

**Board of Selectmen  
Regular Meeting Agenda  
October 20, 2022 at 7:30 pm  
Meeting held via Zoom**

**Please click the link below to join the webinar:**

**<https://us02web.zoom.us/j/84773632098?pwd=VFk2U2VtTWIURDhWSmxGN0JDdk9oZz09>**

**646 558 8656**

**Webinar ID: 847 7363 2098**

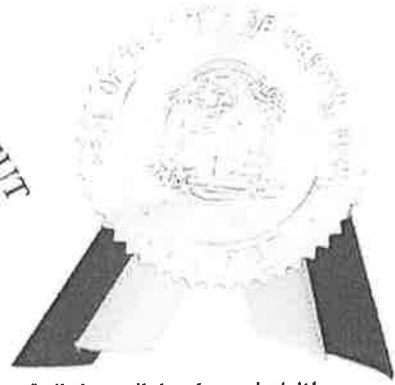
**Passcode: 705992**

1. Call to Order
2. Pledge of Allegiance
3. Moment of Silence
4. Proclamation for Fire Prevention Week
5. Update from the Director of Social Services on the ARPA funded Mental Health Project / Sr. Care
6. Interview of Lisa Luft for a possible appointment to the Board of Education to fill the vacancy created by the resignation of Anthony Pesco
7. Interview of Michael Schramm for possible appointment to the Board of Finance to fill the vacancy created upon the resignation of Jamie Zeppernick on October 30, 2022
8. Interview of Theresa Brasco for possible appointment to the Board of Finance to fill the vacancy created upon the resignation of Jamie Zeppernick on October 30, 2022
9. Discussion/Decision to appoint Genevieve Morales to the Marketing Committee for a term expiring June 30, 2023
10. Discussion/Decision to appoint Wendy Ramos to the Diversity, Equity, and Inclusion Committee for a term expiring June 30, 2024
11. Approval of Tax Refunds
12. Approval of Minutes from the October 6, 2022 Special Board of Selectmen Meeting
13. Adjournment

## DRAFT Motions for the 10/20/22 BOS Regular Meeting

1. Call to Order: **No motion**
2. Pledge of Allegiance: **No motion**
3. Moment of Silence: **No motion**
4. Proclamation for Fire Prevention Week: **No motion**
5. Update from the Director of Social Services on the ARPA funded Mental Health Project / Senior Care: **No motion**
6. Interview of Lisa Luft for a possible appointment to the Board of Education to fill the vacancy created by the resignation of Anthony Pesco: **No motion**
7. Interview of Michael Schramm for possible appointment to the Board of Finance to fill the vacancy created upon the resignation of Jamie Zeppernick on October 30, 2022: **No motion**
8. Interview of Theresa Brasco for possible appointment to the Board of Finance to fill the vacancy created upon the resignation of Jamie Zeppernick on October 30, 2022: **No motion**
9. Discussion/Decision to appoint Genevieve Morales to the Marketing Committee for a term expiring June 30, 2023: **I move to appoint Genevieve Morales to the Marketing Committee for a term expiring June 30, 2023**
10. Discussion/Decision to appoint Wendy Ramos to the Diversity, Equity, and Inclusion Committee for a term expiring June 30, 2024: **I move to appoint Wendy Ramos to the Diversity, Equity, and Inclusion Committee for a term expiring June 30, 2024**
11. Approval of Tax Refunds: **I move to approve tax refunds totaling \$17,421.88, as presented.**
12. Approval of Minutes from the October 6, 2022 Special Board of Selectmen Meeting: **I move to approve the minutes of the October 6, 2022 Special Board of Selectmen Meeting, as presented.**
13. Adjournment: **I move to adjourn**

1. Call to Order: **No motion**
2. Pledge of Allegiance: **No motion**
3. Moment of Silence: **No motion**
4. Proclamation for Fire Prevention Week:  
**No motion**



**WHEREAS**, the Town of Weston is committed to ensuring the safety and security of all those living in and visiting our town; and

**WHEREAS**, fire is a serious public safety concern both locally and nationally, and homes are the locations where people are at greatest risk from fire; and

**WHEREAS**, last year local fire departments responded to an estimated 1.35 million fires in the United States. These fires caused 3,800 civilian fire deaths and 14,700 reported civilian fire injuries. The property damage caused by these fires was estimated at \$15.9 billion.

**WHEREAS**, smoke alarms sense smoke well before you can, alerting you to danger in the event of fire in which you may have as little as 2 minutes to escape safely; and

**WHEREAS**, working smoke alarms cut the risk of dying in reported home fires in half; and

**WHEREAS**, Weston residents should be sure everyone in the home understands the sounds of the alarms and knows how to respond; and

**WHEREAS**, Weston residents who have planned and practiced a home fire escape plan are more prepared and will therefore be more likely to survive a fire; and

**WHEREAS**, Weston residents will make sure their smoke and CO alarms meet the needs of all their family members, including those with sensory or physical disabilities; and

**WHEREAS**, Weston Volunteer Firefighters are dedicated to reducing the occurrence of home fires and home fire injuries through prevention and protection education; and

**WHEREAS**, Weston residents are responsive to public education measures are better able to take personal steps to increase their safety from fire, especially in their homes; and

**WHEREAS**, The 2022 Fire Prevention Week™ theme, "Fire Won't Wait. Plan your Escape™," works to educate everyone about the simple but important actions they can take to keep themselves and those around them safe from home fires.

**NOW THEREFORE**, I Samantha Nestor First Selectwoman of the Town of Weston, do hereby proclaim October 9<sup>th</sup> through 15<sup>th</sup>, 2022, as **Fire Prevention Week** throughout this Town, and I urge all the people of Weston to plan and practice a home fire escape for Fire Prevention Week 2022 and to support the many public safety activities and efforts of Weston's fire and emergency services.

Samantha Nestor  
First Selectwoman, Town of Weston, CT

5. Update from the Director of Social Services on the ARPA funded Mental Health Project / Senior Care: **No motion**



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## Mental Health - \$100,000

**Pilot Program: The Town of Weston is proposing to contract with a local mental health agency to provide mental health assessments and referrals.**

**Pilot Program: The Town of Weston is proposing to contract with a local agency to support homebound or frail seniors and other vulnerable residents.**

6. Interview of Lisa Luft for a possible appointment to the Board of Education to fill the vacancy created by the resignation of Anthony Pesco: **No motion**



Darcy Barrera-Hawes <dbarrerahawes@westonct.gov>

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**[EXTERNAL] BOE endorsement**

1 message

Gayle Weinstein <gaylemweinstein@gmail.com>

Fri, Oct 14, 2022 at 11:38 AM

To: snestor@westonct.gov, dbarrera@westonct.gov, bgralnic@optonline.net

Dear Samantha,

At our regularly scheduled meeting on Wednesday, Oct. 12, the Weston DTC endorsed Lisa Luft to fill the vacancy of Tony Pesco on the Board of Education. As you can see from her resume, her background is superior for this position.

This vacancy was widely promoted and advertised. The DTC search committee did an extensive search process, including the interview of many candidates. We believe that Lisa Luft is a great candidate, and we ask that the BoS expedite the appointment process.

