

SELECT BOARD MEETING
Monday, July 21, 2025
Conducted by Remote Participation*
6:30 PM

AGENDA

PUBLIC COMMENTS

Public comments are allowed for up to 10 minutes at the beginning of each meeting. Each speaker is limited to 2 minutes for comment. Members of the Board will neither comment nor respond, other than to ask questions of clarification. Speakers are encouraged to notify the Select Board's Office at 781-698-4580 if they wish to speak during public comment to assist the Chair in managing meeting times.

SELECT BOARD MEMBER CONCERNS AND LIAISON REPORTS

1. Select Board Member Announcements and Liaison Reports

TOWN MANAGER REPORT

1. Town Manager Weekly Update

CONSENT AGENDA

1. Accept Fund Terms: Robert J. Rivera Scholarship Fund
2. Approve: One-Day Liquor License - Monroe Center for the Arts - 1403 Massachusetts Avenue
 - Annual Lemonade Social - Friday, August 1, 2025.
3. Approve: One-Day Liquor License - Wilson Farm - 10 Pleasant Street
 - Dinner in the Fields - Thursday, July 31, 2025; Rain date: Friday, August 1, 2025.
4. Approve: One-Day Liquor Licenses - Spectacle Management, Inc., 1605 Massachusetts Avenue
 - Summer Concert Series at Cary Memorial Building:
 - Friday, August 1, 2025 - Postmodern Jukebox
 - Saturday, August 9, 2025 - Jane Lynch
 - Wednesday, August 20, 2025 - Jake Shimabukuro
5. Approve: One-Day Liquor License - Clearview Dermatology - 450 Bedford Street
 - Grand Opening Celebration: Wednesday, July 30, 2025
6. Approve: Entertainment License - Follen Church - 755 Massachusetts Avenue
 - East Village Community Fair - Saturday, October 4, 2025.
7. Accept: Select Board Committee Resignation
 - Julie Miller - Town Celebrations Committee
8. Approve: Select Board Committee Appointments
 - Council for the Arts - Thelma L. Goldberg

- Economic Development Advisory Committee - Mitch Tyson
- Historic Districts Commission Associates:
 - Robert A. Bellinger
 - James Carrico
- Housing Partnership Board - Ravneet Grewal
- Lexington Bicycle Advisory Committee - Jason Dearling
- Noise Advisory Committee - Joseph Lehar
- Town Celebrations Committee - Sudha Balasuryan
- Town Celebrations Subcommittee:
 - Seema Badaya
 - William Keim
 - Simon Rubenstein
- Town Report Committee - Beverly Liu
- Transportation Advisory Committee:
 - Jeremy M. Bowman
 - Keshav G. Krishna

9. Approve: Water and Sewer Adjustments

ITEMS FOR INDIVIDUAL CONSIDERATION

- | | |
|---|--------|
| 1. Award: Sale of Bond Anticipation Notes | 6:45pm |
|---|--------|

ADJOURN

- | | |
|----------------------------|--------|
| 1. Anticipated Adjournment | 6:50pm |
|----------------------------|--------|

Meeting Packet: <https://lexington.novusagenda.com/agendapublic/>

*Members of the public can attend the meeting from their computer or tablet by clicking on the following link at the time of the meeting:
<https://lexingtonma.zoom.us/j/82013535294?pwd=mGvKYC9PHOT8ByUHHa0a18jNRhRXpf.1>

iPhone one-tap: +13017158592,,82013535294#,,, *848540#

Phone +1 646 876 9923

Meeting ID: 820 1353 5294

Passcode: 848540

An Act Relative to Extending Certain State of Emergency

Accommodations: <https://www.mass.gov/the-open-meeting-law>

The next regularly scheduled meeting of the Select Board will be held on Monday, August 4, 2025 at 6:30pm via **REMOTE** participation.

*Hearing Assistance Devices Available on Request
 All agenda time and the order of items are approximate and
 subject to change.*

LexMedia
 Recorded by LexMedia

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Select Board Member Announcements and Liaison Reports

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

LR.1

SUMMARY:

Under this item, Select Board Members can provide verbal updates, make announcements, as well as comment on any additional points or concerns.

SUGGESTED MOTION:

FOLLOW-UP:

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Town Manager Weekly Update

PRESENTER:

ITEM NUMBER:

TM.1

SUMMARY:

Under this item, the Town Manager can provide verbal updates, make announcements, as well as comment on any additional points or concerns.

SUGGESTED MOTION:

FOLLOW-UP:

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Accept Fund Terms: Robert J. Rivera Scholarship Fund

PRESENTER:

Jill Hai, Chair

ITEM NUMBER:

C.1

SUMMARY:

Category: Decision-making

Robert J. Rivera Memorial Scholarship Fund

The Select Board is being asked to accept the terms of the Robert J. Rivera Memorial Scholarship Fund, which will be managed by the Trustees of Public Trusts.

The scholarship will be awarded to a graduate of Lexington High School or Minuteman Technical High School, who may or may not be a resident of Lexington. The recipient must major in music or a STEM field, or a combination of both, at an accredited two-to-four-year college program. The student must also demonstrate a passion for music and/or STEM careers and demonstrate financial need.

SUGGESTED MOTION:

To accept the terms of the Robert J. Rivera Memorial Scholarship Fund, which will be managed by the Trustees of Public Trusts.

Move to approve the consent.


FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

ATTACHMENTS:

Description	Type
 07212025 TPT- Robert J. Rivera Memorial Scholarship Fund	Backup Material

Judith C. Blostein (Judy)
82 N. Main St. Apt 3324
Natick, MA 01760

Mr. Lester Savage
Chairman
Town of Lexington
Trustees of Public Trusts

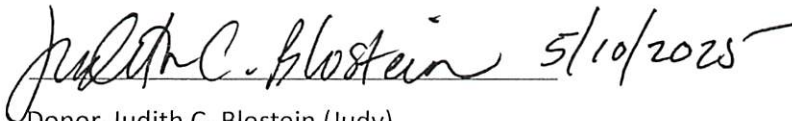
May 10, 2025


Dear Mr. Savage:

This letter is to set the terms by which the Trustees of Public Trusts agree to hold *The Robert J. Rivera Memorial Scholarship Fund* (the "Fund") which we hereby establish.

1. The Trustees will hold and invest the Fund as part of the Endowment Fund administered by the Trustees for the benefit of the Town of Lexington.
2. Each year, the Fund will transfer to The Lexington Scholarship Committee an amount that the Trustees deem appropriate and consistent with their Investment Policy with the intention that the Fund be preserved in perpetuity.
3. Any net income and all capital gains of the Fund not distributed annually shall be transferred to Fund principal.
4. Permit and welcome gifts or money donated to the Fund.
 - Direct 75% of gifted or donated money to the principal.
 - Direct 25% of gifted or donated money to the interest and/or income.
 - If a gift or donation is made to the Fund, write a thank you note to the Donor, which can be sent by email or USPS mail.
5. By signing this letter, I acknowledge that contributions to the Fund are irrevocable and any changes to the terms of the Fund must be approved by the Trustees of Public Trusts and/or the Town of Lexington Select Board or their successors.
6. Purpose/Guidelines for distributions: Each year the Lexington Scholarship Committee shall award one or more scholarships to be known as *the Robert J. Rivera Memorial Scholarship*. To be eligible, the recipient must meet the following criteria:
 - Be a graduate of Lexington High School or Minuteman Technical High School.
 - May be a non-resident of Lexington who attends Lexington High School or Minuteman Technical High School.
 - Will major in a music or a STEM field at an accredited two-to-four-year college program, or a combination of these two fields.
 - Demonstrate a passion for music and/or STEM careers.
 - Demonstrate financial need.

7. The Town of Lexington will notify both Judy Blostein and Craig Hall of the award and to whom the funds are awarded, and provide advance notice of when the awards night is, and do the same for a future Director of Lexington Community Education.
8. The Lexington Scholarship Committee shall allow any of the following people as long as long as they are willing and able to serve, to present the scholarship to the recipient at the annual awards night (see contact information below):
 - Judy Blostein or any member of Judy Blostein's family which consists of Shelly Long and two of her daughters – Andrea Kevin Long and Stephanie Long;
 - Craig Hall, current Director of Lexington Community Education or any member of Craig Hall's family.
 - Future Director of the Lexington Community Education program.
9. If the charitable purpose of the Fund becomes impossible or impractical to achieve or the size of the fund too small to warrant ongoing administration, the Trustees in their sole discretion may dissolve the Fund and apply the proceeds to a similar charitable purpose to benefit the Town of Lexington that benefits the students of the Town of Lexington, which includes residents and non-residents who attend Lexington High School or Minuteman Technical High School.

 5/10/2025
Donor, Judith C. Blostein (Judy)


Town of Lexington Trustee

About Robert Rivera:

Originally from New York City, Robert Rivera was a gifted classical cellist and composer, who started studying cello at the age of seven. He held a diploma from the Mannes School of Music, a Bachelor of Music in Performance Cello from the Manhattan School of Music, and a Certificate of Performance from the Moscow Conservatory.

Music was Robert's life. His art was not limited to the cello, he was also a phenomenal electric bassist. He was equally comfortable playing rock, metal, and jazz on both instruments. His talent was incredible. He aspired to write and play music, but one of his great gifts was also being a teacher. He taught cello, bass, and ukulele to students ages 4 to 65, and had an excellent rapport with students and their families. Parents appreciated Rob's teaching style as he taught their children life lessons and social responsibility in addition to music. His students loved him because he made lessons fun and taught with much love and compassion.

Robert passed away unexpectedly on January 21, 2023, from kidney disease at age 57. Despite being on dialysis for 16 years, he dedicated himself to his instrument and his craft and never gave up, even when his health challenges made it difficult. Rob's life was an example of what you can accomplish musically with practice, hard work, dedication, and love. His legacy will live on through the music and through our scholarship recipients who have the same perseverance and passion to learn and excel in their instrument(s) as he did.

His wife Judy hopes that the Robert Rivera Scholarship fund will be awarded to a student who has a passion for music in the same way that Robert did, or for making the world a better place with a STEM career, or through a combination of both interests.

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: One-Day Liquor License - Monroe Center for the Arts - 1403 Massachusetts Avenue

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.2

SUMMARY:

Category: Decision-Making

The Munroe Center for the Arts is requesting a One-Day Liquor License to serve beer, wine, and limoncello spritz during its Annual Lemonade Social, to be held on the front lawn at 1403 Massachusetts Avenue on Friday, August 1, 2025, from 6:30 PM to 8:30 PM.

The request has been reviewed by the Police Department, Fire Department, and Grounds Division, all of whom have no concerns.

SUGGESTED MOTION:

Move to approve a One-Day Liquor License for the Munroe Center for the Arts to serve beer, wine, and limoncello spritz at the Annual Lemonade Social on August 1, 2025, from 6:30 PM to 8:30 PM at 1403 Massachusetts Avenue.

Move to approve the consent.

FOLLOW-UP:

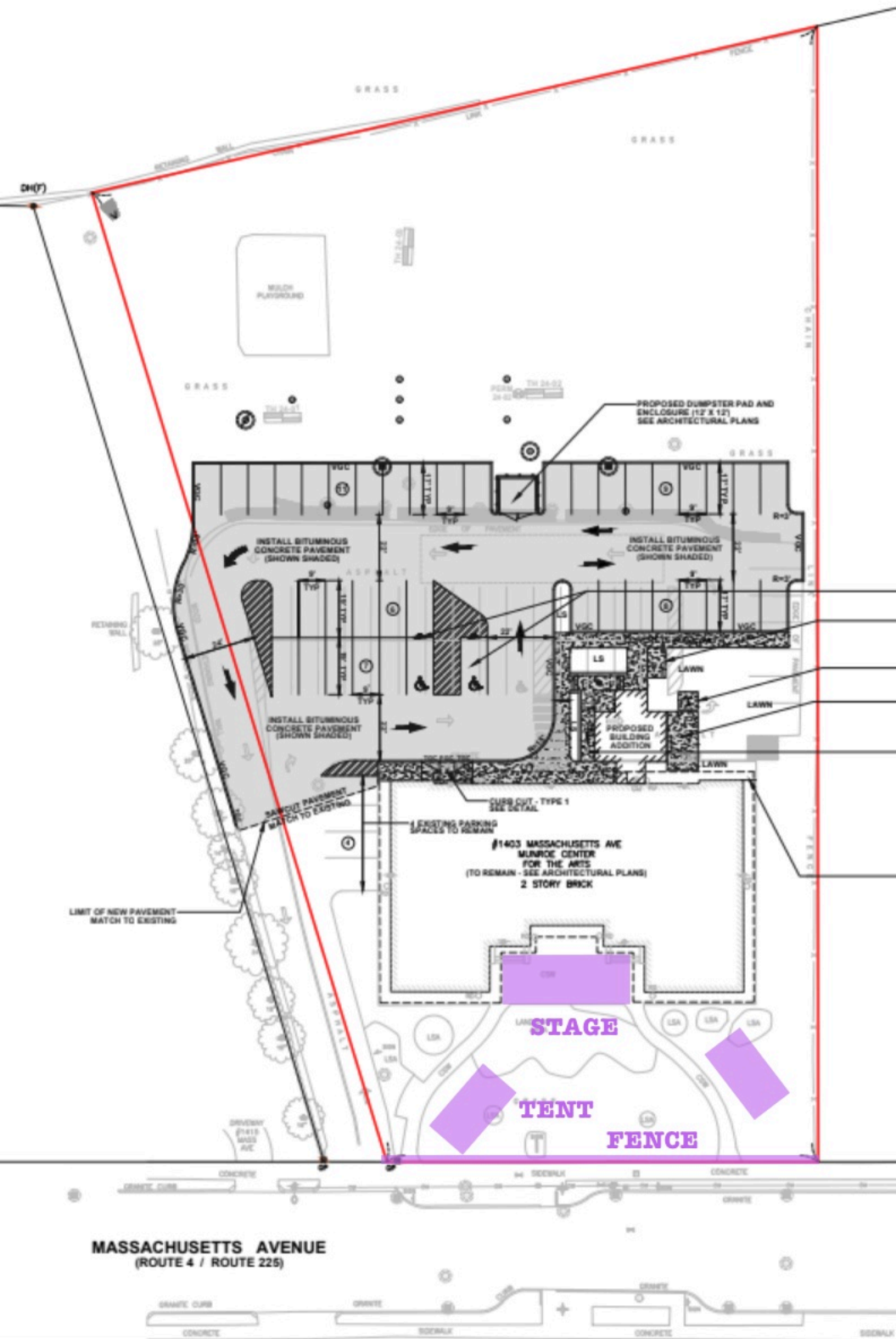
Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

ATTACHMENTS:

Description	Type
 Lemonade_Social_Event Diagram	Backup Material



MASSACHUSETTS AVENUE
(ROUTE 4 / ROUTE 225)

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: One-Day Liquor License - Wilson Farm - 10 Pleasant Street

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.3

SUMMARY:

Category: Decision-Making

Wilson Farm is requesting a One-Day Liquor License to serve wine at its “Dinner in the Fields” event, to be held immediately outside Greenhouse #7 at 10 Pleasant Street, Lexington, on Thursday, July 31, 2025, from 5:30 PM to 9:30 PM.

A rain date has been requested for Friday, August 1, 2025.

SUGGESTED MOTION:

Move to approve a One-Day Liquor License for Wilson Farm to serve wine at Dinner in the Fields on July 31, 2025, from 5:30 PM to 9:30 PM, at 10 Pleasant Street, Lexington, with a requested rain date of August 1, 2025.

Move to approve the consent.

FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

ATTACHMENTS:

Description

Type



Dinner_in_the_fields_Event Map

Backup Material

Stairs with a gate to access the field area where dinner in the fields will be held. Greenhouse is a rain option. Space in circled in red below



AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: One-Day Liquor Licenses - Spectacle Management, Inc., 1605 Massachusetts Avenue

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.4

SUMMARY:

Category: Decision-Making

Spectacle Management, Inc. is requesting three One-Day Liquor Licenses to serve beer and wine at Cary Hall, located at 1605 Massachusetts Avenue, in connection with the Summer Concert Series. The concerts are scheduled for the following dates and times:

- Friday, August 1, 2025, from 6:30 PM to 10:00 PM
- Saturday, August 9, 2025, from 6:30 PM to 10:00 PM
- Wednesday, August 20, 2025, from 6:30 PM to 10:00 PM

The request has been reviewed by the Police Department, Fire Department, and Grounds Division, all of whom have no concerns.

SUGGESTED MOTION:

Move to approve three One-Day Liquor Licenses for Spectacle Management, Inc. to serve beer and wine at Cary Hall, 1605 Massachusetts Avenue, during the Summer Concert Series on August 1, 9, and 20, 2025, from 6:30 PM to 10:00 PM.

Move to approve the consent.

FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: One-Day Liquor License - Clearview Dermatology - 450 Bedford Street

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.5

SUMMARY:

Category: Decision-Making

Clearview Dermatology is requesting a One-Day Liquor License to serve beer and wine at a Grand Opening Celebration for its new Lexington location. The event will take place on Wednesday, July 30, 2025, from 5:00 PM to 7:30 PM at 450 Bedford Street, Unit 1200.

They are requesting the One-Day liquor License in case members of the public attend as it is in a building that is filled with other businesses.

SUGGESTED MOTION:

Move to approve a One-Day Liquor License for Clearview Dermatology to serve beer and wine at its Grand Opening Celebration on July 30, 2025, from 5:00 PM to 7:30 PM, at 450 Bedford Street, Unit 1200, in accordance with all applicable regulations.

Move to approve the consent.

FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: Entertainment License - Follen Church - 755 Massachusetts Avenue

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.6

SUMMARY:

Category: Decision-Making

Follen Church is requesting an Entertainment License for live musical performances during the East Village Community Fair, scheduled for Saturday, October 4, 2025, from 10:00 AM to 3:00 PM.

The entertainment will take place immediately outside Follen Church, between the Sanctuary and the Community Center, located at 755 Massachusetts Avenue.

SUGGESTED MOTION:

Move to approve an Entertainment License for Follen Church for live musical performances at the East Village Community Fair on October 4, 2025, from 10:00 AM to 3:00 PM, at 755 Massachusetts Avenue, in accordance with all applicable regulations.

Move to approve the consent.

FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Accept: Select Board Committee Resignation

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.7

SUMMARY:

Category: Decision-making

Resignation:

Town Celebrations Committee

The Select Board is being asked to accept the resignation of Julie Miller from the Sustainable Lexington Committee, effective immediately.

SUGGESTED MOTION:

To accept the resignation of Julie Miller from the Town Celebrations Committee, effective immediately.

Move to approve the consent.

FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

ATTACHMENTS:

Description	Type
 2025.07.10 Julie Miller - Town Celebrations Committee_Redacted	Backup Material

Samantha Lino

From: Samantha Lino
Sent: Thursday, July 10, 2025 2:28 PM
To: Samantha Lino
Subject: FW: Changing a full membership seat on TCC

From: David Grabel < >
Sent: Thursday, July 10, 2025 2:18 PM
To: Kim Katzenback <kkatzenback@lexingtonma.gov>; Doug Lucente <doug.lucente>; Sudha Balasuryan < >; Geetha Padaki < >; Glen BASSETT < >
Subject: Changing a full membership seat on TCC

Julie Miller has stepped off the TCC back in April, 2023. She unfortunately did not submit a formal resignation letter. TCC respectfully requests asks the Board to accept this memo to serve as confirmation that Julie has not been an active member nor has participated in any meetings since April, 2023 and TCC would like to move associate member, Sudha Balasuryan, up to fill that full member seat.

--
David Grabel

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: Select Board Committee Appointments

PRESENTER:

Jill Hai, Select Board Chair

ITEM NUMBER:

C.8

SUMMARY:

Category: Decision-making

Appointments:

Council for the Arts - Thelma L. Goldberg

Unexpired term ending September 30, 2025, effective immediately.

Economic Development Advisory Committee - Mitch Tyson

Unexpired term ending September 30, 2025, effective immediately.

Historic Districts Commission - Robert A. Bellinger and James Carrico

Robert A. Bellinger and James Carrico, associate seats with an unexpired term ending December 31, 2030, effective immediately.

Housing Partnership Board - Ravneet Grewal

Unexpired term ending September 30, 2025, effective immediately.

Lexington Bicycle Advisory Committee - Jason Dearling

Unexpired term ending September 30, 2026, effective immediately.

Noise Advisory Committee - Joseph Leher

Unexpired term ending September 30, 2027, effective immediately.

Town Celebrations Committee - Sudha Balasuryan

Unexpired term ending June 30, 2027, effective immediately.

Town Celebrations Subcommittee - Seema Badaya, William Keim, and Simon Rubenstein

Unexpired term ending June 30, 2025, effective immediately.

Town Report Committee - Beverly Liu

Unexpired term ending September 30, 2025, effective immediately.

Transportation Advisory Committee - Jeremy M. Bowman and Keshav G. Krishna

Jeremy Bowman: Unexpired term ending September 30, 2025, effective immediately.

Keshav Krishna: Unexpired term ending September 30, 2027, effective immediately.

SUGGESTED MOTION:

Council for the Arts

Move to appoint Thelma L. Goldberg to the Council for the Arts for an unexpired term ending September 30, 2025, to be effective immediately.

Economic Development Advisory Committee

Move to appoint Mitch Tyson to the Economic Development Advisory Committee for an unexpired term ending September 30, 2025, to be effective immediately.

Historic Districts Commission

Move to appoint Robert A. Bellinger and James Carrico to the Historic Districts Committee as associates for an unexpired term ending December 31, 2030, to be effective immediately.

Housing Partnership Board

Move to appoint Ravneet Grewal to the Housing Partnership Board for an unexpired term ending September 30, 2025, to be effective immediately.

Lexington Bicycle Advisory Committee

Move to appoint Jason Dearling to the Lexington Bicycle Advisory Committee for an unexpired term ending September 30, 2026, to be effective immediately.

Noise Advisory Committee

Move to appoint Joseph Lehar to the Noise Advisory Committee for an unexpired term ending September 30, 2027, to be effective immediately.

Town Celebrations Committee

Move to appoint Sudha Balasuryan to the Town Celebrations Committee for an unexpired term ending June 30, 2027, to be effective immediately.

Town Celebrations Subcommittee

Move to appoint Seema Badaya, William Keim, and Simon Rubenstein to the Town Celebrations Subcommittee for an unexpired term ending June 30, 2025, to be effective immediately.

Town Report Committee

Move to appoint Beverly Liu to the Town Report Committee for an unexpired term ending September 30, 2025, to be effective immediately.

Transportation Advisory Committee

Move to appoint Jeremy M. Bowman to the Transportation Advisory Committee for an unexpired term ending September 30, 2025, and Keshav G. Krishna for an unexpired term ending September 30, 2027, to be effective immediately.

Move to approve the consent.

FOLLOW-UP:

Select Board Office.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

ATTACHMENTS:

Description	Type
Thelma Goldberg - Council for the Arts - Application & Resume_Redacted	Backup Material
Mitch Tyson - Economic Development Advisory Committee - Application + Resume_Redacted	Backup Material
Bellinger, Robert 04072025 HDC_Redacted	Backup Material
Carrico, James 03282025 HDC_Redacted	Backup Material
Ravneet Grewal- Housing Partnership Board - Application + Resume_Redacted	Backup Material
Jason Dearling	Backup Material
Joseph Lehar - Noise Advisory Committee - Application + Resume_Redacted	Backup Material
S._Balasuryan 2022_Redacted_Redacted	Backup Material
Seema Badaya - Town Celebrations Subcommittee - Application_Redacted	Backup Material
William Keim - Town Celebrations Subcommittee - Application + Resume_Redacted	Backup Material
Simon Rubenstein - Town Celebrations Subcommittee - Application + Resume	Backup Material
Beverly Liu - Town Report Committee - Application + Resume_Redacted	Backup Material
Jeremy Bowman - Transportation Advisory Committee - Application & Resume_Redacted	Backup Material
Keshav Krishna - Transportation Advisory Committee - Application + Resume_Redacted	Backup Material

Application Form

Profile

Attendance to a regularly scheduled meeting of the board or committee of interest is strongly encouraged when considering applying for membership. All committee meetings are open to the public and are posted at least 48 hours in advance of the meeting in our www.lexingtonma.gov/calendar.

If you are appointed to the board or committee for which you have applied, information from this application will be used to contact you regarding your appointment from the appointing authority as well as the Town Clerk’s Office. Please do not offer information on this application you would prefer we not use.

Applications will be kept on file and considered as vacancies occur for up to six months unless otherwise noted.

If you have any questions or need more information regarding the completion of the application, please contact either the Select Board Office at 781-698-4580 or the Town Manager’s Office at 781-698-4540.

Thelma

First Name

L

Middle Initial

Goldberg

Last Name

Nickname

Thelma

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

tgoldberg@

Email Address

Alternate Email Address (Optional)

tgoldberg@

Ave

Home Address

Suite or Apt

Ave

Lexington

City

MA

State

02420

Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

50 years

What Precinct do you live in?

☒ Precinct 8

Home: (781)

Primary Phone

Home: (781)

Alternate Phone

Employer

Director

Job Title

Work Address

1403 Massachusetts Avenue

Which Boards would you like to apply for?

Council for the Arts: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

50+ years teaching dance 43 years of owning a local dance school advanced study of dance as an instrument for community-building

Upload a Resume

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

I have time to donate my services to the town

How did you hear about the board or commission for which you are applying?

friend

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

Thelma L Goldberg

Thelma Larkin Goldberg

(email)

thedanceinn.com

t

781- (cell)

Avenue, Lexington, MA 02420

PERSONAL STATEMENT

My passion is education, particularly tap-dance education. Since 1915, when metal taps were added to shoes, tap dance has graced local street corners, the stages of vaudeville and Broadway and the movie-musical lots of Hollywood, where stars like Fred Astaire and Shirley Temple inspired dancers of all ages to sign up for dance classes. Who are our tap-dance educators? What techniques and methods are most successful? How does tap-dance education compare with ballet and modern-dance training? Are there correlations between studying tap dance and learning math and other academic subjects? What are the benefits of tap dancing for children, teens and adults? I hope to be accepted into the Doctoral Program at Lesley University this fall so that I can pursue answers to these questions and acquire a deeper knowledge and understanding of the role tap education plays in today's performing arts scene.

PROFESSIONAL QUALIFICATIONS

- 2015–present: Member, National Dance Educators Organization
- 1986–present: Member, Dance Teachers' Club of Boston
- 1974–1983: Licensed Massachusetts Special-Education Teacher

AWARDS

- 2015: Dr. Michael Shannon Dance Champion Award, Boston Dance Alliance
- 2013: Sandra C. Labaree New England Volunteer Values Award (American Cancer Society)
- 2012: Toe-Knee Award, NYC Tap Festival (right-hand support to Executive Director)
- 2003: Tap Teacher Award, NYC Tap Festival
- 1981: Teacher of the Year, District 1, Brighton School District, Boston

CURRENT COMMITTEE POSITIONS

- 2015–present: Lesley University Alumni Council
- 2015–present: Advisory Committee, Boston Dance Alliance
- 2012–present: Town of Lexington Revolutionary Revelry Committee

EDUCATION

- Regis College: MA, Special Education, 1980
- Lesley University: BS, Special Education, 1974
- Numerous intensive workshops with leading dance educators, including Bill Evans, Brenda Bufalino, Billy Siegenfeld, Sarah Petronio, Heather

CAREER EXPERIENCES 2012–present: Author, *Thelma's Tap Notes*

Thelma's Tap Notes is a series of educational materials that includes books, DVDs, posters, classroom worksheets and more. Combining my passions for education and tap dance, I have developed a rhythm-based curriculum that introduces students of all ages to a progression of exercises, combinations and choreography. I specify when, why and how to teach basic foundational skills, leading to students' success and joyful dancing. Accompanying worksheets and posters focus on vocabulary building, music theory and tap history; these supplement and reinforce the physical aspects of dancing by engaging students' minds as well as their bodies.

The following materials have been copyrighted. Books were published by Createspace and are available on Amazon.com. All other materials are available online at <http://shop.thelmastapnotes.com/>.

- 2013: *Thelma's Tap Notes: A Step-by-Step Guide to Teaching Tap, Children's Edition* (levels 1–5)
- 2015: *Thelma's Tap Notes* DVD, to supplement the children's edition
- 2015: *Tap Into Life: A Guide to Tap Dancing for Adults* (levels 1–3)
- 2015: *Tap Into Life* DVDs, to supplement adult edition, levels 1–3
- 2015: *Tap into History*, a poster depicting a timeline of 33 important people in the history of tap dance, starting in the 1600s and continuing through 2010
- 2015: *Classroom Kit*, a series of 25 worksheets and more than 50 rhythm flash cards to supplement the children's edition of *Thelma's Tap Notes*
- Coming soon: *Thelma's Tap Notes for Teens* (levels 6–10)

2012–present: Writer for *Dance Studio Life*

Published by Rhee Gold, a leader in dance education, *Dance Studio Life* is one of the largest international dance magazines, with 66,000 subscribers worldwide. My contributions include:

- "Two Tips for Teachers," a monthly 300-word column dedicated to tap education
- Feature articles:
 - "Mindful Marketing: Tempting Adults with Tap," March–April 2013
<http://www.dancestudiolife.com/mindful-marketing-tempting-adults-with-tap/>
 - "Thinking Out Loud: Celebrating National Tap Dance Day," May–June 2015
<http://www.dancestudiolife.com/may-june-2015-thinking-out-loud-celebrating-national-tap-dance-day/>

1983–present: Director, The Dance Inn, Lexington, MA

The Dance Inn has grown from a class of 13 held in a converted dining room to a multi-studio program serving an average of 500 students weekly. Preschool dance, tap, jazz, ballet, contemporary, hip hop and modern are taught by a team of 10

professional dance educators. The mission is to offer dance programming to all individuals, from the recreational to the pre-professional and including special-needs students, in a non-competitive environment that fosters individual accountability, respect for oneself and others, and reaching for one's personal best. Emphasis is on lifelong learning and bringing dance into the community.

Key highlights of the Dance Inn:

- Many students who have gone on to dance professionally, to dance in college, to teach dance, or otherwise to keep dance in their lives.
- Annual performances for the Making Strides against Breast Cancer Walk
- Annual holiday performances to benefit children's charitable projects
- Outdoor community performances in, for example, the annual Patriot's Day Parade, the Memorial Day Discovery Day festival, the May Day celebration, Tap Day and flash mobs for various events
- Being selected to perform at Disney World on numerous occasions
- Participating in NYC and Chicago dance festivals

2001–present: Master Teacher

- August 2016: Faculty, Boston Beantown Tap Festival, Tap Teacher Workshops
- July 2016: Faculty, Dancelife Retreat Center, Tap Teacher Intensives
- June 2016: Faculty, Glenn Leslie's Rhythm Weekend, Chicago
- Summer 2015: Presenter, Dancelife Teacher Conference (800 attendees)
- 2013–present: Faculty, American Tap Dance Foundation Teacher Training Program, NYC
- 2012–present: Faculty, Dancelife Retreat Center, Teacher Weekend Intensives
- 2010–present: Faculty, various festivals and weekend workshops including New Orleans Tap Festival, University of Wisconsin at Stevens Point, Portsmouth Percussive Dance Festival
- 2003–2009: Director, Pre-Professional Program of the NYC Tap Festival (an intensive one-week summer tap program for 40 students from around the world)
- 2002–present: Master Teacher, NYC Tap Festival (weekend workshops)
- 2000–2002: Advisor, Dance Education Training Course, Dance Teachers' Club of Boston

2000–2006: Tap-Dance Teacher, Boston Conservatory, Boston

- Weekly tap classes with students in the Musical Theatre Department, to prepare them for Broadway auditions

1974–1983: Special-Education Teacher, Boston Public Schools

- Responsible for implementing and coordinating Individualized Education Programs and working to integrate special-needs students into the general population in elementary, middle- and high-school environments
- 1978: Faculty Senate President, Jackson Mann Elementary School
- 1981: Teacher of the Year, District 1, Brighton School District, Boston

Key skills gained:

- Ability to work with diverse populations as both a teacher and a faculty leader

NONPROFIT EXPERIENCE

1997–2014: Executive Director, Dance Inn Productions, a 501c3 organization

The mission of Dance Inn Productions is to pass on the artistry and traditions of dance through programming that entertains, educates and inspires. As Executive Director, I designed, implemented and produced events ranging from month-long series to weekend festivals to one-day workshops. Dance Inn Productions has been dormant since I shifted my goal to teacher education.

1995–2014: Tapestry

“Tapestry” was the annual May tap event that celebrated National Tap Dance Day in the New England community. Weekend activities included workshops, panel discussions, film presentations, professional concerts, student concerts and jams. Among the honorees were Dianne Walker, Buster Brown, Sarah Petronio, Jimmy Slyde, Brenda Bufalino and Billy Siegenfeld, all leaders in the world community of percussive dance.

1997–2005: The Tom and Catherine Larkin Youth Ballroom Program

The Tom and Catherine Larkin Youth Ballroom Program offered free ballroom classes to local middle- and high-school students during the winter season and culminated in a ballroom dance party that brought all generations together to celebrate the joys of partner dancing.

PERSONAL INTERESTS

I've been fortunate to be able to develop my personal interests into professional pursuits, living each moment filled with a passionate drive to connect with others in meaningful ways. Whether teaching my own students of all ages or working with other educators, I thrive on helping them achieve success and joy through movement that is rooted in rhythm. Other interests include traveling to visit my children and grandchildren, and seeing my youngest son perform as a professional dancer. Attending Bikram yoga classes three to five days a week and working out with a personal trainer help me maintain my physical and mental well-being.

REFERENCES are available upon request.

Application Form

Profile

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Applications will be kept on file and considered as vacancies occur for up to six months unless otherwise noted.

If you have any questions or need more information regarding the completion of the application, please contact either the Select Board Office at 781-698-4580 or the Town Manager’s Office at 781-698-4540.

Mitch		Tyson
First Name	Middle Initial	Last Name

Nickname

Mitch

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Mr.

mitch@

Email Address

Alternate Email Address (Optional)

mitch@ t

Road, Lexington, MA, USA 02420		
Home Address	Suite or Apt	
Lexington	MA	02420
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

36

What Precinct do you live in?

☒ Precinct 6

Home: (617)

Primary Phone

Alternate Phone

Self

Employer

Job Title

Work Address

, Lexington, MA, USA 02420

Which Boards would you like to apply for?

Economic Development Advisory Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I've worked in government, business, academia, and finance. Long term resident of Lexington who loves the town.

Upload a Resume

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

I'd like to see a vibrant Lexington Center and a diversified tax base.

How did you hear about the board or commission for which you are applying?

Saw email from Town

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

Mitch Tyson

Mitch Tyson, Principal at Tyson Associates, is an experienced high-tech executive, entrepreneur, mentor, angel investor, and lecturer. He serves on multiple corporate and non-profit boards and advises early-stage companies. Mitch cares deeply about entrepreneurship, innovation, climate change, racial justice, and income inequality.

