

TOWN OF NEW FAIRFIELD
BOARD OF FINANCE
SPECIAL MEETING
WEDNESDAY, JULY 17, 2024
7:30 p.m.
VIRTUAL MEETING VIA ZOOM
<https://zoom.us/j/91204058275>

1. Call to Order
2. Pledge of Allegiance
3. Appointments
4. Announcements/Correspondence
5. Public Comment
6. Discuss/Vote to fill Vacancy of the New Fairfield Board of Finance for the Term Expiring on 11/04/2025.
7. Public Comment
8. Board Member Comments
9. Adjournment

Received by email on 07/12/2024 @ 11:13 a.m.
by Chrystie M. Bontempo, Asst. Town Clerk, New Fairfield

To Whom it may Concern,

My name is Patrick Hearty and I am interested in applying for the vacant role for a fulltime member of the Board of Finance for the Town of New Fairfield CT.

I have earned a BA degree at Western Connecticut University and in my field, I have been a Logistics Manager for the past 20 years.

I have served on 3 New Fairfield Boards. I served 6 years on the Zoning board, 4 years on the Zoning Board of Appeals, 4 years on the Planning Board and 2 years as an alternate for the Zoning Board. Recently I have been an alternate for the BOF for the past two months.

I have been very active in the community for many years and look forward to continuing to be a public servant.

Sincerely,

Patrick Hearty

A black rectangular redaction mark covering the signature area.

PATRICK E. HEARTY

Operations Manager and Logistics Specialist with 23+ years experience in the supply-chain and logistics industries. Project management and customer relationship-building. Identify inefficiencies and process improvements. Strong communication skills; ability to work well with all levels in an organization.

Areas of expertise:

- Metrics KPI development
- Field Personnel Liaison
- Seasoned Client Contact
- Carrier On-Boarding
- Quality Control Assurance
- SAP, Oracle
- Advanced Excel
- SharePoint, PowerPoint
- Tableau, Navision

PROFESSIONAL EXPERIENCE

Logistics and Warehouse Manager

Two Roads Brewery, Stratford, CT (October 2021 – May 2024)

- Oversee all facets of Inbound, Outbound, Warehouse and Dock Operations with a concentration on inventory accuracy, improved reporting and best FIFO practices.
- Develop data and metrics to deeply understand the business, identify areas in need of improvement, lead and influence others and define business health measurement through leading and lagging indicators.
- Build systems, structures and tools to capture and report out on data, while working with internal partners to implement technology, process and program improvements.
- Influence the development of team goals, objectives and prioritization of goals.
- Manage inventory losses by identifying any inconsistencies, determining their causes and implementing appropriate changes to ensure loss is kept to a minimum.

Logistics Specialist

Daymon Associates, Stamford, CT (April 2019 – October 2021)

- Analyze inventory positions across the supply chain, in order to make smart purchasing decisions and to fulfill packaging orders from frozen food packers.
- Handle customer service inquiries. Lead and manage weekly packaging audit reviews with Pre-Press team; provide feedback to print partners as appropriate.
- Create and manage files for packaging samples. Assist Pre-Press team with projects as needed.

Manager of Carrier Performance (May 2014 – February 2019)

PECO Pallet, Inc., Irvington, NY

Report quality and service results to upper management (C level) of the Company's nationwide, supply-chain shipment population data, and to troubleshoot and resolve carrier performance issues.

- Analyze and report daily, weekly and monthly results of carrier performance, shipment tracking, volume and quality percentages.
- Develop KPIs (Key Performance Indicators) to evaluate production volume and on-time percentage for carrier network.
- Create weekly Carrier Ranking Report to target corrective action low performing traffic lanes.
- Actively involved in carrier sourcing inquires and the execution of procurement savings.

National Customer Service Manager (November 2007 – May 2014)

PECO Pallet, Inc., Irvington, NY

- On-boarding of new renters and reporting all service progress to Sales
- Act as primary support contact for field personnel with use of the in-house inventory system, Red-Link and the enterprise resource system, MS Navision
- Elected Safety Captain of Headquarters, which is responsible for organizing practice fire drills, assessing and addressing hazardous situations, and maintaining safety measures for employees.

