarding all aspects of project budgets, funding and other financial related issues.
- Effectively communicate progress, issues and resolutions.

Senior Accountant / Budget Analyst at SALEM CITY HALL

2019 – 2021

- Assist Finance Director and Assistant Finance Director with month end close and overall town administration.
- Work with staff across different departments of the city to advise, train and monitor compliance with budget and assure that best practices are being followed.
- Create new funds as needed and serve as buyer to the city
- Create requisitions, process payments for vendors.
- Enter journal entries to record different city activities (transfer, reclassification, budget amendment)
- Work on yearly City budget book (update budget and narrative for all departments, print and binder assembly)
- Monthly reconciliation with Collector and Assessor's offices and work closely with all other departments to monitor spending.
- Process and post abatements from Assessor's office, water and sewer departments.
- Serve as back up to AP clerk and prepare weekly report for Finance department and post City's payroll.
- Oversee and process all COVID and CARES ACT payments and submit all request for reimbursement to FEMA.

Budget Analyst at NORTHEASTERN UNIVERSITY

2018 – 2019

- Manage the EM divisional expense budgets. • Manage multiple budget indexes, review monthly expenditures and projections with the Senior Director, Vice President of EM and department heads.
- Deliver monthly forecast of expense budgets, identifies and resolves budget related issues, maintain expense controls, ensure appropriateness and accuracy of expenditures and ensure the completion of budget reconciliation and procurement accounting for monthly procurement card statements and conform with University policy and procedures.
- Participate in monthly divisional forecast exercises, monthly salary updates, and quarterly financial reviews with Senior Director and unit managers to review expenses projections for the fiscal year.
- Work with staff across the EM division to advise, train and monitor compliance with budget and Concur procedures within University and divisional policy to assure that best practices are being followed.

Fiscal and Administrative Manager at EDUCATION DEVELOPMENT CENTER

2010 – 2018

- Support the Administrative Director in preparing and doing budget follow up.

- Analyzes activities, services and systems; recommends revisions for efficiency and control Staffing and scheduling
- Budget or proposal preparation and control; financial analysis, tracking, and reporting
- Monitors information, notifying staff or management of findings or trends requiring action
- Coordinates with vendors, subcontractors, or staff to deal with administrative needs or identify information needs
- Monitors project spending, including quarterly analysis, to identify over- or under-spending, bringing any issues to the attention of appropriate director for action
- Creates systems to analyze and manage budgets; reviews and approves budgets; monitors progress
- Analyzes and monitors spending
- Provide technical and operational support for webinars
- Monitor MasterCard, prepare monthly reconciliation and ensure effectiveness of the charges
- Review, code and process subcontractor's invoices on a monthly basis

Administrative and Financial Assistant at UNITED NATIONS - UNFPA

2009 – 2010

- Assisted the Program Managers in the overall management of the Maternal Health Section including budget, finance, procurement and travel;
- Controlled the implementation program budget including periodic review of budget performance, corrective actions and preparation of financial reports;
- Provided Administrative Support in organizing various Events (conferences, Workshops and Seminars) and followed up on incoming and outgoing emails and correspondence

Voucher Examiner/Accounts Payable Specialist at AMERICAN EMBASSY

2003 – 2008

- Examined administrative and contractual payments for companies: assuring documentation meets all standards for certification;
- Prepared vouchers for blanket purchase agreements;
- Frequent and continuous contact with billing agents;
- Managed Citibank Credit Card reconciliation;
- Served as Back up to the Financial Assistant and Payroll liaison staff, preparing Time and Attendance report, Travel vouchers, travel reimbursement, grant, check in and checkout of American officers;
- Administrative task: corresponded with local and international partners, filing of vouchers, reconciling vendors account);

EDUCATION

MBA, UMASS Dartmouth

SEPTEMBER 2023 – PRESENT

BS of Business Administration, Framingham State University, Framingham

SEPTEMBER 2016 – JUNE 2018

GPA: 3.5

Business Administration Associate, MassBay Community College, Wellesley

DECEMBER 2013 – MAY 2016

Graduated with Honors

Associate Degree in Accounting Sciences, INAGHEI Haiti, PAP

OCTOBER 2003 – DECEMBER 2009

Not graduated

Secretarial Science Associate Degree, Christ the King Secretarial School Haiti, PAP

OCTOBER 1998 – JUNE 2001