Education - MIT (1972-1978)

BS – Physics 1975

MS – Nuclear Engineering 1978

MS – Political Science 1978

ABD – PhD Program – Energy Technology and Policy

Policy – US Senate (1979 - 1984) Mitch worked for US Senator Paul Tsongas (MA) and served as his science and technology advisor and legislative assistant for energy policy and industrial policy.

Executive Experience:

GCA Corporation (1984-1987) – Mitch was the director of product management for GCA corporation, one of the pioneering companies in the semiconductor equipment field, and the leading supplier of advanced lithography systems.

PRI Automation (1987-2002) – Mitch joined PRI as the VP of operations and rose to become the CEO. Over that time the company grew from \$4M to over \$300M and became the global leader in supplying automated material handling systems and software to the worldwide semiconductor industry. Mitch led the company's IPO and managed the acquisition and integration of 6 other companies. PRI employed 1800 employees in 14 countries until it was acquired in 2002.

AmberWave Systems (2002-2003) – Mitch was a board member and interim CEO of this advanced material science company that commercialized strained silicon.

Advanced Electron Beams (2005-2010) – Mitch was the CEO of this venture backed clean energy company that developed an industrial energy efficiency technology to replace chemical and thermal processes in multiple industries.

Corporate Board Member – Mitch has served on the board of 15 public, private, and venture back company boards including SDRC, Rubicon, AmberWave, 7AC, Leading Edge Equipment Technology, Big Belly Solar, Brooks Automation, Kuva, Transaera, and Cala Systems. He has served on numerous executive, audit, and compensation committees. He currently serves on the board of Photronics Corporation, a public \$800M semiconductor mask manufacturer and chairs the cyber security committee and serves on the audit committee. He also serves on the boards of Cala Systems and Transaera.

Angel Investor- (2012-present) Mitch is an active angel investor having invested on over 30 early-stage tech and cleantech companies and is a managing partner in the **Clean Energy Venture Group** which

provides seed capital and management expertise to early-stage clean energy companies. He is also a venture partner and limited partner in Clean Energy Ventures, a venture capital firm that invests in scalable early-stage climate tech startups and clean energy technologies addressing global climate change.

Mentor - Mitch has mentored over 250 companies and has worked with many local incubators and accelerators including Clean Tech Open, Greentown Labs, TiE Boston Angels, Carbon to Value, Mass Challenge, MIT Clean Energy Prize, Brandeis University, and Our Generation Speaks. In this role Mitch helps entrepreneurs launch and build purpose driven companies by helping them with customer discovery, organizational development, business models, and fundraising.

Non-Profits Boards

NECEC (ACT) (2007-present) – Mitch is a co-founder and former chair of the New England Clean Energy Council (NECEC) an ecosystem organization that seeks to advance the just, equitable and rapid transition to a clean energy future and diverse climate economy.

Greentown Labs (2014-2024) - Mitch served on the board of Greentown Labs which is the country's largest climatetech incubator with over 200 member companies in Boston and Houston.

Acadia Center (2012-present) – Mitch serves on the board of Acadia Center whose mission is to advance bold, effective, and equitable clean energy policy solutions for a livable climate and a stronger, more equitable economy.

Innovation Studio/Venture Café Foundation (2014-2023) -

Mitch served as board chair from 2014-2021 of Innovation Studio which activates spaces and runs programs to help diverse entrepreneurs and innovators to start and grow their businesses. IT was previously known as the Venture Café Foundation.

Other Organizations – Mitch has also been active in many other organizations including Browning the Green Space, New England Israel Business Council, Impact Entrepreneur Magazine, New England Water Innovation Network, Mass High Tech Council, Alliance for Business Leadership, Year-Up Boston and the Boston Green Academy.

Academia

Brandeis International Business School – (2011-2019) Mitch was an Adjunct Professor where he taught the course on Corporate Sustainability. Mitch also advised the Asper Center for Global Entrepreneurship at Brandeis.

Lecturer – Mitch also lectures on Customer Discovery and Entrepreneurship at area universities and US and Canadian accelerators.

Government

Mass Tech Collaborative (2004-2018) - Mitch served 14 years as a member of the executive committee of the Mass Tech Collaborative, the state's innovation economic development agency.

Massachusetts Advanced Manufacturing Collaborative (2012-2016) Mitch was a Co-Chair of the AMC which was a joint government, industry, academic organization whose purpose was to improve the competitiveness of the Massachusetts manufacturing sector by addressing the issues of workforce development, technical assistance, innovation, the cost of doing business, and access to capital.

Awards

In 2008 Mitch was named a Mass High Tech All-Star for his leadership in the clean energy sector. In 2017 he received the “Decade of Influence Award” and in 2019 he was given the Clean Energy Hall of Fame Award by the Northeast Clean Energy Council.

Application Form

Profile

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Robert	A	Bellinger
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

gmail.com

Email Address

Alternate Email Address (Optional)

Street		
Home Address	Suite or Apt	
Lexington	MA	02420
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

32 years

What Precinct do you live in?

☒ Precinct 1

Home: (781)	
Primary Phone	Alternate Phone

Retired/Self-Employed	Public Historian
Employer	Job Title

Work Address

same as above

Which Boards would you like to apply for?

Historic Districts Commission: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I have a doctorate in history from Boston College and I have close to 40 years of experience teaching history at all levels. A significant amount of my work has been in the area of public history. I am interested in how historic sites are instrumental in telling our collective history.

Upload a Resume

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

I have been engaged in several history projects in Lexington and have developed an interest in being more involved with the preservation of the town's history.

How did you hear about the board or commission for which you are applying?

Through my work on local history projects

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

Robert A. Bellinger
Street
Lexington, MA

Education

Boston College, Chestnut Hill, MA
Ph.D. in American History, December 2000

Dissertation: *Hope of the Race: African Americans in White Colleges and Universities, 1890-1915.*

Lesley College, Cambridge, MA
Student Teaching Practicum, which led to Massachusetts State Teaching Certification in Social Studies (#0258029), fall 1981

Harvard University Graduate School of Education, Cambridge, MA
Ed.M., June 1978 Concentration in Teaching, Curriculum and Learning Environments

Amherst College, Amherst, MA
B.A., June 1977 Majors: Psychology and Black Studies with a concentration in Education

The Frederick Gunn School
Cum Laude, June 1973

Academic Appointments

Suffolk University, Boston MA
Professor Emeritus (2022-present); Associate Professor in History (2002-2021); Assistant Professor in History (1999-2002); Instructor in History (1987- 1999); Director, Collection of African American Literature (1991-present); Director of Black Studies Program (1994-2021)

Wheelock College, Boston, MA
Adjunct Instructor in History (September 1987-December 1991)

Relevant Professional Experience

Public Historian, Righting Histories, Lexington, MA (2024-present)

Director, the African Seed Exchange (ASÉ), Boston, MA & Charleston, SC (2021-present)

Director, Géwël Tradition Project/Historian of the Sing Sing Family, Boston, MA & Dakar, Senegal (2005-present)

Publications

Book

Monuments, Memorials and Historic Sites, New England's Visible Black History in Photographs. Photographs and Text by Robert A. Bellinger, Ph.D. AAHGS New England Chapter, Inc., 2017

Articles

What's in A Name? The Frederick Gunn School Bulletin, December 2019

Dancing Through Time and Space: African Dance and the G  w  l Tradition of Senegal at Suffolk University, Journal of Pan African Studies (on-line), Volume 6 Number 5, 2013,
<http://www.jpanafrican.com/docs/vol6no5/6.5-Bellinger.pdf>

The G  w  l Tradition Project: Supporting A Living Tradition, African Arts, Spring 2013, Vol. 46, No. 1

Appearances in Documentaries

Birth of A Movement, by Susan Gray and Bestor Cram for Northern Light Productions, Watertown, MA. Aired on Independent Lens, PBS in February 2017

Beyond the Fields: Slavery at Middleton Place. Sunhead Projects, LLC for Middleton Place Foundation, Charleston, SC. April 2017

Public History Projects & Consultancies

Lexington Lyceum Advocates Research Group, Lexington, MA (2023)

Rediscover Mapledale/Stow Acres, Stow, MA, historic consultant, (2023)

History Consultant, Middleton Place, Charleston, SC, (2022-present)

Historian/Researcher for Lexington Historical Society Black History Project, 2019-2020
Conducted research on free and enslaved Black people in Lexington, Massachusetts, 1690-1850.

Visiting Scholar, Middleton Place, Charleston, SC July 2019

Honorary Pall Bearer for Ancestral Reburial, African Burying Ground, Portsmouth, New Hampshire, May 22 & 23, 2015

What's in A Name? The Voyage of Discovery! African American Historical and Genealogical Society 29th National Conference hosted by the New England Chapter.
Organized and carried out pre-conference tours of African American history sites and repositories in Massachusetts, Maine, New Hampshire, and Rhode Island. (October 2007)

Scholarly Presentations

A Brief History of Golf and People of African Descent, keynote address at First Robert H. Hawkins Memorial Golf Tournament, Mapledale/ Stow Acres Golf Course, Stow, MA (August 26, 2024)

Landmarks of Slavery and Freedom, Juneteenth Presentation, Community Church of Boston (June 18, 2023)

Gardens of the Enslaved, Colonial Society of Massachusetts (December 16, 2021)

American History and Pedagogy: How Our Understanding of the Past Affects Our Understanding of the Present, The Ralph W. Tyler Wednesday Dialogue, Distinguished Scholar Presentation, Lesley University, Cambridge, MA (July 24, 2019)

The Géwël Tradition Project: A dialogue Between Two Ways of Knowing at the Intersection of the Academy and an African Community, 4th International Symposium of the Dakar Institute of African Studies, "Bridging the Gap: Black Studies Across Social, Geographical, Epistemic, and Linguistic Lines," University of Cheikh Anta Diop, West African Research Center and University of West Indies, Dakar, Senegal (July 6, 2018)

On The Ancestral Trail, Part 2: The Anderson/Gilliams and The Bellinger/Middletons – Enslavement, Slavery, and Emancipation; Crossing the Racial Divide in the Early years of the United States to the End of the 19th Century, AAHGS-NE Chapter Meeting, Cary Memorial Library, Lexington, MA. (February 17, 2018)

On the Ancestral Trail, Part 1: The Anderson/Gilliams and the Bellinger/Middletons, Building Family and Community in Southside, Virginia, and the South Carolina Low Country in the 19th Century. African American Historical and Genealogical Society - New England Chapter Monthly Meeting, Bedford, MA (February 2016)

African American Collegiate Athletes in New England, 1890-1915, presented at Heritage New Hampshire 2015 Black New England Conference - Put Me in Coach: The Battle to Integrate New England Sports, University of New Hampshire (October 30-31, 2015)

Listening with New Eyes: The Anderson Family of Amelia, Virginia, 1835-1935, African American Historical and Genealogical Society 24th National Genealogical Conference: "150 Sounds of Freedom," Nashville, TN (October 2013)

Other Presentations & Related Activities

Dedication of Stepping-Stones for Jack and Diana at the Hancock-Clark House, Lexington, MA, April 2022.

Legacy of the MA 56th Regiment, Cary Memorial Library, Lexington, MA. (February 13, 2019)

West African Coastal Waterways in Legend and History, Riverine Geographies Exhibit, Afriterrra, Boston, MA. (February 11, 2019)

African Americans in Colonial Boston, Art in Colonial Boston, Museum of Fine Arts, Boston, MA. (November 15, 2018)

What Makes Lexington Special? Patriot's Day Talk, The Johnston Family, Lexington, MA. (April 15, 2018)

Honorary Pall Bearer for Ancestral Reburial, African Burying Ground, Portsmouth, New Hampshire, May 22 & 23, 2015

Photography/Art Exhibits

Crown, A Celebration of Black Hair, photography exhibit at Cambridge Multicultural Arts Center, Cambridge, MA (February 2025)

The Magic of Music and Movement, photography exhibit at the Lexington Community Center, Lexington, MA (March – April 2024)

Home of the Heart: Photographs of Senegal, exhibit with photographer Ken Martin, Suffolk University Gallery, Boston, MA (November 2019 – January 2020)

Advocacy Through Art, photograph included in art exhibit, Metro Region Office of Human Rights and Metro Cultural Diversity Committee (November – December 2019)

Simply Being Who We Are . . . photography exhibit at Cary Memorial Library, Lexington, MA (January – February 2019)

Similarities, photography exhibit in the Library Gallery at the Frederick Gunn School, Washington, CT (September – December 2017)

From the Géwël Tradition Project Archives, photo exhibit by Robert A. Bellinger, Celebrate Senegal, Suffolk University, Munce Conference Room, Boston, MA (Nov 15-Dec 10, 2009)

Memberships

Sons of the America Revolution, Old Middlesex Chapter, Massachusetts Society, (2023)

Slave Legacy History Coalition, (2022-present)

The Colonial Society of Massachusetts (nominating committee 2010; council member 2013-2015)

Massachusetts Historical Society, Fellow (2010-present)

The African American Historical and Genealogical Society, New England Chapter (1996-present)

Phi Alpha Theta History Honors Society (1990-present)

Boards

Rediscover Mapledale, Advisory Board, (2025)

Middleton Place, Board of Trustees, (2023-present)

Shirley-Eustis House, Board of Governors, Roxbury, MA (2019-present)

Robbins House, Advisory Committee, Concord, MA (2016-present)

The Frederick Gunn School, Board of Trustees, Washington, CT (2015-present)

Afriterra, Inc. Board Member, Boston, MA (1999-present)

Application Form

Profile

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James

First Name

Middle
Initial

Carrico

Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Mr.

@gmail.com

Email Address

Alternate Email Address (Optional)

Avenue

Home Address

Suite or Apt

Lexington

City

MA

State

02420

Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

2 years

What Precinct do you live in?

☒ Precinct 1

Home: (319)

Primary Phone

Business: (917)

Alternate Phone

Hart Howerton

Employer

Associate

Job Title

Work Address

New York, NY 10016

Which Boards would you like to apply for?

Historic Districts Commission: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

8 years of professional experience as an architect, urban designer, and planner, many of which have involved work on and around a wide variety of historical buildings -3 years - Architectural Designer - Machado Silvetti (Boston) --Menokin Glass House Museum (Virginia): Steel and glass enclosure over stabilized ruins of a 1699 mansion owned by Declaration of Independence signer --McNay Museum (Texas): Master plan and concept design allowing museum to double its footprint while remaining sensitive to original 1900's era Victorian mansion museum --Denver Art Museum: Concept design, schematic design, & design development involving renovation of Gio Ponti's only American Building, a 1960's brutalist museum tower in Denver, plus a smaller connecting glass-enclosed pavilion at ground level - 2 years - Associate - Gamble Associates (Cambridge) --Braintree Electric Light Department Redevelopment: Multi-family housing development that included rehabilitation of three pre-war era buildings along Monatiquot River -3 years - Associate - Hart Howerton (Concord, MA & New York City) --Rehabilitation of gilded-age mansion & Olmsted designed landscape in Northern New England as part of a larger site repositioning from institutional to hospitality use US Fulbright Scholar to Singapore, 2022. Research included studying aging modernist heritage buildings and an article published for Docomomo (Documentation and Conservation of Buildings, Sites and Neighborhoods of Modern Movement). See <https://www.docomomo.sg/happenings/singapores-city-rooms>. Licensed Architect in Massachusetts since 2018 American Institute of Certified Planners (AICP) since 2023 Teaching assistant to David Fixler at the Harvard GSD for the course "HIS 4384: Building Conservation and Renewal: Assessment, Analysis, & Design" (2018)

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

In the aftermath of the bombing of the House of Commons, Winston Churchill said something that architects often quote to this day: "We shape our buildings, thereafter, they shape us." As an architect and planner, this idea increasingly resonates with me the longer I live, and the longer I work in these professions. In our society, the built world is a record and disseminator of culture. This is especially true in Lexington, one of the most important towns in our Nation's history. I need only gaze up at my living room wall for immediate evidence of this. There, hangs a framed print of Grant Wood's "Midnight Ride of Paul Revere", depicting a beautifully dreamlike interpretation of Revere's storied ride through Lexington. While Wood abstracted the scene so as not to match exact reality, it would be no great leap to conclude that the street that anchors the painting's composition is Massachusetts Avenue, the primary spine of Lexington's Historic Districts. Fortunately, we are not rebuilding our town from the ashes, that daunting task that Churchill was faced with. Still, the ongoing stewardship of Lexington's Historical Districts is a deeply important cultural act that demands great care and passion. Given my decade-long, multi-faceted professional experience that has often engaged matters of historic preservation and rehabilitation, I believe I am an ideal candidate to serve on the Historic Districts Commission. I understand that this board is charged with reviewing and approving "all plans for construction, demolition, exterior renovations, color changes, and signs within the Lexington Historic Districts", a charge well suited to my professional and academic experience as an architect and planner who regularly engages questions and debates on the inherent challenges and opportunities that emerge when valuable historical resources are faced with new investment. Interestingly, Churchill's idea for resolving this tension was straightforward: the Commons Chamber was to be reconstructed exactly as it had been before. Were this done in the U.S. today, he'd certainly get points for adhering to the "Reconstruction" strategy, one of the four "treatments" outlined in the Secretary of the Interior's Standards for Historic Buildings. But my professional experience over a decade or so has taught me that there are a variety of ways to approach questions of interventions on historical structures. Briefly here, I'd like to share some of the principles that I've learned along the way: -Start with, and analyze, all of the facts -Seek original source materials -Every place is unique, so is the solution -Places are experienced humanistically and holistically. This is intuitive at face value, but in practice is complicated by the distinctions made between areas of expertise. Resist these distinctions and remember humans, as much as possible. These are in no way intended to be a pontification of gospels or rules, simply a representation of some of my thinking on these topics. I thought this might be useful for those of you reviewing the application to get a glimpse of how my mind works. Of course, I would enjoy discussing and hearing other perspectives, as, to be sure, the life of an architect is full of endless curiosity and opportunities for learning evermore. I'll end on a personal note. The man who gave me my first job in architecture, Ed Sauter, recently died. A beloved fixture in my hometown of Mount Vernon, Iowa, a lengthy obituary was written about him in the local newspaper which I found very moving. The article made several mentions of one of his key community contributions: founding the Mount Vernon Historic Preservation Commission, of which he remained a part of for 36 years. I always admired Mr. Sauter because he was more than just an employer, he was a man who contributed to and was respected about town, in that traditional civic manner that I believe is conspicuously needed these days. So, to the extent that there is a chance to follow in his footsteps in the context of my new home* of Lexington, I would be greatly honored. Thank you for your time. *Incidentally, my wife and I realized after we closed on our house that it is listed on the local historic inventory! We were absolutely thrilled to have our own little slice of Lexington history and had a ball reading the accompanying architectural description.

How did you hear about the board or commission for which you are applying?

Planning Board members Abby McCabe and Michael Schanbacher, and Town Meeting member Cristina Burwell recommended I consider this opportunity after I had emailed around expressing interest in getting involved locally in some form of volunteer role.

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

EDUCATION

Harvard University • Graduate School of Design

Master of Urban Planning (With Distinction)

Cambridge, MA
Aug 2017 - May 2020

Master of Architecture II (Letter of Commendation)

- TA Positions: Building Conservation and Renewal (David Fixler), Frameworks of Practice (Paul Nakazawa), Urban Design for Urban Planners (David Gamble)

University of Arizona • College of Architecture

Bachelor of Architecture

Tucson, AZ
Aug 2009 - May 2014

- Award for Achievement in Studio, B.Arch Faculty Commendation Award

EXPERIENCE

Hart Howerton | Associate

Concord, MA & New York, NY

- Leading teams of architects, landscape architects, and planners with a focus on high-end community and resort development with complex program requirements in particularly unique geographical and cultural environments

Nov 2022 - Present

Fulbright U.S. Student Program | Research Grantee

Singapore

- Represented U.S. abroad to promote peaceful exchange and strengthen US-SG bilateral relations
- Investigated history and innovations in the built environment with a focus on interior public space

Jan 2022 - Nov 2022

Gamble Associates | Associate

Cambridge, MA

- Consulted on design strategies and concepts for urban design & planning projects in the Boston area

May 2020 - Dec 2021

Supernormal | Architect, Planner, & Researcher

Cambridge, MA

- Developed strategies for “missing middle” housing and infill ADU design

May 2019 - Jan 2020

Snøhetta | Summer Position

New York, NY

- Developed office concept design for Ford’s new Corktown Innovation Headquarters in Detroit

May 2018 - Aug 2018

Machado Silvetti | Architectural Designer

Boston, MA

- Responsible for design concepts and development for high profile cultural buildings that involved unique rehabilitations to historically significant buildings ([link](#))

Jul 2014 - Jul 2017

PUBLISHED WORK

“Singapore’s City Rooms”

- Essay published by Docomomo Singapore about interior public space in Singaporean Modern Movement buildings ([link](#))

“Burning in Public — Unpacking the Clash Between Environment and Tradition”

- The culture, stories, and meaning behind Singapore’s street-side burn barrels, published by Rice Media ([link](#))

LEADERSHIP AND ADVOCACY

American Planning Association + Boston Society of Architects | Panel Organizer

Boston, MA

- Co-organized “Moving Massachusetts” dual panel session on implications of new federal infrastructure funding May 2022

Protect Fulbright China Coalition | Writer & Lobbyist

U.S.A.

- Lobbied legis. and exec. branches to advocate for importance of bilateral academic relations ([link](#))

Jun 2020 - Jul 2021

ChinaGSD | Director of International Relations

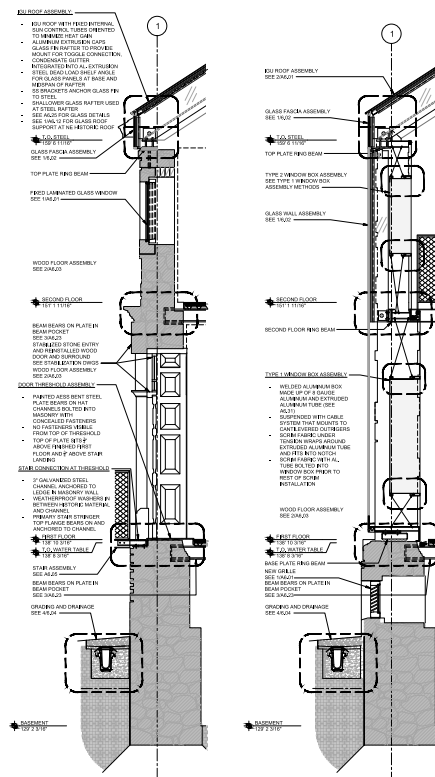
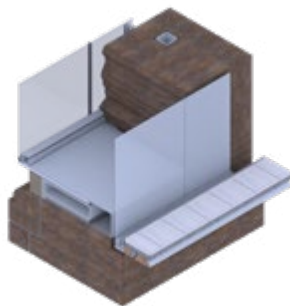
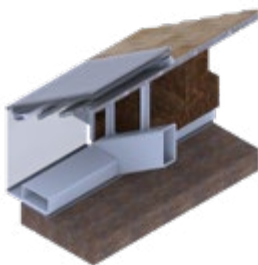
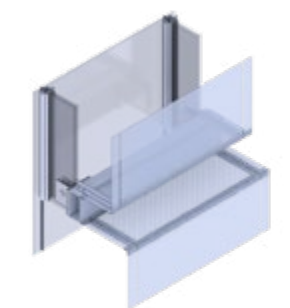
Various Locations

- Led a group of 15 Harvard GSD students on a four-day excursion to Hong Kong during the 2019 China-trek

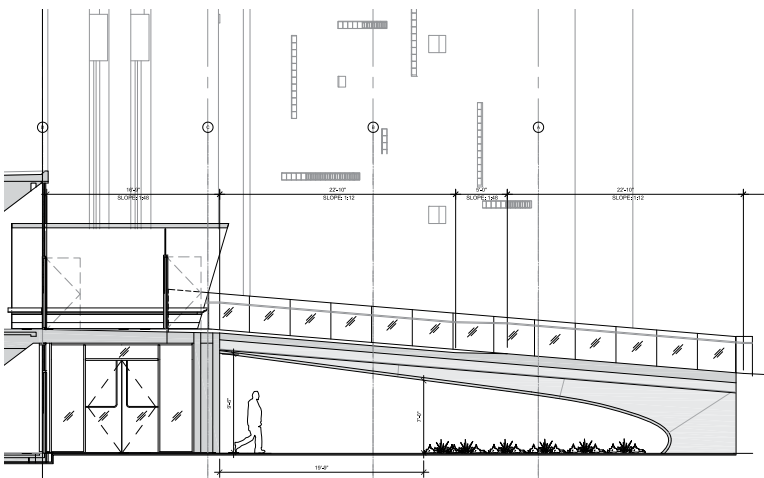
Jan 2019

SELECTED WORK EXAMPLES

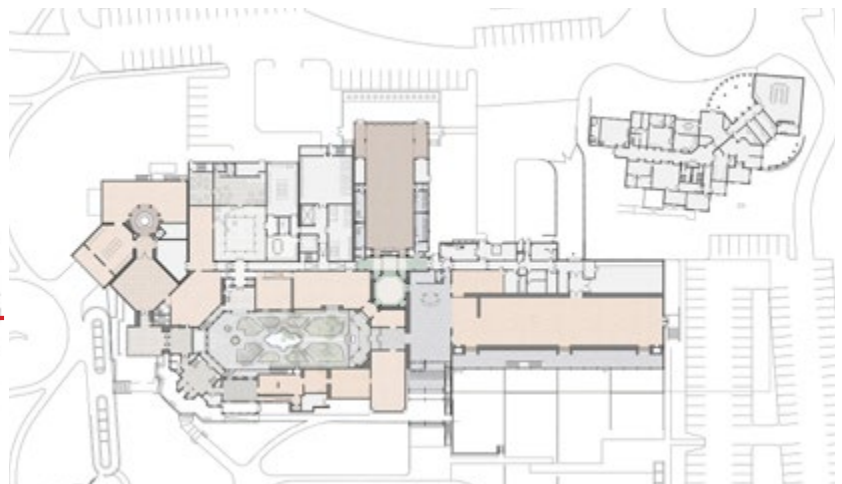
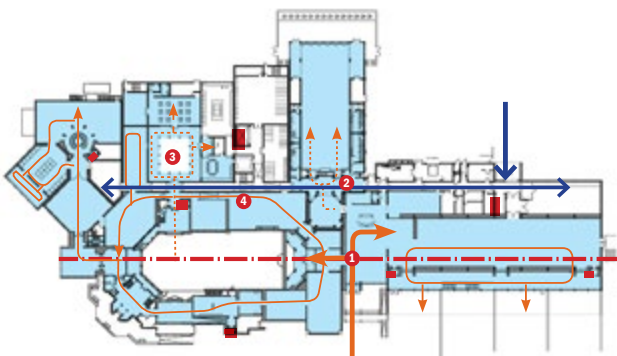
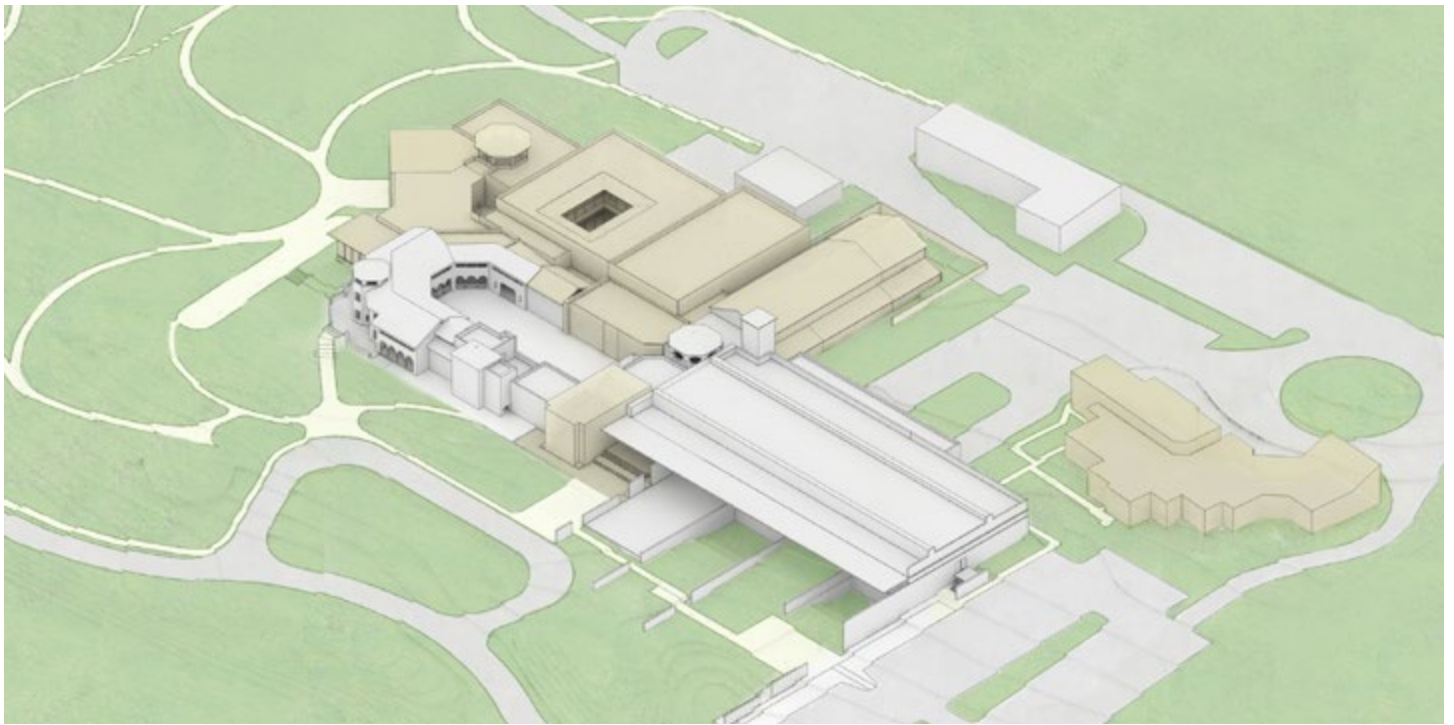
On the subject of preservation and rehabilitation of historic buildings



The Menokin Glass House Museum (*work done at office of Machado Silvetti*)



Denver Art Museum (work done at office of Machado Silvetti)



The McNay Museum (*work done at office of Machado Silvetti*)



James Carrico • Essays

Singapore's City Rooms

In this guest essay, visiting U.S. Fulbright scholar James Carrico reflects on an initial exploration of Singapore's Modern Built Heritage. Primary takeaway? That newly independent Singapore realised something never fully embraced in urban-renewal-era America: that megastructures can provide treasured public space.

[Read More](#)

Buildings like those generally followed the relatively straightforward mixed-use formula of a podium/city room based around retail shops with residential or sometimes offices occupying the tower section. But that is not to say that all city rooms fit into buildings with this mixed-use recipe. Architecturally, many of the ingredients of a city room can actually be traced back to another building that lovers of tropical modernism will recognise: *the Singapore Conference Hall and Trade Union House*, initially completed in 1965. This building is known for its restrained modernist design language, multi-storey interlocking atriums, and inverted-pyramid-style section that provided natural ventilation and copious shading. But importantly, the various exhibition halls and event spaces were all arranged around a space now known as the concourse that can be understood as a prototypical city room. Later city rooms that came to be more associated with spaces of consumption nevertheless owe some conceptual lineage to this important civic landmark.



Singapore's City Rooms *(excerpts from essay written for Docomomo Singapore)*

Application Form

Profile

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Applications will be kept on file and considered as vacancies occur for up to six months unless otherwise noted.

If you have any questions or need more information regarding the completion of the application, please contact either the Select Board Office at 781-698-4580 or the Town Manager’s Office at 781-698-4540.

Ravneet		Grewal
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

ra

Email Address

Alternate Email Address (Optional)

	RD	
Home Address		Suite or Apt
Lexington	MA	02421
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

3

What Precinct do you live in?

☒ Precinct 4

Home:	
Primary Phone	Alternate Phone

Employer	Job Title

Work Address

Which Boards would you like to apply for?

Housing Partnership Board: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

In support of Select Board Member Vineeta Kumar's campaign, I conducted in-depth research on Massachusetts housing regulations, property assessments, and tax revenue models. More recently, I collaborated with members of the Housing Partnership Board and CHAPA to research and inform the public discussion surrounding the 2025 Article 2 development and vote. Through this work, I became even more convinced that Lexington's future — in terms of fiscal sustainability, environmental health, and inclusivity — hinges on how we approach housing development. My academic background in land use management and urban planning, combined with training in education and computer science, allows me to contribute meaningfully across disciplines. I have experience interpreting complex governmental regulations and producing research-based analysis to inform planning decisions. I continue to contribute public comments to Town Meeting and the Planning Board, with a focus on sustainability, DEI, public health, and — above all — housing, which I believe is the keystone issue connecting them all. Professionally, I have worked in education and community-led development. I co-founded the Lexington Food Cooperative, a not-for-profit, community-owned, low-waste grocery startup. Since 2023, I've led the project using an agile process: identifying needs, recruiting a team, and designing an evolving strategy grounded in values and responsive to feedback. This experience parallels the skills needed to foster inclusive, sustainable, community-informed housing development. My early academic work as a National Science Foundation fellow focused on agricultural and land use patterns in the Pacific Islands, contributing to published scientific research. Since then, I've continued my involvement with housing and planning as a co-founder and researcher in the Greater Boston chapter of the Planner's Network. My ongoing studies in Computer Science (with a focus on data analytics) further support my ability to help the Town adapt to changing technical demands and opportunities. In particular, I am passionate about how we communicate complex housing decisions to the public. I believe we must be more intentional in how we educate residents — clearly explaining trade-offs, fiscal realities, and long-term goals in ways that are accessible and trustworthy. I would be honored to bring my desire to learn, interdisciplinary background, research skills, and deep commitment to equitable and sustainable housing to the Lexington Housing Partnership Board.

[Upload a Resume](#)

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

I believe that housing is not just a basic human need but a cornerstone of a stable, peaceful economic and social system. When communities have equitable access to safe, affordable, and sustainable housing, they flourish—culturally, economically, and environmentally. My interest in housing goes beyond theory; I am deeply engaged in current housing policy developments across the Commonwealth. I’ve been closely following the state’s Massachusetts Plan for Tomorrow planning process, which I see as a critical opportunity to shape a more inclusive and resilient housing future. I am also inspired by legislative efforts like Senator Jamie Eldridge’s AHEAD (Affordable Homes for Educational and Economic Development) bill, which aligns with my belief that we must expand access to truly affordable housing while also ensuring that market-rate developments are more accessible, sustainable, and community-oriented. I find it intellectually and morally compelling to think about how fiscal policy, land use planning, and environmental stewardship intersect in housing. Building housing that serves both people and the planet requires vision, collaboration, and careful economic design—work I would be honored to support as a member of the Board. Lexington is uniquely positioned to lead in this area, and I would welcome the opportunity to contribute my time, energy, and perspective to advance housing strategies that serve our community’s long-term goals. Thank you for considering my application. I would be delighted to speak further and answer any questions you may have.

How did you hear about the board or commission for which you are applying?

Nanette Byrnes

Have you recently attended any meetings of the board or committee for which you are applying?