Thank you,  
Gayle Weinstein  
Chair, Weston DTC

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 **Weston Luft resume.docx**  
27K



## Lisa Kalvar Luft

### Weston Board of Education

#### License:

- \*Connecticut State Certification Superintendent
- \*New York State Permanent Certification SDA \*Connecticut State Intermediate Administrator
- \*New York State Permanent Certification Business \*Connecticut State Certification Business
- \*New York State Permanent Certification Reading \*Connecticut State Certification Reading

#### Education:

- University of Connecticut, Executive Leadership Program
- Southern Connecticut State University, New Haven, Connecticut
  - Sixth Year, Leadership
  - Master of Science, Reading
- Adelphi University, Garden City New York - MBA Program
- State University of New York at Albany, Albany, New York - Bachelor of Science Business

#### Professional Experience:

Sept 2014 – Sept 2022 **Principal**

Principal Reserve Bronx High Schools – assigned to support Principals of schools with challenges

#### *Highlights include:*

- Supported Principals to conceptualize, implement, and assess new processes and systems
- Provided Principals with differentiated support of staff, students, and school programs.
- Supported Principals through outcome-based accountability, data-driven decision-making, and differentiated instruction
- Supported data-based decision-making and strategic planning around intervention efforts
- Supported Autistic Spectrum Disorder/NEST program in areas of student social development, sensory and self-regulation, behavior and academics
- Ensured compliance - support of pedagogues through professional development - seamless continuance implementation of school programs.
  - Built organizational capacity – remote school
  - Ensured continued compliance
  - Developed shared leadership and cooperative spirit amongst staff
  - Increased graduation rates

Sept 2010 – 2014 **Principal**

John F. Kennedy High School, 99 Terrace View Avenue, Bronx New York

#### *Highlights include:*

- Principal Performance Review – Substantially Exceeds/highest rating
- Awarded 1.5 million State Grant 2012 /\$400,000 2013
- Awarded \$350,000 Technology Grant
- Awarded \$50,000 ELL Grant
- 1.6 million Library Renovation Grant – raised through Borough President and Councilman

- Implemented PLC with support of faculty and change in teacher schedule
- Implemented online and blended learning
- Campus Collaboration 8 Schools
- Innovative Arts Program resulting in film and video production awards
- ELL performance year over year increases of more than 2%

*Responsibilities included:*

- Established clear mission and vision
- Established a culture of shared decision making
- Led instruction, revised curriculum, implemented differentiated instruction and Collaborative Team Teaching (CTT)
- Differentiated programs to support individual group needs – ELL resource center, mediation center, Special Education and ELL parent workshops
- Planned and implemented professional development to build capacity and improve teaching and learning through Charlotte Danielson and yearly Citywide Instructional Expectations
- Created and supported a shared decision-making structure with five other principals to coordinate activities and building administration
- Reorganized staff and procedures – developed policies that arranged for coordination of services to children to ensure optimum support for the teaching process and instructional goals
- Provided clear expectations and communication – ensuring open and transparent communication among individuals and groups
- Set goals and objectives for administration, Community Based Organizations, teachers
- Hired and recruited staff – built capacity within staff
- Outreached to community and organizations - enabling JFK to have two community-based organization that supported student programs including the arts, student mediation, evening supports, attendance intervention and especially career and college planning through internships
- Evaluated instruction – data analysis, interpretation to revise curriculum, programs, professional development, and instruction for improvement of student performance
- Organized for instruction – grouping of students, planning class schedules, assigning spaces, allocating time for instruction, scheduling, planning events to maximize teaching and learning
- Managed resources and operations to improve teaching and learning and support campus culture – renovated the library to support academics and implementation of technology,

Aug 2006 – Sept 2010 **Director of Campus Initiatives**

New York City Department of Education, Office of New Schools/Portfolio Development  
52 Chambers Street, Manhattan, New York

*Responsibilities included:*

- Conducted research on organizational and achievement data to inform strategic decisions, case-building, and policy to support new schools
  - Created the Building Council Toolkit
- Influenced existing and new policies in consultation with principals, coaches, superintendents and Central Office Staff
- Supported over 1000 schools and programs in multiple school buildings
- Supported building principals including responding to urgent situations
- Supported building councils in a range of effective models of collaboration
- Supported the sharing of best practices within and across schools including supporting the development of “white papers”, a website, and conferences
- Codified and communicated insights from shared campuses and phasing out schools to share with internal and external audiences

- Provided professional development to build capacity and support of shared campuses, school restructuring, and phase out including: SSO Team Leaders, Superintendents, Charter Organizations, Principals and other staff
- Developed Structures to support and facilitate shared campuses
- Played an active role in supporting SSO Leaders and Superintendents in the support of principals on shared campuses
- Directed the mediation/arbitration of conflicts for school improvement and cohabitation
- Supported the work of school restructuring and phase out
- Supported the sharing of best practices within and across phase out schools

Aug 2002 – Aug 2006 **Principal**

William Howard Taft High School, 240 East 172 Street, Bronx, New York

*Responsibilities included:*

- Established clear mission and vision
- Established a culture of shared decision making
- Led instruction, revised curriculum, implemented differentiated instruction and CTT
- Planned and implemented professional development to build capacity and improve teaching and learning through the Institute for Learning and Balanced Literacy
- Created and supported a shared decision-making structure with five other principals to coordinate activities and building administration
- Reorganized staff and procedures – developed policies that arranged for coordination of services to children to ensure optimum support for the teaching process and instructional goals
- Provided clear expectations and communication – ensuring open and transparent communication among individuals and groups
- Set goals and objectives for administration, Community Based Organizations, teachers
- Hired and recruited staff – built capacity within staff
- Outreached to community and organizations - enabling Taft to have five community-based organization that supported student programs including the arts, student mediation, evening supports, attendance intervention
- Evaluated instruction – data gathering, analysis, interpretation to revise curriculum, programs, professional development, and instruction for improvement of student performance
- Organized for instruction – grouping of students, planning class schedules, assigning spaces, allocating time for instruction, scheduling, planning events to maximize teaching and learning
- Managed resources and operations to improve teaching and learning and support campus culture – renovated the library to support academics and implementation of technology,
- Differentiated programs to support individual group needs – ELL resource center, mediation center, Special Education parent workshops

Feb 2001–Aug 2002 **Assistant Principal Organization/Administration**

Evander Childs High School, 800 East Gun Hill Road, Bronx New York

*Responsibilities included:*

- School Business Administrator – 20-million-dollar budget - purchasing agent for: furniture, equipment, supplies, general student funds
- Human Resources Facilitator– 300 staff, staffing, hiring, attendance, lateness, mentoring new teachers
- Operations and Maintenance Director – 300,000 square foot facility – smooth operation of library, cafeteria, 1600-person auditorium, 7 computer labs, storage, building permits, room and storage allocation, fire drills and weather emergency
- Records Management Coordinator– 3100 students – timely compilation of reports, grants, transportation, food services, testing coordinator

- Summer School Supervisor – 3100 students including Bridge Program for incoming freshmen
- Assistant Principal for Pupil Personnel Services- temporary for retired administrator– attendance, guidance, admissions, discharges
- Grant Developer – New Visions, Title I, 21<sup>st</sup> Century
- After school and Saturday activity coordination

Sept 2000 – Jan 2001 **Business Education Teacher** - Tenured  
Dewitt Clinton High School, 100 Mosholu Parkway, Bronx, NY

Aug 1999–June 2000 **Cluster Administrator/Assistant Principal**–Career and Technical Ed  
Putnam/Northern Westchester BOCES, 200 BOCES Drive, Yorktown Heights

- Art and Communications, Culinary Arts, Law Enforcement, Teaching
- Supervisor of 25 personnel including observations of all staff – teachers, guidance counselor, social worker, teachers, aides, secretary and custodians
- Administrator for 250 students, monitoring performance outcomes, integrating academics into vocational areas, monitoring modifications and support strategies, discipline and behavioral strategies
- Instructional Leader – initiated differentiated instruction, revised curriculum and implemented professional development
- Coordinator of all testing
- Special Educational Administrator (temporary - for administrator on leave)
- Developed and updated curriculum and accreditation agreements with several colleges
- Worked closely with businesses and community to improve programs

Sept 1994–Aug 1999 **House Coordinator/Business Education Teacher** - Tenured  
Dewitt Clinton High School, 100 Mosholu Parkway, Bronx, NY

- House Coordinator - Responsibilities include; programming, academic advisement assessment of needs, monitoring performance outcomes and developing support strategies, attendance monitoring and outreach for 630 students
- Instructor of Accounting, Business Law, Programming, Office, Lotus, ENSPAN
- Tutor of remedial reading students - including decoding, comprehension, organization and study skills
- Creator of program for instruction and preparation of taxes for and by students
- Member of Technology committee
- Integrator of technology into reading program