(Continued)

- Hosted monthly Senior Management meetings regarding Service Failures in order to assess root causes and provide practical, effective steps for resolution and implementation

Depot Operations Manager of Regional East Coast (October 2004 – November 2007)

PECO Pallet, Inc., Irvington, NY

Lead the implementation and standardization of the northeast PECO depot network. Managed new and current locations with focus on operational and quality control requirements.

- Ensured inspection and repair processes met specification compliance and appraised depot performance and completed proven best practices.
- Completed budget analysis and assessed depot operating costs and outlined detailed processes
- Provided on-going training of the inventory management system, Red-Link to depot personnel
- Acted as field liaison between Corporate Operations, Sales Managers, Traffic Specialists and Clients
- Performed timely audits of 17 northeast depot locations; investigated and resolved out-of-balance inventories

Logistics Coordinator PECO Pallet, Inc., Irvington, NY (May 2004 – October 2004)

- Researched and assigned carriers for distribution to major clients
- Managed all major accounts for timeliness and product service
- Provided customer service and consumer confidence of product

Terminal Manager, Newburgh, NY

Central Transport International, Inc. (September 2002 – October 2003)

Responsible for all facets of terminal functions, including inbound and outbound operations, recruiting and hiring of drivers, sales and office personnel, maintenance of fleets and facilities, loss prevention, safety and customer service.

- Selected to start-up operations at a new terminal for the southeast New York area; handled site selection and negotiations; successfully expanded productivity and growth of business in new location within a short timeframe
- Handled multiple projects in a time-sensitive, labor intensive environment; gained valuable experience at team building, motivating and directing multi-disciplinary staff

Inbound Freight Supervisor, Central Transport International, Inc. Cheshire, CT (May 2000 – September 2002)

Supervised and motivated a five-man crew in a fast paced, Less-Than-Truckload (LTL) environment

- Responsibilities included freight accountability, dispatching, route scheduling, customer service and quality control, coordinated work schedule to meet forecasted time arrivals for freight deliveries
- Recruited as project leader to improve terminal procedures and efficiency at the Chicago, IL terminal; served as Over Short & Damaged (OS&D) Supervisor in April 2001
- Routed on average 200 bills per day in a 32-door terminal, capacity loaded on average 7 inbound trailers

Operations Supervisor, North Reading, MA (September 1997 – May 2000)

- Managed outbound operations of a LTL terminal; encouraged teamwork and accountability among dock personnel
- Effectively trained entry-level employees and performed safety and compliance audits at several company locations
- Designated as on-call Manager at Londonderry, New Hampshire terminal
- Routed on average 100 bills per day in a 38-door terminal

Shipping Clerk and Materials Handler

Duracell U.S.A., Bethel, CT (January 1994 – September 1997)

Internship. Performed timely and accurate invoicing and billing as well as various warehouse duties such as inventory control and OS&D; ensured packing and shipping of an average of 50 orders per day

EDUCATION AND PROFESSIONAL DEVELOPMENT

Western Connecticut State University, Danbury CT

Bachelor of Arts in Communications, Minor in International Studies, May 1994

(Continued)

COMMUNITY INVOLVEMENT AND AFFILIATIONS

Current member of Board of Finance, New Fairfield, CT

Member of the Ancient Order of Hibernians, Danbury, CT Chapter

Founding member of the musical group, Mighty Ploughboys, LLC

Sent: Wednesday, June 26, 2024 10:27 AM

To: Board of Finance <bof@newfairfieldct.gov>

Subject: My interest in the Board of Finance regular member vacancy

Dear Chairwoman Perkins and Board of Finance members,

I am writing to express interest in being appointed to the vacant regular member seat on the New Fairfield Board of Finance.