☒ Yes ☐ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

RAVNEET K. GREWAL

Rd, Lexington, MA 02421

RELEVANT EXPERIENCE

Lexington Food Cooperative, Lexington, MA

Founder & Community Organizer

2023-Present

- Leading vision, development, and operations for a community-owned, sustainable food cooperative
- Project management and stakeholder engagement for inclusive economic development

Sage Advisors LLC

Consultant – Small-Scale Real Estate Redevelopment

2018 – 2020

- Conducted district-level fiscal analyses to support data-informed pro forma inputs
- Advised homeowners on pathways to economical and sustainable redevelopment
- Focused on community-led development leveraging homeowner & small business strategies

Lilla G. Frederick Pilot School, Boston, MA

Teacher – ESL Levels 1 & 2, Math & Science

2010 – 2015

- Developed interdisciplinary curriculum in an inclusive classroom setting
- Secured \$7,000+ in educational grants (e.g., Captain America Grant, Toshiba America Foundation)

Planner's Network Greater Boston, Cambridge, MA

Chapter Co-founder & Researcher

2008 – Present

- Conducting and presenting research on housing, land use, and zoning practices
- Supporting advocacy through coalitions of planners, academics, and community leaders

SKILLS & INTERESTS

Languages:

- Punjabi (proficient spoken/written) | Hindi (proficient spoken) | Mandarin (intermediate spoken)

Technical Tools:

- Microsoft Office Suite (Advanced)
- Geographic Information Systems (GIS)
- Data analytics for civic planning and policy

Policy & Planning Interests:

- Equitable housing development
 - Sustainable land use and fiscal policy
 - Community-driven planning and cooperative business models
-

RELEVANT EDUCATION**Boston University, Boston, MA**

Master's in Education – Secondary Mathematics & English as a Second Language

- National Science Teachers Association Fellow (2012)

Harvard University, Cambridge, MA

Master's Coursework in Urban Planning – Sustainable & Inclusive Communities

- Land use law, planning processes, taxation policy, and sustainable community development

University of Michigan, Ann Arbor, MI

Bachelor's in Anthropology, Summa Cum Laude – Land Use & Agricultural Archaeology

- National Science Foundation Research Fellow
- Honors Thesis; James B. Angell Scholar

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Jason

First Name

Dearling

Last Name

Middle
Initial

Nickname

Jason

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Mr.

@hotmail.com

Email Address

Alternate Email Address (Optional)

j @hotmail.com

Street

Home Address

Suite or Apt

Lexington

City

MA

State

02420

Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

11.5

What Precinct do you live in?

☒ Precinct 5

Mobile: (617)

Primary Phone

Alternate Phone

Employer

Scientist

Job Title

Work Address

, Watertown

Which Boards would you like to apply for?

Lexington Bicycle Advisory Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I moved to the region in 2006 and lived in Cambridge and Belmont before moving to Lexington in 2013. I am a life scientist and used to work at Boston Children's Hospital before moving to a startup company in 2021. At BCH I was a Research Associate with a laboratory that developed new imaging and therapy agents with a strong focus on cancer, but also addressing clinical unmet needs in other disease areas. I was also an Assistant Professor in Radiology at Harvard Medical School and taught at various levels through the Joint Program in Nuclear Medicine. I moved to a small biotech in the oncology space in late 2021 and we have gradually developed the company from preclinical to a clinical-stage company while maintaining a productive preclinical research and development team.

Upload a Resume

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

I would like to be more active in my community and to contribute to the work that the Town does to support local residents. I usually cycle to work, mostly using the Minuteman Bikeway and also cycle as a hobby. The Bikeway is a gift for local residents to enjoy outside time, to move between the local towns, and also to commute to work. It provides us with an excellent way to welcome visitors from other local towns, and to encourage personal transport by an environmentally responsible means. I would like to contribute to this and to support the Bikeway and Lexington. I have attended some of the recent meetings of this Committee and have also joined a bike ride out to Concord in April.

How did you hear about the board or commission for which you are applying?

An email from a neighbor who is active in Town activities.

Have you recently attended any meetings of the board or committee for which you are applying?

☒ Yes ☐ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

JASON DEARLING, PhD

Professional Summary

- Strong career focus on cancer research and the development of radiation-based therapies.
- Broad experience in the design and application of multiple theranostic imaging-probe platforms including small molecules, peptides, proteins (including antibodies), macromolecules (targeted liposomes, exosomes and microbubbles) and stem cells. I have used these agents to investigate a range of diseases including cancer, stroke, heart disease and inflammation.
- My current role at Mariana Oncology is to lead the Radiopharmacology function. This includes integrating the various internal functions (Medicinal Chemistry, Biology, CMC) to ensure efficient assessment of candidate molecules across a range of platforms. I also lead our interactions with international groups and CROs which contribute to analysis and development.

Experience

Mariana Oncology, Inc. (acquired by Novartis, March 2024)

Vice President, Head of Radiopharmacology

2023-present

Senior Director of Radiopharmacology

2021-2023

- Responsible for establishing the radiopharmacology function within a radiopharmaceutical development startup biotech company.
- Established the radiochemistry, tissue culture, vivarium (including the IACUC), imaging suite, and tissue analysis functions.
- Recruited recognized experts and developed a group that is fully integrated into the broader R&D team.
- Coordinate with other groups to generate, assess, and disseminate critical data in a fast-paced, early-stage company.

Strategy, vision, and mission planning: Successful experience in communicating the high-level plan envisioned by leadership as a tactical series of targets. Translating this into an action plan for the R&D team, always with a focus on generating data to support advancing the product to clinical application.

Development and leadership: Emphasis on team training and development. Investing in a long-term view of the individual's role as a scientist and future leader as part of the company's legacy.

Communication: Within the organization to set goals, discuss technical challenges and celebrate achievements; within the team to maintain coherence and to meet goals within resources; beyond the organization to present the potential clinical impact of our products.

Boston Children's Hospital, Harvard Medical School, Boston, US

2006-2021

Assistant Professor, Division of Nuclear Medicine and Molecular Imaging, Department of Radiology

- Demonstrated the potential for a theranostic approach to improve neuroblastoma detection and therapy with our research partners at St Jude Children's Research Hospital.
- Initiated extensive academic and industry collaborations, leading to the identification of new imaging probes for colitis, Ewing sarcoma, transplant rejection, among others. We also used our capabilities to assess models and in drug development for multiple indications.
- Established a preclinical imaging core (Imogen) at BCH to provide a consultation service for basic scientists who want to use imaging to answer biological questions. This also acted as an interface for our work with external agents, enabling us to apply technical expertise to work with academic and industrial partners with short-term project timelines to achieve key milestones.

Royal Free and University College London Medical School, UK

1998-2006

Senior Research Fellow, Cancer Research UK Targeting and Imaging Laboratory, Tumor Biology Group

- Investigated the impact of the tumor microenvironment on antibody-based cancer therapies and designed more effective therapeutic regimes to overcome this challenge, leading to several clinical trials.

Leadership

- Co-director of the Joint Program in Nuclear Medicine (JPNM) radiopharmacy and radiochemistry course for residents. Member of the Program Evaluation Committee.
- Member of examination committees, including the MRes at UCL (2005) and PhD for King's College London, UK (2014).
- Member of the SNMMI (2007-present) and RPSC (Board of Directors 2016-2018) and of the CMIIT Educational Task Force (2011-present).
- *Ad hoc* Member of the NIH/NCI Special Emphasis Panels, 2014 and 2015, and grant reviewer for other funding organizations. Editor/*ad hoc* reviewer for >20 academic journals.

Education

1995 – 1998 – PhD in Biochemistry/Nuclear Medicine, University of Kent, UK

1992 – 1995 – BSc(Hons) in Biotechnology, University College London, UK

Academic Contributions and Selected Publications

- More than 10 invited talks, 9 book chapters and reviews, more than 100 published abstracts, more than 40 published manuscripts (of which 14 first name, 4 more in preparation).

Collaborative Projects Over a Spectrum of Modalities and Targets

The following 6 selected publications and brief descriptions demonstrate my ability to collaborate successfully with specialized teams on a wide range of projects, with the long-term goal of clinical application.

1. **Dearling JL**, Park EJ, Dunning P, Baker A, Fahey F, Treves ST, Soriano SG, Shimaoka M, Packard AB, Peer D. Detection of intestinal inflammation by microPET imaging using a ^{64}Cu -labeled anti- β_7 integrin antibody. *Inflamm Bowel Dis*. 16(9); 1458-66: 2010.
- In this work with collaborators at Tel-Aviv University we used an antibody that binds a molecule expressed by the lymphocytes causing intestinal inflammation to image the development of the disease. Since publication we have extended the work by engineering the antibody to improve pharmacokinetics, further defined the target cell population (PMID: 26841223) and then used the antibody to target therapeutic liposomes delivering cell cycle-blocking siRNA (PMID: 34140675).
2. Vāvere AL, Butch ER, **Dearling JLJ**, Packard AB, Navid F, Shulkin BL, Barfield RC, and Snyder SE. ^{64}Cu -*p*-NH₂-Bn-DOTA-hu14.18K322A, a PET radiotracer targeting neuroblastoma and melanoma. *J Nucl Med*, 2012; 53:1772-8.
- This publication marked a step forward in our collaborative work with the St Jude Children's Research Hospital team. I trained the team in the handling and radiolabeling of their humanized antibody, and we are now using it to deliver cytotoxic emissions to metastases (preclinical RIT) and are working with SJCRH to translate it to clinical use.
3. **Dearling JL**, Barnes JW, Panigrahy D, Zimmerman RE, Fahey F, Treves ST, Morrison MS, Kieran MW, Packard AB. Specific uptake of $^{99\text{m}}\text{Tc}$ -NC100692, an $\alpha\text{v}\beta_3$ -targeted imaging probe, in subcutaneous and orthotopic tumors. *Nucl Med Biol* 2013; 40:788-794.
- In this joint work with GE Healthcare and Merck KGaA we used an RGD-binding peptide to detect tumor expression of the target molecule ($\alpha\text{v}\beta_3$) and to confirm *in vivo* binding of the anti-vascular therapeutic agent cilengitide.
4. Daly KP, **Dearling JL**, Seto T, Dunning P, Fahey F, Packard AB, Briscoe DM. Use of [^{18}F]FDG positron emission tomography to monitor the development of cardiac allograft rejection. *Transplantation* 2015 ; 99: e-132-9.
- In this multidisciplinary project we used a range of different imaging probes to detect the chronic rejection of a minor mismatch cardiac transplant.
5. **Dearling JL**, Paterson BM, Akurathi V, Betanzos-Lara S, Treves ST, Voss SD, White JM, Huston JS, Smith SV, Donnelly PS, Packard AB. The ionic charge of copper-64 complexes conjugated to an engineered antibody affects biodistribution. *Bioconjugate Chemistry* 2015; 26: 707-717.
- We worked with collaborators from Australia, Madrid and London to reduce the kidney uptake of an engineered immunoprotein from 40 to 5% injected dose per gram by exchanging the outer positive charge of the bifunctional chelator with a negative. We concluded the study by imaging hepatic micrometastases (diameter < 1mm) using a ^{64}Cu -labeled antibody.
6. Mancebo JG, Sack K, Hartford J, Dominguez S, Balcarcel-Monzon M, Chartier E, Nguyen T, Cole AR, Sperotto F, Harrild DM, Polizzotti BD, Everett AD, Packard AB, **Dearling J**, Nedder AG, Warfield S, Yang E, Lidov HGW, Kheir JN, Peng Y. Systemically injected oxygen within rapidly dissolving microbubbles improves the outcomes of severe hypoxaemia in swine. *Nat Biomed Eng*. 2024 Oct 17. doi: 10.1038/s41551-024-01266-8. Epub ahead of print. PMID: 39420063.
- The original polymers used to create these microbubbles were causing kidney failure in the cardiac patients. We worked with the team to change their distribution while retaining the ability to deliver oxygen to compromised tissue.

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Joseph		Lehar
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Dr

Email Address

Alternate Email Address (Optional)

.l.com

St	
Home Address	Suite or Apt

Lexington	MA	02421
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

27 years (moved 1996)

What Precinct do you live in?

☒ Precinct 4

Mobile: (339)	Home: (781)
Primary Phone	Alternate Phone

Lehar Advising LLC

Employer

Advisor to 15 biotechs,
incubators and venture
funds.

Job Title

Work Address

t, Lexington MA 02421

Which Boards would you like to apply for?

Noise Advisory Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

Over 20 years experience as an innovator and executive, focused on using data and digital technologies to transform health care. Before my current activities at Owkin, venture and board member/advisor to multiple organizations, I led cross-functional teams and drove scientific projects at J&J/Janssen, Google/Verily, Novartis, and CombinatoRx. Biomedical experience with data science (real world data, clinical studies, digital phenotypes, drug screening, and systems biology) relating to cancer and other diseases. Deeply committed to developing others' professions through mentoring, Boston University, and WEST. Previous career in astrophysics focused on gravitational lensing; at Harvard, Cambridge Univ, and MIT.

Upload a Resume

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

Noise became an issue in recent years because there are a number of noise-related topics that have arisen, some with town-wide import and others affecting my immediate neighborhood. Given the importance of a healthy noise environment in the town of Lexington, I would be happy to help my neighbors by joining the NAC.

How did you hear about the board or commission for which you are applying?

I was encouraged to apply for this position by Barbara Katzenberg, who currently serves Lexington in this capacity. I also applied for this position last year when the NAC was reconstituted after a hiatus.

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

Joseph Lehar, Ph.D.

Lexington, MA 02421, USA

(2023 Aug)

Digital & Data Science Innovator • Executive • Advisor

Over 20 years experience as an innovator and executive, focused on using data and digital technologies to transform health care. Before my current activities at Owkin, venture and board member/advisor to multiple organizations, I led cross-functional teams and drove scientific projects at J&J/Janssen, Google/Verily, Novartis, and CombinatoRx. Biomedical experience with data science (real world data, clinical studies, digital phenotypes, drug screening, and systems biology) relating to cancer and other diseases. Deeply committed to developing others' professions through mentoring, Boston University, and WEST. Previous career in astrophysics focused on gravitational lensing; at Harvard, Cambridge Univ, and MIT. Speak English, German, French, and am a citizen of the UK, Canada, and USA. For more, see [gScholar](#).

Experience

2021-now **Owkin** ([owkin.com](#)), Paris France & New York NY USA. SVP Strategy.

Helping reimagine and execute Owkin's approach to new capabilities, partners and industry sectors.

For a recent overview of what I am up to at Owkin see my [talk at a Google Workshop](#) in May 2023.

2018-now **Various funds & incubators**. Venture advisor.

Strategic advice to funds and incubators on data science, digital health, and precision medicine.

- [UPMC Enterprises](#). Mid-late strategic biotech fund. Pittsburgh PA. Advisor ('21-now).
- [Crick Inst KQ-Labs](#). KQ-Labs accelerator. London UK. Advisor ('21-now: strategy, mentoring).
- [MIT Jameel Clinic](#). Connect MIT with industry. Cambridge MA. Affiliate ('19-now: partnering).

Past Advisory

- [Outsized/Luminous](#). Early-stage bio/tech investments. London UK. Advisor ('21-'22).
- [JLABS](#). J&J incubator. Cambridge MA. Advisor ('18-'20, diligence, mentor, QuickFire judge 2x).

2008-now **Various companies & organizations**. Life Science Advisor.

Provide strategic guidance as an Advisor, or on Scientific Advisory Board (SAB).

- [Benchsci](#). Bio-data integration. Toronto CAN. SAB ('20-now: strategy, partner).
- [Solvemed](#). Ocular monitoring. Cambridge UK. Advisor ('22-now: science, partner).

Past Advisory

- [Aether Bio](#). AI-optimized enzymes. SF CA. SAB ('21-'23: strategy, partner).
- [Boston Univ](#). VisANT systems biology integration software. SAB ('08-'12: science).
- [Domino Datalab](#). Data science tools ecosystem. Boston MA. Advisor ('20-'21: partner).
- [Google](#). AlvsCovid19 initiative. NLP mining tools. SF CA. Advisor ('20-now: science, partner).
- [MindMics](#). Digital heart monitor. Boston MA. BoA, Advisor ('20-'21: strategy, data sci, partner).
- [Owkin](#). Deep AI and federated learning. Paris France. Advisor (2021: strategy, partner).
- [Pentavere](#). NLP-driven clinical data management. Toronto ON. Advisor ('20-'21: partner, strategy).
- [Saama](#). Biomedical data integration. Campbell, CA. Advisor ('20-'21: partner)
- [UCD Medicine](#). Centre for Bioinformatics. Dublin Ireland. SAB ('08-'13: curriculum).
- [Udacity](#). Online data science education platform. SF CA. Advisor ('20-'21: partner).

2002-now **Boston University**, Boston MA, USA. Adjunct Professor.

Contributing to Bioinformatics and BME programs through seminars, advising, and committees.

- Collaborating on scientific research on machine learning, digital health, and systems biology.
- Supervised PhD theses, masters, and rotation students. Presenter for graduate seminars.
- Reviewed, selected, and welcomed applicants to Bioinformatics graduate program (3 yrs).
- Participated on curriculum committees (2y), and a professional ethics workshop.

2016-now **WEST** ([westorg.org](#)), Boston MA, USA. Board Member.

A leading women's professional empowerment organization in the Boston area.

- WEST Board ('18-now), Fundraising Committee head ('20-now), Mentor program contributor.
- Advisory Board ('16-'18), helped with fundraising, mentoring.

- 2018-20 **Johnson & Johnson / Janssen Pharma**, Spring House PA, USA. Vice President Data Science. *Co-led cross-departmental effort towards coordinated data-driven decision making, through initiatives to acquire external datasets, build software tools for informing decisions across R&D, and move the ~1000 data scientists at J&J towards greater collaboration. Drove outreach to academia and related industry.*
- Led a team of 18+ data scientists in 3 sites (NJ/PA, CA, Belgium) connecting R&D data science efforts by providing skills (RWD, deep learning, digital phenotypes) or cross-TA projects.
 - Supported ~50 R&D projects for digital phenotypes, chemical biology, imaging, real-world data, clinical ops, and therapeutic areas (onc, neuro, immu, cardio, metab); also proto/testing software.
 - Explored, evaluated, and negotiated collaborations with external providers of RWE data.
 - Provided advice, diligence and mentorship for [JLABS](#) incubator ([QuickFire Challenge](#) judge for 2y, presenter at 3 workshops; JPAL mentor for 2 companies, diligence on dozens of startups).
 - Represented J&J on the [American Assoc. Artificial Intelligence](#) board ('19-20).
 - Co-founder of [Innovate for Health fellowship program](#), between J&J and Univ California.
 - Established a strategic research collaboration with [Google Research](#) focused on J&J projects.
- 2017-18 **Merck Research Laboratories**, South San Francisco, CA, USA. Exec Dir, Comput Biology. *Joined Merck to drive coordination of data science and digital medicine efforts across R&D. Activities included connecting data science teams, BD & partnering, and integrating digital health initiatives.*
- Connected computational teams between organizations, towards greater collaboration.
 - Developed AI & digital health industry landscapes; helped BD identify, evaluate, and partner.
 - Advanced a coherent digital/AI strategy for Merck, and publicized at various conferences.
 - Contributed to collaboration as Joint Steering Committee member for GRAIL (early cancer detection).
 - Co-founded partnership with [Google](#). Initiated 4 projects, now template for Google+pharma research.
- 2015-17 **Google / Verily**, South San Francisco CA, USA. Head, Computational Biology. *Co-led Verily science organization (4 research leaders, ~100 FTE in org), reporting to CSO. Set science strategy, delivering analyses for molecular and clinical research, collaboration & partnering.*
- Built team of data scientists in CA and MA (16 FTE, +2 20%, +2 MD-PhD from Mt Sinai), supporting molecular platforms (seq, M/S, CyTOF), digital sensors, hyperspectral pathology, data integration.
 - Developed analysis pipelines and advanced molecular profiling for Baseline Study (1000s of subjects, 3 years, WGS, WGMesq, RNAseq, CyTOF, MS-Prot, MS-Metab), in <12 months.
 - Drove analysis for [SystemS Collaboration](#) (with Harvard BWH and Biogen), to follow 3000 [CLIMB study](#) patients for 3yr. ~100-pt pilot validated Verily platforms yield relevant digital biomarkers.
 - Led *Future directions for innovative research in MS*, with 40 MS leaders (Google Cambridge MA, '16 May)
 - Supervised Mt Sinai-Verily neurosurgery fellowships. Eg, used NLP&DNN to automate neurosurgery triage. Model from 80k head-CT scans sped decisions 3x (8 papers, Nature Med, Radiology, ..).
- 2009-14 **Novartis Institutes for Biomedical Research**, Cambridge MA, USA. Director, Bioinformatics. *Supported precision medicine program for Novartis Oncology, to match tumor genetics to drug and combination responses, and guide oncology trials.*
- Built a team of data scientists and software engineers and 1 postdoc, collaborated with clinical, experimental teams, and with NIBR-IT on computational tools. Team supervised interns (3 MIT, 1 BU) and hosted 3 Novartis employees on mini-sabbaticals.
 - Provided data science for ~100 FTE clinical and biomarker translational teams, supporting ~18 drug programs, analyzed preclinical screens, and built biomarker models.
 - Drove research on patient selection, drug combinations, and overcoming drug resistance, including screen of ~100x100 drugs across >100 lines with CombinatoRx (>20 papers in Nature, Science, ..).
 - Key contributor to [Cancer Cell Line Encyclopedia](#) with Broad Inst, CLiP screen of 1000 compounds across CCLE, and xenograft drug/combination testing capability (4 Nature papers).

- Awarded 2010 Oncology Presidential prize for Cancer Cell Line Encyclopedia; 2012 Oncology Translational Medicine's Innovation Solutions prize for drug combination screens

2002-09 **CombinatoRx** (now Horizon Discovery), Cambridge MA, USA. Sr. Director, Computational Biology. *Led data science for CombinatoRx, 250-person biotech with novel experimental and software platforms for screening drug combinations in cell-based assays. We explored inflammation, cancer, neurodegen, and infectious disease (bact, fungal, viral), and drove clinical programs (1xPh2 rheum arthr, 7xPh1 various).*

- Built a team of computational biologists, plus BU Ph.D. thesis and MIT intern students, augmented by supervising (direct or via team) 3 BU grad students and 11 MIT interns.
- Designed and analyzed many screens, and drove research on drug synergies to probe mechanism. Co-authored 13 papers (Nature, Science, PLoS, ..), and 7 grant applications (2 funded by DoD).
- Prototyped and co-developed [Chalice](#), the analysis software for CombinatoRx's [cHTS platform](#), both since [acquired by Horizon Discovery](#) for \$8M in 2014. Chalice was used widely within CombinatoRx, and by hundreds of external researchers ([>300 Chalice citations](#)) to the present da.

2000-02 **Broad Institute** (was Whitehead Inst CGR), Cambridge MA, USA. Research Scientist. *Transitioned to biology in a "mini-postdoc" - working on gene expression, gene set enrichment, extreme alignment statistics, cross-species homology, and the RNA folding structure of protein-coding genes.*

Previous **Various**. Astrophysicist.

Research on gravitational lenses (where a galaxy's mass distorts background objects), using Hubble space telescope, Very Large Array observations, dark matter modeling. Also taught physics/astro.

- **Harvard-Smithsonian Center for Astrophysics**, Cambridge MA. Research Assoc (see [CASTLES](#)).
- **Cambridge University, Inst of Astronomy**, Cambridge UK. Postdoc. Res. Associate.
- **MIT, Physics/Astrophysics department**, Cambridge MA. Cambridge MA USA. Research Assistant.
- **Harvard, Cambridge University, MIT**. Teaching Fellow, Physics Supervisor, Teaching Assistant.

Education

Massachusetts Inst of Technology, Cambridge MA, USA. Ph.D. in Physics (Astrophysics).

Thesis: *The time delay in the double quasar Q0957+561 and a search for gravitational lenses.*

Adviser: Prof. Bernard F. Burke. Elected to Sigma Xi (honorary society).

Brandeis University, Waltham, MA, USA. B.A. in Physics.

Thesis: *Fourier analysis of OJ287 time series data using a one-dimensional CLEAN algorithm.*

Adviser: Prof. David H. Roberts, Physics Faculty Prize, Magna cum Laude with Highest Honors.

Other Activities

Committees, Mentorship programs, and invited workshops (*organizer and coordinator)

- 2020-now **WEST**, Cambridge MA, USA, Chair, *fundraising committee*. Mentor, *Mentorship program*.
- 2020-now **Mass General Postdoc Assoc**, Boston MA, USA, Mentor, *MGPA Mentorship program*.
- 2016 Sep **WEST**, Cambridge MA, USA, *Pathway to success for women in science and technology (panelist)*.
- 2016 May* **Verily/BWH/Biogen**, Cambridge MA, USA, *Future directions for innovative research in MS*.
- 2015-16 **ISCB/ECCB**, Bethesda MD, USA. *ISMB Program Committee*.
- 2014 May **ISBE/ERASysAPP**, Berlin, Germany, *Networking between academia, research centers, and industry*.
- 2009-14 **Boston University**, Boston MA, USA. *Bioinformatics graduate admissions committee*.
- 2013 Jan **AACR-NBTS think tank**, Philadelphia PA, USA, *Cancer systems biology (for brain tumors)*.
- 2013 **NCI-DREAM**, Bethesda MD, USA. *Grand Challenge leadership team*.
- 2012 Apr **NCI-DREAM**, Bethesda MD, USA, *DREAM Challenges organizing summit (drug response prediction)*.
- 2012 **Boston University**, Boston MA, USA. *Bioinformatics curriculum committee*.
- 2011 Jun **EMBO workshop**, Vienna, Austria, *Synthetic lethality*.
- 2011 Feb **FEBS advanced course**, Innsbruck, Austria, *Systems biology, from molecules to function*.
- 2008 Sep **NIH/NHLBI workshop**, Bethesda MD, USA, *Cellular functional signatures framework*.

2008 Jun **Astra Zeneca workshop**, Portofino, Italy. *Putting systems biology to work for drug discovery*.

2008 Jan **JST-BBSRC workshop**, Tokyo, Japan. *Future challenges in systems biology*.

Referee for research grant proposals.

Google (GRA-2015, GRA-2016), **NSF** (USA), **ERC** (EU), **NWO** (Netherlands), **WWTF** (Austria).

Referee for scientific journals (50+ reviews since 1992, 30+ in life sciences).

Nature, Science, Cell, PNAS, Bioinformatics, Nature Biotech, Nature Chem Bio, Nature MSB, Nature SREP, BMC Pharm, J Nat Canc Inst, PLoS Biology, JoVE, Trends Biotech, Trends Pharm Sci, Exp Opin Drug Discov, J Royal Soc Interface, Astronomical J, Astrophysical J, Monthly Notices Royal Astron Soc.

Publications (life sciences) (37 papers: *key papers, #contributions, †in progress, noting team)

- †2023 (in prep). *Using a wearable patch to develop a digital monitoring biomarker of inflammation in response to LPS challenge*. Avey, Chatterjee, Manyakov, Cooper, Sabins, Mosca, Mori, Baribaud, Morris, **Lehár**, ..3., Lamouse-Smith, Campbell, Pandis.
- #2023 **J Clin Onc** 41(16) supp.e15076, [ascopubs](#). *MOSAIC: Multi-Omic Spatial Atlas in Cancer; effect on precision oncology*. **Lehár**, Madissoon, ..13., Vert, Durand, Soumelis, Weinrib, Clozel, [MOSAIC consortium](#) ([Owkin/YouTube](#), [BusWire](#), [GenomWeb](#)).
- #2021 **arXiv:cs**, [arXiv:2008.06606](#). *BERT diagnosis generalizability across medical specialties using semantic dataset distance*. Khambete, Su, Garcia, **Lehár**, Kang, Badgeley.
- *2019 **NPJ Digit Med** 2:123, [PMID 31840094](#). *Quantifying multiple sclerosis severity via biosensors for in-clinic and free-living settings*. Chitnis, ..8., Bakshi, Bajaj, ..2., [Blocker](#), ..7., [Manway Liu](#), **Lehár**, ..19., Rhodes, Rudick, Ransohoff, ..2., Marks, Weiner, Snyder.
- *2019 **Nature** 569(7757):503, [PMID 31068700](#). *Next generation characterization of the Cancer Cell Line Encyclopedia*. Ghandi, Huang, Jane-Valbuena, Kryukov, ..28., [Reddy](#), [Manway Liu](#), **Lehár**, ..5., Caponigro, ..24., Golub, Garraway, Sellers.
- 2019 **Bioinformatics** epub/bty855, [PMID 30304439](#). *CANDI: An R/Shiny app for annotating radiographs and computer-aided diagnoses*. [Badgeley](#), [Manway Liu](#), Glicksberg, Shervey, Zech, Shameer, **Lehár**, [Oermann](#), McConnell, Snyder, Dudley.
- *2018 **Nature Med** 24(9):1337, [PMID 30104767](#). *Automated surveillance of head CTs for acute neurologic events with DNN*. Titano, [Badgeley](#), Schefflein, Pain, Su, Cai, Swinburne, Zech, Kim, Bederson, Mocco, Drayer, **Lehár**, Cho, Costa, [Oermann](#).
- 2018 **Radiology** 30:171093, [PMID 29381109](#). *NLP-based machine learning models for the annotation of clinical radiology reports*. Zech, Pain, Titano, [Badgeley](#), Schefflein, Su, Costa, Bederson, **Lehár**, [Oermann](#).
- 2017 **PNAS** 114(12):3151, [PMID 28265066](#). *Resistance mechanisms to TP53-MDM2 inhib from piggyBac mutagenesis in Arf-/- mice*. Chapeau, Gembarska, Durand, ..3., Wiesmann, Tiedt, **Lehár**, Kauffmann, ..8., Murakami, Sellers, Hofmann, Jensen.
- *2016 **Cancer Res** 76(23):6950, [PMID 27659046](#). *High-order drug combinations are required to effectively kill colorectal cancer cells*. [Horn](#), Ferretti, Ebel, Tam, Ho, ..4., Sellers, Schlegel, ..5., Halilovic, Garraway, Caponigro, **Lehár**.
- *2016 **PLoS One** 11(1):e0147651, [PMID 26821252](#). *Simulating serial antibacterial drug synergies using flux balance analysis*. [Krueger](#), Munck, Dantas, Church, Galagan, **Lehár**, Sommer.
- 2015 **Nature** 528(7580):84, [PMID 26570998](#). *Pharmacogenomic agreement between two cancer cell line data sets (CCLE/GDSC)*. Stransky, Ghandi, Amzallag, **Lehár**, [Manway Liu](#), Sonkin, Kauffmann, ..16., Morrissey, Sellers, Garnett, Benes, Garraway.
- *2015 **Nature Med** 21(11):1318, [PMID 26479923](#). *High-throughput screening of tumor xenografts to predict clinical trial drug response*. Hui Gao, Korn, Ferretti, Monahan, Wang, ..20., Kauffmann, **Lehár**, ..9., [Reddy](#), ..23., Bitter, Lees, Hofmann, Sellers.
- 2015 **PLoS One** 10(9):e0138486, [PMID 26378449](#). *Gene expression ratios lead to translatable predictors of DR5 agonism in tumors*. [Reddy](#), Gowney, Wilson, Emery, ..10., Rickles, Myer, Ettenberg, Schlegel, Sellers, Huet, **Lehár**.
- *2015 **Science Tr Med** 7(290):290ra89, [PMID 26041706](#). *Screen of approved drugs and probes identifies drugs with anti-Ebola activity*. Johansen, DeWald, Shoemaker, Hoffstrom, ..8., **Lehár**, Hensley, Glass, White, Olinger.
- 2014 **PLoS One** 9(7):e103050, [PMID 25036042](#). *Meta-analysis approach to characterize pan-cancer mechanisms of drug response*. Wang, Shrestha, Wyatt, [Reddy](#), **Lehár**, Wang, Lapuk, Collins.
- *2014 **Cancer Cell** 26(1):136-49, [PMID 25002028](#). *CDK4/6 inhibitors sensitize PIK3CA mutant breast cancer to PI3K inhibitors*. Vora, Juric, ..6., [Manway Liu](#), **Lehár**, Wiesmann, Wartmann, ..3., Kim, Schlegel, Huang, Engelman.
- 2014 **Cancer Res** 74(12):3294-305, [PMID 24747911](#). *Inhibiting TNKS sensitizes KRAS cancers to MEK inhibitors via FGFR2 feedback*. Schoumacher, Hurov, **Lehár**, Yan-Neale, Mishina, Sonkin, Korn, Flemming, Jones, ..4., Stump, Sellers, Danial, Shao.
- *2014 **Molec Canc Ther** 13(5):1117-29, [PMID 24608574](#). *The PI3Kα inhibitor NVP-BYL719 and a patient stratification for clinical trials*. Fritsch, Huang, Chatenay-Rivauday, [Reddy](#), [Manway Liu](#), Kaufmann, ..18., **Lehár**, Schlegel, Caravatti, Hofmann, Sellers.
- 2013 **Science Tr Med** 5(190):190ra79, [PMID 23785035](#). *FDA-approved estrogen receptor modulators inhibit Ebola virus infection*. Johansen, Brannan, Delos, Shoemaker, Stossel, Lear, Hoffstrom, Dewald, Schomberg, Scully, **Lehár**, Hensley, White, Olinger.
- *2012 **Nature** 483(7391):603-7, [PMID 22460905](#). *The Cancer Cell Line Encyclopedia enables predictive modeling of drug sensitivity*. Barretina, Caponigro, Stransky, Venkatesan, ..3., **Lehár**, [Reddy](#), [Manway Liu](#), ..47., Morrissey, Sellers, Schlegel, Garraway.
- 2012 **PLoS One** 7(11):e48548, [PMID 23155392](#). *RAD001 enhances BEZ235's potency to inhibit mTOR signaling and tumor growth*. Nyfeler, Li, Pinzon-Ortiz, Wang, [Reddy](#), Pradhan, Das, **Lehár**, Schlegel, Final, Cao, Murphy, Huang.

