

CITY OF NEWTON

DOCKET REQUEST FORM

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2023 MAR 21 PM 5:43

CLERK
MA. 02459

DEADLINE NOTICE: Council Rules require items to be docketed with the Clerk of the Council NO LATER THAN 7:45 P.M. ON THE MONDAY PRIOR TO A FULL COUNCIL MEETING.

To: Clerk of the City Council

Date: 03/21/2023

From (Docketer): Council President Susan Albright

Address: _____

Phone: _____

E-mail: _____

Additional sponsors: _____

1. Please docket the following item (it will be edited for length if necessary):

PRESIDENT ALBRIGHT reappointing Carl F. Valente, 84 Sumner Street, Newton as a member of the Financial Audit Advisory Committee for a term of office to expire on April 21, 2026.

2. The purpose and intended outcome of this item is:

- Fact-finding & discussion
- Appropriation, transfer,
- Expenditure, or bond authorization
- Special permit, site plan approval,
- Zone change (public hearing required)

- Ordinance change
- Resolution
- License or renewal
- Appointment confirmation
- Other: _____

3. I recommend that this item be assigned to the following committees:

- | | | |
|--|---|--|
| <input type="checkbox"/> Programs & Services | <input checked="" type="checkbox"/> Finance | <input type="checkbox"/> Real Property |
| <input type="checkbox"/> Zoning & Planning | <input type="checkbox"/> Public Safety | <input type="checkbox"/> Special Committee |
| <input type="checkbox"/> Public Facilities | <input type="checkbox"/> Land Use | <input type="checkbox"/> No Opinion |

4. This item should be taken up in committee:

Immediately (Emergency only, please). Please state nature of emergency:

- As soon as possible, preferably within a month
- In due course, at discretion of Committee Chair
- When certain materials are made available, as noted in 7 & 8 on reverse
- Following public hearing

PLEASE FILL OUT BOTH SIDES

5. I estimate that consideration of this item will require approximately:

- One half hour or less
- More than one hour
- More than one meeting
- Up to one hour
- An entire meeting
- Extended deliberation by subcommittee

6. The following people should be notified and asked to attend deliberations on this item. (Please check those with whom you have already discussed the issue, especially relevant Department Heads):

City personnel

Citizens (include telephone numbers/email please)

- | | |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

7. The following background materials and/or drafts should be obtained or prepared by the Clerk's office prior to scheduling this item for discussion:

8. I have or intend to provide additional materials and/or undertake the following research independently prior to scheduling the item for discussion. *

(*Note to docketer: Please provide any additional materials beyond the foregoing to the Clerk's office by 2 p.m. on Friday before the upcoming Committee meeting when the item is scheduled to be discussed so that Councilors have a chance to review all relevant materials before a scheduled discussion.)

Please check the following:

- 9. I would like to discuss this item with the Chairman before any decision is made on how and when to proceed.
- 10. I would like the Clerk's office to contact me to confirm that this item has been docketed. My daytime phone number is:
- 11. I would like the Clerk's office to notify me when the Chairman has scheduled the item for discussion.

Thank you.

/s/Susan Albright
Signature of person docketing the item

[Please retain a copy for your own records]

Application Form

Profile

Carl F Valente
First Name Middle Initial Last Name

[Redacted]
Email Address

84 Sumner Street
Home Address Suite or Apt

Newton MA 02459
City State Postal Code

What Ward do you live in?

[X] Ward 6

[Redacted]
Primary Phone Alternate Phone

Retired Town Manager
Employer Job Title

Which Boards would you like to apply for?

Financial Audit Advisory Committee: Submitted

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on a board or commission?

I served in local government management positions for nearly all of my 40 year professional career. Even after I 'retired' I have done municipal consulting, primarily in the finance area. For the first 13 or so years my focus was in municipal finance. When I moved to chief executive positions, I continued to keep abreast in local government financial management and the network of finance professionals. I learned early on in my career, from one of my mentors, that just about everything in local government revolves around finances, a key competency for a municipal manager. I found that advice to be true to this day. There are few normative standards in municipal finance and no one correct way to manage a city or town finances. That being said, I would hope to be able to assist the City in overseeing its finances and financial management practices based on my experiences, my sense of best practices and an overall interest in this aspect of local government.

cfv_resume_v2.docx
Upload a Resume

Carl F. Valente

84 Sumner Street ~ Newton Center, MA 02459-1958
[REDACTED]

Professional Experience

Town Manager, Lexington MA, 2005 to August 2018 (retirement)

Perform local government chief executive duties for town of 32,000, including oversight of all Town operating departments, appointment and management of all Town staff and negotiations of all contracts.