#### **Special Training or Courses:**

Effective Communicating 12/99 - Decker, Communication Education Law Updates 6/00 – BOCES, Principal Institute Cohort 57 8/02-6/03, NYCDOE Educational Leadership Institute NYTALKS 9/02-6/03 - CSA, Change Process, Ramp-up 8/03 - The Institute for Learning, Using Data to Lead Change 8/04 - SREB/Bank Street College, Adult Facilitation '06 – Learning Center Institute, Executive Leadership Institute – workshops - Douglas Reeves Leadership 07, EXCEL 08, Engaging the Power of Level 5 Networks for Sustainable change 09 – Richard Elmore Rounds 10 ASCD '10 '11 '12, Teach Scape '13 – Danielson Observer Expert, '14 – '21 NYCRBERN/Fordham Univ ENL Training, 2020 - Autism Spectrum Disorder/NEST- NYU graduate program, 2021 Autism Spectrum Disorder/NEST – NYU graduate program

**Professional Memberships:** International Reading Association - National Business Teachers Association – ASCD - NASSP

7. Interview of Michael Schramm for possible appointment to the Board of Finance to fill the vacancy created upon the resignation of Jamie Zeppernick on October 30, 2022: **No motion**



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**Fwd: [EXTERNAL] RTC Endorsed Candidate for BOF Vacancy**

1 message

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----- Forwarded message -----

From: **Alex Burns** <afbarnberg1@gmail.com>

Date: Wed, Oct 12, 2022 at 1:13 PM

Subject: [EXTERNAL] RTC Endorsed Candidate for BOF Vacancy

To: <jlulz@westonct.gov>

Hi Mr. Luiz,

I would like to inform you that Theresa Brasco is not our endorsed candidate (please see an email I sent you last week).

Mike Schramm is the RTC endorsed candidate.

If you have any questions, please call me at 203-300-1998 or email me.

Thank you,  
Alex Burns

Sincerely,  
Jonathan Luiz  
Weston Town Administrator

## Michael K. Schramm, CFA

**Product Manager / Portfolio Manager:** Structured Products expert with diverse trading, analytics and money management experience with global money management leaders. Skilled in asset-liability management to meet desired risk profiles. Deep understanding of both fundamental and technical factors that influence the valuation of complex financial fixed income products. Decisive leader able to inspire and influence teams to top performance.

### EXPERIENCE:

#### Bloomberg L.P., New York, New York (August 2013 – Present):

##### **Product Manager, Head of Agency Securitized Products. BVAL Group (March 2021 – Present)**

- Market and manage the BVAL Group pricing process for all Agency mortgage products. Asset classes included are Agency RMBS, Agency Pools, Agency CMOs and derivatives, TBAs as well as Agency CMBS - GNMA Project loans, FN DUS, and FHMS/FHLMC CMOs.
- Design, implement and advise upper management of new BVAL product solutions to meet both external and internal client valuation needs.
- Engage with current clients on new product development, discuss current valuation needs as well as potential solutions to current BVAL weaknesses.
- Successfully led scrum team to migrate BVALs Euro ABS bonds to a new pricing infrastructure. Increased BVAL coverage by approximately 1600-line items as well as increased client satisfaction via improved screen experience.
- Experience with managing end to end product development utilizing roadmap feature planning for BVAL product enhancements.
- Attend all industry conferences to market BVAL's Agency products and services to potential and existing clients.

##### **Product Manager, Structured Products. BVAL Group (January 2020 – March 2021)**

- Manage and market and the BVAL Group pricing process for Agency CMBS. Asset classes included are GNMA Project loans, FN DUS, FHMS/FHLMC, Agency RMBS and Agency Pools.
- Design and implement new BVAL product solutions to meet both external and internal valuation needs.
- Led team to migrate BVAL Structured Product's security population adder to a more robust and expansive technology.

#### Senior Evaluator, BVAL Group (August 2013 – December 2019):

- Manage and improve the BVAL Group pricing process for Agency CMBS. Asset classes included are GNMA Project loans, FN DUS, FHMS/FHLMC (FREDDIE Multifamily), Securitized SBAs and SBA Pools.
- Daily responsibilities include evaluating market inputs, tracking and monitoring daily asset class specific credit spread movements and examining the cross-market implications of these movements.
- Develop a more comprehensive pricing methodology/process via working closely with the quantitative and research and development teams building more robust algorithms.
- Solely responsible for client communication on pricing results and methodology.
- Internally publish a weekly economic summary for the entire BVAL group. This weekly research paper is utilized by both the sales and analyst teams for marketing BVAL product solutions as well as to help identify possible client requests and needs.

#### Sandler O'Neill Partners, New York, New York (September 2010 – August 2012)

##### **Associate Director / Senior CMBS Trader, Fixed Income Group**

- Senior trader responsible for Non-Agency CMBS, Small Balance ABS, CRE-whole loan trading as well as back-up responsibilities in Agency CMBS.
- Actively marketed trade ideas to banking clients including publishing CMBS Updates/Trade Ideas in the quarterly periodical, weekly updates on the CMBS market and communicating trade ideas tailored to client return objectives and risk constraints.
- Generated trades via a thorough understanding of client return objectives and risk constraints. Entailed constant communication with select clients on technical and fundamental pricing drivers in the market.

#### Genworth Financial, Stamford, Connecticut (January 2008 – September 2010)

##### **Director / Senior CMBS Trader, Portfolio Management Group**

- Recruited to manage a \$4+ billion CMBS and GNR Project loan portfolio in a yield-based trading environment. Portfolio included AAA through NR securities as well as IO positions.
- Responsibilities included trading decisions, portfolio performance and the generation / implementation of trading strategies.
- Executed trading decisions using top down relative value analysis incorporating a bottom-up fundamental methodology.
- Developed and implemented a formal relative value process across the fixed income arena. Incorporated relative value principles across asset classes and served as a fundamental input in the allocation of cash.

ING Investment Management, Atlanta, Georgia (June 2001 – June 2007)

**Vice President / Senior Portfolio Manager, Fixed Income Group**

- Promoted to manage a \$4 billion Structured Finance portfolio within a third-party mandate. Included ABS and CMBS securities that were managed within a larger MBS portfolio valued at over \$11 billion.
- Funds included Core and Core Plus, an Absolute Return Fund and a LIBOR-plus mandate.
- Managed under a total return framework with a focus on credit-based strategies including capital structure arbitrage, synthetic versus cash basis trades and relative value MBS trades.

**Vice President / Senior Portfolio Manager, Investment Management Group**

- Member of four-person team responsible for managing the \$11 billion Structured Finance portfolio for ING's general account. Returns exceeded custom benchmark (50/50 weighting of Lehman ABS and CMBS ERISA-eligible indexes) by approximately 20bps for three years.
- Co-managed the \$6.5 billion CMBS portfolio for the general account. Responsibilities included management of 6-person team, portfolio positioning, execution of buy/sell decisions and the attribution of portfolio returns. Utilized cash as well as synthetic markets in an effort to limit downside risk while maintaining upside exposure.
- Developed a robust credit monitoring system that utilized various stress scenarios that allowed early buy/sell decisions.
- Participated in Investment Committee decisions regarding commercial real estate whole loan purchases/sales.
- Member of a four-person macro economic team responsible for establishing the duration position and posture for ING's general account portfolio (approximately \$80 billion).

**Associate, Investment Management Group**

- Senior financial analyst for a CMBS and ABS portfolio of approximately \$3.6 billion. Main sectors of focus include CMBS, Credit Card and Airplane-lease securitizations.
- Re-engineered aircraft-lease securitizations and modeled various cash flow stress scenarios in Trepp Analytics and Intex Desktop.

JPMorgan Chase, New York, New York (September 1994 – March 2000):

**Vice President Proprietary Positioning Trading Desk**

- Utilized and maintained risk forecasting models for relative value trading positions for the Proprietary Positioning desk.
- Generated and analyzed daily P/L reconciliations for trading positions across multiple markets and currencies.
- Promoted from Analyst to Vice President over the tenor of my employment at JP Morgan.