- #2012 **Polypharmacology in Drug Discovery**, 315-24. *Multicomponent therapeutics*.
Borisy, Zimmermann, **Lehár**. Wiley Publications, ed. Peters, ISBN 978-0-470-59090-4.
- 2011 **Nature Methods** 8(2):159-64, [PMID 21217751](#). *Knocking out multi-gene redundancies via sexual assortment and selection*.
Suzuki, St Onge, Ramamurthy, King, **Heilbut**, ..5., Nislow, Giaever, Gladyshev, Vidal, **Lehár**, Roth.
- 2010 **Assay & Drug Dev Tech** 8:679-84, [PMID 21050065](#). *Identification of synergistic combinations of F508del CFTR modulators*.
Lin, Sui, Cotard, Fung, Andersen, Zhu, El Messadi, **Lehár**, Lee, Staunton.
- 2010 **Molecular Sys Bio (Nature)** 6:375, [PMID 20531405](#). *Chemical combinations elucidate pathway regulation relevant to hepatitis C*.
Owens, Mawhinney, Altmeyer, Lee, Borisy, **Lehár**, Johansen.
- 2010 **PLoS One** 5(5):e10613, [PMID 2052247](#). *Recurrent, robust and scalable patterns underlie human approach and avoidance*.
Kim, Kennedy, **Lehár**, Lee, Blood, Lee, Perlis, Smoller, Morris, Fava, Breiter.
- #2009 **Discovery Medicine** 8:185-90, [PMID 20040268](#). *Therapeutic selectivity and the multi-node drug target*.
Lehár, **Krueger**, Zimmermann, Borisy. Invited review.
- #2009 **Beilstein Symposium on Systems Chemistry**, 7pp. *Multicomponent therapeutics*.
Borisy, Zimmermann, **Lehár**. Logos Verlag, eds Hicks, Kettner, ISBN 978-3-8325-2188-2.
- *2009 **Nature Biotechnology** 27:659-66, [PMID 19581876](#). *Synergistic combinations tend to improve therapeutically relevant selectivity*.
Lehár, **Krueger**, Avery, **Heilbut**, Johansen, Price, Rickles, Short, Staunton, Jin, Lee, Zimmermann, Borisy.
- 2008 **Nature Chemical Biology** 4:674-81, [PMID 18936752](#). *Combination Chemical Genetics* (invited review).
Lehár, Stockwell, Nislow, Giaever.
- *2008 **Mol Sys Bio (Nature)** 4:215, [PMID 18682705](#). *High order combination effects and biological robustness*.
Lehár, **Krueger**, Zimmermann, Borisy.
- 2008 **Osteoarth Cartilage** 16(4):S106-7, [OARSI link](#). *Combination CRx-102 inhibits MMP in macrophages and chondrocytes*.
Fraser, Wang, **Lehár**, Lee, McCabe, O'Brien, Kilfeather, Borisy, Zimmermann.
- *2007 **Mol Sys Bio (Nature)** 3:80, [PMID 17332758](#). *Chemical combination effects predict connectivity in biological systems*.
Lehár, Zimmermann, **Krueger**, **Molnar**, Ledell, **Heilbut**, Short, Giusti, Nolan, Magid, Lee, Borisy, Stockwell, Keith.
- 2007 **Drug Discovery Today** 12:34-42, [PMID 17198971](#). *Multi-target therapeutics: when the whole is greater than the sum of the parts*.
Zimmermann, **Lehár**, Keith (invited review).
- 2007 **Pain Practice** 7:53-4, [gScholar](#). *New drug candidate for treatment of chronic pain P1120 CRX-170*.
Avery, Selig, **Lehár**, Zimmermann, Padval, Nichols, Cermak.
- 2003 **PNAS** 100:7977-82, [PMID 12799470](#). *Systematic discovery of multicomponent therapeutics*.
Borisy, Elliott, Hurst, Lee, **Lehár**, Price, Serbedzija, Zimmermann, Foley, Stockwell, Keith.
- 2003 **Nature Genetics** 34:267-73, [PMID 12808457](#). *PGC1 α -responsive genes for OxPhos downregulated in human diabetes*.
Mootha, Lindgren, Eriksson, Subramanian, Sihag, **Lehár**, ..5., Golub, Tamayo, Spiegelman, Lander, Hirschhorn, Altshuler, Groop.

Publications by team members (life sciences) (26 papers: #contributions, †0 in progress, [team](#))

- 2021 **Lung Cancer** 163:7-13, [PMID 34890832](#). *Genetic landscape in ALK-fusion NSCLC & ceritinib response in ASCEND-1 study*.
Tan DS-W, Thomas, Kim DW, [Szpakowski](#), Urban, ..3., Solomon, Filip, Camidge, Vasteenkiste, Petruzzelli, Pantano, Shaw AT.
- 2021 **Cancer Med** 10(14):4805, [PMID 34114376](#). *Using deep learning to identify FGFR-mutated bladder cancers from histology images*.
Velmahos, Su William, [Badgeley](#), Lo Ying-Chun.
- 2021 **AMIA Jt Sumt TS** 2021:345, [PMID 34457149](#). *Quantifying diagnosis across medical specialties using BERT semantic distance*.
Khambete, William Su, Juan C Garcia, [Badgeley](#).
- 2020 **Mol Cancer Ther** 19(4):1031, [PMID 32029634](#). *Genomic profiling of uveal melanoma and phase-1 results for PKC-i AEB071*.
Piperno-Neumann, Larkin, Carvajal, ..4., [Szpakowski](#), ..4., [Derti](#), Emery, Yerramilli-Rao, Kapiteijn.
- 2020 **Oncotarget** 11(14):1235, [PMID 32292573](#). *Mutation-specific single-arm phase-2 study of dovitinib in advanced malignancies*.
Taylor, Alva, Larson, [Szpakowski](#), Purkayastha, Amin, Karpiak, Piha-Paul.
- 2020 **Oncotarget** 10(60):6526, [PMID 31741715](#). *Efficacy and safety of PI3K-i buparsilib in a phase-2 open-label, single-arm study*.
Piha-Paul, Taylor, Spitz, Schwartzberg, Beck, Bauer, Meric-bernstam, Purkayastha, Karpiak, [Szpakowski](#), Braiteh.
- 2019 **NPJ Digit Med** 2:31, [PMID 31304378](#). *Deep learning predicts hip fracture using confounding patient and healthcare variables*.
[Badgeley](#), Zech, Oakden-Rayner, Glicksberg, [Manway Liu](#), Gale, McConnell, Percha, Snyder, Dudley.
- 2019 **Nature Methods** 16(6):519, [PMID 31133761](#). *High-quality MS/MS spectrum prediction for data in/dependent acquisition analysis*.
Tiway, [Roie Levy](#), Gutenbrunner, Salinas Soto, Palaniappan, Deming, Berndt, Brant, [Cimermanic](#), Cox.
- 2019 **Oncotarget** 10(19):1850, [PMID 30956763](#). *Biomarkers from phase2 study of binimetinib/MEK162 in BRAF/BRAF mutant melanoma*.
van Herpen, Agarwala, Hauschild, Berking, Beck, Schadendorf, Jansen, ..5., [Derti](#), Antona, Nauwelaerts, Zubel, Dummer.
- 2018 **Oncotarget** 9(81):35226, [PMID 30443290](#). *CDK4/6 inhibitor ribociclib (LEE011) for combinations in preclinical cancer models*.
Kim, Tiedt, Loo, [Horn](#), Delach, Kovats, Haas, Engstler, Cao, Pinzon-Ortiz, ..4., di Tomaso, Sellers, Caponigro.
- 2018 **PLoS Med** doi:1371/1002683, [PMID 30399157](#). *Generalization performance of DNN to detect pneumonia in chest radiographs*.
Zech, [Badgeley](#), [Manway Liu](#), Costa, Titano, [Oermann](#).

- 2018 **J Thorac Onc** 13(4):576, [PMID 29247830](#). *Phase2 study of HSP90 inhib AUY922 in advanced non-small-cell lung cancer.*
Felip, Barlesi, Besse, Chu, Gandhi, Kim, Carcereny, Sequist, Brunsvig, Chouaid, Smit, ..4..., [Szpakowski](#), Akimov, Garon.
- 2018 **J Neurointerv Surg** 10(4):358, [PMID 28954825](#). *Deep learning guided stroke management: review of clinical applications.*
Feng, [Badgeley](#), Mocco, [Oermann](#).
- *2018 **PLoS Med** 15(11):e1002683, [arXiv:1807.00431](#). *Confounding variables can degrade generalization of radiological DNN models.*
Zech, [Badgeley](#), [Manway Liu](#), Costa, Titano, [Oermann](#).
- *2017 **arXiv:cs**, [arXiv:1710.01217](#). *Wide and deep residual networks for volumetric image classification.*
Arvind, Costa, [Badgeley](#), Cho, [Oermann](#).
- 2016 **J Clin Onc** 34(15S):9064, [ASCOpubs](#). *Genetic landscape of ALK+ NSCLC patients and response to ceritinib in ASCEND-1.*
Tan, Kim, Thomas, Pantano, Wang, [Szpakowski](#), ..8..., Bitter, Petruzzelli, Dugan, Shaw.
- 2016 **BMC Sys Bio** 10:16, [PMID 26864072](#). *Integrative modeling of multi-omics to identify cancer drivers and patient-specific activity.*
[Brandusa-Pavel](#), Sonkin, [Reddy](#).
- 2015 **Cancer Cell** 13(4):533, [PMID 25873175](#). *AXL mediates PI3K-alpha inhibition via EGFR/PKC/mTOR axis in HNSCC.*
Elkabets, Pazarentzos, Juric, Sheng, Pelossof, Brook, [Manway Liu](#), Huang, ..14..., Rosen, Bivona, Scaltriti, Baselga.
- 2015 **Cancer Res** 75(10):1949, [PMID 25788694](#). *A chemical genetics approach for the functional assessment of novel cancer genes.*
Zhou, [Derti](#), Ruddy, Rakiec, Kao, Lira, Gibaja, Chan, Yang, Min Schlabach, Stegmeier.
- 2015 **Mol Canc Ther** 14(5):1224, [PMID 25724664](#). *Loss of TSC2 confers sensitivity to mTOR-i Everolimus in hepatocellular carcinoma.*
Huynh, Hao, Chan, Chen, Ong, Soo, Pochanard, Yang, Ruddy, [Manway Liu](#), [Derti](#), ..4..., Zhu, Schlegel, Huang.
- 2015 **Nature** 518(7538):240, [PMID 25409150](#). *Convergent loss of PTEN leads to acquired resistance to a PI(3)K-alpha inhibitor.*
Juric, Castel, Griffith, Griffith, Won, Ellis, Ebbesen, ..11..., Quadt, Peters, Huang, [Derti](#), Schlegel, Berger, Baselga, Scaltriti.
- 2014 **Nature Biotech** 32(9):903, [PMID 25150838](#). *Comprehensive assessment of RNA-seq accuracy, reproducibility, and information.*
SEQC/MAQC-III Consortium: Su, Labay, Li, Thierry-Meg, ..52..., [Derti](#), ..105..., Tong, Kreil, Mason, Shi.
- 2014 **Nature Med** 20(1):87-92, [PMID 24362935](#). *Pharmaco-genomic profiling identifies NFkB treatment for mantle cell lymphoma.*
Rahal, Frick, Romero, Korn, ..5..., Ruddy, Kaufmann, [Derti](#), ..11..., Fritsch, Sellers, Cooke, Gascoyne, Lenz, Stegmeier.
- 2013 **Science Tr Med** 5(196):196re99, [PMID 23903756](#). *mTORC1-i required for PI3K-i sensitivity in PIK3CA mutant breast cancer.*
Elkabets, Vora, Juric, Morse, Mino-Kenudson, Muranen, ..10..., Quadt, [Manway Liu](#), Huang, Rosen, Engelman, Baselga.
- 2013 **Mol Canc Ther** 12(6):890-900, [PMID 23493311](#). *The HSP90 inhibitor AUY922 potently inhibits non-small cell lung cancer growth.*
Garon, Finn, Hamidi, Dering, Pitts, Kamranpour, Desai, Hosmer, Ide, Avsar, Jensen, Quadt, [Manway Liu](#), Dubinett, Slamon.
- 2012 **Science Tr Med** 4(139):139ra84, [PMID 22539746](#). *mTOR inhibitors synergize against hepatocellular carcinoma.*
Thomas, Mercer, Carnevali, Park, Andersen, Conner, ..4..., [Manway Liu](#), Maira, Thorgeirsson, Mischel, Thomas, Kozma.

Patents (life sciences) (14 applications: *issued patents, [team members](#))

- 2015 **US App** 15/756,094. *MDM2 inhibitors and combinations thereof for the treatment of cancer.*
Halilovic, Caponigro, [Horn-Spirohn](#), [Lehár](#).
- 2015 **US App** 15/755,797. *Combination therapy using PI3K inhibitor and MDM2 inhibitor for colon cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#).
- 2015 **US App** 15/755,270. *Combination of CDK4/6 inhibitor ribociclib and BRAF inhibitor dabrafenib for cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#).
- *2015 **US App** 15/755,140. **Grant** US10328066B2. *Combining PI3K inhibitor alpelisib and CDK4/6 inhib ribociclib for colon cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#).
- *2015 **US App** 15/755,122. **Grant** US10328065B2. *Combining PI3K inhibitor alpelisib and BRAF inhib dabrafenib for colon cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#).
- 2015 **US App** 15/755,045. *Combination of CDK4/6 inhibitor ribociclib and EGFR inhibitor erlotinib for colon cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#).
- 2015 **US App** 15/754,649. *Combining PI3K inhibitor alpelisib with AKT inhibitors for colon cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#), Hirawat.
- 2015 **US App** 15/753,452. *Combining CDK4/6 inhib LEE011, MEK1/2 inhib trametinib, and PI3K inhib BYL719 for cancer.*
Caponigro, [Horn-Spirohn](#), [Lehár](#).
- *2012 **US App** 14/420,792; 16/526,027; 16/157,333. **Grant** JP6644042B2. *Combining PI3K and C-Met inhibitors to treat cancer.*
Caponigro, Huang, [Lehár](#), Wang.
- *2009 **US App** 12/710,203; 13/928,630. **Grant** US8475804B2. *Compositions and methods for treatment of filovirus-mediated diseases.*
Johansen, [Lehár](#), Hoffstrom, Olinger, Stossel.
- 2004 **US App** 60/547,843. *Combinations for the treatment of fungal infections.*
Zimmermann, Serbedzija, [Lehár](#), Keith.
- 2003 **US App** 10/951,275. *Using multiple perturbations to elucidate connectivity in network systems.*
[Lehár](#), [Molnar](#), Keith, Zimmermann.

2003 **US App** 10/863,592; 10/863,594. *System and method for evaluation of drug combinations.*

Zimmermann, Molnar, Lehár, Fong, Keith, Serbedzija, Lee, Jost-Price, Hurst, Borisy, Foley, Stockwell

2001 **US App** 10/292,382. *Gene expression models associated with psychiatric disorders.*

Sklar, Petryshen, Tsan, Lehár.

Talks & Panels (life sciences) ([†]scheduled)

Precision medicine from federated multimodal patient data.

[†]2023 Sep, **UPMC Enterprises**, Top-of-Mind for Healthcare Summit. panel.

2023 May, **BIO Intl Convention**, Boston MA. *AI tools in drug development.* [Event](#), [panel](#).

2023 May, **Google & Clora**, Leveraging AI & ML to drive drug discovery. [Event](#), [talk video](#).

2023 Apr, **Mayo Clinic**, Jacksonville FL. *Empowering Oncology with AI and spatial biology.* [Event](#).

2023 Apr, **Goldman Sachs**, Healthruption, NYC. [Event](#), [Adiso ref](#), AI/ML panel.

2023 Feb, **FDA/MCERSI**, *AI in precision medicine.* [Event](#), [talk video](#), [panel video](#).

2023 Jan, **Precision Med World Conf**, Silicon Valley CA. [Event](#), [talk](#).

2022 Oct, **BU Business School**, Health & Life Sci Conf. *Future of fintech in healthcare.* [Event](#), [panel](#)

2022 Oct, **Plug-N-Play**, NYC Health Innovation Showcase, [Event](#), talk

2022 Jun, **HIMSS Europe**, Helsinki Finland. *Technologies enabling precision medicine at scale.* [Event](#), [talk](#).

2022 May, **BioITWorld Expo**, Boston MA. [Event](#), [agenda](#).

2022 Mar, **MIT Tech Review**, Emtech: Inside Track: *From AI startup to "tech unicorn".* [online](#), [talk video](#)

2021 Oct, **Open Precision Medicine OPM1**, [online](#), [talk video](#), [panel video](#).

2021 Oct, **Precision Med World Conf**, Pittsburgh PA, USA. [Event](#), [speakers](#).

2021 Oct, **Pistoia Alliance**, *Optimizing RCTs with covariate adjustment.* [Event](#).

Data science at scale for healthcare: perspectives from biotech, big tech, and pharma.

2022 Nov, **Erasmus MC**, Rotterdam NL.

2022 Sep, **Crick Institute**, London UK.

2022 May, **Weill Cornell Center for Precision Med**, NYC, USA.

2019 Nov, **Boston University Statistics Symposium**, Boston, MA, USA.

2019 May, **J&J Postdoc Symposium**, New Brunswick, NJ, USA.

2019 May, **Canadian Soc Pharm Sci (CSPS) Symposium**, Vancouver, BC, Canada.

2019 May, **Simon Fraser University Omics Data Science Inst**, Vancouver, BC, Canada.

2019 Apr, **Janssen Clin Innov @ JLABS**, South San Francisco, CA, USA, [tweet](#).

Data science at Janssen: collaborating towards data driven decisions.

2019 Nov, **AI Applications Summit Biopharma**, Harvard Med School, Boston, MA, USA. talk.

2019 June, **BIO Conference**, Philadelphia, PA, USA, [Event](#), [JNJ agenda](#). panel.

2019 Apr, **Janssen Clin Innov @ JLABS**, South San Francisco, CA, USA. talk.

2019 Apr, **Healthkick @ JLABS** (J&J accelerator with many startups), Toronto, ON, Canada. talk.

2019 Apr, **AI/ML for Pharma Workshop**, Novartis Auditorium, Cambridge, MA, USA. panel.

Digital health innovations and AI collaborations at Merck.

2018 May, **BIO-IT World Conf**, Boston, MA, USA.

2018 May, **AI Pharma Innov Forum**, Hanson Wade, Boston, MA, USA, [Event](#).

2018 May, **GNS Precision Med Forum**, Cambridge, MA, USA.

2018 Apr, **EMBL Machine Learning Workshop**, Merck auditorium, Boston, MA, USA.

2018 Apr, **AI/ML Workshop**, Pfizer innovation center, Cambridge, MA, USA.

Invited panelist, representing Merck's digital health initiatives.

2018 May, **GNS Precision Med Forum**, Cambridge, MA, USA, [Event](#).

2018 Apr, **Panagora AI/ML Workshop**, Pfizer innovation center, Cambridge, MA, USA, [tweet](#).

2018 Mar, **Biodata West Conf**, Hotel Kabuki, San Francisco, CA, USA.

2018 Jan, **Precision Med World Conf**, Mountain View, CA, USA, [Event](#), [video](#).

Exploring biology at scale: systems biology of drug combinations and translational precision medicine.

2018 Apr, **Icahn School of Med Seminar, Mt Sinai Hosp**, New York, NY, USA.

2017 Nov, **Boston QSP on Modeling & Simulation**, Cambridge, MA, USA, [Link](#).

2017 Apr, **Univ Illinois Dept Bioengineering Seminar**, Urbana-Champaign, IL, USA, [Link](#).

2017 Apr, **Flatiron Inst Seminar, Simons Foundation**, New York, NY, USA.

Invited panelist, representing Verily's data science and digital health initiatives.

2016 Nov, **Brigham & Women's Hosp**, Discover BWH: Battling Brain Disease, Boston, MA, USA, [Link](#), [Vimeo](#).

Using the CCLE for Drug Combinations and Patient Selection Strategies at Novartis.

- 2014 Feb, **UCLA (IPAM) Cancer Data and Modeling workshop**, Los Angeles CA, USA, [Link](#).
- 2013 May, **AACR**, Synthetic Lethal Approaches to Cancer Vulnerabilities, Seattle WA, USA, [Link](#).
- 2013 Apr, **Bio-IT World**, Systems Pharmacology track, Annual Meeting, Boston, MA, USA, [Link](#).
- 2013 Feb, **Mass. General Hospital**, Cancer Center Seminar, Boston MA, USA, [Link](#).
- 2012 Oct, **Int. Chemical Biology Soc**, Annual Meeting, Cambridge MA, USA, [Link](#).
- 2012 Jul, **SBMC: Systems Biology**, Leipzig, Germany, [Link](#).
- 2012 Apr, **Keystone Symposia**, Complex Traits (B5), Breckenridge CO, USA, [Link](#).
- 2012 Mar, **TxSACT Workshop**, Drug Comb. for Cancer Ther, Houston TX, USA, [Link](#).
- 2011 Jul, **Molecular Therapeutics of Cancer Research**, Asilomar CA, USA, [Link](#).
- 2011 Jun, **New York Acad Sci Discussion**, Systems Biology, New York NY, USA, [Link](#).
- 2011 Jun, **EMBO Workshop**, Synthetic Lethality, Vienna, Austria, [Link](#).
- 2011 May, **Keystone Symposia**, Omics Meets Cell Biology (E1), Alpbach, Austria, [Link](#).

Systems biology and drug discovery from chemical combinations.

- 2011 Feb, **FEBS**, Systems Biology Advanced Course, Innsbruck, Austria, [Link](#).
- 2010 Apr, **BASS Biology**, Harvard Med School, Boston MA, USA, [Link](#).
- 2010 Mar, **Johns Hopkins Univ**, Neuroscience seminar, Baltimore MD, USA.
- 2009 Oct, **Genentech**, San Francisco CA, USA.
- 2009 Oct, **Max-Planck-Institut für Molekulare Genetik**, Berlin, Germany.
- 2009 Sep, **European Molecular Biology Laboratory**, Seminar, Heidelberg, Germany.
- 2009 Sep, **Nature Chemical Biology Symposium**, Boston, MA, [Link](#).

Systems biology and drug discovery from chemical combinations.

- 2009 May, **Austrian Academy of Sciences (CeMM)**, Vienna, Austria.
- 2009 May, **University College Dublin (CASL)**, Dublin, Ireland.
- 2009 Jan, **Memorial Sloan Kettering Cancer Center**, New York NY, USA.
- 2008 Dec, **Dana Farber Cancer Institute**, Boston MA, USA.
- 2008 Nov, **Boston University**, Systems Biology Seminar, Boston MA, USA, [Link](#).
- 2008 May, **Beilstein Symposium on Systems Chemistry**, Bolzano, Italy, [Link](#).
- 2008 Apr, **MIT Biology**, Bioinformatics Seminar, Cambridge MA, USA, [Link](#).
- 2008 Apr, **IRB Symposium**, Systems Biology, Barcelona, Spain, [Link](#).
- 2008 Jan, **JST-BBRC Workshop**, Future Challenges in Systems Biology, Tokyo, Japan, [Link](#).

Synergy, connectivity, and robustness in microbial systems.

- 2009 Jun, **International Conf on Pathways Networks & Systems**, Corfu, Greece, [Link](#).
- 2009 May, **Enanta Pharmaceuticals**, Watertown MA, USA.
- 2009 Apr, **Harvard Medical School**, Church Laboratory, Boston MA, USA.
- 2008 Apr, **MIT CSAIL**, Bioinformatics seminar, Cambridge MA, USA, [Link](#).
- 2007 Jul, **ISMB/ECCB**, Joint Conference on Computational Biology, Vienna, Austria, [Link](#).
- 2007 Jun, **International Conf on Pathways Networks & Systems**, Porto Heli, Greece, [Link](#).

Chemical combinations as multi-target therapeutics and biological probes.

- 2006 Oct, **ICSB**, Annual Meeting, Yokohama, Japan, [Link](#).
- 2006 Jun, **New York University**, Biology seminar, New York NY, USA.
- 2006 Apr, **Pfizer Research Technology Center**, Cambridge MA, USA.
- 2006 Jun, **International Specialized Symposium on Yeasts**, Helsinki, Finland, [Link](#).
- 2005 Nov, **Harvard Center for Genomic Research**, Cambridge MA, USA.
- 2005 Jan, **Millennium Pharmaceuticals Inc**, Cambridge MA, USA.
- 2004 Mar, **Pfizer Discovery Technology Center**, Cambridge MA, USA.
- 2004 Feb, **Institute for Systems Biology**, Seattle MA, USA.
- 2003 Sep, **Internat Conf on Pathways Networks & Systems**, Santorini, Greece, [Link](#).

Secondary structure in protein-coding mRNAs.

- 2003 Feb, **Boston University Bioinformatics**, Boston MA, USA.

Publications (astrophysics) (selected from 60+ papers. For all, search "Lehar, J." at adsabs.harvard.edu)

- 2008 **Astron J** 135(3):984-90 ([ads](#)) *The central component of the gravitational lens Q0957+561*
Haarsma, Winn, Shapiro, **Lehar**.
- 2006 **Astrop J** 649:616-34 ([iop](#)) *Probing the coevolution of black holes and galaxies using lensed quasar hosts*.
Peng, Impey, Rix, Kochanek, Keeton, Falco, **Lehar**, McLeod.
- 2005 **Astrop J** 618:108-22 ([ads](#)) *The radio variability of radio-quiet and radio-loud quasars*.
Barvainis, **Lehar**, Birkinshaw, Falcke, Blundell.

- 2003 **Astrop J** 587:143-59 ([iop](#)) *Evolution of a mass-selected sample of early-type field galaxies.*
Rusin, Kochanek, Falco, Keeton, McLeod, Impey, **Lehár**, Muñoz, Peng, Rix.
- 2001 **Astrop J** 557(2):594-604 ([iop](#)) *B1359+154: a six-image lens produced by a z~1 compact galaxy group.*
Rusin, Kochanek, Norbury, Falco, Impey, **Lehár**, McLeod, Rix, Keeton, Muñoz, Peng.
- 2001 **Astrop J** 547:60-76 ([ads](#)) *An efficient search for gravitationally lensed radio lobes.*
Lehár, Buchalter, McMahon, Kochanek, Muxlow.
- 2001 **Astrop J** 546:769-74 ([iop](#)) *Multifrequency analysis of the wide-separation gravitational lens RXJ0921+4529.*
Muñoz, Falco, Kochanek, **Lehár**, McNamara, Vikhlinin, Impey, Rix, Keeton, Peng, Mullis.
- 2000 **Astron J** 120:2868-78 ([iop](#)) *PMNJ1838-3427: a new gravitationally lensed quasar.*
Winn, Hewitt, Schechter, Dressler, Falco, Impey, Kochanek, **Lehár**, Lovell, McLeod, Morgan, Muñoz, Rix, Ruiz.
- 2000 **Astrop J** 543:131-48 ([iop](#)) *Fundamental plane of gravitational lens galaxies and evolution of early-type galaxies.*
Kochanek, Falco, Impey, **Lehár**, McLeod, Rix, Keeton, Muñoz, Peng.
- 2000 **Astrop J** 542:74-93 ([iop](#)) *The host galaxy of the lensed quasar Q0957+561.*
Keeton, Falco, Impey, Kochanek, **Lehár**, McLeod, Rix, Muñoz, Peng.
- 2000 **Astrop J** 536:584-605 ([ads](#)) *HST observations of 10 two-image gravitational lenses.*
Lehár, Falco, Kochanek, McLeod, Muñoz, Impey, Rix, Keeton, Peng.
- 1999 **Astrop J** 523:617-32 ([iop](#)) *Interstellar medium of lens galaxies: Dust and extinction curves in z>0 gravitational lenses.*
Falco, Impey, Kochanek, **Lehár**, McLeod, Rix, Keeton, Muñoz, Peng.
- 1997 **Astron J** 114:48-53 ([ads](#)) *The gravitationally-lensed radio source MG0751+2716.*
Lehár, Burke, Conner, Falco, Fletcher, Irwin, McMahon, Muslow, Schechter.
- 1995 **Astrop J** 450:L41-4 ([ads](#)) *A gravitational lens solution for IRAS F10214+4724.*
Broadhurst, **Lehár**.
- 1993 **Astron J** 105:847-52 ([ads](#)) *A gravitationally-lensed ring in MG1549+3047.*
Lehár, Langston, Silber, Lawrence, Burke.
- 1991 **Nature** 352:43-5 ([ads](#)) *The Hubble constant from the time delay in double quasar 0957+561.*
Roberts, **Lehár**, Hewitt, Burke.
- 1987 **Astron J** 93:968-89 ([ads](#)) *Time series analysis with CLEAN: derivation of a spectrum.*
Roberts, **Lehár**, Dreher.
- 1986 **Nature** 320:239-42 ([ads](#)) *Very Large Array observations of rapid non-periodic variations in OJ 287.*
Dreher, Roberts, **Lehár**.

Invited Talks (astrophysics)

- The CASTLES Hubble Space Telescope gravitational lens survey.*
2000 May, **New England Regional Quasar/AGN Meeting**, Waltham MA, USA.
1999 Jul, **Cambridge Univ Institute of Astronomy**, Cambridge, UK.
- Gravitational lensing by galaxies.*
1998 Apr, **Wellesley College**, Astronomy Dept, Wellesley MA, USA.
1996 Aug, **MIT**, Astrophysics Colloquium, Cambridge MA, USA.
- Is the ultra-luminous galaxy FSC10214+4724 gravitationally lensed?*
1995 Oct, **Boston University**, Astrophysics Colloquium, Boston MA, USA.
1995 Aug, **Harvard-Smithsonian Ctr for Astrophysics**, Cambridge MA, USA.
1995 Jul, **International Astronomical Society**, Symposium #173, Melbourne, Australia.
- Two new gravitational lenses from the MG-VLA search.*
1994 Jan, **Space Telescope Science Institute**, Symposium, Baltimore MD, USA.
1994 Jan, **Harvard-Smithsonian Ctr for Astrophysics**, Cambridge MA, USA.
- A four-image gravitational lens in MG0751+2716.*
1994 Jan, **American Astron Soc Conf #183**, Washington DC, USA.
- A gravitationally lensed ring in the radio galaxy MG1549+3047.*
1993 Jan, **Royal Astronomical Society**, London, UK.
1993 May, **Mullard Radio Astronomy Observatory**, Cambridge, UK.
1992 Jun, **Cambridge Univ Institute of Astronomy**, Cambridge, UK.
1992 May, **Jodrell Bank Observatory**, Manchester, UK.

The radio time delay in the gravitationally-lensed quasar Q0957+561.

1992 Apr, **Mullard Radio Astronomy Obs.** Cambridge, UK.

1991 Oct, **Cambridge Univ Institute of Astronomy.** Cambridge, UK.

1991 Mar, **MIT Haystack Observatory,** Westfield MA, USA.

1991 Feb, **Harvard-Smithsonian Ctr for Astrophysics,** Cambridge MA, USA.

1991 Jan, **Royal Astronomical Society,** London, UK.

Invited Talks (other audiences)

An astrophysicist turns from CLEAN living to cocktails and drug peddling.

2017 Jun, **Brandeis University,** Symposium in honor of Profs Roberts & Wardle, Waltham MA, USA.

2013 Jan, **Brandeis University,** Physics Colloquium, Waltham MA, USA, [Link](#).

Systems biology and drug combinations.

2008 Apr, **Chinese American Biomed Assoc,** Cambridge MA, USA.

New approaches in chemical genetics.

2006 Aug, **Mass Biotech Council,** Cambridge MA, USA.

Everything you need to know to get excited about genomics.

2001 May, **MIT Astrophysics,** Graduate Student Lunch, Cambridge MA, USA.

2001 Apr, **Harvard-Smithsonian Ctr for Astrophysics,** Grad Student Forum, Cambridge MA, USA.

Gravitational lensing by galaxies.

2000 Apr, **Buckingham Browne & Nichols School,** Cambridge MA, USA.

**APPLICATION FOR APPOINTMENT
FOR BOARD/COMMITTEE MEMBERSHIP**

Board/Committee of Interest: 1. Town Celebrations Subcommittee 2. _____
3. _____ 4. _____

Would you consider another Committee: May be

For how long should we keep your application on file? Year?

Full Name: Sudha Balasuryan Nickname: _____

Preferred Title (please circle) Mr./Ms./Mrs./Other: Mrs

Home Address: _____ Road _____ Zip: 02420

Length of Residence in Lexington: since March'92 - 30 years

Occupation: Accounts Manager, VEDAS

Work Address: 158 Great Road, Unit 389, Bedford, MA-01730

Phone: Home _____ Work _____ Fax _____
Cell _____

E-mail: Primary: _____ Secondary: _____

If you currently serve on a Board or Committee, please identify: one of the founders of IAL

Special Training, Interests, Qualifications: _____

Quick books, excel, documentation etc.

Have you been asked by a Committee to become a member? _____

How did you hear about the Committee? email and a friend in town

Please attach a current resume, if possible. Add any comments below or on a separate page.

Signature:  Date: 02/01/2022

Application Form

Profile

Attendance to a regularly scheduled meeting of the board or committee of interest is strongly encouraged when considering applying for membership. All committee meetings are open to the public and are posted at least 48 hours in advance of the meeting in our www.lexingtonma.gov/calendar.

If you are appointed to the board or committee for which you have applied, information from this application will be used to contact you regarding your appointment from the appointing authority as well as the Town Clerk’s Office. Please do not offer information on this application you would prefer we not use.

Applications will be kept on file and considered as vacancies occur for up to six months unless otherwise noted.

If you have any questions or need more information regarding the completion of the application, please contact either the Select Board Office at 781-698-4580 or the Town Manager’s Office at 781-698-4540.

Seema		Badaya
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

@gmail.com

Email Address

Alternate Email Address (Optional)

road	
Home Address	Suite or Apt

Lexington	MA	02421
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

1

What Precinct do you live in?

None Selected

Home: (614)	
Primary Phone	Alternate Phone

Employer	Job Title

Work Address

Which Boards would you like to apply for?

Town Celebrations Subcommittee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I have held and organized lot of events and have a passion towards organizing events and celebrations

Upload a Resume

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

How did you hear about the board or commission for which you are applying?

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

Application Form

Profile

Attendance to a regularly scheduled meeting of the board or committee of interest is strongly encouraged when considering applying for membership. All committee meetings are open to the public and are posted at least 48 hours in advance of the meeting in our www.lexingtonma.gov/calendar.

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Applications will be kept on file and considered as vacancies occur for up to six months unless otherwise noted.

If you have any questions or need more information regarding the completion of the application, please contact either the Select Board Office at 781-698-4580 or the Town Manager’s Office at 781-698-4540.

William	J	Keim
First Name	Middle Initial	Last Name

Nickname

Bill

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Mr.

@gmail.com
Email Address

Alternate Email Address (Optional)

s Lane		
Home Address	Suite or Apt	
LEXINGTON	MA	02420
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

27

What Precinct do you live in?

☒ Precinct 8

Mobile: (617)	Home: (781)
Primary Phone	Alternate Phone

Retired

Employer

NA

Job Title

Work Address

NA

Which Boards would you like to apply for?

Town Celebrations Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

Education and Professional certificates include Master of Science from M.I.T., MBA from Boston University, Chartered Financial Analyst (CFA) charter holder, and passed Financial Risk Manager (FRM). Corporate experience includes 35 years of employment and financial experience at firms Salomon Brothers, HSBC Securities, State Street Bank, and Bank of New York. Served in roles of financial and risk analyst. The Economic Development Advisory Committee represents an ideal opportunity to apply my experience in a meaningful way.

Upload a Resume

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

I have been a resident of Lexington for over 27 years and have always taken a strong interest in the town's governance, community initiatives, and long-term planning. Over the years, I have followed committee updates and stayed actively informed about local developments through the Town website, newsletters, and community discussions. I admire the impact that volunteer boards and commissions have on shaping the town's future. My decision to apply is an extension of that long-standing interest. I have also participated in and contributed to the Town Celebrations committee where my wife, Cerise Jalelian, is an active member.

How did you hear about the board or commission for which you are applying?