- Prepare and recommend to Board of Selectmen the annual operating and capital budget.
- Conduct all collective bargaining with ten municipal unions, the Employee Health Insurance Coalition, and serve as voting member of the School Committee for the purpose of School Department collective bargaining contracts.
- Responsible for the Town's economic development efforts, including negotiating mitigation agreements related to significant commercial developments.

Town Manager, Weston MA, 2001 to 2005

First Town Manager of town of 11,500 after Charter Change. Perform local government chief executive duties, including oversight of all Town operating departments under the jurisdiction of the Board of Selectmen.

- Develop and propose to the Board of Selectmen and Finance Committee a consolidated operating and capital budget for all general government departments.
- Develop programs and strategies to advance the general policies and directions of the Board of Selectmen.
- Provide leadership in bringing together senior staff for inter-departmental, customer driven solutions.
- Represent the Town before State and local officials, business representatives and citizen groups.

Town Administrator, Needham MA, 1990 to 2001

Chief Administrative Officer of town of 28,000. Responsible for overseeing all operating departments under the jurisdiction of the Board of Selectmen.

- Develop all revenue and long-term financial projections.
- Develop and propose to the Board of Selectmen and Finance Committee the capital improvement plan.
- Develop programs and strategies to advance the general policies and directions of the Board of Selectmen.
- Conduct all collective bargaining with municipal unions.
- Serve as staff or member of numerous Town committees

Director of Finance, Needham MA, 1988 to 1990

Chief Financial Officer responsible for planning and directing the Town's financial management operations, and for overseeing the Comptroller's Office, Treasurer/Collector's Office, Information Services and all Risk Management activities.

Section Chief for Technical Assistance, Massachusetts Department of Revenue, Division of Local Services Boston MA, 1984 to 1988

Directed a technical assistance and training program that worked toward building the financial management capacity of appointed and elected officials in Massachusetts cities and towns. Organized and led a staff of six professionals to provide local officials with assistance in budgeting, cash management, capital planning, forecasting, reorganization studies and other financial management programs.

- Produced technical assistance manuals and conducted financial management workshops.
- At request of local officials, conducted studies of a community's overall financial condition, identifying strengths and weaknesses in the revenue, expenditure and debt structure.

Director for Financial Management, International City/County Management Association (ICMA) Washington DC 1979 to 1984

Directed technical assistance and training projects whose goals were to: 1) enhance the ability of municipal managers to understand and better manage the financial operations in their communities; and 2) enable municipal managers to examine creative alternatives for providing and funding municipal services. Authored or co-authored publications on local government financial management topics, including alternative service delivery techniques, exemplary financial management practices, and use of the Financial Trend Monitoring System (FTMS) for evaluating of municipal financial health.

Cost and Price Analyst, Intern, US Army Computer Systems Selection and Acquisition Agency Boston MA Summer 1978

Education

Master of Public Administration, University of Hartford, 1978

Bachelor of Arts, Political Science, University of Connecticut, 1976

Credentialed Manager, International City/County Management Association, 2004-2018

Affiliations**International City/County Management Association (ICMA)**

- ICMA Emerging Leaders Development Program – Mentor

Massachusetts Municipal Management Association (MMMA)

- President, 2001
- Executive Committee, 1995-2001
- Chair of following committees: Program Committee (1994-1995), Scholarship Committee (1997-2001), Website Committee (2004 – 2018), Legal Assistance Fund Committee (2011-2018). Member: Future Managers Committee (2010 – 2018)

Massachusetts Municipal Association (MMA)

- President, 2001
- Board of Directors, 1995-1996 and 1999-2001
- Public Works and Transportation Policy Committee, 2005-2013