**EDUCATION:**

**Goizueta Business School, Emory University Atlanta, GA**

Master's of Business Administration: Concentration in Finance. May 2001

**University of Delaware Newark, DE**

Bachelor of Science: Major: Finance / Minor: Economics and Management Information Systems. May 1994

**SOCIETIES:** Member of CFA Institute: 2008  
NYSSA

**FINRA EXAMS:** Passed Series 7, 63 and 79. Non-active



8. Interview of Theresa Brasco for possible appointment to the Board of Finance to fill the vacancy created upon the resignation of Jamie Zeppernick on October 30, 2022: **No motion**



Jonathan Luiz <jluiz@westonct.gov>

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**[EXTERNAL] RTC BOF Replacement**

1 message

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**Alex Burns** <afbamberg1@gmail.com>  
To: "jluiz@westonct.gov" <jluiz@westonct.gov>

Tue, Oct 4, 2022 at 9:16 PM

Good evening Jonathan,

I'm just writing to let you know that the RTC has endorsed Theresa Brasco to fill the Republican vacancy on the Board of Finance.

If you have any questions or need anything further from me on this matter, please let me know.

Thank you,  
Alex Burns  
203-300-1998

**Fwd: [EXTERNAL] RTC Endorsed Candidate for BOF Vacancy**

1 message

----- Forwarded message -----

From: Alex Burns <afbamberg1@gmail.com>  
Date: Wed, Oct 12, 2022 at 1:13 PM  
Subject: [EXTERNAL] RTC Endorsed Candidate for BOF Vacancy  
To: <jlulz@westonct.gov>

Hi Mr. Luiz,

I would like to inform you that Theresa Brasco is not our endorsed candidate (please see an email I sent you last week).

Mike Schramm is the RTC endorsed candidate.

If you have any questions, please call me at 203-300-1998 or email me.

Thank you,  
Alex Burns

Sincerely,  
Jonathan Luiz  
Weston Town Administrator

Theresa Brasco

October 11, 2022

Ms. Samantha Nestor  
First Selectwoman  
Town of Weston  
56 Norfield Road  
Weston, CT 06883

Sent via email

Dear First Selectwoman Nestor,

I appreciate the willingness of the Board of Selectmen to consider candidates in addition to Town Committee endorsements to fill board vacancies which occur between municipal elections. As you and your fellow Selectmen have indicated, this is a serious responsibility of the Board of Selectmen and your continued leadership on this is critical.

For personal reasons, I am not pursuing the Republican Town Committee endorsement for the upcoming Board of Finance vacancy created by Jamie Zeppernick's announced October 30, 2022, resignation. I welcome the opportunity to be considered by the Board of Selectmen to fill this position.

Attached is a summary of my background.

I look forward to hearing from you.

Sincerely,

*Theresa A. Brasco*

Attachment (Background Summary)

Cc: Mr. Martin Mohabeer  
Ms. Amy Jenner  
Mr. Jonathan Luiz

## Theresa Brasco

### Background

#### **Professional:**

- 20-year career in finance (1977-1997), primarily in structured capital expenditure financing for large domestic and international corporations in U.S. and foreign debt and equity markets. Employers in San Francisco, New York and London include the Federal Reserve Bank of San Francisco, Wells Fargo Leasing, Citibank/Citicorp, and Bankers Trust Company. Retired from professional career upon moving to Weston.

#### **Weston and Fairfield County (from most recent):**

- Weston Historical Society, Board Member and Treasurer
- Town of Weston, Registrar of Voters (Republican)
- Weston Republican Town Committee, Member and Treasurer
- Aspetuck Land Trust, Board Member and Finance Committee member
- Weston High School Swim and Dive Team parents, Treasurer
- WHS College and Career Center, weekly volunteer
- Math Olympiads for 4<sup>th</sup> and 5<sup>th</sup> grades, encouraged schools to begin program and ran it for two years. Second year in conjunction with newly hired elementary school Math Department Chair.
- Team member with Walter Erikson to produce financial comparative analyses for benefit of BOS, BOF, BOE and other town boards from 2001-2011
- Select Committee for School Construction, member of Finance subcommittee
- Weston Women's League (while previously known as Weston Young Woman's Club), Board Member and Treasurer, Chair of Weston Farmer's Market

#### **Personal:**

- Have lived with family in Weston for 26 years
- Both of our children attended Weston schools from Kindergarten through High School; WHS classes of 2010 and 2013
- Avid cyclist

**Theresa Brasco**

**Background**

**Professional:**

20-year career in finance (1977-1997), primarily in structured capital expenditure financing for large domestic and international corporations in U.S. and foreign debt and equity markets. Employers in San Francisco, New York and London include the Federal Reserve Bank of San Francisco, Wells Fargo Leasing, Citibank/Citicorp, and Bankers Trust Company. Retired from professional career upon moving to Weston.

**Weston and Fairfield County (from most recent):**

Weston Historical Society, Board Member and Treasurer Town of Weston, Registrar of Voters (Republican) Weston Republican Town Committee, Member and Treasurer Aspetuck Land Trust, Board Member and Finance Committee member Weston High School Swim and Dive Team parents, Treasurer WHS College and Career Center, weekly Volunteer Team member with Walter Erikson to produce financial comparative analyses for benefit of BOS, BOF, BOE and other town boards from 2001-2011 Math Olympiads for 4th and 5th grades, encouraged schools to begin program and ran it for two years. Second year in conjunction with newly hired elementary school Math Department Chair. Select Committee for School Construction, member of Finance subcommittee Weston Women's League (while previously known as Weston Young Woman's Club), Board Member and Treasurer, Chair of Weston Farmer's Market

**Personal**

Have lived with family in Weston for 26 years Both of our children attended Weston schools from Kindergarten through High School; WHS classes of 2010 and 2013 Avid cyclist

9. Discussion/Decision to appoint Genevieve Morales to the Marketing Committee for a term expiring June 30, 2023: **I move to appoint Genevieve Morales to the Marketing Committee for a term expiring June 30, 2023**

# Genevieve Morales

## Education Consultant

**Dynamic and highly organized leader with comprehensive experience promoting awareness on diversity, equity, and inclusion by creating and executing innovative strategies.**

Inquisitive and dedicated individual; recognized for supporting students to flourish and realize internal capabilities with keen focus on removing barriers to diversity, equity, and inclusion. Coherent communicator with ability to assess needs and priorities of children by liaising across all organizational levels. Solid history of empowering culturally and linguistically diverse / exceptional learners by designing and implementing performance-based learning / development programs. Proven track record of assisting students in becoming well-rounded individuals with emphasis on contributing to society in a positive manner. Deeply familiar with all facets of child developmental milestones and instructional practices for children in special education.

## Areas of Expertise

Team Leadership & Support  
Diversity, Equity, & Inclusion  
Strategic Planning & Execution

Curriculum Development  
Written & Verbal Communication  
Professional Development & Growth

Coaching & Mentoring  
Recruitment & Selection  
Operations Planning & Control

## Career Experience

**Norwalk, CT Board of Education, Norwalk, CT  
Interim Special Education LEA Coordinator**

**2021 – 2022**

Improved students' learning capabilities by supporting evaluation teams in determining qualifications for special education / services based on a child's learning needs in line with the least restrictive environment and FAPE. Delivered best-in-class services for special education by leading development of quality IEPs in accordance with state standards.

- Obtained most accurate information on child learning abilities by guiding pre-school evaluation teams on evaluations of linguistic and cultural biases.
- Increased family engagement in special education meetings by overseeing planning and placement of team meetings, while welcoming parents to the process of special education.

**2021**

### **092 Intermediate Administrator Intern**

Working collaboratively with school administrators as well as authorized special education and specialized instruction services during planning / placement of team meetings. Ensured staff personal growth by creating and presenting PD workshops for related service providers and paraprofessionals. Acted as Extended School Year (ESY) Assistant and organized class lists / services for staffing purposes at middle school level.

- Utilized in-depth field knowledge to support staff in the accurate / appropriate identification of culturally and linguistically diverse student population.
- Streamlined overall workflow by serving as Interim Special Education Supervisor and coordinating with special education teachers and related service providers.
- Fulfilled organizational staffing needs by serving actively as hiring committee member, conducting interviews, and filtering candidates for position openings.

**Greenwich, CT Board of Education, Greenwich, CT  
Bilingual Speech & Language Pathologist**

**2016 – 2021**

Decreased the overall number of students in special education by reducing overidentification of multilingual learners and Hispanics in Special Education. Generated collaborative-transdisciplinary intervention model across curriculum with keen focus on providing excellent speech and language services. Developed therapeutic objectives / goals based on language exposure for every student in accordance with latest educational standards.