I have attended and spoken at Board of Finance meetings regularly since 2017. In November 2023 I was a candidate in the election to fill a regular member vacancy, a position for which I did much preparation, including: attending your medical insurance subcommittee meetings; obtaining and reading your policies; reading the town's latest audit and S&P ratings report; and meeting with the finance director and tax collector. Through this experience I have become very familiar with your responsibilities, how you operate, and the challenges you face. I have given much thought to the types of questions I'd ask and the data I'd like to see in order to help you vet budgets and monitor the town's revenue and expenses.

I am a 25-year resident of New Fairfield. I have a B.S. in computer science and mathematics and an M.S. and Ph.D. in computer science. I was employed as a software engineer and computer science researcher. I was a member of the New Fairfield Board of Education from November 2017 to November 2021.

My analysis and attention to detail skills from my education and profession, my previous service on the Board of Education, and my demonstrated interest in and knowledge of the Board of Finance would serve me well as a regular member.

Thank you for your consideration.

Rick Regan

Jessica Sanchez

[REDACTED]

[REDACTED]

My name is Jessica Sanchez. I'm submitting my application to the New Fairfield Board of Finance. I grew up in New Fairfield, attended New Fairfield schools from kindergarten through my graduation from New Fairfield High School in 2000. I attended and graduated from Boston College in 2004, earning a BA in English. While working full-time, I earned a Master of Business Administration from Boston University School of Management (2008). I moved back to New Fairfield in 2016 and would like the opportunity to serve the town that has meant so much to me.

I've worked in BioTech and Pharmaceutical companies for the majority of my career. My 20+ year career has been concentrated in Procurement, Strategic Sourcing, Financial Operations and Business Operations positions in various global organizations. I have extensive experience in negotiating contracts and achieving savings targets in addition to managing multi-million dollar department budgets and multi-year project (capital and non-capital) budgets.

I have observed, over the years, the town struggle to efficiently meet the needs of a growing community while maintaining a reasonable tax rate. It is a difficult balance and I believe my professional experience in procurement and establishing multi-year budgets can provide valuable skills to the Board of Finance and our town.

I have a vested interest in our town having just built my forever home in New Fairfield. I'm a firm believer in fiscal responsibility and making investment in maintaining infrastructure to reduce and plan for future costs. I want to ensure New Fairfield continues to thrive as a welcoming community, with excellent schools, services and facilities that provide for all our citizens. Rather than just using my vote, it is time to offer my services to assist in the process which governs our progress in meeting these goals.

Jessica Sanchez

Background Summary

- Experience driving strategic vision to deliver complex projects across Sourcing/Procurement, Financial Operations, Supply Chain, Regulatory and Quality in multi-billion dollar revenue, multinational pharmaceutical, medical device, biotech and late stage start-up industries.
- Proficiencies include financial operations (Procure, A/P, Sourcing, T&E), policy/SOP creation, ERP implementations, cross functional leadership, project management, business process/continuous improvement and mitigation of supply risks.
- Extensive experience addressing compliance risks relating to finance (SOX, SEC, MDET) and regulatory (conflict minerals, REACH) requirements.
- Highly organized self-starter with a passion for fostering collaboration and cultivating relationships at all levels of an organization.

Business Achievements

- Assumed financial leadership of departmental budget resulting in spend utilization of budget from 20% underspent to 99% utilization, in first year, while delivering 6 pipeline “stretch goal” initiatives
- Proposed and executed an organizational transformation to centralize and streamline global sourcing and materials personnel: ROI of \$24M over 3 years and headcount reduction of 15 (12%)
- Minimized revenue loss of major supply disruption from \$2.4M to \$750k over three-month time frame*
- Created business case for Indirect Category Mgmt FTE by negotiating \$2M of savings (10%) in 6 months

Awards and Affiliations

- Guest Writer, BravoSolution - StrategicSourcing.com “5 Steps to Improve Communications with Suppliers and Stakeholders”
- Practitioner Pro to Know – Supply & Demand Chain Executive (March 2013 Edition)
- Top Female Supply Chain Executive – Supply & Demand Chain Executive (March 2013)