Through years of participation in community events, public forums, and ongoing engagement with local issues, I've developed a familiarity with the Town's various committees and the vital work they carry out and have followed their initiatives with interest and appreciation. Their efforts reflect the values and priorities of our community—something I've remained attuned to over my many years as a resident.

Have you recently attended any meetings of the board or committee for which you are applying?

☒ Yes ☐ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

William J Keim

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

WILLIAM J. KEIM, MBA, CFA, FRM

I am a seasoned professional available for an opportunity to add value to a variety of projects to enhance and develop solutions for enterprise-wide operations and decision support systems. My diverse education, strong, steady and uninterrupted career experience, and superior academic skills qualify me exceptionally to serve in a variety of organizational and support roles.

EMPLOYMENT

BANK OF NEW YORK

New York, New York 2011 - 2024

Enterprise Risk (2011 – 2021) and Financial Crimes Compliance (2022 – 2024): *Senior Vice President*

- Evaluated compliance metrics and determined the necessary data content for their calculation.
- Collaborated with sourcing systems to identify required data content, establish metrics, and develop Service Level Agreements.
- Designed a data quality framework that generated statistics for data sourced from originating systems to the Compliance database.
- Developed and populated a comprehensive template to document data details and quality rules for all internal bank systems linked to Financial Crimes data (transaction monitoring and sanctions)
- Updated an enterprise data quality application with rules, statistics, and business glossary terms for transaction monitoring and sanctions-related data.
- Acted as Business Analyst and Product Owner for key enterprise risk projects, including Intraday Risk Analysis, Counterparty Credit and Country Risk Reporting, and Single Counterparty Credit Limit Analysis.
- Played a pivotal role in introducing Agile methodology at BNY, taking on dual roles as Senior Business Analyst and Product Owner for various projects.

STATE STREET CORPORATION:

Boston, Massachusetts 1998-2010

State Street Associates: *Senior Research Associate, Vice President* 2007-2010

Responsible for mining insights from State Street Corporation's trades and holdings information to develop and construct proprietary indicators of asset transactions and inventory turnover by institutional investors.

- Served as project lead for the design, construction, and continuous refinement of a \$14 trillion customer holdings database from which billions of dollars of daily trade activity is captured and analyzed.
- Developed and managed a data infrastructure supporting research and production systems. The platform integrated complex data on securities, pricing, and proprietary/third-party sources for fixed income, equity, FX, and derivatives.
- Delivered a study on credit market liquidity analysis that was ultimately presented to the National Economic Council and Federal Reserve Chairman Bernanke (April 2009).

State Street Global Markets: *Senior Financial Analyst, Vice President* 1998-2007

Responsible for creating and delivering proprietary decision-support platforms used by State Street Corporation analysts, traders and operations.

- Orchestrated the business and technology components associated with a buy-side to buy-side trading platform for fixed income instruments.
- Developed standardized management reports as a decision-support tool for senior executives in the Global Markets Division.
- Managed the transition to a new trading system used by the money market, foreign exchange and equity trading desks and business operations unit. Collaborated with suppliers, internal IT, legal, and compliance to achieve a successful result.
- Researched and delivered foreign exchange markets analyses, including currency price trends/momentum and currency volatility analysis used to identify trading strategies; portfolio price volatility and FX options pricing using Monte Carlo simulations; and FX business and revenue generation studies.

HONG KONG SHANGHAI BANK SECURITIES, INC., New York, New York 1996-1998

Vice President, Fixed Income Research

Responsible for financial analysis in the U.S. Treasury, agency and corporate bond markets.

- Designed and implemented a platform to produce automated financial information packets for HSBC domestic and foreign sales force and traders.
- Developed financial models and fixed income analytics, including a relative value model for the U.S. Treasury Bond and Bills markets.
- Trained the sales force, traders, and firm clients on trading strategies.

SALOMON BROTHERS, New York, New York 1993-1996

Bond Portfolio Research Group: Vice President

Quality Assurance Manager for the Yield Book Project

Responsible for creating systemic fixes for a critical multi-platform application used daily by traders and portfolio managers.

- Coordinated efforts of a quality assurance team to construct manual and automated test plans for a complex fixed-income analysis program. Financial products included cash instruments for sovereign, agency, corporate and mortgage bonds and associated derivative instruments of swaps, futures and options.
- Established numerous process improvements, including program test plan protocols, software release methodology, team member communication, and a single computer/software platform.
- Assisted a diversified customer base of traders and portfolio managers in using the *Yield Book* and interpreted results for investment decisions.

GENERAL ELECTRIC COMPANY, Lynn, Massachusetts 1979-1993

Staff Engineer, Control Systems Design, Aircraft Engine Business Group, 1985-1993

Mechanical Engineer, Power Systems Division, 1979 - 1984

Responsible for developing simulation models for power plant systems and jet engines.

- Programmed the first jet engine model for use in an electronic control simulator. This work was done on a computing device that I created – essentially the first PC in the era of mainframes.
- Awarded a patent for development of a jet engine inlet temperature control system.
- Internally consulted to GE management personnel and customers, including a two-week presentation to a Japanese consulting firm and customer in Tokyo, 1984.

ADVANCED EDUCATION

Boston University School of Management

1990

Master of Business Administration (MBA)

High Honors, GPA: 3.8/4.0

Massachusetts Institute of Technology, School of Engineering

1983

Master of Science (MS) Mechanical Engineering

High Honors, GPA: 4.7/5.0

University of Massachusetts, Dartmouth

1979

Bachelor of Science, Mechanical Engineering

Highest Distinction, GPA: 3.8/4.0

Graduated #1 in Class

CREDENTIALS and LICENSURES

Chartered Financial Analyst

1997-present

CFA Examination Grader

1999-2003

Boston Security Analysts Society, Inc., Member

1998-present

CFA Examination Committee and CFA Practice Test Editor: Levels II and III

2008-present

PluralSight Machine Learning: Completed all Paths for scikit-learn, PyTorch and

2021 - 2023

Tensorflow, achieving Expert rating for all

Great Learning and MIT Schwartzman College of Computing:

April 2022

Completed Certificate for 'Data Science and Machine Learning'

Great Learning and Amazon Web Services

Presently enrolled in 'Generative Artificial Intelligence'

November 2024

Application Form

Profile

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If you are appointed to the board or committee for which you have applied, information from this application will be used to contact you regarding your appointment from the appointing authority as well as the Town Clerk’s Office. Please do not offer information on this application you would prefer we not use.

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If you have any questions or need more information regarding the completion of the application, please contact either the Select Board Office at 781-698-4580 or the Town Manager’s Office at 781-698-4540.

Simon		Rubenstein
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Email Address

Alternate Email Address (Optional)

Home Address

Suite or Apt

City

State

Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

27 years

What Precinct do you live in?

☒ Precinct 6

Primary Phone

Alternate Phone

Creative firm & event logistics

Employer

Owner, producer, director

Job Title

Work Address

1 Rd.

Which Boards would you like to apply for?

Town Celebrations Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I've been deeply connected to the Lexington community nearly my entire life — growing up here, attending Lexington High School (where I was President of the Drama Club for three years and graduated with honors), and continuing to serve in various leadership and volunteer roles. From ages 10 to 18, I served as the Drum Major of the William Diamond Junior Fife and Drum Corps, which hosts the annual Lexington Muster — a tradition I continued supporting as Logistics Coordinator from 2015 to 2024, and now as Deputy in Charge for the 2024 and 2025 Musters. I'm also an active Lexington Minuteman, and a member of both the Lexington Chamber of Commerce and the Lexington Retailers Association, where I've taken on a leadership role in planning community-facing events. Most recently, I produced the Waltham Street Stage for Discovery Day 2024. In addition to my logistical and leadership background, I'm a filmmaker and producer. I shot the official promotional video for Lexington's 300th anniversary, and I've worked closely with the Historical Society, the Lexington minutemen, and the 10th Regiment on commemorative projects — including "Lex 250" content. These experiences fuel my passion for bringing Lexington's history and community spirit to life through public celebrations. * Over 15 years of experience in event production, operations, and logistics * Film and media production background with work for Lexington's 300th and 250th commemorations * Leadership roles in civic groups, including Lexington Minutemen, William Diamond Junior Fife and Drum Corps, and Chamber of Commerce, Lexington Retailers Association. * Strong collaboration and communication skills developed through high-level community coordination and creative project management * Longstanding Lexington resident with personal insight into the town's history, values, and civic culture

Upload a Resume

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

As someone who grew up in Lexington and continues to contribute to its civic and cultural life, I want to serve on the Town Celebrations Committee to help strengthen the events that make this town special. I see this as a way to give back to a community that shaped me and to use my experience in production, event planning, and community leadership to support meaningful and engaging town-wide celebrations.

How did you hear about the board or commission for which you are applying?

I was invited to apply by Glen Basset, Susan Sterling, and Steve Cole (a former committee member).

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

June 16 2025

Conflict of Interest Law Training Certificate

SIMON RUBENSTEIN

EXPERIENCE

BROOKLYN PICTURES ENTERTAINMENT, New York

Creative Development + Production, Producer & Director

January 2008 – Present

- Develop and articulate the creative vision for each project. Lead the creative team in executing the project's vision. Collaborate and oversee writers, producers, creatives to refine scripts and storyboards.
- Identify and develop new business opportunities to expand client base. Serve clients across industries notably financial security, pharmaceuticals, legal, & select nonprofits with excellent attention to detail & problem-solving.
- Produce and direct on-set activities to ensure effective execution of the vision. Review and approve edits to ensure consistency with the vision. Lead, train, mentor and managed early career directors, producers, artists & clients.
- Well informed on industry trends to bring fresh ideas to projects. Communicate effectively with clients to align goals, coordinate logistics across Federal, State & Local, using a Unified Command Center (UCC) when necessary.
- Identified and qualified prospective client opportunities; prepare and present business development proposals.
- Developed a clear understanding of clients' needs, culture requirements, and required skill sets; communicate multiple clients' needs on a weekly basis, set up sourcing and search priorities for the team.
- Proven experience as commercial director and producer with strong portfolio. Strong leadership & creative vision.
- Ability to collaborate effectively with diverse teams. Proficiency directing on-set activities and post-production.
- Fellow Producer Director Joseph Ritter began his commercial career with MPO. As an assistant cameraman, Joseph worked on over 200 high-end commercials for top national brands including being a cameraman on the famous Nissan Polo commercial for Ridley and Tony Scott, Chevrolet with Andy Davis & Haskell Wexler, Al & Bobby Unser, Jell-O pudding pops with Bill Cosby, Bean Kahn on Charmin, Tide, Allstate & another 40 with Ted Churchill. Joseph also worked on films & tv giving him a well rounded education in reaching an audience through imagery including doing five portfolio reviews with the museum of modern art photographic department.

ARIA ARTS, New York

Creative Production, Producer & Director

June 2015 – Present

- Produce & direct commercial content, VIP experiences and tour 40-80 member bands + staff in US and Europe.
- Ability to manage tight deadlines and deliver high-quality results in all industries most notably financial security, legal, news and entertainment. Strong communication skills in English for client and team interactions.
- Developed marketing and sales materials for clients and agencies to support business development efforts.

I.A.T.S.E. LOCAL 52 - New York - Sex and the City, Insidious 5, Russian Doll, West Side Story, Etc.

Creative Production, Camera & Lighting Craft Logistics Manager

Sept.2020 - Present

- Managed craft strategy for CBS, HBO, Universal, Marvel, Amazon, Netflix, Disney, AppleTV+, Lionsgate, Sony

Creative Production, Camera & Lighting Craft Logistics Coordinator

May 2016 - Mar 2020

- Developed and finalized craft strategy for CBS, Marvel, FX, Netflix, NBC, Amblin, AppleTV+, Amazon, Disney

MUSÉE MAGAZINE, New York

Research, Logistics & Operations

March 2020 - March 2021

- Developed and produced print publishing. Maintained sponsor, donor and media outlets relationships.
- Created and executed web and print sales, marketing, strategic partnerships and promotional initiatives.

Independent Consultant - FR Films for Live Broadcast Events, Boston & New York

Creative Production, Talent & Logistics Coordinator

May 2012 - September 2017

- Coordinated logistics for HBO, David G. Mugar, Bloomberg, NHL, MTV VMA's, VH1, CBS, Viacom, etc.

AMV CREATIVE, Boston

Producer

January 2011 – March 2020

- Developed marketing initiatives to raise brand awareness, drive traffic and implement commercial strategy with senior managers to deliver steady and sustainable financial growth for shareholders and stakeholders.
- Directed and oversaw the execution of the seasonal creative development and production, web design, marketing, online promotions and advertising.
- Managed the in-house production of advertising campaigns; responsible for media planning and business operations.

- Video strategist and marketing consultant to the CEO from January 2010 - January 2011.
- Managed complex calendars and scheduling to ensure efficient production and team communications.

THE STEVE KATSOS SHOW, Boston

Live Broadcast Producer, Set Director, Camera Operator

May 2008 - December 2016

- Coordinated logistics during the development of shooting schedules, secured and prepared locations, and equipment for efficient production.
- Implementation of large scale, complex projects, communications and multimedia initiatives.
- Managed the set, lighting and production livestream operations for a crew of 40, live cable broadcast.
- Excellent eye for composition, lighting, and cinematography to create visually engaging television.
- Set up the company's first live broadcast streaming online.
- Maintain open communication with clients throughout the project, presenting creative concepts, addressing feedback, and ensuring client satisfaction.

CAREER HIGHLIGHTS

American Museum of Natural History 2020 Cinematographer, Producer, Director Ballet Installation

TIFF Pre-selection 2017, Euro-Vision Palermo 2017 Producer & Director

NYU Tisch Film Institute Best in Class 2015 Writer, Producer, Director Toni Hawkins Award for Excellence

Boston Globe Scholastic Art and Writing Award 2014 Film Photography

Lexington Honors Community Photography Award 2013 Film Photography

USY New England 2012 - 2013 VP Communications, Mel Goldman Award for Individual Excellence 2014

BROOKLYN PICTURES ENTERTAINMENT

December 2015 - Present

Commercial Producer & Director

- Provide video strategy advice to private clients.
- Proven track record of successfully directing commercials, films & television across various genres and styles.
- Deep understanding of narrative structure and the ability to craft compelling stories within a short commercial format.

EDUCATION

NEW YORK UNIVERSITY

Tisch School of the Arts

Bachelor of Fine Arts, Film and Television Production

PHILANTHROPY

NATIONAL ALOPECIA AREATA FOUNDATION

January 2021 - Present

Board of Directors, Secretary 2022 & 2023, Thought Leader, Speaker

- Live broadcast interview PBS NewsHour, CBS Affiliates, etc. On-site logistics for events.
- Created professional associations to provide strategy & collaborate with agencies and clients to brainstorm and refine creative concepts for commercials, aligning with brand messaging and marketing objectives.
- Actively network with agencies, brands, and industry professionals to secure new projects and opportunities.
- Developed and facilitated original programs and panels, June 2015 - present.

Application Form

Profile

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Beverly		Liu
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

@gmail.com
Email Address

Alternate Email Address (Optional)

@gmail.com

Street	Suite or Apt	
Home Address		
Lexington	MA	02420
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

15

What Precinct do you live in?

<input checked="" type="checkbox"/> Precinct 7
--

Home: (781)	
Primary Phone	Alternate Phone

Thermo Fisher Scientific
Employer

Finance Analyst
Job Title

Work Address

, Waltham MA

Which Boards would you like to apply for?

Town Report Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I have a degree in Business Administration and Management with special focus in Finance and Business Analytics. The past 2 years of my career have been devoted to strengthening my skills in corporate finance and corporate strategy for a Fortune 500 company. Out of the office, I am an huge proponent of community care and active citizenship. I am also natively bilingual and proficient with technology and digital tools.

Upload a Resume

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

I find myself a resident of Lexington once again. Before moving back, I was product of Lexington High School. As I reflect on my development and accomplishments so far, I strongly believe that our town's community and resources were a key contributor. I think serving on a board or commission is a great way to pay this gratitude forward.

How did you hear about the board or commission for which you are applying?

Town website

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Beverly Liu

PROFESSIONAL EXPERIENCE

Thermo Fisher Scientific various locations in the United States (see below) July 2023 – Present
Finance Leadership Development Program

Drove operational excellence through four dynamic 6-month rotations by delivering stellar execution of financial and business strategy for Fortune 500 company.

Strategy and Development – Corporate (Waltham, MA) February 2025 – Present

- Developed market growth guidelines for company 5-year strategic plan.
- Generated communication materials for executive leaders, board of directors, and external investors.

Portfolio Management – Research and Safety Division (Pittsburgh, PA) July 2024 – February 2025

- Built and validated \$20M operating plan with business partners for supplier portfolio expansions.
- Analyzed and forecasted period costs, assessing impacts of key supplier accounts, product disposal, and channel mix.

Site Operations – Biosciences Division (Carlsbad, CA) January 2024 – July 2024

- Revamped multi-site capital investment playbook and implemented governance mechanism to improve decision-making for an \$8M annual budget.
- Partnered with manufacturing teams to achieve \$1.8M productivity savings in 1Q2024 and streamlined reporting processes, saving two hours per month.

Financial Planning and Analysis – Genetic Sciences Division (Carlsbad, CA) July 2023 – January 2024

- Owned weekly presentations for Finance VP to use in reviews with EVP driving commercial intensity, resulting in mitigation \$20M of \$30M revenue risk in 4Q2023.
- Improved cash flow strategy by leading fixed asset documentation cleanup to mitigate \$2M depreciation risk in 2023 and identified timing opportunities to de-risk 2024 capital deployment by \$1.5M.

Boston University Boston, MA September 2022 – May 2023

Quantitative Modeling Teaching Assistant

- Supported 800 students for two semesters with Quantitative Modeling curriculum focused on risk analysis for seed-stage ventures.

EDUCATION

Boston University Questrom School of Business Boston, MA September 2019 – May 2023

Bachelor of Science in Business Administration, *magna cum laude*

GPA: 3.8/4.0

Concentrations: Business Analytics and Finance, Minor: Chemistry

Extracurriculars: Community Service Center, LOCK Honorary Society, Beta Gamma Sigma, Questrom Honors Program, Women's Ultimate Frisbee (Captain 2020-23)

Awards: National Merit Finalist, Presidential Scholarship, 2019-23 Dean's List

VOLUNTEER EXPERIENCE

Haley House Boston, MA July 2021 – Present

Humane Animal Rescue of Pittsburgh Pittsburgh, PA July 2024 – February 2025

ARE Animal Rescue Inc. Oceanside, CA July 2023 – July 2024

SKILLS

Technical: Microsoft Office, Python, SQL, Oracle Hyperion Suite, PowerBI, GenAI Prompt Engineering

Language: Fluent in Mandarin (Native Speaker), Conversational Spanish

Application Form

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Jeremy	M	Bowman
First Name	Middle Initial	Last Name

Nickname

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

j

Email Address

Alternate Email Address (Optional)

Rd	
Home Address	Suite or Apt

Lexington	MA	02421
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

4

What Precinct do you live in?

☒ Precinct 9

Mobile: (617)	
Primary Phone	Alternate Phone

Capital One	Sr. Mgr, Software Engineering
Employer	Job Title

Work Address

314 Main St. Cambridge, MA 02142

Which Boards would you like to apply for?

Transportation Advisory Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I took the first 2 classes in MIT's urban planning program as an undergraduate. I lived car-free (primarily in Somerville) until I was 47, becoming very familiar with the MBTA and other transit services in the Boston area. I also served on the East Somerville Main Streets board of directors for 5 years, and was its secretary for most of that time. I served on the Assembly Square Advisory Committee, and was an active participant in many of the community meetings for the Green Line Extension and Assembly Square Orange Line station. I am an avid reader of urban planning and public transit books, including Human Transit, The High Cost of Free Parking, Walkable City, Green Metropolis, and Suburban Nation. I follow the news feeds for the MBTA, Human Transit, StreetsBlogMASS, and Strong Towns, as well as several urban planning and public transit podcasts.

 Upload a Resume

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

Although my family now has 2 cars, I prefer to use them as little as practical. I've been in a few accidents which were impossible for the driver to avoid, and am keenly aware of the risks involved in driving. And yet, as the parent of an elementary student with a busy schedule, I'm also keenly aware of the limits of non-automotive transportation (at least in its current state). My parents-in-law (who currently live with my family) are immigrants without driver's licenses. Overall, I have many reasons to seek to improve the state of multi-modal transportation in Lexington.

How did you hear about the board or commission for which you are applying?

I've seen it mentioned in some of the town's communications, and it also came up in some discussion threads about the proposed MBTA "Better Bus" schedule adjustments.

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

Conflict of Interest Law Training Certificate

Jeremy M. Bowman

Senior engineering manager with extensive Python and Django web application development experience, and a particular focus on developer experience. My specialty is applying a software developer's knack for debugging and optimization to organizational problems and workflows in software development.

Experience

CAPITAL ONE – Cambridge, MA

September, 2024 - Present

Sr. Mgr, Software Engineering – I manage one of the teams maintaining the company's enterprise machine learning platform.

2U (EDX) – Cambridge, MA

May, 2016 – January, 2024

Joined edX as an individual developer and took on increasing leadership responsibilities through and beyond its acquisition by 2U. Ultimately responsible for 4 teams, spanning developer experience, software maintenance, QA, and the primary monolith service.

Senior Manager of Software Engineering | April, 2022 – January, 2024

- Established and managed an offshore front-end maintenance team to complement the back-end one. Within a year, this took us from being behind on many critical security patches to performing preemptive upgrades for developer experience gains.
- Took over management of the QA team and helped it find new ways to identify and prevent regressions earlier (consumer-driven contract testing, end-to-end API testing, updated accessibility testing tools, etc.)
- Coordinated implementation of a cross-service Kafka (or Redis Streams) event bus that integrates smoothly with Django signals.

Software Engineering Manager | July, 2018 – April, 2022

- Reduced Jenkins maintenance from 100% of team effort to roughly 50% while also reducing the monolith's CI duration by more than 50% and flaky test occurrences by over 75%.
- Took ownership of the primary monolith service and took many steps to reduce cognitive load and accelerate a shift to more microservices.
- Established and managed a team of offshore contractors to proactively perform major upgrades and address technical debt in back-end code. Other teams went from spending about 40% of their time on this to 10%.
- Designed and coordinated development of a repository health dashboard that streamlined tech debt management across the organization.
- Coordinated Python 2.7 → 3.5, Python 3.5 → 3.8, Django 1.11 → 2.2, and Django 2.2 → 3.2 upgrades across more than a dozen services.

Principal Software Engineer | May, 2016 – July, 2018

- Did a major refactoring of course import & export which eliminated chronic page timeouts among other user experience improvements.
- Co-led the Django 1.8 → 1.11 upgrade across all services with minimal disruption to uptime or other teams.
- Led the creation of a new Docker-based development environment to resolve multiple limitations in the old Vagrant-based one.
- Devised an updated Python dependency management policy and tooling that dramatically reduced the number of stale dependencies.

SAFARI BOOKS ONLINE – Boston, MA

October, 2012 – May, 2016

Principal Software Engineer – Technical lead for a team of developers maintaining an online subscription library containing well over 30,000 professional books, videos, and tutorials. Coordinated development and maintenance of multiple Django services which interacted with a Backbone web client and native mobile clients, and introduced an assortment of new utilities and

procedures to improve productivity and code quality (seamless deployments, automated packaging checks, dependency version tracking, etc.).

UBUNTU CAPITAL – Boston, MA September, 2015 – January, 2016
Contractor – Improved and extended a Django-based online marketplace for matching contractors with jobs in Uganda. Worked on search improvements, SMS integration, feature phone support, better analytics, and assorted debugging and optimizations.

SIX RED MARBLES – Boston, MA February, 2013 – August, 2013
Contractor – Improved and debugged a Django-based authoring system for online multimedia courses.

IMPERIAL CONSULTING – Boston, MA February, 2010 – October, 2012
Lead Developer – Developed a variety of primarily Django-based web applications with dynamic interfaces using jQuery and Dojo. Projects included a career information database and resume builder, a searchable directory of private schools, a company strategy planning and execution system, and a networked iOS vocabulary quiz game.

DASKALA – Chicago, IL February, 2008 – January, 2010
Senior Software Engineer – Developed a set of educational assessment applications using Ruby on Rails, Dojo, and PostgreSQL. Implemented and maintained unit, functional, integration, load, and browser-automation tests.

ATG – Cambridge, MA April, 2005 – January, 2008
Senior Developer – Took over maintenance and development of key aspects of a mature Java application framework for large e-commerce businesses.

HOUGHTON MIFFLIN COMPANY – Boston, MA December, 2004 – March, 2005
Consultant – Did code review, performance optimization, debugging, and migration from PostgreSQL to Oracle of a J2EE online testing application.

ADVISORTECH – Boston, MA November, 2000 – June, 2004
Software Engineer – Maintained and enhanced a J2EE-based system for portfolio management and trading used by financial advisors in Japan, Korea, and Germany.

Skills

Collaboration Tools: Slack, GitHub, Google Workspace, Zoom, Confluence, Jira, Zulip
Programming Languages: Python, JavaScript, C++, Java, Rust, Objective-C, C
Server Components: Django, Docker, Kubernetes, PostgreSQL, Redis, MySQL, memcached
Cloud Environments: AWS, Heroku, Netlify (Jamstack), Digital Ocean
CI/CD: GitHub Actions, Jenkins, Pact, Codecov, Coveralls, GoCD
Libraries: Django REST Framework, Celery, SQLite, Qt, ReportLab
Technologies: SQL, HTML, CSS, OAuth, CORS, Java EE, XML, XSLT, UML
Development Tools: VS Code, PyCharm, git, Sphinx, pytest, tox, pylint, axe-core, Selenium, OpenAPI, eslint, Emacs, Ant, Jprofiler, Checkstyle, cppcheck
Web Services: New Relic, Splunk, Renovate, ReadTheDocs, Sentry, Salesforce, Fastly
Operating Systems: macOS, Ubuntu, Debian GNU/Linux, Windows
Languages: Native English and fluent in Japanese (JLPT N1)

Education

MASSACHUSETTS INSTITUTE OF TECHNOLOGY – Cambridge, MA
Graduated June 1997 with Master's of Science in Operations Research.
Graduated June 1995 with Bachelor's of Science in Mathematics.

Application Form

Profile

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Keshav	G	Krishna
First Name	Middle Initial	Last Name

Nickname

Keshav

Preferred Title (i.e. Mr., Ms., Mx., Dr., Rev)

Mr

k	
Email Address	

Alternate Email Address (Optional)

	Lane	
Home Address		Suite or Apt
Lexington	MA	02420
City	State	Postal Code

Length of Residence in Lexington (Note: ZBA requirement is a minimum of 8 years)

14 years

What Precinct do you live in?

☒ Precinct 5

Mobile: (6	1	
Primary Phone		Alternate Phone

Employer

Job Title

Work Address

Which Boards would you like to apply for?

Transportation Advisory Committee: Submitted

Interests & Experiences

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

Special Training and/or Qualifications

I am a rising Junior at Lexington High School and I live in Lexington. I want to serve in the Transportation Advisory Committee because of my deep interests in transportation. I have always been fascinated by trains, buses, and all modes of transportation with a deep passion. My goals are to improve Lexington's transportation network of the Lexpress and to help bring ideas that would help solve Lexington's transportation needs. I am a strong supporter for improving the transportation needs in Lexington and I am willing to do what it takes. I have attached my qualifications and other info on my resume.

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

I am interested in serving on a board so I can get a good grasp on the experience being in one and making decisions that would affect Lexington as a whole. I want to know how a board works, and how to communicate and solve issues for our town.

How did you hear about the board or commission for which you are applying?

I was inspired by Kunal Botla during the last election. As a result, I was researching the transportation committee in Lexington and went through some of the agenda items and meeting minutes on the website. I also volunteer for the Safe Routes to School as an LHS Ambassador. Through that, I have interacted with some people who also mentioned the Transportation Advisory Committee.

Have you recently attended any meetings of the board or committee for which you are applying?

☐ Yes ☒ No

Have you confirmed your availability to attend the board or committee's meetings? (i.e. can attend at the time the committee regularly meets)

☒ Yes ☐ No

Keshav G Krishna

Do you currently serve on another board or committee?

☐ Yes ☒ No

If yes, please list date of most recent Conflict of Interest Law Training.

KESHAV KRISHNA

 Lexington, MA

OBJECTIVE

Motivated high school student with a strong passion for civil engineering, particularly in transportation and urban planning. Seeking an internship opportunity to apply knowledge, gain hands-on experience, and contribute to projects that enhance urban mobility and infrastructure.

SKILLS

- Strong analytical and problem-solving abilities
- Effective teamwork and leadership skills
- Strong written and verbal communication
- Highly dedicated and a hard worker
- Willing to work Independently and with people
- Can use technology including (Microsoft Excel/Powerpoint)

CAREER HIGHLIGHTS

- Student-School Building Committee member for the New Lexington High School Building Project (2024 - Present)
- Safe-Routes-To-School Ambassador representing Lexington High School for Walking/Biking Infrastructure Projects for the town of Lexington (2024 - Present)
- Part-Time Chocolate Producer @ Philips Chocolate in Boston (Oct - Dec 2024)

EXPERIENCE

Safe Routes to School (2024 - present)

- Worked on an abundance of case studies, Examples include: should the speed limit around my school become a school zone (High Schools were previously not required to have school zones), accidents in various school zones across Lexington, solving biking and infrastructure problems on roads. The goal was to make the roads as safe as possible for people to use.
- Spring 2024, Volunteered at a bike rodeo for students in grades K - 8 to raise awareness for biking safety on roads

Student-School Building Committee (2024 - present)

- April 2024, Visited other high schools that were recently built or under construction to help gain ideas and inspiration for the proposed Lexington High School project
- May 2024, Job-shadowed a Civil Engineer from SMMA, an architect firm that is involved with the new Lexington High School project
- October 2024, Presented at LHS representing the Student-School Building Committee for students to get informed about the new Lexington High School Project. The Main Question at the time was whether the new Lexington High School should be built in phases (tearing down a part of the school, and re-building it and the process repeats until the all of the old Lexington High School is gone) or building a completely new building on the fields

Philips Chocolate (2024)

- Part-Time Job in manufacturing chocolates during the Christmas Season
- Gained experience on maintaining an efficient and clean workspace while continuously assembling handmade high quality chocolates and managing kitchen equipment

EXTRA CURRICULAR

- First Degree Black Belt in Karate, Assisted with coaching beginners @ Elite Freestyle Karate (2017 - Present)
- Piano ABRSM Level-3

EDUCATION

Lexington High School, Class of 2027

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Approve: Water and Sewer Adjustments

PRESENTER:

Jill I Hai, Select Board Chair

ITEM NUMBER:

C.9

SUMMARY:

Category: Decision-making

Water & Sewer Adjustment per WSAB 6/5/25 \$ 30,627.79

SUGGESTED MOTION:

to approve Water & Sewer Adjustment per WSAB 6/5/25 \$ 30,627.79

Move to approve the consent.

FOLLOW-UP:

Treasurer / Collector

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

ATTACHMENTS:

Description	Type
□ W & S Adj 7-21-25	Cover Memo



FY 2025
ADJUSTMENTS TO WATER/ SEWER
AS RECOMMENDED BY THE WATER AND SEWER ABATEMENT BOARD

WSAB JUNE 5, 2025 SELECT BOARD JULY 21, 2025

ACCOUNT	NBR	STREET	WATER	SEWER	TOTAL	BILL	YEAR	NOTES
0200430400	145	BURLINGTON STREET	\$ (621.24)	\$ (2,212.74)	\$ (2,833.98)	1135338		TOILET LEAK
0300686600	1	CONSTITUTION ROAD	\$ (104.72)	\$ (353.86)	\$ (458.58)	1139671		TOILET LEAK
0200317700	3	ELIOT ROAD	\$ (643.83)	\$ (2,310.43)	\$ (2,954.26)	1133701		TOILET LEAK
0200310000	1661	MASSACHUSETTS AVE	\$ (4,272.78)	\$ (15,578.02)	\$ (19,850.80)	1133600		TOILET LEAK
0200573600	19A	OAKLAND STREET	\$ (319.09)	\$ -	\$ (319.09)	1137483		TOILET LEAK
0100057200	60	MAPLE STREET	\$ (178.17)	\$ (624.96)	\$ (803.13)	1129389		TOILET LEAK
0100260800	10	POTTER POND	\$ (88.94)	\$ (358.36)	\$ (447.30)	1132279		TOILET LEAK
0301005200	6	ROYAL CIRCLE	\$ (98.37)	\$ (331.03)	\$ (429.40)	1143772		TOILET LEAK
0200358700	33	FOREST STREET	\$ (52.19)	\$ (421.35)	\$ (473.54)	1134543		MULTI LEAK
0300649300	101	SCHOOL STREET	\$ (225.52)	\$ (820.44)	\$ (1,045.96)	1139134		BURST PIPE
0200503702	532	LOWELL STREET	\$ (805.14)	\$ -	\$ (805.14)	1120838		IRRIGATION LEAK
0200496602	73	LACONIA STREET	\$ (206.61)	\$ -	\$ (206.61)	1136286		IRRIGATION LEAK
0200536800	38	SADDLE CLUB ROAD	NA	NA	NA	1136898		INTEREST ONLY
0200992700	9	KEELER FARM WAY	NA	NA	NA	1138291		INTEREST ONLY
			\$ (7,616.60)	\$ (23,011.19)	\$ (30,627.79)			

It is the recommendation of the Water and Sewer Abatement Board that the Town Collector be authorized to waive interest that has accrued on the bills included herein, unless stated here otherwise, from the due date of the bill until 30 calendar days after the date of written notification to applicant of the Selectmen's action.

THE SUM SET AGAINST THE ABOVE ACCOUNTS IS HEREBY ADJUSTED.

WATER	SEWER	TOTAL
\$ (7,616.60)	\$ (23,011.19)	\$ (30,627.79)

7-10-25

DIRECTOR OF PUBLIC WORKS

SELECT BOARD 7/21/25

AGENDA ITEM SUMMARY

LEXINGTON SELECT BOARD MEETING

AGENDA ITEM TITLE:

Award: Sale of Bond Anticipation Notes

PRESENTER:

Carolyn Kosnoff, Assistant Town
Manager Finance

ITEM NUMBER:

I.1

SUMMARY:

On Wednesday, July 16, 2025 the Town sold \$15.852 million of Bond Anticipation Notes which will mature in February 2026. This issue will fund a variety of construction projects through the summer and fall, including the renovation of 173 Bedford St, design of a new Lexington High School, remaining Police Station and associated Solar Canopy, Pine Meadows Clubhouse renovation, and the Cedar Street sidewalk construction. A full list of purposes is attached.

The BAN was rated a MIG-1 by Moody's which is highest rating available for this issue, and the sale received 5 competitive bids. The low bidder was Jeffries LLC, with a net interest cost (NIC) of 2.78%, including a premium of \$113,816.64. All related documents and closing paperwork are attached

SUGGESTED MOTION:

Move: We hereby determine, in accordance with G.L. c.70B, that the cost of the Lexington High School Feasibility Study authorized by a vote of the Town passed on April 11, 2022 (Article 2) and the High School Feasibility Study and Schematic Design authorized by a vote of the Town passed on April 1, 2024 (Article 26) each being financed with proceeds of a portion of the Notes defined below, together with all other bonds and notes of the Town previously issued to pay costs of this project, if any, does not exceed the portion of the total cost of the project that is not being paid by the school facilities grant and we hereby approve the issuance of notes and bonds to finance this project under G.L. c.70B.