- Increased comprehension and retention of academic curriculum for monolingual and dual language learners by creating / executing robust strategies.
- Prevented students from falling behind socially and academically by evaluating and identifying communication disorders in dual language learners and EL students.
- Ensured individuals' professional development for faculty and educational leaders in the areas of special education / bilingual development / diversity, equity, and inclusion.

## **Additional Experience**

**Bilingual Speech & Language Pathologist | Speech & Language Pathologist** – Norwalk, CT Board of Education

**Teacher of Speech & Hearing Handicapped** – Susan E. Wagner Daycare Center

**Teacher of Speech & Hearing Handicapped** – Personal Touch Early Intervention

## **Post-Secondary Work History**

**Adjunct Professor** – New York University

**Curriculum Developer** (Experienced in Multimedia Recording & Presentation) – New York University

**Adjunct Professor** – Mercy College, Dobbs Ferry Campus

## **Education & Credentials**

**Post MA in Multilingual, Multicultural Studies: Bilingual Education** – New York University, New York, NY

**Master of Science in Communication Disorders** – Mercy College, Dobbs Ferry, NY

**Bachelor of Science in Speech Language Pathology** – New York University, New York, NY

**Bilingual Extension in Speech-Language Pathology** – Teachers College Columbia University, New York, NY

**092 Intermediate Administrator Certification** – Sacred Heart University, Fairfield, CT

**061 Speech Language Pathology, Connecticut**

## **Workshops Developed**

Norwalk Public Schools – When is Dismissal from Special Education Appropriate?

Norwalk Public Schools – Culturally & Linguistically Diverse Students: Assessment & Interpretation

Norwalk Public Schools – Multilingual Speech & Language Development

Sacred Heart University – Spring Faculty Institute, Learning from the Field: Student Panel on Inclusive Strategies for Non-Native Speakers

Mercy College – Implicit, Cultural, & Racial Bias

Norwalk Community College – Guest Lecturer on Multilingual Learners and Special Education

Greenwich Public Schools – Working with Bilingual Clients as a Monolingual SLP

Mercy College – Working with Bilingual Clients as a Monolingual SLP

Greenwich Public Schools – Language Barrier or Learning Issue

## **Research & Publication**

ASHA Convention 2007 Poster Session: Educator's Perception of Speech Language Pathologists in the Middle School Setting

ASHA Convention 2008 Technical Platform: Phonological Disorders in Spanish Speaking Preschoolers: Implications for Monolingual SLPs

## **Professional Affiliations**

Founder of Speech & Language Assessment Services, LLC.

American Speech-Language-Hearing Association (ASHA)

National Association for Multicultural Education (NAME)

## Languages

English (Fluent) | **Spanish** (Fluent)

**10. Discussion/Decision to appoint Wendy Ramos to the Diversity, Equity, and Inclusion Committee for a term expiring June 30, 2024: I move to appoint Wendy Ramos to the Diversity, Equity, and Inclusion Committee for a term expiring June 30, 2024**

Executive Biography



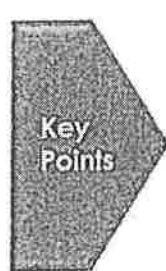
Wendy is the Managing Director of ISI Professional Services' Leadership & Coaching Center (LCC) and an ICF-certified executive coach. She is also a certified partner in Predictive Index. She leads the LCC's business to provide executive coaching, customized leadership development, and business advisory services, which partners with clients to help align their people and business strategy.

- **Leadership Style** Transformational Leadership is foundational to any successful company
- **Executive Presence** Trust and credibility are earned every day, they do not come from a title
- **Business Optimization** Strong company culture translates into financial success

Wendy believes leadership, now more than ever must be infused into every aspect of a company. Leadership at every level of an organization cannot be created only through recruiting and hiring, especially in today's work environment. She understands the importance of talent management in identifying high-potential leaders and developing them for future growth and responsibilities.

She is certified in many behavioral qualitative and quantitative assessment tools and will provide the most relevant to her client's needs. Wendy's strength lies in her pragmatic, yet highly individualized and empathetic approach to coaching clients, while dedicated to providing quantifiable results. Wendy's goal is to provide positive, impactful, and results-driven outcomes for the LCC's clients to facilitate their professional growth.

Prior to ISI, Wendy's 20 years of senior executive corporate global business management and leadership was for a Fortune 500 International trading company, Noble Group. She was a principal member in constructing the company's oil marine trading desk from inception into a global leader. Additionally, Wendy previously worked for Phibro Energy and Stoll-Nielsen. She was also an Executive Director and Board Member of Stamparts Inc. from its inception in 2011 until 2018. She is a graduate of Towson University and earned her graduate certificate in executive coaching at William James College.



- Assessment Tools**
- Hogan Assessment
  - Leadership Circle 360
  - Predictive Index®
  - Behavior and Cognitive Assessments
  - Myers-Briggs Type Indicator

- Coaching and Organizational Themes**
- Executive and Leader Coaching
  - Leader Development Workshops
  - Organizational Culture and Health Assessments
  - Qualitative and Quantitative Assessment Methods
  - Conflict Management

ISI Leadership & Coaching Center

The Leadership & Coaching Center supports organizations dedicated to investing in their most valued resource, their people. The LCC believes in "shaping tomorrow's leaders today." Partnership with our clients is how we differentiate our services and we will be there by your side for the successes and more importantly, for the challenges. Whether it is business advisory services, leadership workshops, or individual and group coaching, we listen to our clients to better understand their needs.



Wendy Ramos



## Wendy Ramos

Senior Corporate Executive | ICF Certified Executive & Leadership Coach | Organizational Management

New York City Metropolitan Area

172 followers · 167 connections

Sign in to connect

 ISI Professional Services

 Towson University

 Company Website [↗](#)

## About

I am a senior executive leader with multiple years of global business experience with proven experience for driving positive change by focusing on people, process improvement, and bottom-line results. I am an effective communicator who directs complex cross functional projects through their life cycle. I embrace change, and the constant creation and implementation of new technology. A strategic thinker who understands the value and alignment of organizational vision and goals aligned with key performance indicators by leveraging technology and data analytics.



Wendy Ramos

Linked by Wendy Ramos

Sign in to see all activity

## Experience

### Managing Director, ISI Leadership & Coaching Center

ISI Professional Services

Sep 2021 - Present · 1 year 2 months

### Certified Executive Coach

The Advocacy Group

2020 - Present · 2 years

I am a certified executive coach who specializes in coaching senior level executives within the private sector as well as the non-profit arena. I also provide consulting to both companies and their individual talent to build their organizational and management development skills to improve their effectiveness as successful leaders.

### Client Advisor

Libertas

2018 - 2020 · 2 years

United States

I worked as a client advisor at Libertas, a financial hedge fund technology firm specializing in providing funding to small and medium sized businesses all over the United States. This position gave me the opportunity to become highly versed in SEO, Salesforce, and ultimately, and setting sales strategy to generate revenue through the build out of a start up.



## Wendy Ramos

2009 - 2018 · 9 years

United States

I was the global head of oil liquids shipping for Noble Americas Corp., and one of nine GH's reporting directly to the CEO. I was responsible for driving the creation, development, and expansion of the physical chartering desk for Noble's Oil Liquids Team from its inception as a regional USA player to a major global shipping entity.

### Vice President-Chartering

2002 - 2009 · 7 years

United States

In my role as VP Chartering, I concurrently managed both the oil operations and shipping activities for the Oil Liquids Oil Team. I was directly responsible for the hiring and management of approximately 40 direct reports. I managed the first trainee program for college graduates that were part of the Noble International Trainee program. I created, implemented, and enforced all processes and procedures required for the streamlining of the chartering and operations Teams.

### Operations Manager

1999 - 2002 · 3 years

United States

My role as Operations Manager was to ensure the overall successful management of the operations related to all business lines within the Oil Liquids Platform. These included physical waterborne, colonial pipeline, ethanol plant off-take, demurrage, settlements, contracts, and credit issues. I was negotiated yearly contracts with all physical inspection companies, as well as the negotiation of all storage contracts for product storage at various US Facilities.