Career Experience

Feb 2021-Current	Alexion Pharmaceuticals (AstraZeneca)	New Haven, CT
<i>Feb 2021 to Current</i>	<i>Associate Director of Quality Business Planning and Operational Excellence</i>	
	<ul style="list-style-type: none">■ Fiscal leadership of departmental budget ~\$10M annually, \$11M 3 year integration budget.<ul style="list-style-type: none">■ Consolidated management of GxP platforms to remove \$540k (45% reduction) of cost per year.■ Built financial modeling tool to provide real-time visibility to spending at line-item level of budget, resulted in 100% utilization of budget, historically 20-25% underspent.■ Create operational tools and governance methodology for the Central Quality Department to increase visibility of operational objectives (goals) and risks associated with those objectives.<ul style="list-style-type: none">■ QC Micro Batch Tool reduced <i>Overdue Batches</i> by 20% Week/Week the 1st 4 weeks post tool delivery■ Spearheaded lean initiatives Quality Operations departments, sample results:<ul style="list-style-type: none">■ (NTM) Reduction of 11.7 weeks of transactional time per annum, removed 32% process wait time■ (Inspection) 4.9 weeks of repetitive work removed annually	

Jessica Sanchez

Oct 2018 - Feb 2020

WeWork

New York, NY

Oct 2018 - Mar 2020

Director Finance Strategic Projects

- Assessed operational finance processes. Craft strategic proposals to address project delivery shortfalls, increase capabilities and operational excellence.
 - Accounts Payable Training Documentation Project: Reduced procedures handbook by 50 pages resulting in an average of 15% reduction of same processor errors in one quarter of sampling data.
- Managed implementation of a multi-module global Source to Pay and ERP system to standardize purchasing and sourcing of materials, drive increase in negotiated savings, increase customer system adoption, and increase invoice accrual accuracy.
- Built business requirements for purchase/change order, global invoicing for construction management system ensuring alignment of approvals and regulatory requirements through process life cycle.
- Authored Financial Delegation of Authority policy. Driving operational consistency, increased budgetary management review and controls while maintaining flexibility in a hyper growth global environment.

Apr 2011 – Sept 2018

CR Bard

Murray Hill, NJ

Mar 2017 – Sept 2018

Associate Director Business Transformation and Risk

- Performed strategic evaluation of international materials management teams for strategically critical manufacturing plants. Created operating model to reassess headcount; trained purchasing team on processes, systems and standard work for master data and inventory management, supply assurance, cost savings, and purchasing. Increased output of purchasing team by 15% with 2 fewer FTEs.
- Built Strategic Procurement, Vendor Management and Business Continuity risk program and framework.
- Managed department of 15 FTEs to identify and mitigate risk, drive continuous improvement, perform root cause analysis. Achieved cost reductions*, supply assurance, and quality improvement.
- Manage functional aspects of Bard's procurement systems, including process improvement, new technology implementations (ERP, eSourcing platforms, web-based approval systems, etc.), system upgrades, and ongoing production support to deliver cost savings and improve process efficiencies.

Aug 2015 – Feb 2017

Senior Manager Global Risk and Strategy

- Launched supplier risk assessment program, completing proactive risk potential for 108 of 3800+ direct material suppliers in first year (\$328M or 65% of direct material spend).
- Lead cross functional team (27 FTEs) from quality, regulatory, and operations located in 15 global sites to address compliance risk response to FDA Warning letter issued in 2015.
- Managed Conflict Minerals program annually assessing the supply chain of over 640 suppliers globally covering \$190M spend annually. Aligned program with internal and external audit and legal requirements and recommendations.
- Co-authored internal Strategic Category Management Methodology playbook including guidelines for category management engagement and business partnership.

Aug 2013 – Aug 2015

Manager Global Risk and Strategy

- Developed procurement roadmap; managed change for Operational (supply chain) and Regulatory risk.
- Designed and implemented the policy, process and technology platform to address Conflict Minerals Regulations (Dodd-Frank) for US Operations.