And Further: to approve the sale of \$15,851,900 4.00 percent General Obligation Bond Anticipation Notes (the "Notes") of the Town dated July 25, 2025, and payable February 27, 2026, to Jefferies LLC at par and accrued interest, if any, plus a premium of \$113,816.64.

And Further: that in connection with the marketing and sale of the Notes, the preparation and distribution of a Notice of Sale and Preliminary Official Statement dated July 9, 2025, and a final Official Statement dated July 16, 2025, each in such form as may be approved by the Town Treasurer, be and hereby are ratified, confirmed, approved and adopted.

And Further: that the Town Treasurer and the Select Board be, and hereby are, authorized to execute and deliver a significant events disclosure undertaking in compliance with SEC Rule 15c2-12 in such form as may be approved by bond counsel to the Town, which undertaking shall be incorporated by reference in the Notes

for the benefit of the holders of the Notes from time to time.

And Further: that we authorize and direct the Town Treasurer to establish post issuance federal tax compliance procedures and continuing disclosure procedures in such forms as the Town Treasurer and bond counsel deem sufficient, or if such procedures are currently in place, to review and update said procedures, in order to monitor and maintain the tax-exempt status of the Notes and to comply with relevant securities laws.

And Further: that any certificates or documents relating to the Notes (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document; delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document; and electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

And Further: that each member of the Select Board, the Town Clerk and the Town Treasurer be and hereby are, authorized to take any and all such actions, and execute and deliver such certificates, receipts or other documents as may be determined by them, or any of them, to be necessary or convenient to carry into effect the provisions of the foregoing votes.

FOLLOW-UP:

Comptroller's Office to coordinate signatures on closing paperwork.

DATE AND APPROXIMATE TIME ON AGENDA:

7/21/2025

6:45pm

ATTACHMENTS:

Description	Type
❏ BAN Sale Results	Backup Material
❏ BAN Purposes	Backup Material
❏ Statement Certificate	Backup Material
❏ Tax Certificate	Backup Material
❏ Significant Events Disclosure	Backup Material
❏ Note Form and Opinion	Backup Material

Town of Lexington, Massachusetts

\$15,851,900 General Obligation Bond Anticipation Notes

Sale Date: 7/16/2025
Dated Date: 7/25/2025
Delivery Date: 7/25/2025
Due Date: 2/27/2026
Days Per Year: 360
Day Count: 212
Bank Qualified: No
Rating: MIG-1



Bidder	Underwriter	Principal	Coupon Rate	Premium	Interest	Net Interest	NIC	Prorata Premium	Prorata Interest	Award	Reoffering Yield
Jefferies LLC	•	\$15,851,900	4.00%	\$113,816.64	\$373,400.31	\$259,583.67	2.7808%	\$113,816.64	\$373,400.31	\$15,851,900	
Fidelity Capital Markets	•	\$15,851,900	4.00%	\$108,902.55	\$373,400.31	\$264,497.76	2.8334%				
Truist Securities	•	\$15,851,900	4.00%	\$95,428.43	\$373,400.31	\$277,971.88	2.9777%				
Oppenheimer & Co.	•	\$15,851,900	4.00%	\$95,111.40	\$373,400.31	\$278,288.91	2.9811%				
TD Securities	•	\$15,851,900	4.00%	\$86,075.81	\$373,400.31	\$287,324.50	3.0779%				
Award Totals								\$113,816.64	\$373,400.31	\$15,851,900	

Weighted Average Net Interest Cost: 2.7808%

MUNICIPAL PURPOSE LOAN

Town of Lexington, Massachusetts

\$15,851,900 General Obligation Bond Anticipation Notes

Sale Date: 7/16/2025
Dated Date: 7/25/2025
Delivery Date: 7/25/2025
Due Date: 2/27/2026
Bank Qualification: No



<u>Purpose</u>	<u>Vote Date(s)</u>	<u>Reference</u>	<u>Article Number</u>	<u>Amount Authorized</u>	<u>Previous Issues</u>	<u>Bonds, Grants, and/or Paydowns</u>	<u>Renewal This Issue</u>	<u>New This Issue</u>	<u>Total This Issue</u>	<u>Balance Unissued</u>	<u>Original Issue Date</u>	<u>Prorata Interest</u>	<u>Prorata Premium</u>	
Lexington Children's Place Construction	4/9/2018	Ch. 44, s. 7(1)	12	\$11,997,842	\$0	\$11,450,000	\$0	\$245,000	\$245,000	\$302,842	7/25/2025	\$5,771.11	\$1,759.10	EXEMPT
45 Bedford Street Fire Station Replacement	4/9/2018	Ch. 44, s. 7(1)	13	\$18,820,700	\$0	\$17,500,000	\$0	\$200,000	\$200,000	\$1,120,700	7/25/2025	\$4,711.11	\$1,436.00	EXEMPT
Automatic Meter Reading System	4/3/2019	Ch. 44, s. 8(7A)	16F	\$4,940,000	\$100,000	\$3,770,000	\$0	\$600,000	\$600,000	\$470,000	7/25/2025	\$14,133.33	\$4,308.00	
Equipment Replacement	6/1/2020	Ch. 44, s. 7(1)	12F	\$1,313,000	\$0	\$1,089,300	\$0	\$33,000	\$33,000	\$190,700	7/25/2025	\$777.33	\$236.94	
Westview Cemetery Building Construction	6/3/2020	Ch. 44, s. 7(1)	16K	\$3,290,000	\$0	\$3,050,000	\$0	\$215,000	\$215,000	\$25,000	7/25/2025	\$5,064.44	\$1,543.70	
Lexington Police Station Construction	3/28/2022	Ch. 44, s. 7(1)	2	\$32,400,000	\$0	\$30,000,000	\$0	\$2,400,000	\$2,400,000	\$0	7/25/2025	\$56,533.33	\$17,232.00	EXEMPT
Battle Green Streetscape Improvements	4/4/2022	Ch. 44, s. 7(1)	12N	\$3,615,000	\$0	\$3,000,000	\$0	\$560,000	\$560,000	\$55,000	7/25/2025	\$13,191.11	\$4,020.80	
High School Equipment Emergency Funds	4/6/2022	Ch. 44, s. 7(1)	16G	\$500,000	\$0	\$0	\$0	\$200,000	\$200,000	\$300,000	7/25/2025	\$4,711.11	\$1,436.00	
LHS Feasibility Study	4/11/2022	Ch. 70B	2	\$1,825,000	\$500,000	\$1,000,100	\$0	\$324,900	\$324,900	\$0	7/25/2025	\$7,653.20	\$2,332.78	
New Sidewalk Installations	4/24/2023	Ch. 44, s. 7(1)	12M	\$1,620,000	\$0	\$0	\$0	\$1,000,000	\$1,000,000	\$620,000	7/25/2025	\$23,555.56	\$7,180.00	
Solar Canopy & System - New Police Station	4/26/2023	Ch. 44, s. 7(1)	16I	\$3,400,000	\$0	\$0	\$0	\$3,000,000	\$3,000,000	\$400,000	7/25/2025	\$70,666.67	\$21,540.00	
Compost Equipment Replacement	3/20/2024	Ch. 44, s. 7(1)	12D	\$320,000	\$0	\$0	\$0	\$299,000	\$299,000	\$21,000	7/25/2025	\$7,043.11	\$2,146.82	
Pine Meadows Clubhouse Renovation	4/2/2024	Ch. 44, s. 7(1)	25	\$2,575,000	\$0	\$0	\$0	\$1,275,000	\$1,275,000	\$1,300,000	7/25/2025	\$30,033.33	\$9,154.50	
Lexington High School Design	4/1/2024	Ch. 70B	26	\$10,000,000	\$0	\$0	\$0	\$2,500,000	\$2,500,000	\$7,500,000	7/25/2025	\$58,888.89	\$17,950.00	
173 Bedford Street Renovation	4/3/2024	Ch. 44, s. 7(1)	27	\$5,635,845	\$0	\$0	\$0	\$3,000,000	\$3,000,000	\$2,635,845	7/25/2025	\$70,666.67	\$21,540.00	
Totals				\$102,252,387	\$600,000	\$70,859,400	\$0	\$15,851,900	\$15,851,900	\$14,941,087		\$373,400.31	\$113,816.64	

(Please Note: The following statements are an essential part of the permanent record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

Town of Lexington, Massachusetts
\$15,851,900 General Obligation Bond Anticipation Notes
dated July 25, 2025

SIGNATURE, NO LITIGATION AND OFFICIAL STATEMENT CERTIFICATE

A. Certificate of Authorized Officers. We, the Treasurer and members of the Select Board of the Town of Lexington, Massachusetts (the “Town”), certify that we have signed the \$15,851,900 4.00 percent General Obligation Bond Anticipation Notes (the “Notes”) of the Town dated July 25, 2025 and payable February 27, 2026. A book entry system is being used to evidence ownership and transfer of the Notes on the records of The Depository Trust Company (“DTC”). The Notes are issued in the form of a single Note for the full principal amount, registered in the name of “CEDE & CO.” as nominee for DTC and immobilized in the custody of DTC. The Note bears the Town seal which is also affixed to this certificate.

We, the said officers, also certify as follows:

1. Authority. The Notes are issued in the respective amounts set forth below in anticipation of the sale of bonds authorized pursuant to the following statutes and votes of the Town and a vote of the Select Board duly adopted on July 21, 2025:

- (a) \$3,000,000 - \$3,400,000 Solar Energy Facilities Bonds under G.L. c.44, §7(1) and a vote of the Town passed on April 26, 2023 (Article 16I);
- (b) \$3,000,000 - \$5,635,845 Building Renovation Bonds (173 Bedford Street) under G.L. c.44, §7(1) and a vote of the Town passed on April 1, 2024 (Article 27);
- (c) \$2,500,000 - \$10,000,000 School Project Loan, Chapter 70B Bonds (High School Feasibility Study and Schematic Design) under 70B, and a vote of the Town passed on April 1, 2024 (Article 26);
- (d) \$2,400,000 - \$32,400,000 New Police Station Bonds under G.L. c.44, §7(1) and a vote of the Town passed on March 28, 2022 (Article 2), excluded from the limitations of Proposition 2 ½, so-called, on June 6, 2022 (Question 1);

- (e) \$1,275,000 - \$2,575,000 Building Renovation Bonds (Pine Meadows Clubhouse) under G.L. c.44, §7(1) and a vote of the Town passed on April 1, 2024 (Article 25);
- (f) \$1,000,000 - \$1,620,000 Sidewalk Construction Bonds under G.L. c.44, §7(1) and a vote of the Town passed on April 24, 2023 (Article 12);
- (g) \$560,000 - \$3,615,000 Battle Green Streetscape Improvement Bonds under G.L. c.44, §7(1) and a vote of the Town passed on April 4, 2022 (Article 12N);
- (h) \$324,900 - \$1,825,000 Lexington High School Feasibility Study Bonds under G.L. c.70B, §6(e) and a vote of the Town passed on April 11, 2022 (Article 2);
- (i) \$300,000 - \$4,940,000 Meter Reading System Bonds (Water) under G.L. c.44, §8(7A) and a vote of the Town passed on April 3, 2019 (Article 16f);
- (j) \$300,000 - \$4,940,000 Meter Reading System Bonds (Sewer) under G.L. c.44, §8(7A) and a vote of the Town passed on April 3, 2019 (Article 16f);
- (k) \$299,000 - \$320,000 DPW Equipment Bonds under G.L. c.44, §7(1) and a vote of the Town passed on March 20, 2024 (Article 12D);
- (l) \$245,000 - \$11,997,842 Lexington Children's Place Bonds under G.L. c.44, §7(1) and a vote of the Town passed on April 9, 2018 (Article 12), excluded from the limitations of Proposition 2 ½, so-called, on December 4, 2017 (Question 2);
- (m) \$215,000 - \$3,290,000 Westview Cemetery Facility Construction Bonds under G.L. c.44, §7(1) and a vote of the Town passed on June 3, 2020 (Article 16K);
- (n) \$200,000 - \$18,820,700 Fire Headquarters Bonds under G.L. c.44, §7(1) and a vote of the Town passed on April 9, 2018 (Article 13), excluded from the limitations of Proposition 2 ½, so-called, on December 4, 2017 (Question 3);
- (o) \$200,000 - \$500,000 Lexington High School Extraordinary Repairs and Equipment Bonds under G.L. c.44, §7(1) and a vote of the Town passed on April 6, 2022 (Article 16G); and
- (p) \$33,000 - \$1,038,000 portion of \$1,313,000 DPW Equipment Bonds under G.L. c.44, §7(1) and a vote of the Town passed on June 1, 2020 (Article 12F).

2. Description and Purpose of Notes. The Town is issuing and delivering the Notes simultaneously with the delivery of this certificate. The following amounts of the issue are for the following purposes:

	<u>Amount</u>	<u>Purpose</u>
(a)	\$3,000,000	- Design, purchase and installation of solar canopies and energy storage batteries located at the site of the new Police Station at 1575 Massachusetts Avenue;
(b)	\$3,000,000	- Renovation of the building located at 173 Bedford Street;
(c)	\$2,500,000	- Lexington High School feasibility study and schematic design;
(d)	\$2,400,000	- Design and construction of a new Police Station located at 1575 Massachusetts Avenue;
(e)	\$1,275,000	- Renovation of the Pine Meadows Clubhouse;
(f)	\$1,000,000	- Design and construction of new sidewalks on Cedar Street;
(g)	\$560,000	- Design, construction and project management for the roadways and intersections around the Lexington Battle Green;
(h)	\$324,900	- Lexington High School feasibility study;
(i)	\$300,000	- Automatic meter reading system (water);
(j)	\$300,000	- Automatic meter reading system (sewer);
(k)	\$299,000	- Purchase of new compost equipment for the Department of Public Works;
(l)	\$245,000	- Design and construction for a new Lexington Children's Place located at 20 Pelham Road;
(m)	\$215,000	- Westview Cemetery building construction;
(n)	\$200,000	- Replacement of 45 Bedford Street Fire Station;
(o)	\$200,000	- Extraordinary repairs and modifications to building systems and Equipment at the Lexington High School; and
(p)	\$33,000	- Equipment replacement for the Department of Public Works.

3. Other Debt. No other debt has been incurred under those votes except for the following bonds and bond anticipation notes:

- (a)–(c) None;
- (d) \$30,000,000 proceeds of bonds dated February 23, 2023;
- (e)–(f) None;
- (g) \$3,000,000 proceeds of bonds dated February 22, 2024;
- (h) \$100,000 notes dated June 29, 2023 and payable February 23, 2024, on which date such notes were paid with available funds of the Town; \$500,000 proceeds of bonds dated February 22, 2024; and \$500,000 notes dated September 27, 2024, renewed February 28, 2025 and payable February 27, 2026;
- (i) \$3,770,000 bonds issued to the Massachusetts Water Resources Authority dated June 13, 2022; \$100,000 notes dated September 26, 2024, renewed February 28, 2025 and payable February 27, 2026; and \$300,000 Notes of this issue payable from the Sewer Fund;
- (j) \$3,770,000 bonds issued to the Massachusetts Water Resources Authority dated June 13, 2022; \$100,000 notes dated September 26, 2024, renewed February 28, 2025 and payable February 27, 2026; and \$300,000 Notes of this issue payable from the Water Fund;
- (k) None;
- (l) \$9,000,000 proceeds of bonds dated February 14, 2019 (and notes issued in anticipation thereof); \$1,000,000 proceeds of bonds dated February 13, 2020 (and notes issued in anticipation thereof); \$1,400,000 proceeds of bonds dated June 25, 2020; and \$50,000 paid with available funds of the Town dated February 10, 2022;
- (m) \$100,000 notes dated June 30, 2021 which were paid with revenue funds at maturity on February 22, 2022; \$2,500,000 proceeds of bond dated February 23, 2023; and \$450,000 proceeds of bonds dated February 22, 2024;
- (n) \$11,470,676 proceeds of bonds dated February 14, 2019 (and notes issued in anticipation thereof); \$529,324 paid on February 15, 2019 with available funds of the Town; and \$5,500,000 proceeds of bonds dated June 25, 2020;
- (o) None;
- (p) \$845,000 proceeds of bonds dated February 10, 2022 (and notes issued in anticipation thereof);

4. Consolidated Issue. The Notes constitute a consolidated issue for purposes of G.L. c.44, §16.

5. School Building Assistance Grant. As of the date hereof, the Town has received grant payments from the Massachusetts School Building Authority in the aggregate amount of

\$528,625 for the Lexington High School feasibility study and schematic design project being financed in part with the proceeds of the \$2,500,000 portion of the Notes referred to in Paragraph A(1)(c) above and the proceeds of the \$324,900 portion of the Notes referred to in Paragraph A(1)(h) above.

6. Approval of Sale. We approve the sale of the Notes to Jefferies LLC (the “Purchaser”) at par and accrued interest, if any, plus a premium of \$113,816.64.

B. Delivery and Receipt. I, the Treasurer, further certify that the Notes were delivered on this date and that the full purchase price including accrued interest for the period, if any, from the date of the Notes to this date was received from the Purchaser on or before this date.

C. Certification Regarding Official Statement. I, the Treasurer, certify as follows:

(a) I have reviewed the Preliminary Official Statement dated July 9, 2025 (the “Preliminary Official Statement”) and the Official Statement dated July 16, 2025 (the “Official Statement”) relating to the sale of the Notes.

(b) To the best of my knowledge and belief, the Preliminary Official Statement did not, as of its date and as of the date of sale of the Notes, and the Official Statement (excluding the price or yield on the cover page, as to which no view is expressed) did not as of its date and does not as of this date (which is the date of delivery of the Notes), contain any untrue statement of a material fact or omit to state a material fact necessary to make the statements made therein, in light of the circumstances under which they were made, not misleading.

(c) Since the date of the Official Statement there has been no material adverse change in the financial condition or affairs of the Town except as set forth in or contemplated by the Official Statement.

D. Debt Limit. I, the Treasurer, certify that at the time of their authorization, the Notes and the bonds in anticipation of which they are issued were and on the date hereof are within every applicable debt and other limit prescribed by law or otherwise.

E. Certificate of Town Clerk. I, the Town Clerk, certify as follows:

(a) Signatures and Incumbency. The signatures of the Treasurer and members of the Select Board as appearing below are the genuine signatures of the persons who executed the Notes and who held those offices when the Notes were signed and when the Notes were delivered.

(b) Open Meeting Law. Except for the town meetings called pursuant to G.L. c.39, §10, all proceedings essential to the issue of the Notes and the authorization of the bonds and deliberations of a quorum relating thereto have been taken at a meeting or meetings open to the public; notice of each such meeting was filed in my office and publicly posted in the time and manner set forth in G.L. c.30A, §§18-25, as amended, or, if applicable, in accordance with an alternative method of notice prescribed or approved

by the Attorney General as set forth in 940 CMR 29.03(2)(b); no deliberations, decision or vote in connection with the Notes or bonds were taken in executive session and no vote was taken by secret ballot; and the official record of each such meeting was made available to the public and remains available to the public as set forth in G.L. c.30A, §§18-25, as amended.

(c) Proceedings. No proceeding essential to the issue of the Notes or bonds has been repealed or amended except as stated in paragraph (1) above and no proceedings have been taken relating to the Notes or bonds other than those certified to Troutman Pepper Locke LLP.

(d) Bylaws. The bylaws described below are the only bylaws or standing votes of the Town affecting the authorization, sale or issue of the Notes or bonds, including the calling and conduct of town meetings, or the use of assessments or other charges imposed to pay for any project financed by the Notes, and there has been no change therein affecting those matters in any way except as may be indicated below:

General By-Laws of the Town of Lexington, as amended through November 9, 2023 and certified to Troutman Pepper Locke LLP on June 5, 2024.

(e) Home Rule. The Town has not adopted a home rule charter and the Town has not amended or repealed any special law relating to the Town through the use of home rule procedures.

(f) Development Districts. The Town has not established any development districts pursuant to G.L. c.40Q.

F. Execution of Counterparts and Delivery by Electronic Means. This certificate, as well as any other certificates or documents relating to the Notes (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document. Electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

[Remainder of page intentionally left blank; signature page follows.]

G. No Litigation; No Financial Interest. All of the undersigned certify that there has been no litigation affecting the validity of the Notes or bonds or the power of the Town to levy and collect taxes to pay them; that none is pending or to our knowledge threatened; that neither the corporate existence nor boundaries of the Town nor the title of any of us to our respective offices is being contested; and that none of us and, to the best of our knowledge, no other official of the Town has any direct or indirect financial interest in or relationship with the Purchaser.

Date: July 25, 2025
(Date of delivery of and
payment for the Notes)

Select Board

Treasurer

Town Clerk

(Town Seal)

(Please Note: The following statements are an essential part of the permanent bond record. Read them carefully before signing this certificate. Advise Troutman Pepper Locke LLP of any inaccuracy.)

TAX CERTIFICATE

This Tax Certificate is executed and delivered by the Town of Lexington, Massachusetts (“Issuer”), in connection with the issuance of \$15,851,900 stated principal amount of its General Obligation Bond Anticipation Notes dated the Issue Date (“Issue”). The Issue is issued pursuant to Votes duly adopted by the Issuer and the Massachusetts General Laws. Pursuant to Reg §§ 1.141-2(d)(1) and 1.148-2(b)(2)(i), the Issuer certifies, covenants, warrants and represents as follows in connection with the issuance of the Issue:

ARTICLE I. IN GENERAL

1.1 Delivery of the Notes of the Issue. On the Issue Date, in exchange for receipt of good funds, the Issuer is delivering the notes of the Issue to the Successful Bidder, for resale to the Public.

1.2 Purpose of Tax Certificate. The Issuer is delivering this Tax Certificate to Bond Counsel, with the understanding that Bond Counsel will rely in part upon this Tax Certificate in rendering its opinion that interest on the Issue is excluded from gross income for federal income tax purposes under Section 103.

1.3 Definitions and References. All capitalized terms used in this Tax Certificate include either the singular or the plural. All terms used in this Tax Certificate, including terms specifically defined, shall be interpreted in a manner consistent with Sections 103 and 141-150 and the applicable Regulations thereunder except as otherwise specified. Capitalized terms used and not otherwise defined herein and in the exhibits hereto and in the schedules and attachments to those exhibits shall have the respective meanings set forth in Appendix A and Appendix B hereto. Reference to a Section means a section of the Code. Reference by number only (for example, “2.10”) means that numbered paragraph of this Tax Certificate.

1.4 Purpose of Financing. The Issue is being issued to provide funds (i) to finance on a “new money” basis the capital costs of certain municipal projects as more fully described in the Signature Certificate, including the payment of Capitalized Interest, if any (“Projects”), and Funded Interest, if any, and (ii) to pay Issuance Costs and other common costs of the Issue.

1.5 Single Issue. The notes of the Issue were sold to the Successful Bidder on the Sale Date. No other governmental obligations of the Issuer which are expected to be paid out of substantially the same source of funds as the Issue have been or will be sold less than 15 days apart from the Sale Date pursuant to the same plan of financing as the Issue.

1.6 Reliance. With respect to certain matters contained in this Tax Certificate, the Issuer specifically relies upon the certifications of the Successful Bidder set forth in Exhibit A, the certifications of the Municipal Advisor set forth in Exhibit B, and upon the certifications set forth in the other exhibits attached hereto or as otherwise described herein. The Issuer is not aware of

any facts or circumstances that would cause it to question the accuracy or reasonableness of any representation made in this Tax Certificate including the exhibits hereto.

ARTICLE II. GENERAL TAX LIMITATIONS

2.1 Application of Sale Proceeds and Certain Other Moneys. On the Issue Date, the Sale Proceeds, \$15,970,313.69, less an underwriter's discount of \$4,597.05, will be deposited to the General Fund and applied as follows:

Projects	\$15,851,900.00
Issuance Costs	46,661.90
Payment of a portion of the interest on the Issue due February 27, 2026	<u>67,154.74</u>
TOTAL:	\$15,965,716.64

Investment Proceeds earned on the amounts in the General Fund will be commingled with other revenues of the Issuer, and are expected to be expended for operating or other expenses of the Issuer within six months after deposit of the Investment Proceeds therein. Pursuant to Reg § 1.148-6(d)(6), all such Investment Proceeds will be treated as expended when so commingled.

2.2 Expenditure of Gross Proceeds. For purposes of this Tax Certificate, Sale Proceeds and, to the extent not deemed expended as described in 2.1, Investment Proceeds will be treated as spent when they are used to pay or reimburse disbursements by the Issuer that are (i) capital expenditures, including any Capitalized Interest, if any and to the extent allowable, (ii) Issuance Costs, (iii) Funded Interest, (iv) initial operating expenses directly associated with the Projects (in an aggregate amount not exceeding 5% of the Sale Proceeds), or (v) other miscellaneous expenditures described in Reg § 1.148-6(d)(3)(ii).

The Issuer hereby certifies that no disbursement to be paid or reimbursed from Gross Proceeds shall have been previously paid or reimbursed from the proceeds of any other obligation, whether issued by the Issuer or any other party.

To the extent that Sale Proceeds will be applied to reimburse expenditures made by the Issuer prior to the Issue Date, the Issuer hereby certifies that such expenditures either (i) constitute capital expenditures incurred not earlier than 60 days prior to the applicable Vote, which Votes constitute the Issuer's declarations of official intent to issue debt to finance the costs of the Projects, or (ii) constitute Preliminary Expenditures to the extent permitted by Massachusetts law.

The Issuer further certifies that any such reimbursement described in clause (i) of the preceding sentence shall be made not later than 18 months after the later of the date of the expenditure or the date on which the Project component to which such expenditure relates is placed in service, but in no event more than 3 years after the date of such expenditure.

2.3 Governmental Bond Status. Absent an Opinion of Bond Counsel, the Issuer will not loan more than 5% of the Proceeds to one or more Nongovernmental Persons. Absent an Opinion of Bond Counsel, the Issuer has not allowed and will not allow more than 10% of the

Proceeds or the Projects to be used directly or indirectly by any Nongovernmental Person in any trade or business, other than as a member of the general public, and has not allowed and will not allow more than 5% of the Proceeds or the Projects to be so used to the extent such use is unrelated or disproportionate to the governmental uses thereof. Absent an Opinion of Bond Counsel, for purposes of this 2.3, a Nongovernmental Person will be treated as “using” Proceeds or the Projects to the extent the Nongovernmental Person:

- (i) borrows Proceeds of the Issue;
- (ii) uses any portion of the Projects as owner, lessee, service provider, operator, or manager;
- (iii) acquires the output of the Projects; or
- (iv) enters into any other arrangement that provides a special legal entitlement or special economic benefit to a Nongovernmental Person.

As of the Issue Date, the Issuer certifies that there are no contracts or other arrangements for any such use of any component of the Projects by any party other than a Governmental Unit, other than the following: (i) Solar Power Purchase Agreement between Lexington Municipal Solar LLC made as of July 31, 2014 and certain of the Issuer’s public schools; and (ii) contract between Lexington Public Schools and Whitsons New England, LLC dated July 28, 2022 (together, the “School Contracts”); and (iii) the contract between Pine Meadows Golf Course Management commencing January 1, 2024 and the Issuer (the “Golf Contract”). The School Contracts do not cause more than 5% of the Proceeds or the Projects to be used directly or indirectly by any Nongovernmental Person in any trade or business. The Golf Course contract does not create “private business use” as it falls under the safe harbor provisions of Rev. Proc. 2017-13. Absent an Opinion of Bond Counsel, the Issuer will not enter into any contract or other arrangement after the Issue Date for any such use of any component of the Projects by any party other than a Governmental Unit.

2.4 Qualified Equity. The Issuer reasonably expects that a portion of the cost of the Projects being financed and/or refinanced in part with the Sale Proceeds may be paid from Qualified Equity. In this regard, the Issuer will receive grants from the Massachusetts School Building Authority to pay a portion of the school projects being financed in part with Sale Proceeds, \$528,625 of which grants has been received as of the Issue Date. The Issuer intends that the undivided portion or portions of any of the Projects paid with Qualified Equity may be used for Private Business Use without restriction. Qualified Equity will be allocated to any Private Business Use of the Projects before any Proceeds are allocated to any such Private Business Use. To the extent that Private Business Use of the Projects ever exceeds the applicable limitation under the “private business tests” imposed pursuant to Section 141(b), the Issuer hereby allocates Qualified Equity to the Projects. In addition, the Issuer reserves the right to allocate this Qualified Equity to the Projects if and as needed in the future.

2.5 Change in Use. The Issuer reasonably expects to use all Proceeds and all facilities that are financed and refinanced therewith as set forth in 2.3 for the entire stated term to maturity

of the Issue. Absent an Opinion of Bond Counsel, the Issuer in fact will use all Proceeds and each facility financed and refinanced therewith as set forth in 2.3.

2.6 Registered Form. The notes of the Issue are being issued in registered form.

2.7 Federal Guarantee. The Issuer will not directly or indirectly use or permit the use of any Proceeds or any other funds of the Issuer or any Related Party or take or omit to take any action that would cause the notes of the Issue to be obligations that are “federally guaranteed.” In furtherance of this covenant, the Issuer will not allow the payment of principal or interest with respect to the Issue to be guaranteed (directly or indirectly) in whole or in part by the United States or any agency or instrumentality thereof. Except as provided in the next sentence, the Issuer will not use 5% or more of the Proceeds to make or finance loans the payment of principal or interest with respect to which is guaranteed in whole or in part by the United States or any agency or instrumentality thereof, nor will it invest 5% or more of the Proceeds in federally insured deposits or accounts. The preceding sentence shall not apply to (i) investments in the portions of the General Fund described in 3.5 during the temporary period described therein, (ii) investments in the Bona Fide Debt Service Fund, and (iii) investments in obligations issued by the United States Department of Treasury.

2.8 Information Reporting. The Issuer will cause a properly completed and executed IRS Form 8038-G to be filed with respect to the Issue no later than the 15th day of the second month of the calendar quarter immediately following the calendar quarter of the Issue Date.

2.9 No Pooling. The Issuer will not use any Proceeds directly or indirectly to make or finance loans to two or more ultimate borrowers.

2.10 No Hedge Bonds. The Issuer reasonably expects that more than 85% of Net Sale Proceeds of the Issue will be expended for the governmental purposes thereof within three years after the Issue Date. Not more than 50% of the Proceeds will be invested at a substantially guaranteed yield for four years or more.

2.11 Useful Life. The weighted average maturity of the Issue is 0.589 years, which does not exceed 120% of the remaining average reasonably expected economic life of the assets comprising the Projects.

ARTICLE III. ARBITRAGE GENERAL

3.1 Reasonable Expectations. This Article III states the Issuer’s reasonable expectations with respect to the amounts and uses of Proceeds and certain other moneys.

3.2 Issue Price of the Issue. On the Issue Date, the Issuer is delivering the notes of the Issue to the Successful Bidder in exchange for an aggregate payment of \$15,965,716.64 (which represents the total amount of Sale Proceeds, \$15,970,313.69, less an underwriter’s discount of \$4,597.05). As reflected in Exhibit B, the Municipal Advisor has certified that the competitive sale requirements (as defined in the Notice of Sale) were met with respect to the notes of the Issue. Accordingly, based on the advice of the Successful Bidder as set forth in Exhibit A, the Issue Price

of the Issue is \$15,970,313.69, which is the reasonably expected initial offering price to the Public for the notes of the Issue.

3.3 Funds and Accounts. The Issuer will use certain portions of its General Fund (or accounts or subaccounts within the General Fund) to hold certain of the Proceeds, as more particularly described in this Article III. The Issuer does not expect that either it or any other Person benefiting from the issuance of the Issue will use any moneys in any fund or account other than the Bona Fide Debt Service Fund to pay debt service on the Issue; nor is any other fund or account so pledged as security for the Issue that there is a reasonable assurance that amounts held in such other fund or account will be available if needed to pay debt service on the Issue.

3.4 Bona Fide Debt Service Fund.

3.4.1 Payment of the Issue. The notes of the Issue are general obligations of the Issuer payable from revenues available therefor pursuant to the Massachusetts General Laws and, when and as applicable, Sale Proceeds, Investment Proceeds, and the Proceeds of Refunding Obligations.

3.4.2 Revenues. Except for the debt service to be paid from a portion of the Sale Proceeds, Investment Proceeds, and the Proceeds of Refunding Obligations, each when and as applicable, payments of debt service on the Issue are expected to be derived from current revenues of the Issuer and current revenues are expected to equal or exceed such amount of debt service on the Issue during the payment period.

3.4.3 Match Between Revenues and Debt Service. The portions of the Issuer's General Fund that are reasonably expected to be used to pay debt service on the Issue (such portions of the Issuer's General Fund being referred to herein as the "Debt Service Fund") will be allocated to the payment of debt service on the Issue on a "first in, first out" (FiFo) basis. Accordingly, the Debt Service Fund will be used primarily to achieve a proper matching of revenues and debt service within the Bond Year. Amounts in the Debt Service Fund will be invested without regard to yield.

3.5 Three-Year Temporary Period. A portion of the Sale Proceeds in the amount of \$15,851,900.00, will be deposited in the General Fund for the purpose of paying costs of the Projects. The Issuer's expenditure expectations with respect to the Proceeds allocable to the Projects are reflected in Exhibit C. The Issuer reasonably expects that at least 85% of the Net Sale Proceeds will be spent to pay costs of the Projects within three years from the Issue Date. The Issuer heretofore has incurred or within six months hereafter will incur a binding obligation to one or more unrelated parties involving an expenditure of not less than 5% of Net Sale Proceeds. Completion of the Projects and allocations of Net Sale Proceeds and Investment Proceeds to costs of the Projects will proceed with due diligence. Net Sale Proceeds allocable to paying costs of the Projects held in the General Fund, and Investment Proceeds earned thereon, will be invested without regard to yield during the period ending on the third anniversary of the Issue Date.

3.6 No Overissuance. Taking into account anticipated Investment Proceeds, the Sale Proceeds do not exceed the amount necessary to pay (i) costs of the Projects, (ii) Funded Interest, if applicable, and (iii) Issuance Costs and other common costs of the Issue.

3.7 No Other Replacement Proceeds. Neither the Issuer nor any Related Party will use any Gross Proceeds directly or indirectly to replace funds of the Issuer or any Related Party, which funds are or will be used directly or indirectly to acquire Investment Property reasonably expected to produce a yield that is materially higher than the Yield on the Issue.

3.8 No Expected Sale. It is not expected that the Projects or any part thereof financed and/or refinanced in whole or in part by the Issue will be sold or otherwise disposed of before February 27, 2026, the scheduled final maturity date of the Issue, except for minor portions due to normal wear or obsolescence.

ARTICLE IV. ARBITRAGE - YIELD AND YIELD RESTRICTION

4.1 Yield. The Yield on the Issue, adjusted as may be required for substantial original issue premium or discount, has been calculated by the Municipal Advisor to be 2.7080091%, as reflected in Exhibit B.