### Operations Specialist

Noble Group

1997 - 1998 · 1 year

United States



Wendy Ramos

**William James College**

Executive Coaching

Graduate Certificate / ICF Certified Executive Coach

**Licenses & Certifications**

**Hogan Assessment Certified**

Hogan Assessment Systems

Issued Nov 2021

**ICF Member**

International Coaching Federation

Issued Oct 2021

**Talent Optimization Certificate**

The Predictive Index

Issued Sep 2021 · Expires Sep 2023

See credential

**More activity by Wendy**



**11. Approval of Tax Refunds: I move to approve tax refunds totaling \$17,421.88, as presented.**

2021-3-50595	BLAKE TERRENCE	\$ 129.19	10/3/2022	00CXVE
2021-3-50596	BLAKE TERRENCE	\$ 738.47	10/3/2022	AC48105
2021-3-51057	CCAP AUTO LEASE LTD	\$ 595.22	10/3/2022	AR98208
2019-3-51299	CHOPIN STEFAN	\$ 59.14	10/3/2022	7ATTSO
2021-3-51204	CHOPIN STEFAN	\$ 167.72	10/3/2022	AU24561
2021-3-51202	CHOPIN STEFAN	\$ 749.83	10/3/2022	BB52340
2020-3-51548	DAIMLER TRUST	\$ 137.87	10/3/2022	AP79506
2021-3-51533	DAIMLER TRUST	\$ 845.26	10/3/2022	AP79506
2021-3-51550	DAIMLER TRUST	\$ 381.25	10/3/2022	AV56866
2021-3-51519	DAIMLER TRUST	\$ 925.82	10/3/2022	AF04789
2021-3-51545	DAIMLER TRUST	\$ 793.13	10/5/2022	AS93488
2021-3-51512	DAIMLER TRUST	\$ 128.74	10/5/2022	9AKGK7
2021-3-51482	DAIMLER TRUST	\$ 439.38	10/5/2022	310UVV
2021-3-53067	HONDA LEASE TRUST	\$ 116.34	10/3/2022	363MXL
2021-3-53104	HONDA LEASE TRUST	\$ 57.81	10/3/2022	AH45376
2021-3-53112	HONDA LEASE TRUST	\$ 278.87	10/3/2022	AJ54572
2021-3-53136	HONDA LEASE TRUST	\$ 71.76	10/3/2022	AS57877
2021-3-53094	HONDA LEASE TRUST	\$ 386.89	10/5/2022	AD37007
2021-3-53442	JP MORGAN CHASE BANK NA	\$ 1,048.78	10/3/2022	IFG25
2021-3-53600	JP MORGAN CHASE BANK NA	\$ 42.00	10/5/2022	BD87356
2021-3-54600	MCDONALD DAVID & KRISTEN	\$ 20.77	10/5/2022	459UBO
2021-3-54603	MCDONALD DAVID & KRISTEN	\$ 46.42	10/5/2022	416YOA
2021-3-55110	NISSAN INFINITI LT LLC	\$ 746.90	10/3/2022	198ZUM
2021-3-55145	NISSAN INFINITI LT LLC	\$ 161.88	10/3/2022	AG77619
2020-3-55169	NISSAN INFINITI LT LLC	\$ 171.41	10/3/2022	198ZUM
2021-3-55180	NISSAN INFINITI LT LLC	\$ 171.36	10/3/2022	AY47954
2021-3-55196	NISSAN INFINITI LT LLC	\$ 462.92	10/3/2022	BC85
2021-3-55663	PRESSMAN LINDA	\$ 31.00	10/3/2022	6AKWM8
2020-4-81603	TOYOTA LEASE TRUST	\$ 227.68	10/3/2022	AN50394
2021-3-56993	TOYOTA LEASE TRUST	\$ 578.76	10/3/2022	920ZBS
2021-3-57028	TOYOTA LEASE TRUST	\$ 326.23	10/3/2022	AN50394
2021-3-57030	TOYOTA LEASE TRUST	\$ 661.67	10/3/2022	AP15303
2021-3-57062	TOYOTA LEASE TRUST	\$ 949.36	10/3/2022	AV65899
2021-3-56977	TOYOTA LEASE TRUST	\$ 94.59	10/3/2022	663UYL
2021-3-57006	TOYOTA LEASE TRUST	\$ 862.27	10/5/2022	AC64611
2021-3-57265	VACCA ERIC	\$ 55.96	10/3/2022	BA74697
2021-3-57300	VAULT TRUST/ALLY FINANCIAL	\$ 808.25	10/3/2022	AM39133
2021-3-57299	VAULT TRUST/ALLY FINANCIAL	\$ 661.86	10/3/2022	AJ93877
2021-3-57313	VAULT TRUST/ALLY FINANCIAL	\$ 117.25	10/3/2022	AU95661
2021-3-57305	VAULT TRUST/ALLY FINANCIAL	\$ 596.88	10/3/2022	AR98194
2020-3-57324	VAULT TRUST/ALLY FINANCIAL	\$ 267.64	10/3/2022	AM03288
2021-3-57484	VW CREDIT LEASING LTD	\$ 140.13	10/3/2022	OASGT6
2021-3-57530	VW CREDIT LEASING LTD	\$ 68.39	10/3/2022	AF85952
2021-3-57599	VW CREDIT LEASING LTD	\$ 694.06	10/5/2022	BA32895
2021-3-57798	WESTON ARBORISTS	\$ 404.77	10/3/2022	AU39552

TOTAL \$ 17,421.88 SUBMITTED FOR 10/20/22 MEETING

- 12. Approval of Minutes from the October 6, 2022 Special Board of Selectmen Meeting: I move to approve the minutes of the October 6, 2022 Special Board of Selectmen Meeting, as presented.**

**Board of Selectmen  
Special Meeting Minutes  
October 6, 2022 at 5:00 pm  
Meeting held via Zoom**

1. **Call to Order:** First Selectwoman Samantha Nestor called the meeting to order at 5:00 pm. Also in attendance were Selectman Martin Mohabeer, Selectwoman Amy Jenner, Town Administrator Jonathan Luiz, Fire Chief John Pokorny, EMS Chief Michael Schlechter, Police Chief Edwin Henion, Police Sergeant Joe Miceli, Genevieve Morales, Wendy Ramos, and members of the public.
2. **Pledge of Allegiance:** Chief Henion, Chief Pokorny, and Chief Schlechter led in the recitation of the Pledge of Allegiance.
3. **Remembering Mark Blake with Chief Pokorny and Chief Schlechter:** Fire Chief Pokorny and EMS Chief Schlechter spoke about the many contributions Mark Blake made to the fire and EMS Departments and expressed the significance of the loss of Mr. Blake.
4. **Acceptance of Jamie Zeppernick's resignation from the Board of Finance effective October 30, 2022:** Motion to accept Jamie Zeppernick's resignation from the Board of Finance effective October 30, 2022 made by Selectman Mohabeer, motion was seconded by Selectwoman Jenner. Motion carried unanimously.
5. **Discussion/Decision to make an appointment to the Board of Finance to fill the vacancy created by the resignation of Steve Ezzes for a term ending upon the next biennial election on November 6, 2023 in accordance with section 7.6 of the Town Charter:** Discussion took place regarding the candidates for the vacant position on the Board of Finance. Motion to appoint Jeff Goldstein to the Board of Finance to fill the vacancy of Steve Ezzes made by Selectwoman Nestor. The motion was not seconded, so the motion failed. Motion to appoint Max Rosenthal to fill the vacancy on the Board of Finance made by Selectwoman Jenner. Motion was seconded by Selectman Mohabeer. Motion passed 2-1-0 with Selectwoman Jenner and Selectman Mohabeer voting in favor and Selectwoman Nestor opposed.
6. **Interview of Genevieve Morales for a possible appointment to the Marketing Committee:** The Board of Selectmen interviewed Genevieve Morales for a possible appointment to the Marketing Committee.
7. **Interview of Wendy Ramos for a possible appointment to the Diversity, Equity, and Inclusion Committee:** The Board of Selectmen interviewed Wendy Ramos for a possible appointment to the Diversity, Equity, and Inclusion Committee.
8. **First Selectwoman's Update on select ARPA Projects: Weston Food Pantry, Senior Center Bathroom Renovation, Bisceglie Pond Resurfacing, EV Charging Stations, Municipal Campus WiFi:** First Selectwoman Nestor gave an update on select ARPA Projects, she stated that the check for \$20,000 has been sent to the Weston Food Pantry, the Senior Center bathroom renovation project

is underway, resurfacing of the Pond will take place in spring 2023, and that the Municipal Campus WiFi is operational. Discussion took place regarding the free public wifi network name.