Jessica Sanchez

- Mapped operations and supply chain of 4 major product lines (>\$750M revenue) to ensure supply assurance and monitor cycle time of the raw material to production facilities.
- Partnered with all levels of leadership cross-functionally to build impactful, efficient and cost-effective business and vendor relationships management program.

Apr 2011 – Aug 2013

Manager Sourcing Systems and Indirect Sourcing

- Implemented four sourcing web-based modules; executed 3 months ahead of schedule, \$25k savings.
- Served as sourcing stakeholder for IT projects relating to source data, ERP and Business Intelligence (BI).
- Managed a global team (8ppl) to ensure timely completion of 8 RFPs and subsequent negotiations over six months, resulting in launch of indirect spend program by achieving \$2M savings target per annum.

May 2005 – Apr 2011

Biogen Idec

Cambridge, MA

May 2007 – Apr 2011

Financial Shared Service Operations Specialist and Trainer

- Discovered, analyzed and documented client business requirements; translated needs into system, procedural and process solutions by maintaining excellent relationships with stakeholders.
- Managed 20-45 direct client facing projects per year to assess ongoing business needs and ensure high client satisfaction with change management planning, communication, execution and service.
- Owned stakeholder analysis and requirement engineering during upgrade of invoice system.
- Identified refund allocation issues and redesigned the process, resulting in \$3.9M of overpaid funds being properly returned to specific cost centers (budgets) in year 1.
- Created training program that addressed compliance issues for Procure to Pay (P2P) processes and provided live trainings for 800+ employees annually.
- Subject matter expert and advisor on business impact of P2P compliance and purchasing policies.

Additional Career Experience upon request.

Education and Certifications

- MBA, Strategy and Implementation – Boston University Graduate School of Management
- Bachelor of Arts, English – Boston College
- Business Analysis Certificate – Boston University – Corporate Education Center
- Six Sigma Green Belt Certified (CR Bard)
- Certificate of Quality Engineering - American Society for Quality (ASQ, expired 2019)

Software and System Proficiencies

- Sourcing Software Advanced Proficiency: BravoSolution Suite (RFX, Project, Contract, Spend Analytic Tool); SMART by GEP Suite (Spend Analytics, Contracts, Project, RFX, Auction, Guided Buying, P2P)
- Project Management Advanced Proficiency: Smartsheet, MS Project, Visio, Mural
- Financial Software Proficient: 170Markview, iProcurement, Cognos, Appian
- ERP Systems Expert Proficiency: Oracle, MFG Pro(QAD), JD Edwards, Workday, SAP, COUPA
- Supply Chain Risk Advanced Proficiency: Resilinc, BravoSolution (JAEGGER)
- Quality Systems Proficient: Veeva Vault, Trackwise

Gregory Williams

June 25, 2024

New Fairfield Board of Finance
4 Brush Hill Road
New Fairfield, CT 06812

To the members of the New Fairfield Board of Finance:

I would like to be considered for the open full board member position recently vacated by Doug Jendras and even more recently vacated by Gary Reetz. I'm a committed and capable member of our community and am already well aware of the major points of contention between our board and various interested groups in town. I will not – barring truly extraordinary personal circumstances – abandon the position if promoted to it.

My history with community organizations and local government includes quite a few entries that reflect my dedication to New Fairfield including, but not limited to:

- Planning Commission Alternate
- Vice Moderator and now Moderator of the Congregational Church of New Fairfield
- Ball Pond VFC Member, Interior FF, and current Vice President
- Board of Finance Alternate

My professional experience has included meaningful leadership in both financial and personnel management capacities for two decades, in organizations that have been incredibly successful. Neither I nor my employers have ever needed to declare bankruptcy as a business tool due to our success.

If I'm asked to describe my own personal hopes for the future of New Fairfield, those are to preserve it, in more or less its current form, but with proper upkeep! This position includes funding our schools in alignment with any reasonable Board of Education our citizens choose to elect, including the current one.

Sincerely,

Gregory Williams

PS – I was told in school I use commas excessively as a substitute for pauses in speech, and I continue to do that now. Here's hoping properly funded NF schools can correct that with current students. , , ,