4.2 No Qualified Hedges. No Qualified Hedge has been, and (absent an Opinion of Bond Counsel) no Qualified Hedge will be, entered into such that failure to take the Qualified Hedge into account would distort the Yield on the Issue or otherwise would fail clearly to reflect the economic substance of the transaction.

4.3 Yield Restriction. Absent an Opinion of Bond Counsel, if the sum of (A) any Proceeds allocable to the payment of the Projects held in the General Fund after the third anniversary of the Issue Date, or, if applicable, the Issue Date of any Original Issue, plus (B) any amounts held in the Bona Fide Debt Service Fund and remaining unexpended after 13 months from the date of accumulation in such fund (excluding any amounts held for Capitalized Interest and Funded Interest), plus, if applicable, (C) any Proceeds allocable to the retirement of any Refunded Bonds and Refunded Notes held in the General Fund after 90 days from the Issue Date, plus, if applicable, (D) any Transferred Proceeds held in the General Fund after the third anniversary of any Original Issue, plus (E) any Proceeds held in the Issuer's General Fund to pay Issuance Costs after 90 days from the Issue Date, at any time in the aggregate exceeds \$100,000, the excess will be invested as follows: (i) in Investment Property with a yield not exceeding the Yield on the Issue, or such other issue of Tax-Exempt Bonds to which such amounts are then allocated as proceeds, (ii) in assets that are not treated as Investment Property (e.g., Tax-Exempt Bonds), or (iii) in assets that satisfy the requirements for Yield Reduction Payments.

ARTICLE V. REBATE

5.1 Undertakings. The Issuer hereby covenants to comply with requirements of the Code pertaining to the Rebate Requirement. The Issuer acknowledges that the United States Department of the Treasury has issued Regulations with respect to certain of these undertakings, including the proper method for computing whether any rebate amount is due the federal

government under Section 148(f). (Reg §§ 1.148-1 through 1.148-11A, 1.150-1, and 1.150-2.) The Issuer further acknowledges that the United States Department of the Treasury may yet issue additional Regulations with respect to certain of these undertakings. The Issuer covenants that it will undertake to determine what is required with respect to the rebate provisions contained in Section 148(f) and said Regulations from time to time and will comply with any requirements that may apply to the Issue.

5.2 Recordkeeping. The Issuer shall maintain or cause to be maintained detailed records with respect to each Nonpurpose Investment allocable to Gross Proceeds, including: (a) purchase date; (b) purchase price; (c) information establishing fair market value on the date such investment became a Nonpurpose Investment; (d) any accrued interest paid; (e) face amount; (f) coupon rate; (g) periodicity of interest payments; (h) disposition price; (i) any accrued interest received; and (j) disposition date. Such detailed recordkeeping is required to facilitate the calculation of the Rebate Requirement.

5.3 Exceptions to the Rebate Requirement.

5.3.1 Bona Fide Debt Service Fund Exception. Based on the representations set forth in 3.4.3 and this 5.3.1, no rebate calculations need be made in respect of amounts in the Bona Fide Debt Service Fund (i) if (a) the weighted average maturity of the Issue is longer than 5 years and (b) the Issue is a Fixed Yield Issue or (ii) if clause (i) does not apply, to the extent the earnings thereon in the Bond Year are less than \$100,000.

5.3.2 Six-Month Expenditure Exception. If applicable, no rebate calculations will be required to be made with respect to the Adjusted Gross Proceeds allocable to the Refunding Portion if all such Adjusted Gross Proceeds are expended within six months of the Issue Date.

5.3.3 Eighteen Month Spending Exception. In general, when applicable, no rebate calculations will be required with respect to Adjusted Gross Proceeds if the Eighteen Month Spending Exception is met. The Issuer's spending expectations with respect to the Adjusted Gross Proceeds are included in Exhibit C.

5.3.4 Two-Year Spending Exception. The Issuer reasonably expects that at least 75% of Available Construction Proceeds will be expended for Construction Expenditures with respect to the Projects. The Issuer's spending expectations with respect to the Proceeds allocable to the New Money Projects or the Projects, as applicable, are reflected in Exhibit C. In general, when applicable, no rebate calculations will be required with respect to Available Construction Proceeds if Available Construction Proceeds are spent in accordance with the Two-Year Spending Exception. Additionally, Proceeds of the Issue that are used to pay Issuance Costs will be treated, together with all Investment Proceeds thereon, as satisfying the Rebate Requirement if the Two-Year Spending Exception is satisfied and all such Issuance Costs are paid within twenty-four months after the Issue Date.

5.4 Rebate Requirement or Yield Reduction Payments with Respect to the Issue. The Issuer covenants to, and will, pay any Rebate Requirement or Yield Reduction Payments due

with respect to the Issue within 60 days from the Computation Date for the Issue or, if later, within 60 days of missing one of the spending milestones, as required by Section 148(f)(3).

ARTICLE VI. OTHER MATTERS

6.1 Expectations. The undersigned are authorized representatives of the Issuer acting for and on behalf of the Issuer in executing this Tax Certificate. To the best of the knowledge and belief of the undersigned, there are no other facts, estimates or circumstances that would materially change the expectations as set forth herein, and said expectations are reasonable.

6.2 Covenant to Comply. The Issuer hereby covenants that it will not take or permit to be taken on its behalf any action or actions that would adversely affect the exclusion from federal income taxation of interest on the Issue and will take or require to be taken such acts as may reasonably be within its ability and as may from time to time be required under applicable law to maintain the exclusion from federal income taxation of interest on the Issue.

6.3 Post Issuance Compliance Procedures. The Issuer has written procedures to monitor compliance with the arbitrage Yield restriction and rebate requirements of Section 148 after the Issue Date. The Issuer also has written procedures to ensure that all Nonqualified Bonds are remediated in accordance with Reg § 1.141-12. Such procedures are substantially in the form attached hereto as Appendix C. The Issuer will monitor the expenditure of Gross Proceeds and the use of facilities financed and/or refinanced by the Issue, and will undertake, if necessary, any available measures under Reg § 1.141-12 to ensure compliance after the Issue Date with the applicable covenants contained herein.

6.4 Record Retention. In order to ensure that interest on the Issue continues to be excluded from gross income for federal tax law purposes, the Issuer acknowledges that records should be maintained to support the representations, certifications, and expectations set forth in this Tax Certificate (including the exhibits hereto) at least until the date three (3) years after the later of (a) the date on which the Issue is retired, or (b) the date on which the last of the Refunding Obligations is retired. In addition to the items described in 5.2, records to be retained include, but are not limited to:

- (i) basic records and documents relating to the Issue, and, when applicable, the Prior Issues and any Qualified Equity relating to the Projects;
- (ii) documentation evidencing the expenditure of the Proceeds and, when applicable, Proceeds of the Prior Issues;
- (iii) documentation evidencing the use of the Projects or any component thereof by public and private sources (i.e., copies of management contracts, research agreements, leases, etc.);
- (iv) documentation evidencing all sources of payment or security for the Issue and, when applicable, the Prior Issues;

(v) documentation evidencing compliance with the timing and allocation of expenditures of the Proceeds, and, when applicable, Proceeds of the Prior Issues and any Qualified Equity relating to the Projects; and

(vi) records of all amounts paid to the United States in satisfaction of the Rebate Requirement for the Issue and IRS Forms 8038-T (or successor forms thereto) related to such payments or to Yield Reduction Payments.

6.5 Amendments. Notwithstanding any other provision of this Tax Certificate, the Issuer may amend this Tax Certificate and thereby alter any actions allowed or required by this Tax Certificate if such amendment is signed by an authorized officer and is supported by an Opinion of Bond Counsel.

[Remainder of page intentionally left blank; signature page follows.]

6.6 Survival of Payment or Defeasance. Notwithstanding any provision in this Tax Certificate or in any other agreement or instrument relating to the Issue to the contrary, the obligation to remit the Rebate Requirement, if any, to the United States Department of the Treasury and to comply with all other requirements contained in this Tax Certificate shall survive payment or defeasance of the Issue.

6.7 Execution of Counterparts and Delivery by Electronic Means. This Certificate, as well as any other certificates or documents relating to the Issue (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document. Electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Dated: July 25, 2025

TOWN OF LEXINGTON, MASSACHUSETTS

By: _____
Treasurer

By: _____

Select Board

APPENDIX A GENERAL DEFINITIONS

For purposes of the Tax Certificate to which this Appendix A is attached, and the exhibits to the Tax Certificate and any schedules or attachments to those exhibits, the following capitalized terms have the following meanings:

501(c)(3) Organization means any entity described in Section 501(c)(3).

Adjusted Gross Proceeds generally means Gross Proceeds, less amounts held in the Bona Fide Debt Service Fund.

Available Construction Proceeds has the meaning set forth in Reg § 1.148-7(i) and generally means all Sale Proceeds reduced by Issuance Costs or, if applicable, all Sale Proceeds allocable to the Nonrefunding Portion, reduced by Issuance Costs allocable to the Nonrefunding Portion financed with Sale Proceeds, plus all Investment Proceeds earned thereon before the earlier of two years after the Issue Date or substantial completion of the New Money Projects or Projects, as applicable. In determining the amount of Available Construction Proceeds as of any date, there shall be included the amount of investment earnings reasonably expected after such date, together with investment earnings actually received or accrued as of such date.

Bona Fide Debt Service Fund has the meaning set forth in Reg § 1.148-1(b) and generally means the Debt Service Fund identified in 3.4.3.

Bond Counsel means Troutman Pepper Locke LLP or, if applicable, another law firm with a nationally recognized public finance practice.

Bond Notice of Sale means, when applicable, the separate Notice of Sale for the bonds of the Issue.

Bond Purchaser means, when applicable, an entity that purchases the bonds of the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Capitalized Interest means interest on the Issue, or, when applicable, a Prior Issue, from the Issue Date to the placed in service date of the Projects, that is properly capitalized in the cost of the Projects under general federal income tax principles.

Code means the Internal Revenue Code of 1986, as amended.

Computation Date has the meaning set forth in Reg § 1.148-3(e) and generally means the date not later than the fifth Bond Year and each five years thereafter and the final maturity date of the Issue, each as applicable.

Construction Expenditures has the meaning set forth in Reg § 1.148-7(g)(1) and generally means capital expenditures that are allocable to the cost of real property or constructed personal property and includes costs of reconstruction and rehabilitation, but does not include costs of acquiring any interest in land or other existing real or personal property.

Controlled Group has the meaning set forth in Reg § 1.150-1(c) and generally means a group of entities controlled directly or indirectly by the same entity or group of entities.

Debt Service Fund means the Debt Service Fund described in Article III.

Deliberate Action has the meaning set forth in Reg § 1.141-2(d)(3) and generally means any action taken by the Issuer that is within its control, but excludes (i) an involuntary or compulsory conversion under Section 1033 or (ii) an action taken in response to a regulatory directive made by the federal government.

Eighteen Month Spending Exception has the meaning set forth in Reg § 1.148-7(d) and generally means Adjusted Gross Proceeds are spent at least as quickly as follows:

15% within six months after the Issue Date

60% within twelve months after the Issue Date

100% within eighteen months after the Issue Date

The requirement that 100% of Adjusted Gross Proceeds be spent within eighteen months after the Issue Date will be met if at least 95% of Adjusted Gross Proceeds is spent within eighteen months and the remainder is held as a Reasonable Retainage, as permitted by contracts with the Issuer's contractors, and such remainder is spent within thirty months after the Issue Date.

Fixed Yield Bond has the meaning set forth in Reg § 1.148-1(b) and generally means any bond whose yield is fixed and determinable on its Issue Date.

Fixed Yield Issue has the meaning set forth in Reg § 1.148-1(b) and generally means any issue of which each bond of the issue is a Fixed Yield Bond.

Funded Interest means interest on the Issue, or, when applicable, a Prior Issue, other than Capitalized Interest, through the later of three years after the Issue Date, or, if applicable, the Issue Date of a Prior Issue, or one year after the first component of the Projects is placed in service as set forth in Reg § 1.148-6(d)(3)(ii)(A)(3).

General Rule Maturities means, when applicable, those Maturities listed as the general rule maturities in Schedule A to the attached Issue Price Certificate for the Bonds of the Issue or the Notes of the Issue, as applicable.

Governmental Person has the meaning set forth in Reg § 1.141-1(b) and generally means a Governmental Unit.

Governmental Unit means a State or Local Governmental Unit.

Gross Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means all proceeds derived from or relating to the Issue, or, when applicable, a Prior Issue, including Proceeds and Replacement Proceeds.

Guidelines means Reg §1.141-3(b)(4) and Revenue Procedure 2017-13 or any applicable predecessor or successor thereto.

Hold-the-Offering-Price Maturities means, when applicable, those Maturities listed as the hold-the-offering-price maturities in Schedule A to the attached Issue Price Certificate for the Bonds of the Issue or the Notes of the Issue, as applicable.

Holding Period means, with respect to a Hold-the-Offering-Price Maturity, the period starting on the Sale Date and ending on the earlier of (i) the close of the fifth business day after the Sale Date, or (ii) the date on which the Successful Bidder/Successful Bond Bidder/Successful Note Bidder sold at least 10% of such Hold-the-Offering-Price Maturity to the Public at prices that are no higher than the initial offering price for such Hold-the-Offering-Price Maturity.

Investment Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means earnings received from investing and reinvesting Proceeds and from investing and reinvesting such earnings.

Investment Property has the meaning set forth in Section 148(b)(2) and generally means any security or obligation, any annuity contract, or any other investment-type property, but does not include any Tax-Exempt Bond.

Issuance Costs has the meaning set forth in Reg § 1.150-1(b) and generally means costs, to the extent incurred in connection with, and allocable to, the issuance of the Issue within the meaning of Section 147(g), and includes: underwriters' spread; counsel fees; financial advisory fees; credit rating fees; trustee fees; paying agent fees; bond registrar, certification, and authentication fees; accounting fees; printing costs; public approval process costs; engineering and feasibility study costs; and similar costs.

Issue Date has the meaning set forth in Reg § 1.150-1(b) and generally means the date the Issue, or, when applicable, a Prior Issue, was delivered to the Underwriter or Purchaser thereof and payment was received therefor.

Issue Price has the meaning set forth in Reg § 1.148-1(f) and generally means (i) the Expected Offering Price of a Successful Bidder/Successful Bond Bidder/Successful Note Bidder, (ii) the amount paid by the Purchaser for the Issue, the notes of the Issue, and/or the bonds of the Issue, and/or (iii) the price at which at least 10% of each maturity of the General Rule Maturities were sold by the Successful Bidder/Successful Bond Bidder/Successful Note Bidder, all as set forth in Exhibit A, or, when applicable, the sum of the applicable clauses above.

Maturity means bonds and/or notes of the Issue with the same credit and payment terms. Bonds and/or notes of the Issue with different maturity dates, or with the same maturity date but different stated interest rates, are treated as separate maturities.

Minor Portion has the meaning set forth in Section 148(e) and generally means any amount of Gross Proceeds that does not exceed the lesser of (i) 5% of the Proceeds or (ii) \$100,000.

Net Sale Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means the Sale Proceeds allocable to the Nonrefunding Portion, less the portion of those Sale Proceeds

invested in a reasonably required reserve or replacement fund pursuant to Section 148(d) or as part of the Minor Portion.

Nongovernmental Person means any Person other than a Governmental Person. Nongovernmental Person includes the United States and any agency or instrumentality of the United States.

Nonpurpose Investment means any Investment Property in which Gross Proceeds are invested that is not a Purpose Investment.

Nonqualified Bonds has the meaning set forth in Reg § 1.141-12(j) and generally means the portion of outstanding bonds of an Issue that, as of the date of a Deliberate Action, would not meet the private business use test in Section 141(b) or the private loan financing test in Section 141(c).

Nonrefunding Portion means, when applicable, the portion of the Issue or the Prior Issue, as applicable, that is not allocable to the Refunding Portion.

Note Notice of Sale means, when applicable, the separate Notice of Sale for the notes of the Issue.

Note Purchaser means, when applicable, an entity that purchases the notes of the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Notice of Sale means the Notice of Sale, or, when applicable, collectively the Bond Notice of Sale and Note Notice of Sale, attached as Attachment 1 to Exhibit B.

Opinion of Bond Counsel means a written opinion of nationally recognized bond counsel, delivered to the Issuer, to the effect that the exclusion from gross income for federal income tax purposes of interest on the Issue will not be adversely affected.

Original Issues means, when applicable, collectively, the portions of the Refunded Bonds and/or Refunded Notes and the issues that were issued to finance the Projects on a “new money” basis and any other obligations all or a portion of which were issued to finance the Projects on a new money basis which have been ultimately refinanced by this Issue.

Person has the meaning set forth in Section 7701(a)(1) and generally includes an individual, trust, estate, partnership, association, company or corporation.

Preliminary Expenditures has the meaning set forth in Reg § 1.150-2(f)(2) and generally means architectural, engineering, surveying, soil testing, Issuance Costs, including, when applicable, Issuance Costs allocable to the Nonrefunding Portion, and similar costs paid with respect to the Projects in an aggregate amount not exceeding 20% of the Issue Price of the Issue, or, when applicable, the Issue Price of the Issue allocable to the Nonrefunding Portion. However, Preliminary Expenditures do not include land acquisition, site preparation or similar costs incident to the commencement of construction.

Prior Issue(s) means, when applicable, individually or collectively, the Original Issues and each series of exclusively current refunding obligations all or a portion of which were thereafter issued to refinance the Original Issues.

Private Business Use has the meaning set forth in Reg § 1.141-3(a) and generally means use (directly or indirectly) in a trade or business carried on by any Nongovernmental Person other than use (i) as a member of, and on the same basis as, the general public or (ii) pursuant to the Guidelines or the Research Guidelines. Any activity carried on by a Nongovernmental Person (other than a natural Person) shall be treated as a trade or business.

Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means Sale Proceeds, Investment Proceeds and Transferred Proceeds of the Issue or, when applicable, a Prior Issue.

Public has the meaning set forth in Reg § 1.148-1(f)(3)(ii) and generally means any Person other than an Underwriter or a Related Party to an Underwriter.

Purchaser means, when applicable, an entity, including a Successful Bidder, that purchases the Issue, or, when applicable, a Prior Issue, for its own account without a present intent to resell.

Purpose Investment has the meaning set forth in Reg § 1.148-1(b) and generally means an investment that is acquired by the Issuer to carry out the governmental purpose of the Issue.

Qualified Equity has the meaning set forth in Reg § 1.141-6(b)(3) and generally means funds that are not derived from proceeds of a Tax-Advantaged Bond.

Qualified Guarantee has the meaning set forth in Reg § 1.148-4(f) and generally means an arrangement that imposes a secondary liability that unconditionally shifts substantially all of the credit risk for all or part of the payments on the Issue to the guarantor under that arrangement.

Qualified Hedge has the meaning set forth in Reg § 1.148-4(h) and generally means a contract entered into by the Issuer with a hedge provider primarily to modify the Issuer's risk of interest rate changes with respect to all or a part of the Issue.

Reasonable Retainage has the meaning set forth in Reg § 1.148-7(h) and generally means an amount, not to exceed 5% of Available Construction Proceeds or Adjusted Gross Proceeds, as applicable, on the date 24 months, or 18 months, as applicable, after the Issue Date, that is retained for reasonable business purposes relating to the Projects, including to ensure or promote compliance with a construction contract.

Rebate Requirement means the amount of rebatable arbitrage with respect to the Issue, computed as of the last day of any Bond Year pursuant to Reg § 1.148-3.

Refunded Bonds means, when applicable, all or the portion of each of the series of bonds being refunded by the Issue, as identified in Appendix B.

Refunded Notes means, when applicable, all or the portion of each of the series of notes being refunded by the Issue, as identified in Appendix B.

Refunding Obligations means a Tax-Advantaged Bond issued to refund any portion of the Issue, including any subsequent Tax-Advantaged Bond in a series of refundings thereof.

Refunding Portion means, when applicable, the portion of the Issue allocable to the refunding of the Refunded Bonds and/or Refunded Notes, together with the portion of the Issue allocable to the financing of a ratable share of Issuance Costs and other common costs of the Issue.

Regulations or Reg means the applicable Treasury Regulations promulgated by the Secretary of the Treasury of the United States under the Code.

Related Party has the meaning set forth in Reg §1.150-1(b) and generally means, in reference to a Governmental Unit or a 501(c)(3) Organization, any member of the same Controlled Group, and in any reference to any other Person, any two or more Persons who have more than fifty percent (50%) common ownership, directly or indirectly.

Replacement Proceeds has the meaning set forth in Reg §1.148-1(c) and generally means amounts that have a sufficiently direct nexus to the Issue or to the governmental purpose of the Issue to conclude that the amounts would have been used for that governmental purpose if the Proceeds of the Issue were not used, and includes a sinking fund, a pledged fund, and other replacement proceeds, each as defined in Reg § 1.148-1(c).

Research Guidelines means Reg §1.141-3(b)(6) and Revenue Procedure 2007-47 or any applicable successor thereto.

Sale Date has the meaning set forth in Reg § 1.150-1(c)(6) and generally means the first day on which there is a binding contract in writing for the sale of a Maturity.

Sale Proceeds has the meaning set forth in Reg § 1.148-1(b) and generally means amounts actually or constructively received from the sale of the Issue, or, when applicable, a Prior Issue.

Signature Certificate means the Signature, No Litigation and Official Statement Certificate or similar certificate prepared by Bond Counsel relating to the Issue or, when applicable, a Prior Issue.

Small Issuer Exception has the meaning set forth in Section 148(f)(4)(D) and Reg § 1.148-8(a) and generally means that, as of the Issue Date, either (i) the Issue meets the exception for a current refunding under Section 148(f)(4)(D)(v) or (ii) the Issuer reasonably expects that the aggregate Issue Price of Tax-Exempt Bonds (other than (a) current refunding bonds to the extent the amount thereof does not exceed the outstanding amount of the obligations to be refunded thereby and (b) qualified private activity bonds) issued and to be issued by or on behalf of the Issuer during the current calendar year will not exceed \$5,000,000 except by the lesser of (1) \$10,000,000 or (2) the aggregate face amount of bonds, in either case attributable to financing the construction of public school facilities, as provided in Section 148(f)(4)(D)(vii). In addition, the Issuer must have the power to impose or to cause the imposition of taxes of general applicability which, when collected, may be used for the general purposes of the Issuer. The Issuer's power to impose or cause the imposition of such taxes cannot be contingent on approval by any other Governmental Unit. The Issuer cannot form or avail itself of an entity for the purpose of avoiding the volume limitation described above.

State or Local Governmental Unit has the meaning set forth in Reg § 1.103-1(a) and is generally a state or any political subdivision of a state, but excludes the United States and its agencies or instrumentalities.

Successful Bidder(s) means, when applicable, the Successful Bidder(s) set forth in Appendix B.

Successful Bond Bidder means, when applicable, the Successful Bond Bidder set forth in Appendix B.

Successful Note Bidder means, when applicable, the Successful Note Bidder set forth in Appendix B.

Tax-Advantaged Bond has the meaning set forth in Reg § 1.150-1(b) and generally means a tax-exempt bond or a taxable bond that provides a federal tax benefit that reduces the Issuer's borrowing costs.

Tax Certificate means the Tax Certificate to which this Appendix A is attached.

Tax-Exempt Bond means any obligation the interest on which is excluded from gross income for federal income tax purposes pursuant to Section 103, other than a "specified private activity bond" within the meaning of Section 57(a)(5)(C), as well as (i) stock in a "regulated investment company" (within the meaning of Section 852) to the extent at least 95 percent of income to the stockholder is treated as interest on Tax-Exempt Bonds and (ii) any demand deposit obligation issued by the United States Department of the Treasury pursuant to Subpart C of 31 CFR Part 344.

Transferred Proceeds has the meaning set forth in Reg § 1.148-9(b) and generally means Proceeds of a Prior Issue that become Proceeds of the Issue under the transferred proceeds allocation rule in Reg § 1.148-9(b).

Two-Year Spending Exception has the meaning set forth in Reg § 1.148-7(e) and generally means Available Construction Proceeds are expended at least as quickly as follows:

10% within six months after the Issue Date

45% within twelve months after the Issue Date

75% within eighteen months after the Issue Date

100% within twenty-four months after the Issue Date

The requirement that 100% of Available Construction Proceeds be spent within twenty-four months after the Issue Date will be met if at least 95% of Available Construction Proceeds is spent within twenty-four months and the remainder is held as Reasonable Retainage, as permitted by contracts with the Issuer's contractors, and such remainder is spent within thirty-six months after the Issue Date.

Underwriter means (i) any Person, including, when applicable, a Successful Bidder/Successful Bond Bidder/Successful Note Bidder, that agrees pursuant to a written contract with the Issuer (or with the lead underwriter to form an underwriting syndicate) to participate in the initial sale of the bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public, and (ii) any Person that agrees pursuant to a written contract directly or indirectly with a Person described in clause (i) of this paragraph to participate in the initial sale of such bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public (including a member of a selling group or a party to a third-party distribution agreement participating in the initial sale of such bonds and/or notes of the Issue, or, when applicable, a Prior Issue, to the Public).

Votes means the authorizations for the Issue specified in the Signature Certificate.

Yield has the meaning set forth in Reg § 1.148-4 for an issue and Reg § 1.148-5 for investments, and generally means, as to the Issue, or, when applicable, a Prior Issue, or Investment Property, as applicable, that discount rate which, when used in computing the present value of all unconditionally payable payments representing (i) principal, adjusted, as required, for any substantial discounts or premiums, (ii) interest, including costs of Qualified Guarantees, and (iii) payments or receipts on Qualified Hedges, produces an amount equal to the Issue Price of the Issue, or, when applicable, a Prior Issue, or the purchase price of Investment Property, as appropriate.

Yield Reduction Payment means a “qualified yield reduction payment” to the United States Department of the Treasury that reduces the yield on Investment Property, as set forth in Reg § 1.148-5(c).

APPENDIX B ISSUE SPECIFIC DEFINITIONS

For purposes of the Tax Certificate to which this Appendix B is attached, and the exhibits to the Tax Certificate and any schedules or attachments to those exhibits, the following capitalized terms have the following meanings:

Bond Year means the period beginning on the Issue Date and ending on February 27, 2026, which is the last day on which any notes of the Issue will remain outstanding for federal tax purposes.

Issue Date means, as to the Issue, the date of this Tax Certificate, July 25, 2025.

Municipal Advisor means Hilltop Securities Inc., as municipal advisor to the Issuer in connection with the Issue.

Sale Date of the Issue is July 16, 2025.

Sale Proceeds means as to the Issue, the amount of \$15,970,313.69, comprising the stated principal amount of the Issue (\$15,851,900), plus original issue premium thereon in the amount of \$118,413.69.

Successful Bidder means Jefferies LLC.

APPENDIX C
POST-ISSUANCE TAX COMPLIANCE PROCEDURES
TAX-EXEMPT OBLIGATIONS AND OTHER TAX-BENEFITED OBLIGATIONS

I. Introduction

These post-issuance compliance procedures of the Issuer are designed to provide for the effective management of the Issuer's post issuance compliance program for tax-exempt and other tax-benefited obligations in a manner consistent with state and federal laws applicable to such obligations.

II. Post-Issuance Tax Compliance

The Treasurer of the Issuer, or such other designated officer (the "Compliance Officer") shall be the primary bond compliance officer responsible for each issuance by the Issuer of tax-exempt (or otherwise tax-benefited) bonds, notes, financing leases, or other obligations (herein, collectively referred to as "bonds"). All information related to each bond issue and the facilities, equipment and other assets financed by such issue shall be maintained by or on behalf of the Compliance Officer and the actions taken under subsections A through C of this Section II shall be taken by the Compliance Officer or on behalf of the Compliance Officer by such other officers or employees of the Issuer as appropriate.

A. Tax Certificate and Continuing Education

- 1. Tax Certificate** – A Tax Certificate is prepared for each issuance of bonds. Immediately upon issuing any bonds, the Compliance Officer, in conjunction with the Issuer's bond counsel and financial advisor, shall review the Tax Certificate and make notes regarding specific compliance issues for such bond issue on the Post-Issuance Compliance Notes form at Exhibit A. The Tax Certificate and Notes shall clearly define the roles and responsibilities relating to the ongoing compliance activities for each bond issue and will identify specific compliance requirements.
- 2. Continuing Education** – The Compliance Officer will actively seek out advice of bond counsel on any matters that appear to raise ongoing compliance concerns and may attend or participate in seminars, teleconferences, etc. sponsored by organizations such as the Massachusetts Collector-Treasurer Association and the Massachusetts Government Finance Officers Association that address compliance issues and developments in the public finance bond arena. In addition, national organizations such as the Securities Industry and Financial Markets Association (SIFMA) and the National Association of Bond Lawyers (NABL) offer numerous training opportunities and materials which may be useful to the Compliance Officer.

B. Tax-Exempt Bonds Compliance Monitoring

- 1. Restrictions against Private Use** – The Compliance Officer will continuously monitor the expenditure of bond proceeds and the use of facilities or equipment financed or refinanced with bonds to ensure compliance with Section 141 of the Internal Revenue Code (the

“Code”) which generally establishes limitations on the use of bond-financed facilities by non-state or local governmental entities, such as individuals using bond-financed assets on a basis other than as a member of the general public, corporations and the federal government and its agencies and instrumentalities.

a. Use of Bond Proceeds – The Compliance Officer will monitor and maintain records with respect to expenditures to ensure that bond proceeds are being used on capital expenditures for governmental purposes in accordance with the bond documents and document the allocation of all bond proceeds. Such monitoring is required not only for tax-exempt bonds, but also for tax credit bonds.

b. Use of the Bond-Financed Facility or Equipment

i. Equipment assets financed with bonds will be listed in a schedule for each bond issue, which schedule may be included in the Tax Certificate. Equipment assets generally are not to be disposed of prior to the earlier of (a) the date the bonds and all subsequent refundings of such bonds are fully paid, or (b) the end of the useful life of such equipment. The Compliance Officer will maintain the list of all bond-financed equipment for each bond issue, together with the equipment’s expected useful life.

ii. Constructed or acquired assets financed with bonds – In order to ensure that assets constructed or acquired using bond proceeds, such as infrastructure assets, are not leased, sold or disposed of prior to the end of the term of the bonds and of all subsequent refundings of such bonds:

- Any asset constructed or acquired with bond proceeds shall be flagged in the Issuer’s records, and
- These projects will be monitored by the Compliance Officer.

iii. If there is any proposal to change the use of a bond-financed facility from a governmental purpose to a use in which a private entity may have the use or benefit of such a facility on a basis that is different from the rest of the general public, the Compliance Officer will consult with bond counsel prior to the occurrence of the proposed change in use.

2. Qualification for Initial Temporary Periods and Compliance with Restrictions against Hedge Bonds

a. Expectations as to Expenditure of “New Money” Bond Proceeds

i. In order to qualify under the arbitrage rules for an initial temporary period of 3 years for “new money” issues during which bond proceeds can be invested without regard to yield (but potentially subject to rebate), the Issuer must reasonably expect to spend at least 85% of “spendable proceeds” by the end of the temporary period. In general under Code Section 149, in order to avoid classification of an issue of bonds as “hedge bonds,” the Issuer must both (x) reasonably expect to spend 85% of the “spendable proceeds” of the bond issue within the 3 year period beginning on the date the bonds are issued and (y)

invest not more than 50% of the proceeds of the issue in investments having a substantially guaranteed yield for 4 years or more. These expectations have been documented for the Issuer's outstanding bond issues in the tax certificates executed in connection with each bond issue.

- ii. If, for any reason, the Issuer's expectations concerning the period over which the bond proceeds are to be expended change from what was documented in the applicable tax certificate, the Compliance Officer will consult with bond counsel.

b. Project Draw Schedule Compliance Monitoring – While there are unspent proceeds of a bond issue, the Compliance Officer will compare and analyze the original anticipated project draw schedule and the actual expenditure payouts and reimbursements on each bond-financed project on an annual or more frequent basis. The purpose of this analysis is to determine the variances from the original expected draw schedule for each project and to document the reasons for these variances to provide a continual record on the spending progress of each bond-financed project. Factors relevant to the analysis include unexpected delays in the project timelines, extreme weather, contract time extensions due to unexpected events, supplemental agreements and any other factor with a potential to impact the progress or completion of the projects. Generally, there should be no effect on the tax-exempt status of the bonds under either the temporary period rules or the hedge bond rules if the actual disbursements do not meet the original project draw schedule, unless circumstances surrounding the actual events cast doubt on the reasonableness of the stated expectations on the issuance date. Therefore, it is important for the Compliance Officer to update the progress of each project at least annually, and consult with bond counsel as to any variance from the original schedule.

c. Bond Proceeds Expenditure Schedule Compliance Monitoring – While there are unspent proceeds of bonds, the Compliance Officer will compare and analyze the bond proceeds expenditure schedule and the actual investment earnings on each project on an annual or more frequent basis. The purpose of this analysis is to determine any variances from the expected expenditure schedule and to document the reasons for these variances.

3. Arbitrage Rebate Compliance

- a. Bonds may lose their tax-favored status, retroactive to the date of issuance, if they do not comply with the arbitrage restrictions of section 148 of the Code. Two general sets of requirements under the Code must be applied in order to determine whether governmental bonds are arbitrage bonds: the yield restriction requirements of section 148(a) and the rebate requirements of section 148(f).
- b. **Yield Restriction Requirements** – The yield restriction requirements provide, in general terms, that gross proceeds of a bond issue may not be invested in investments earning a yield higher than the yield of the bond issue, except for investments (i) during one of the temporary periods permitted under the regulations (including the initial three

year temporary period described above), (ii) in a reasonably required reserve or replacement fund or (iii) in an amount not in excess of the lesser of 5% of the sale proceeds of the issue or \$100,000 (the “minor portion”). Under limited circumstances, the yield on investments subject to yield restriction can be reduced through payments to the IRS known as “yield reduction payments.” The Tax Certificate will identify those funds and accounts associated with a particular issue of bonds known, as of the date of issuance, to be subject to yield restriction.

c. Rebate Requirements

- i.** If, consistent with the yield restriction requirements, amounts treated as bond proceeds are permitted to be invested at a yield in excess of the yield on the bonds (pursuant to one of the exceptions to yield restriction referred to above), rebate payments may be required to be made to the U.S. Treasury. Under the applicable regulations, the aggregate rebate amount is the excess of the future value of all the receipts from bond funded investments over the future value of all the payments to acquire such investments. The future value is computed as of the computation date using the bond yield as the interest factor. At least 90% of the rebate amount calculated for the first computation period must be paid no later than 60 days after the end of the first computation period. The amount of rebate payments required for subsequent computation periods (other than the final period) is that amount which, when added to the future value of prior rebate payments, equals at least 90% of the rebate amount. For the final computation period, 100% of the calculated amount must be paid. Rebate exceptions and expectations are documented for each bond issue in the tax certificate executed at the time of such bond issue.
- ii.** **While there are unspent proceeds of bonds, the Issuer will engage an experienced independent rebate analyst to annually calculate any rebate that may result for that year and annually provide a rebate report to the Compliance Officer. Bond counsel can assist with referrals to qualified rebate analysts.**

d. Timing of Rebate Payments

The Compliance Officer will work with the rebate analyst to ensure the proper calculation and payment of any rebate payment and/or yield-reduction payment at the required time:

- i.** First installment due no later than 60 days after the end of the fifth anniversary of each bond issuance;
- ii.** Succeeding installments at least every five years;
- iii.** Final installment no later than 60 days after retirement of last bond in the issue.¹

4. Refunding Requirements

¹ Generally, rebate payments must be paid not later than 60 days after retirement of the last bond in the issue.