- 9. First Selectwoman's Update on the Small Town Economic Assistance Program (STEEP) Grant Award and a request for a supplemental appropriation in the amount of \$50,000 for architectural/engineering services:** First Selectwoman Nestor, Jonathan Luiz, Chief Henion, and Sergeant Joe Miceli spoke about the locker room and bathroom improvement renovation project at the Police Department. Motion to approve a supplemental appropriation in the amount of \$50,000 for architectural/engineering services associated with the Police locker room and bathroom improvement project made by Selectman Mohabeer. Motion was seconded by Selectwoman Jenner. Motion carried unanimously.
- 10. Discussion of the creation of a Water Study Committee and development of charge(not a task force):** First Selectwoman Nestor stated that this is a committee created by the Board of Selectmen, and that it is not a task force. She requested that Selectwoman Jenner's proposed charge for this committee be reviewed by Joe Stromwall of the Building Committee. This item was tabled.
- 11. Discussion/Decision to approve a side letter of agreement for a temporary access road easement at Keene Park:** Motion to approve a side letter of agreement for a temporary access road easement at Keene Park, as presented, made by Selectwoman Jenner. The motion was seconded by Selectman Mohabeer. Motion carried unanimously.
- 12. Approval of Minutes from the September 15, 2022 Regular Board of Selectmen Meeting and September 22, 2022 Special Board of Selectmen Meeting:** Motion to approve Minutes from the September 15, 2022 Regular Board of Selectmen Meeting and September 22, 2022 Special Board of Selectmen Meeting made by Selectman Mohabeer. The motion was seconded by Selectwoman Jenner. Motion carried unanimously.
- 13. Adjournment:** Motion to adjourn made by Selectwoman Jenner. The motion was seconded by Selectman Mohabeer. Motion carried unanimously. Meeting adjourned at 6:15 pm.

Minutes prepared by Darcy Barrera-Hawes, Executive Administrative Assistant

**13. Adjournment: I move to adjourn**

Added to the Agenda at the October 20, 2022 Meeting of  
the Board of Selectmen

To whom it may concern,

I'm writing to express my interest in serving on the Weston Board of Education. As a professional with divergent leadership and pedagogical experiences and a Weston parent (Olivia is in 2<sup>nd</sup> grade at Hurlbutt, and Bo will enter K next year!), I am qualified and motivated to lend my skills to the BoE.

I'll share some of my vision shortly, but before I focus on my ideas, I'd rather focus on the people in the equation who matter the most: our kids! By many measures American kids are struggling – and I'm not talking about learning loss from the two years of Covid lockdown nor regressing test scores. By more powerful metrics, it is a deeply challenging time to be young in America. The most horrific data point is the devastating rise in suicide and self-harm rates. But that is not the only discouraging indicator. Our kids' own reporting of mental illness and the genuine threats to their emotional, mental, and physical well-being posed by smart phones and social media are two topics that come instantly to mind. Anecdotally, I walked into the Westport YMCA last week and the community bulletin board was broadcasting information about an open discussion to help our "stressed out kids."

I'm sure we like to think that our kids are more protected; Weston is certainly an idyllic place. But it would be naïve to assume our kids don't face many of the same stressors that other American kids do.

And the answer is not pushing our kids to improve their standardized test scores so we can close the gap between our school district and those of Darien, Westport, and Greenwich, or any other Connecticut community. The standardized test scores of other "Gold Coast" communities aren't the most relevant point to assess and encourage our kids' development. Nor will we be delivered by buying more Google Chrome books and hoping technology will fix things for us.

If I am selected to join the BoE, I will be relentlessly focused on the steps we can take to prepare our kids to thrive in a world that will be utterly changed from the one we knew, and a world that is innovating and changing faster and faster all the time. Our kids will graduate into a world in which most blue-collar and many white-collar jobs can be better and more cheaply accomplished by AI and machines (including traditional white-collar professions like law and finance); a world in which entrepreneurial efforts will be more essential and more rewarded than ever as the gig economy supercharges the trend away from life-long occupations via a single employer; a world in which creative problem solving and innovation trumps experience and pedigree. Equipping them for the world they will enter will take creative thinking and bravery, and our schools will need to be endlessly inventive.

But it's not sufficient to critique standardized tests and laissez-faire reliance on technology without offering an alternative vision. So where would I start? There are many common-sense, attainable initiatives we could accomplish now to make WPS even more exceptional. Just for examples, consider:

1. The most forward-thinking classrooms in America are moving away from excessive sedentary desk time. Too much time in chairs is bad for our kids' spines, brains, and moods (candidly, it's bad for *ours* too). We could have better chairs, less time in them, and more options besides them. The best schools in the country do this; why not us?
2. We could embrace even more project-based learning. Like many parents I was alarmed when notified about the high levels of PFAs in the water on school premises. That crisis is a prime candidate to involve the older kids in multi-disciplinary, project-based learning. *History* – high concentrations of PFAs typically coincide with large-scale manufacturing; what were the industries of Weston's past? *Biology* – what are the threats to vertebrates and invertebrates from high PFA concentrations? *Social studies* – how is America coping with this challenge in other communities? *Chemistry* – what the heck are polyfluoroalkyl substances? *Physics* – what are the materials of the future that can accomplish PFAs' purpose without their toxicity? *Civics* – what will we as a community implement as mitigation steps?
3. Establish far more robust ways to assess a school's performance. I'm not opposed to standardized tests per se; I'm opposed to them receiving an outsized importance in evaluating our schools'



performance and health. Nationally, we're moving away from the hegemony of the SAT and ACT; why would we not do the same in Weston? And if the focus on test scores is in part driven by a desire to demonstrate parity with the other nearby CT communities like Darien, Westport, and Greenwich, we should face a blunt truth: we're unlikely to win that contest. I was a strategic partner with an elite academic and test-prep tutoring firm in Manhattan. The parents of the Dalton, St. Anne's, Horace Mann, Grace and Avenues students eager to gain every college-admission advantage would spend in the tens of thousands per month for virtually round-the-clock tutoring. A test scores arms race is probably measuring the wrong stuff and it's an effort we'll likely lose.

4. We can expose our kids to the transformative educational power of entrepreneurship, mentorship, and apprenticeship-style learning. Speaking of the above point, what might help our kids gain an upper hand in college admissions beyond battling a Staples High student for a 1600 SAT?: Being able to show a portfolio of entrepreneurial activity throughout their high school career that demonstrates actual real-world knowledge acquisition and results. As the BoE PTO rep, the second biggest concern I hear in talking to parents (after the success of their kids, of course!) is property values. They fear that if Weston schools don't maintain their lofty reputation, people won't move to Weston and property values could decline. Here's an entrepreneurial example of a different approach to protecting property values in Weston: What if the school was known nationally as an innovation leader, in part because of amazing student-led projects in which high schoolers tracked the patterns of deer migration and managed the overall deer population in Weston to have a statistically significant reduction in the incidence of Lyme disease? Less Lyme disease would be a pretty attractive selling point for a CT home with 2+ acres.

I'm equipped to bring creative problem solving, collaboration, and a proven track record of excellence to the BoE. In large part this is because I have that same track record in each of the disciplines I've chosen in my life, as: a successful entrepreneur who grew a business from scratch; an educator who designed curriculum for the PhD program at Columbia Business School, and other institutions; a coach and consultant who has advised US Presidential candidates; a mentor and advisor to hundreds of young founders through the start-up technology accelerators I advise; a ghost writer for thought leaders with op-eds placed in *Washington Post*, *Time*, and more; an actor who performed in network TV and two Broadway productions. I mention those accomplishments not to sing my own praises, but rather to emphasize that equipping our children to thrive in the unpredictable future they will inherit will call on all the creativity, know-how, and versatility that we parents and community members can muster.

An example that predates my awareness of the BoE opening might be useful. I have been in communication with the superintendent's office beginning in spring of 2022 about donating the differentiated public speaking curriculum I created with my firm ([GK training](#)) to WHS. We were hired by a [private NJ High School](#) to design their public speaking program. As part of this engagement, my company owns the curriculum, as well as permission to record classroom footage to document the experience and pedagogical approach (for a glimpse, [CLICK](#)). I have offered to donate this curriculum to WHS and am meeting with WHS Principal Meghan Ward and Jessica Dibuono on 10/18 to discuss.

The BoE should encompass traditionalist and non-traditionists – those who have a lifetime in the institutional educational arena, and those who have deep expertise in other disciplines who can be a conduit for new ideas and approaches. If I can be of service, I am happy to be and I will excel in the role.

I look forward to sharing more of my vision with you in future discussions.

Sincerely,

Michael Chad Hoepfner

## MICHAEL CHAD HOEPPNER

646.247.4902 \* 25 White Birch Road, Weston, CT 06883 \* [mc.hoeppner@gmail.com](mailto:mc.hoeppner@gmail.com)

### QUALIFICATIONS SUMMARY

Creative professional, leader, and collaborator with proven track record of success delivering results in multiple fields: curriculum designer for Columbia Business School PhD course; communication advisor to US presidential candidates; educational advisor to Avenues School, Grace School, more; entrepreneur & founder of company that serves 250+ clients globally; advisor to start-up tech companies defining industries of future; former professional actor (Broadway credits w/ Nathan Lane, Dana Ivey, more); volunteer supporting dozens of non-profits pro bono; and donor offering coaching, tools, & support to the unemployed, neurologically divergent kids, and education orgs

### ENTREPRENEUR & CEO

#### Founder, President & Chief Executive Officer: GK Training

2009-present

- Founded a boutique communication skills training firm. Grew company into 40 industries and 250+ historical accounts on 3 continents by combining world-class artistic training, rigorous social science research, and practical know-how. Pedagogy built on kinesthetic learning and embodied cognition.
- Serve blue-chip brands like: Xerox, Pfizer, the NFL, NYU Stern School of business, the United Nations, 30+ of the AMLAW 100 (100 largest global law firms), and 3 of the 6 largest global financial orgs.
- Relevance to BoE position: 1) Built a successful company with entrepreneur's perspective on creative problem-solving; and 2) have deep experience in designing innovative kinesthetic curriculum

### PROFESSOR & TEACHER

- Professor, Columbia Business School, Management Division and PhD program. 2013-2018
  - **1. The Leader's Voice; MBA track.** Subject matter: business communication and strategy (rating 4.8 of 5).
  - **2. Effective Communication; PhD program.** Designed custom course on dissertation defenses & job talks.
- Contributor to consortium of behavioral scientists: working group that examines performance of public figures; features professors from UCLA, U. of Chicago, Wharton, and Columbia. 2016-present
- Staten Island Zoo. Passion project: taught animal education (reptiles, small mammals, insects) to K-6 students on educational field trips to SI Zoo. Total audience ~4,000 children reached. 2006-2008
- Relevance to BoE position: Accustomed to and appreciative of being in classrooms and keenly aware of the challenges and joys that attend it, whether in Master's level courses or pre-k.

### EDUCATIONAL ADVISOR AND CONSULTANT

- NYU Law School. Advised & consulted for admissions team on communication and messaging.
- Avenues School, NYC. Consulted on creation and delivery of orientation session for families.
- Intelligentsia: Strategic partner, head of spoken communications training.
- Executive coach to educational professionals, including: Columbia Business School Dean Costis Maglaris, Salem State University President John Keenan, Grace school Head Robbie Pennoyer, education advocate Ted Dintersmith, Future Project founder Andrew Mangino, more.
- Communication coach: HS and college students; Georgetown, Princeton, Harvard, more.
- Relevance to BoE position: Diverse knowledge and exposure to national education issues, K – MBA

### POLITICAL COMMUNICATION ADVISOR AND CONSULTANT

- Delivered feedback for US presidential candidates in multiple election cycles. 2016-present.
- Senior communications strategist: Andrew Yang 2020 Presidential campaign. Coached the candidate on all stump speeches, debate prep and delivery, and major platform speeches. 2018-2020
- Relevance to BoE position: Have a front-row seat to the political pitfalls that litter our discourse. Equipped to diffuse energy, align constituencies, and navigate polarization with grace and empathy.

## START-UP ADVISOR

- *Advisor and mentor to SSOV (one of most active VC funds globally) and its two accelerators, IndieBio and Hax. SOSV focuses on: human health, planetary health, and deep tech. 2018-present*
- *Mentor & advisor at 3 other incubators: 37 Angels, Urban Future Lab, TechUnited. 2014-present*
- *Relevance to BoE position: I have a daily and weekly window into the next-gen technologies that will shape the industries of the future in which our kids will need to be equipped to contribute and excel*

## CURRICULUM DESIGNER

- *Franklin School, Jersey City, NJ: Contracted by new private 9-12 high school in NJ to build its public speaking course curriculum for fall of 2022. GK Training owns curriculum as well as permission to record course to share with non-profits and other academic institutions (to view class footage: [LINK](#))*
  - *(\* I have offered to donate curriculum to WHS, at inception of course (April 2021). Meeting with Principal Meghan Ward and Curriculum/Instructional Leader Jessica DiBuono to discuss, Oct 18.)*
- *Columbia Business School, PhD program: Communication capstone course for PhD candidates, preparing them to deliver their job talks and dissertation defenses.*
- *GK Training Online: Architect and designer of all 7 company courses; over 35 hours of asynchronous curriculum, hosted in online LMS. Mixed channels for integrated learning: email boosts, slack & DMs, and video. Clients: Novo Nordisk, Intuit, Latham & Watkins, Meta, and more.*
- *Relevance to BoE position: Deep experience and expertise designing innovative and fun ways for learners to gain, use, and retain new skills*

## DESIGNER & MAKER:

- *Question Roulette: Envisioned and designed interactive and responsive practice app for GK Training clients. Currently exploring use case for neurologically divergent teens and tweens. (2016)*
- *Genuine Dojo, VR headset (Oculus): envisioned & designed immersive training environment headset. (2017)*
- *Relevance to BoE position: Experience leveraging technology to create innovative learning tools*

## COMMUNICATION COACH

- *GK Training: Coached hundreds of societal leaders. Clients include: Special Olympics founder Tim Shriver, SOSV founder Sean O'Sullivan, business leader Katherine Gehl, Presidential candidate Andrew Yang, more.*
- *Relevance to BoE position: Deep expertise in how to communicate important – and potentially controversial – spoken communication messages in a responsive and unifying manner.*

## VOLUNTEER & DONOR

- *Current BoE representative for Hurlbutt Elementary School PTO*
- *52<sup>nd</sup> Street project: collaborated with K-6 playwrights & directed Broadway actors in the students' plays*
- *Provided access for over 70 fired/furloughed individuals to GK Training curriculum during pandemic*
- *Vote Mama Foundation: Donated pro bono support to first-time candidates running for public office*

## WRITER

- ***Ghost writer**: Wrote op-eds, non-fiction, profiles for public figures. Placed in *Time*, *Wash. Post*, more*
- ***Speech writer**: Created speeches for professionals in arts, law, politics, including debate openers for US Presidential candidates and keynotes for Fortune 500 CEOs.*
- ***Copy editor**: Guggenheim Museum, Columbia NAJP, Clarion Books, *NYTimes* supplementals.*
- *Relevance to BoE position: Deep expertise in how to communicate important written communication messages in an inclusive and compelling manner.*

## EDUCATION

**New York University** – MFA, acting; **Colorado College** – BA *cum laude*, history & philosophy; GPA 3.9; Phi Beta Kappa, 1993-1997; **Dartmouth College** – GPA 3.5, 1992-1993