- a. **Refunded Projects** – The Compliance Officer will maintain records of all bond financed assets for each bond issue, including assets originally financed with a refunded bond issue.
- b. **Yield Restriction** – The Compliance Officer will work with its financial advisor and bond counsel to maintain records of allocation of bond proceeds for current and advance refundings of prior bond issues to ensure that such bond proceeds are expended as set forth in the applicable tax certificate executed at the time the refunding bonds are issued. Any yield restricted escrows will be monitored for ongoing compliance.

C. Record Retention

1. Section 6001 of the Code provides the general rule for the proper retention of records for federal tax purposes. The IRS regularly advises taxpayers to maintain sufficient records to support their tax deductions, credits and exclusions. In the case of a tax-exempt bond transaction, the primary taxpayers are the bondholders. In the case of other tax benefited bonds, such as “build America bonds” or “recovery zone economic development bonds”, the Issuer will be treated as the taxpayer. In order to ensure the continued exclusion of interest to such bondholders, it is important that the Issuer retain sufficient records to support such exclusion.
2. **In General**
 - a. All records associated with any bond issue shall be stored electronically or in hard copy form at the Issuer’s offices or at another location conveniently accessible to the Issuer.
 - b. The Compliance Officer will ensure that the Issuer provides for appropriate storage of these records.
 - c. If storing documents electronically, the Issuer shall conform with Rev. Proc. 97-22, 1997-1 C.B. 652 (as the same may be amended, supplemented or superseded), which provides guidance on maintaining books and records by using an electronic storage system. Bond counsel can furnish a copy of this Revenue Procedure if needed.
3. **Bonds** – Unless a longer period of time is required by state law, the Issuer shall maintain the bond record as defined in this section for the longer of the life of the bonds plus 3 years or the life of refunding bonds (or series of refunding bonds) which refunded the bonds plus 3 years. The bond record shall include the following documents:
 - a. **Pre-Issuance Documents**
 - i. **Guaranteed Investment Contracts (“GICs”) and Investments (other than Treasury’s State and Local Government Series Securities, “SLGs”)** – If applicable, the Compliance Officer shall retain

all documentation regarding the procurement of each GIC or other investment acquired on or before the date of bond issuance, including as applicable the request for bids, bid sheets, documentation of procurement method (i.e., competitive vs. negotiated), etc. If investments other than SLGs are used for a defeasance escrow, the documentation should include an explanation of the reason for the purchase of open market securities and documentation establishing the fair value of the securities and compliance with safe harbor bidding rules. If SLGs are purchased, a copy of the final subscription shall be maintained.

- ii. **Project Draw Schedule** – The Compliance Officer shall retain all documentation and calculations relating to the draw schedule used to meet the “reasonable expectations” test and use of proceeds tests (including copies of contracts with general and sub-contractors or summaries thereof).
 - iii. **Issue Sizing** – The Compliance Officer shall maintain a copy of all financial advisor’s or underwriter’s structuring information.
 - iv. **Bond Insurance** – If procured by the Issuer, the Compliance Officer shall maintain a copy of insurance quotes and calculations supporting the cost benefit of bond insurance, if any.
 - v. **Costs of Issuance documentation** – The Compliance Officer shall retain all invoices, payments and certificates related to costs of issuance of the bonds.
- b. **Issuance Documents** – The Compliance Officer shall retain the bound bond transcript delivered from bond counsel.
- c. **Post-Issuance Documents**
 - i. **Post-Issuance Guaranteed Investment Contracts and Investments (Other than SLGs)** – the Compliance Officer shall retain all documentation regarding the procurement of any GIC or other investment acquired after bond issuance, including as applicable the request for bids, bid sheets, documentation of procurement method (i.e., competitive vs. negotiated), etc. If investments other than SLGs are used for a defeasance escrow, the documentation should include an explanation of the reason for the purchase of open market securities and documentation establishing the fair value of the securities and compliance with safe harbor bidding rules.
 - ii. **Records of Investments** shall be retained by the Compliance Officer.
 - iii. **Investment Activity Statements** shall be retained by the Compliance Officer.
 - iv. **Records of Expenditures** – The Compliance Officer shall maintain or shall cause to be maintained all invoices, etc. relating to equipment purchases and constructed or acquired projects, either electronically or in hard copy.

v. Records of Compliance

- **Qualification for Initial Temporary Periods and Compliance with Restrictions against Hedge Bond Documentation** – The Compliance Officer shall prepare the annual analysis described in Section II(B)(2) above and maintain these records.
- **Arbitrage Rebate Reports** may be prepared by the Compliance Officer or a third party as described in section II (B)(3) of this document and retained by the Compliance Officer.
- **Returns and Payment** – Shall be prepared at the direction of the Compliance Officer and filed as described in Section II(B)(3) of this document.
- **Contracts under which any bond proceeds are spent (consulting engineering, acquisition, construction, etc.)** – The Compliance Officer shall obtain copies of these contracts and retain them for the bond record.

d. General

- i. **Audited Financial Statements** – The Compliance Officer will maintain copies of the Issuer’s annual audited Financial Statements.
- ii. **Reports of any prior IRS Examinations** – The Compliance Officer will maintain copies of any written materials pertaining to any IRS examination of the Issuer’s bonds.

III. Voluntarily Correcting Failures to Comply with Post-Issuance Compliance Activities

If, in the effort to exercise due diligence in complying with applicable federal tax laws, a potential violation is discovered, the Issuer may address the violation through the applicable method listed below. The Issuer should work with its bond counsel to determine the appropriate way to proceed.

A. Taking remedial actions as described in Section 141 of the Internal Revenue Code

B. Utilizing the Voluntary Closing Agreement Program (VCAP) – Section 7.2.3 of the Internal Revenue Manual establishes the voluntary closing agreement program for tax-exempt bonds (TEB VCAP) whereby issuers of tax-exempt bonds can resolve violations of the Internal Revenue Code through closing agreements with the Internal Revenue Service.

IV. Post Issuance Tax Compliance Procedures Review

The Compliance Officer shall review these procedures at least annually, and implement revisions or updates as deemed appropriate, in consultation with bond counsel.

Exhibit A

POST ISSUANCE COMPLIANCE NOTES
[Name of Bond]

Transaction Parties

Overall Responsible Party for Debt Management Activities _____
Bond Counsel _____
Paying Agent _____
Rebate Specialist _____
Other _____

EXHIBIT A

\$15,851,900
Town of Lexington, Massachusetts
General Obligation Bond Anticipation Notes
Dated July 25, 2025

ISSUE PRICE CERTIFICATE AND RECEIPT

The undersigned, on behalf of the Successful Bidder, hereby certifies as set forth below with respect to the sale of the above-captioned obligations (“Issue”) of the Issuer. Capitalized terms used and not otherwise defined herein shall have the respective meanings set forth in the Tax Certificate to which this Exhibit A is attached.

1. Reasonably Expected Initial Offering Price.

(a) As of the Sale Date, the reasonably expected initial offering price of the notes of the Issue to the Public by the Successful Bidder is the price listed in Schedule A (“Expected Offering Price”). The Expected Offering Price is the price for the notes of the Issue used by the Successful Bidder in formulating its bid to purchase the Issue. Reflected in Schedule B is a true and correct representation of the bid provided by the Successful Bidder to purchase the notes of the Issue.

(b) The Successful Bidder was not given the opportunity to review other bids prior to submitting its bid.

(c) The bid submitted by the Successful Bidder constituted a firm offer to purchase the notes of the Issue.

2. Receipt. The Successful Bidder hereby acknowledges receipt of the notes of the Issue from the Issuer and further acknowledges receipt of all certificates, opinions and other documents required to be delivered to the Successful Bidder, before or simultaneously with the delivery of such notes of the Issue, which certificates, opinions and other documents are satisfactory to the Successful Bidder.

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Successful Bidder’s interpretation of any laws, including specifically Sections 103 and 148 and the Regulations thereunder.

[Remainder of page intentionally left blank; signature page follows.]

The undersigned understands that the foregoing information will be relied upon by the Issuer with respect to certain of the representations set forth in the Tax Certificate and with respect to compliance with the federal income tax rules affecting the Issue, and by Troutman Pepper Locke LLP in connection with rendering its opinion that the interest on the Issue is excluded from gross income for federal income tax purposes, the preparation of the Internal Revenue Service Form 8038-G, and other federal income tax advice that it may give to the Issuer from time to time relating to the Issue.

Dated: July 25, 2025

JEFFERIES LLC

By: _____
Name:
Title:

SCHEDULE A TO EXHIBIT A
EXPECTED INITIAL OFFERING PRICE TO THE PUBLIC

Town of Lexington, Massachusetts
\$15,851,900 General Obligation Bond Anticipation Notes
Dated July 25, 2025

Pricing Summary

Maturity	Type of Bond	Coupon	Yield	Maturity Value	Price	Dollar Price
02/27/2026	Serial Note	4.000%	2.710%	15,851,900.00	100.747%	15,970,313.69
Total	-	-	-	\$15,851,900.00	-	\$15,970,313.69

SCHEDULE B TO EXHIBIT A

SUCCESSFUL BIDDER'S BID

Jefferies LLC - New York , NY's Bid



Lexington (Town) \$15,851,900 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$15,851,900.00, we will pay you \$15,965,716.64, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/27/2026	15,851.9M	4.0000	2.7100	100.747

Bid: 100.718000

Premium: \$113,816.64

Net Interest Cost: \$259,583.67

NIC: 2.780755

Time Last Bid Received On:07/16/2025 10:53:17 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Jefferies LLC, New York , NY

Contact: Dan Kiley

Title:

Telephone:212-336-7163

Fax:

Issuer Name: Town of Lexington

Company Name: _____

Accepted By: _____ Accepted By: _____

Date: _____ Date: _____

EXHIBIT B

\$15,851,900

**Town of Lexington, Massachusetts
General Obligation Bond Anticipation Notes
Dated July 25, 2025**

CERTIFICATE OF THE MUNICIPAL ADVISOR

The undersigned, on behalf of the Municipal Advisor, has assisted the Issuer in soliciting and receiving bids from potential underwriters in connection with the sale of the notes of the Issue in a competitive bidding process in which bids were requested for the purchase of such notes at specified written terms set forth in the Notice of Sale, a copy of which is attached to this certificate as Attachment 1. Capitalized terms used and not otherwise defined herein shall have the respective meanings set forth in the Tax Certificate to which this Exhibit B is attached. The competitive sale requirements (as defined in the Notice of Sale) for the notes of the Issue were met. The Municipal Advisor further advises as follows:

1. The notes of the Issue were offered for sale at specified written terms more particularly described in the Notice of Sale, which was distributed to potential bidders.

2. The Notice of Sale was disseminated electronically through PARITY. The method of distribution of the Notice of Sale is regularly used for purposes of disseminating notices of sale of new issuances of municipal bonds, and notices disseminated in such manner are widely available to potential bidders.

3. To the knowledge of the Municipal Advisor, all bidders were offered an equal opportunity to bid to purchase the notes of the Issue so that, for example, if the bidding process afforded any opportunity for bidders to review other bids before providing a bid, no bidder was given an opportunity to review other bids that was not equally given to all other bidders (that is, no exclusive “last-look”).

4. The Issuer received bids for the notes of the Issue from at least three Underwriters who represented that they have established industry reputations for underwriting new issuances of municipal bonds. Based upon the Municipal Advisor’s knowledge and experience in acting as the Municipal Advisor for other municipal issues, the Municipal Advisor believes those representations to be accurate. Copies of any written bids received are attached to this certificate as Attachment 2. Bids not reflected in Attachment 2, if any, were received by telephone rather than in writing.

5. The winning bidder for the notes of the Issue was the Successful Bidder, whose bid was determined to be the best conforming bid in accordance with the terms set forth in the Notice of Sale, as shown in the bid comparison attached as Attachment 3 to this certificate. The Issuer awarded the notes of the Issue to the Successful Bidder.

6. The Yield on the Issue is 2.7080091% as shown on the attached Schedule A.

The representations set forth in this certificate are limited to factual matters only. Nothing in this certificate represents the Municipal Advisor's interpretation of any laws, including specifically Sections 103 and 148 and the Regulations thereunder.

[Remainder of page intentionally left blank; signature page follows.]

The undersigned understands that the foregoing information will be relied upon by the Issuer with respect to certain of the representations set forth in the Tax Certificate to which this certificate is attached and with respect to compliance with the federal income tax rules affecting the Issue, and by Troutman Pepper Locke LLP in connection with rendering its opinion that the interest on the Issue is excluded from gross income for federal income tax purposes, in the preparation of the Internal Revenue Service Form 8038-G, and in providing other federal income tax advice that it may give to the Issuer from time to time relating to the Issue. The Issuer and Troutman Pepper Locke LLP may also rely on the foregoing information for purposes of determining compliance with Section 21A of Chapter 44 of the Massachusetts General Laws, if applicable. No other Persons may rely on the representations set forth in this certificate without the prior written consent of the Municipal Advisor.

Dated: July 25, 2025

HILLTOP SECURITIES INC.

By: _____

Name:

Title:

ATTACHMENT 1 TO EXHIBIT B
NOTICE OF SALE

ATTACHMENT 2 TO EXHIBIT B
COPIES OF WRITTEN BIDS RECEIVED

Jefferies LLC - New York , NY's Bid



Lexington (Town)
\$15,851,900 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$15,851,900.00, we will pay you \$15,965,716.64, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/27/2026	15,851.9M	4.0000	2.7100	100.747

Bid: 100.718000
Premium: \$113,816.64
Net Interest Cost: \$259,583.67
NIC: 2.780755
Time Last Bid Received On:07/16/2025 10:53:17 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Jefferies LLC, New York , NY
Contact: Dan Kiley
Title:
Telephone:212-336-7163
Fax:

Issuer Name: Town of Lexington Company Name: _____

Accepted By: _____ Accepted By: _____

Date: _____ Date: _____

Fidelity Capital Markets - Boston , MA's Bid



Lexington (Town)
\$15,851,900 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$15,851,900.00, we will pay you \$15,960,802.55, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/27/2026	15,851.9M	4.0000	2.6000	100.812

Bid: 100.687000

Premium: \$108,902.55

Net Interest Cost: \$264,497.76

NIC: 2.833396

Time Last Bid Received On:07/16/2025 10:44:28 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Fidelity Capital Markets, Boston , MA

Contact: Katherine Estes

Title: Vice-President

Telephone:774-392-0159

Fax: 617-692-5949

Issuer Name: Town of Lexington

Company Name: _____

Accepted By: _____

Accepted By: _____

Date: _____

Date: _____

Truist Securities, Inc. - Charlotte , NC's Bid



Lexington (Town)
\$15,851,900 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$15,851,900.00, we will pay you \$15,947,328.43, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/27/2026	15,851.9M	4.0000	2.9500	100.607

Bid: 100.602000
Premium: \$95,428.43
Net Interest Cost: \$277,971.88
NIC: 2.977736
Time Last Bid Received On: 07/16/2025 10:23:12 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Truist Securities, Inc., Charlotte , NC
Contact: Keon Williams
Title:
Telephone: 980-333-6604
Fax:

Issuer Name: Town of Lexington Company Name: _____

Accepted By: _____ Accepted By: _____

Date: _____ Date: _____

Oppenheimer & Co., Inc. - Philadelphia , PA's Bid



Lexington (Town)
\$15,851,900 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$15,851,900.00, we will pay you \$15,947,011.40, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/27/2026	15,851.9M	4.0000	2.7000	100.753
Bid:				100.600000
Premium:				\$95,111.40
Net Interest Cost:				\$278,288.91
NIC:				2.981132
Time Last Bid Received On:07/16/2025 9:01:12 EDST				

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Oppenheimer & Co., Inc., Philadelphia , PA
Contact: Darren Smith
Title: Executive Director
Telephone:215-656-2893
Fax: 215-656-2896

Issuer Name: Town of Lexington Company Name: _____

Accepted By: _____ Accepted By: _____

Date: _____ Date: _____

TD Securities - New York , NY's Bid



Lexington (Town)
\$15,851,900 General Obligation Bond Anticipation Notes

For the aggregate principal amount of \$15,851,900.00, we will pay you \$15,937,975.81, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate:

Maturity Date	Amount \$	Coupon %	Yield %	Dollar Price
02/27/2026	15,851.9M	4.0000	3.0000	100.578
Bid:				100.543000
Premium:				\$86,075.81
Net Interest Cost:				\$287,324.50
NIC:				3.077925
Time Last Bid Received On:07/16/2025 10:41:32 EDST				

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: TD Securities, New York , NY
Contact: Chris Dimon
Title:
Telephone:212-827-7171
Fax:

Issuer Name: Town of Lexington Company Name: _____

Accepted By: _____ Accepted By: _____

Date: _____ Date: _____

ATTACHMENT 3 TO EXHIBIT B

BID COMPARISON

Town of Lexington, Massachusetts

\$15,851,900 General Obligation Bond Anticipation Notes

Sale Date: 7/16/2025
Dated Date: 7/25/2025
Delivery Date: 7/25/2025
Due Date: 2/27/2026
Days Per Year: 360
Day Count: 212
Bank Qualified: No
Rating: MIG-1



Bidder	Underwriter	Principal	Coupon Rate	Premium	Interest	Net Interest	NIC	Prorata Premium	Prorata Interest	Award	Reoffering Yield
Jefferies LLC	•	\$15,851,900	4.00%	\$113,816.64	\$373,400.31	\$259,583.67	2.7808%	\$113,816.64	\$373,400.31	\$15,851,900	2.71%
Fidelity Capital Markets	•	\$15,851,900	4.00%	\$108,902.55	\$373,400.31	\$264,497.76	2.8334%				
Truist Securities	•	\$15,851,900	4.00%	\$95,428.43	\$373,400.31	\$277,971.88	2.9777%				
Oppenheimer & Co.	•	\$15,851,900	4.00%	\$95,111.40	\$373,400.31	\$278,288.91	2.9811%				
TD Securities	•	\$15,851,900	4.00%	\$86,075.81	\$373,400.31	\$287,324.50	3.0779%				
Award Totals								\$113,816.64	\$373,400.31	\$15,851,900	

Weighted Average Net Interest Cost: 2.7808%

SCHEDULE A TO EXHIBIT B
PROOF OF YIELD ON THE ISSUE

Town of Lexington, Massachusetts
\$15,851,900 General Obligation Bond Anticipation Notes
Dated July 25, 2025

Proof of Bond Yield @ 2.7080091%

Date	Cashflow	PV Factor	Present Value	Cumulative PV
07/25/2025	-	1.0000000x	-	-
02/27/2026	16,225,300.31	0.9842846x	15,970,313.69	15,970,313.69
Total	\$16,225,300.31	-	\$15,970,313.69	-

Derivation Of Target Amount

Par Amount of Bonds.....	\$15,851,900.00
Reoffering Premium or (Discount).....	118,413.69
Original Issue Proceeds.....	\$15,970,313.69

EXHIBIT C

SPENDING SCHEDULE

Town of Lexington, Massachusetts

\$15,851,900 General Obligation Bond Anticipation Notes

Spending Schedule

Sale Date: 7/16/2025
Dated Date: 7/25/2025
Delivery Date: 7/25/2025
Due Date: 2/27/2026

New Money Purpose	This Issue	Date of First Expenditure*	Spent by Original Issue Date - 7/25/2025	Spent By 1/25/2026
Lexington Children's Place Construction	\$245,000	9/20/2024	\$228,925	\$245,000
45 Bedford Street Fire Station Replacement	\$200,000	8/23/2024	\$155,382	\$200,000
Automatic Meter Reading System	\$300,000	1/3/2025	\$244,621	\$300,000
Automatic Meter Reading System	\$300,000	1/3/2025	\$244,621	\$300,000
Equipment Replacement	\$33,000	3/14/2025	\$33,000	\$33,000
Westview Cemetery Building Construction	\$215,000	11/15/2024	\$167,380	\$215,000
Lexington Police Station Construction	\$2,400,000	9/20/2024	\$1,451,172	\$2,400,000
Battle Green Streetscape Improvements	\$560,000	7/26/2024	\$529,161	\$560,000
High School Equipment Emergency Funds	\$200,000	1/17/2025	\$200,000	\$200,000
LHS Feasibility Study	\$324,900	9/20/2024	\$324,900	\$324,900
New Sidewalk Installations	\$1,000,000	3/14/2025	\$32,195	\$1,000,000
Solar Canopy & System - New Police Station	\$3,000,000	10/18/2024	\$377,112	\$3,000,000
Compost Equipment Replacement	\$299,000	10/18/2024	\$299,000	\$299,000
Pine Meadows Clubhouse Renovation	\$1,275,000	1/17/2025	\$602,569	\$1,275,000
Lexington High School Design	\$2,500,000	3/14/2025	\$1,145,248	\$2,500,000
173 Bedford Street Renovation	\$3,000,000	5/9/2025	\$69,394	\$3,000,000
Total	\$15,851,900		\$6,104,680	\$15,851,900

(Please Note: The following certificate is an essential part of the permanent record and creates ongoing obligations of the Issuer. Please read it carefully before signing. Advise Troutman Pepper Locke LLP of any inaccuracy.)

SIGNIFICANT EVENTS DISCLOSURE CERTIFICATE

This Significant Events Disclosure Certificate (the “Disclosure Certificate”) is executed and delivered by the Town of Lexington, Massachusetts (the “Issuer”) in connection with the issuance of \$15,851,900 General Obligation Bond Anticipation Notes dated July 25, 2025 (the “Notes”). The Issuer covenants and agrees as follows:

SECTION 1. Purpose of the Disclosure Certificate. This Disclosure Certificate is being executed and delivered by the Issuer for the benefit of the Owners of the Notes and in order to assist the Participating Underwriter in complying with the Rule.

SECTION 2. Definitions. For purposes of this Disclosure Certificate the following capitalized terms shall have the following meanings:

“Listed Events” shall mean any of the events listed in Section 3(a) of this Disclosure Certificate.

“MSRB” shall mean the Municipal Securities Rulemaking Board as established pursuant to Section 15B(b)(1) of the Securities Exchange Act of 1934, or any successor thereto or to the functions of the MSRB contemplated by this Disclosure Certificate. Filing information relating to the MSRB is set forth in Exhibit A attached hereto.

“Obligated Person” shall mean the Issuer.

“Owners of the Notes” shall mean the registered owners, including beneficial owners, of the Notes.

“Participating Underwriter” shall mean any of the original underwriters of the Notes required to comply with the Rule in connection with offering of the Notes.

“Rule” shall mean Rule 15c2-12 adopted by the Securities and Exchange Commission under the Securities Exchange Act of 1934, as the same may be amended from time to time.

SECTION 3. Reporting of Significant Events.

(a) The Issuer shall give notice, in accordance with the provisions of this Section 3, of the occurrence of any of the following events with respect to the Notes:

1. Principal and interest payment delinquencies.
2. Non-payment related defaults, if material.
3. Unscheduled draws on debt service reserves reflecting financial difficulties.

4. Unscheduled draws on credit enhancements reflecting financial difficulties.
5. Substitution of credit or liquidity providers, or their failure to perform.
6. Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB) or other material notices or determinations with respect to the tax status of the Notes, or other material events affecting the tax status of the Notes.
7. Modifications to rights of the Owners of the Notes, if material.
8. Bond calls, if material, and tender offers.
9. Defeasances.
10. Release, substitution or sale of property securing repayment of the Notes, if material.
11. Rating changes.
12. Bankruptcy, insolvency, receivership or similar event of the Obligated Person.*
13. The consummation of a merger, consolidation, or acquisition involving an Obligated Person or the sale of all or substantially all of the assets of the Obligated Person, other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms, if material.
14. Appointment of a successor or additional trustee or the change of name of a trustee, if material.
15. Incurrence of a financial obligation of the Obligated Person, if material, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a financial obligation of the Obligated Person, any of which affect Owners of the Notes, if material.†

* As noted in the Rule, this event is considered to occur when any of the following occur: (i) the appointment of a receiver, fiscal agent or similar officer for an Obligated Person in a proceeding under the U.S. Bankruptcy Code or in any proceeding under state or federal law in which a court or governmental authority has assumed jurisdiction over substantially all of the assets or business of an Obligated Person, or if such jurisdiction has been assumed by leaving the existing governing body and officials or officers in possession but subject to the supervision and orders of a court or governmental authority, or (ii) the entry of an order confirming a plan of reorganization, arrangement or liquidation by a court or governmental authority having supervision or jurisdiction over substantially all of the assets or business of the Obligated Person.

† For purposes of event numbers 15 and 16 in Section 3(a) of this Disclosure Certificate, the term “financial obligation” means a (i) debt obligation; (ii) derivative instrument entered into in connection with, or pledged as security or a source of payment for, an existing or planned debt obligation; or (iii) guarantee of (i) or (ii). The term “financial obligation” excludes municipal securities for which a final official statement has been provided to the MSRB consistent with the Rule.

16. Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation of the Obligated Person, any of which reflect financial difficulties.[†]

(b) Upon the occurrence of a Listed Event, the Issuer shall, in a timely manner not in excess of ten (10) business days after the occurrence of the event, file a notice of such occurrence with the MSRB.

SECTION 4. Transmission of Information and Notices. Unless otherwise required by law, all notices, documents and information provided to the MSRB shall be provided in electronic format as prescribed by the MSRB and shall be accompanied by identifying information as prescribed by the MSRB.

SECTION 5. Termination of Reporting Obligation. The Issuer's obligations under this Disclosure Certificate shall terminate upon the legal defeasance or payment in full of all of the Notes.

SECTION 6. Default. In the event of a failure of the Issuer to comply with any provision of this Disclosure Certificate the sole remedy under this Disclosure Certificate shall be an action for specific performance of the Issuer's obligations hereunder and not for money damages in any amount. Any failure by the Issuer to comply with any provision of this Disclosure Certificate shall not constitute a default with respect to the Notes.

SECTION 7. Amendment. Notwithstanding any other provision of this Disclosure Certificate, the Issuer may amend this Disclosure Certificate and any provision of this Disclosure Certificate may be waived if such amendment or waiver is permitted by the Rule, as evidenced by an opinion of counsel expert in federal securities law (which may also include bond counsel to the Issuer) to the effect that such amendment or waiver would not cause this Disclosure Certificate to violate the Rule.

[Remainder of page intentionally left blank; signature page follows.]

SECTION 8. Beneficiaries. This Disclosure Certificate shall inure solely to the benefit of the Owners of the Notes from time to time, and shall create no rights in any other person or entity.

Date: July 25, 2025

TOWN OF LEXINGTON,
MASSACHUSETTS

By: _____
Treasurer

Select Board

EXHIBIT A

Filing information relating to the Municipal Securities Rulemaking Board is as follows:

Municipal Securities Rulemaking Board

<http://emma.msrb.org>

Registered
Number 1

Registered
\$15,851,900

United States of America

The Commonwealth of Massachusetts

TOWN OF LEXINGTON

GENERAL OBLIGATION
BOND ANTICIPATION NOTE
(Municipal Purpose Loan of 2025)

<u>Interest Rate</u>	<u>Maturity Date</u>	<u>Registration and Original Issue Date</u>	<u>CUSIP</u>
4.00%	February 27, 2026	July 25, 2025	529284 5C1

PRINCIPAL AMOUNT: FIFTEEN MILLION EIGHT HUNDRED FIFTY-ONE
THOUSAND NINE HUNDRED DOLLARS

REGISTERED OWNER: CEDE & CO.

REGISTRAR AND
PAYING AGENT: U.S. BANK TRUST COMPANY, NATIONAL ASSOCIATION

The Town of Lexington, Massachusetts (the “Town”) for value received, promises to pay to the Registered Owner of this note or registered assigns the Principal Amount specified above in lawful money of the United States of America on the Maturity Date upon presentation and surrender hereof, with interest (calculated on the basis of a 30-day month and a 360-day year) at the Interest Rate per annum, payable on the Maturity Date. This note will bear interest from the Original Issue Date.

This note certificate is the only instrument representing an issue of \$15,851,900 aggregate principal amount of notes issued by the Town pursuant to Chapters 44 and 70B of the General Laws as amended in anticipation of bonds authorized for school, fire, water, department equipment, cemetery, police, streetscape improvement, sidewalk, golf clubhouse renovation, road purposes.

The notes are general obligations of the Town and the full faith and credit of the Town is pledged for the payment of principal of and interest on the notes as the same shall become due.

The notes are being issued by means of a book entry system, with a note certificate immobilized at The Depository Trust Company, New York, New York (“DTC”) evidencing

ownership of the notes in principal amounts of \$1,000 or integral multiples thereof, with the exception of one principal amount of \$1,900, and with transfers of beneficial ownership effected on the records of DTC and its participants pursuant to rules and procedures established by DTC. Note certificates are not available for distribution to the public. The principal of and interest on this note are payable by U.S. Bank Trust Company, National Association, or its successor as paying agent (the "Paying Agent") for the Town, in immediately available funds to the Registered Owner of this note, as nominee of DTC. Transfer of principal and interest payments to participants of DTC is the responsibility of DTC; transfer of principal and interest payments to beneficial owners by participants of DTC will be the responsibility of such participants and other nominees of beneficial owners. The Town is not responsible or liable for maintaining, supervising or reviewing the records maintained by DTC, its participants or persons acting through such participants.

Unless this note certificate is presented by an authorized representative of The Depository Trust Company to the Paying Agent for registration of transfer, exchange or payment, and any note certificate issued is registered in the name of Cede & Co. or such other name as requested by an authorized representative of The Depository Trust Company and any payment is made to Cede & Co., ANY TRANSFER, PLEDGE OR OTHER USE HEREOF FOR VALUE OR OTHERWISE BY OR TO ANY PERSON IS WRONGFUL since the registered owner hereof, Cede & Co., has an interest herein.

In the event that (a) DTC determines not to continue to act as securities depository for the notes or (b) the Town determines that continuation of the book entry system of evidence and transfer of ownership would adversely affect the interests of the beneficial owners of the notes, the Town will discontinue the book entry system with DTC. If the Town fails to identify another qualified securities depository to replace DTC, the Paying Agent will authenticate and deliver replacement notes in the form of fully registered certificates.

This note is transferable only upon the registration books kept by the Paying Agent as registrar, but only in a manner which will maintain immobilization of note certificates at one or more securities depositories. This note may not be transferred or exchanged in a manner which would involve the delivery of note certificates to the beneficial owners unless the book entry system has been discontinued by the Town in accordance with the terms of this note, in which case replacement notes may be issued in accordance with law and such procedures as the Town shall deem appropriate.

The Town hereby covenants that it will take all lawful action necessary to comply with all requirements of the Internal Revenue Code of 1986, as amended, that must be satisfied subsequent to the issuance of the notes in order that interest on the notes be and continue to be excluded from gross income for federal income tax purposes and it will refrain from taking any action that would cause interest on the notes to become included in gross income for federal income tax purposes.

[Remainder of page intentionally left blank; signature page follows.]

In connection with the offering of the notes the Town has executed a Significant Events Disclosure Certificate dated as of the date hereof (as it may be amended from time to time, the "Certificate"). The Town hereby covenants to comply with the provisions of the Certificate, and reference is made to the Certificate for a description of the nature and extent of the obligations of the Town and the rights of the owners of the notes under the Certificate. The Certificate is described in the Official Statement relating to the notes. A copy of the Certificate is available from the Town upon request.

TOWN OF LEXINGTON,
MASSACHUSETTS

By: _____
Treasurer

Countersigned:

Select Board

(Town Seal)

LEGAL OPINION

The following opinion is based on facts and the law existing on the date of original delivery of the notes described therein.

TROUTMAN PEPPER LOCKE LLP
111 Huntington Avenue
Boston, Massachusetts

Arnold Lovering, Treasurer
Town of Lexington
Lexington, Massachusetts

\$15,851,900
Town of Lexington, Massachusetts
General Obligation Bond Anticipation Notes

We have acted as bond counsel to the Town of Lexington, Massachusetts (the “Town”) in connection with the issuance by the Town of the above-referenced notes (the “Notes”) dated July 25, 2025 and payable February 27, 2026. In such capacity, we have examined the law and such certified proceedings and other papers as we have deemed necessary to render this opinion.

As to questions of fact material to our opinion we have relied upon representations and covenants of the Town contained in the certified proceedings and other certifications of public officials furnished to us, without undertaking to verify the same by independent investigation.

Based on our examination, we are of the opinion, under existing law, as follows:

1. The Notes are valid and binding general obligations of the Town and, except to the extent they are paid from the proceeds of the bonds in anticipation of which they are issued or from any other available moneys, the principal of and interest on the Notes are payable from taxes which may be levied upon all taxable property in the Town without limitation as to rate or amount, except as provided under Chapter 44, Section 20 of the General Laws, with respect to that portion of the principal and interest payments that the Town has voted to exempt from the limit imposed by Chapter 59, Section 21C of the General Laws, and subject to the limit imposed by Chapter 59, Section 21C of the General Laws with respect to that portion of the principal and interest payments that the Town has not voted to exempt from that limit.

2. Interest on the Notes is excluded from the gross income of the owners of the Notes for federal income tax purposes. In addition, interest on the Notes is not a specific preference item for purposes of the federal individual alternative minimum tax. However, interest on the Notes will be included in the “adjusted financial statement income” of certain corporations that are subject to the alternative minimum tax under Section 55 of the Internal

Revenue Code of 1986 (the “Code”). In rendering the opinions set forth in this paragraph, we have assumed compliance by the Town with all requirements of the Code, that must be satisfied subsequent to the issuance of the Notes in order that interest thereon be, and continue to be, excluded from gross income for federal income tax purposes. The Town has covenanted to comply with all such requirements. Failure by the Town to comply with certain of such requirements may cause interest on the Notes to become included in gross income for federal income tax purposes retroactive to the date of issuance of the Notes. We express no opinion regarding any other federal tax consequences arising with respect to the Notes.

3. Interest on the Notes is exempt from Massachusetts personal income taxes and the Notes are exempt from Massachusetts personal property taxes. We express no opinion regarding any other Massachusetts tax consequences arising with respect to the Notes or any tax consequences arising with respect to the Notes under the laws of any state other than Massachusetts.

This opinion is expressed as of the date hereof, and we neither assume nor undertake any obligation to update, revise, supplement or restate this opinion to reflect any action taken or omitted, or any facts or circumstances or changes in law or in the interpretation thereof, that may hereafter arise or occur, or for any other reason.

The rights of the holders of the Notes and the enforceability of the Notes may be subject to bankruptcy, insolvency, reorganization, moratorium and other similar laws affecting creditors’ rights heretofore or hereafter enacted to the extent constitutionally applicable, and their enforcement may also be subject to the exercise of judicial discretion in appropriate cases.

/S/ TROUTMAN PEPPER LOCKE LLP