



Date of Council Meeting: January 8, 2013

**TOWN OF LEESBURG
TOWN COUNCIL MEETING**

Subject: Town Council appointments and re-appointments to the Utility Rate Advisory Committee

Staff Contact: Lee Ann Green, Clerk of Council

Recommendation: That Council consider the following appointments and re-appointments to the Utility Rate Advisory Committee:

Mayor Umstattd will be re-nominating Kimberly E. Hicks.
Council Member Butler will be nominating Misha Ptak.
Council Member Dunn will be re-nominating Greg A. Hudson.
Council Member Hammler will be re-nominating Frank Holtz.

Council Member Butler will be nominating John Caron as an out-of-town representative.

Background: The terms of office for Commissioners correspond to the term of the council member who nominated them.

Fiscal Analysis: There is no fiscal impact as no compensation is provided for Committee members.

Attachments: (1) **Resumes**
(2) **Appointment Resolution**

December 23, 2012

Dear Lee Ann Green, Leesburg Clerk of Council

Subject: Statement of Interest and Qualifications for serving on the Leesburg Utility Rate Advisory Committee (URAC)

I am interested in joining the Utility Rate Advisory Committee (URAC) to assist in providing recommendations for appropriate and effective utility rates and practices for Leesburg customers. I am particularly interested in helping to ensure that Leesburg utility practices and rates encourage efficient utility usage and conservation, and do not inadvertently penalize residents for reducing consumption or waste.

My qualifications include:

- Active Leesburg resident homeowner since 1998
- Treasurer of the Exeter Homeowners Association for the past 10 years; responsible for an annual budget exceeding \$900K
- Tracking personal utility usage, including water, gas, and electricity, over the past 10 years
- Quality practices and Process Improvement professional
- Ongoing cooperation with various Town offices, including the Town Manager's, to continue making Exeter and the Town of Leesburg a wonderful place to live.

I look forward to hearing from you regarding next steps.

Sincerely,

Mr. Misha L. Ptak

712 Chimney Court NE

Leesburg, VA 20176

[h] 703-779-5604

[c] 703-623-6629

[e] mishaptak@verizon.net

From: John Caron [jvcaron@smartneighborhood.net]
Sent: Wednesday, January 02, 2013 1:44 PM
To: Lee Ann Green
Subject: Statement of Interest -- URAC

My name is John Caron and I would like to volunteer to serve on the URAC. I am a resident of Lansdowne on The Potomac and have been an out of town water/sewer customer since July 2004. I was involved in the water rate lawsuit efforts but I was not a named plaintiff in the case. Due to this involvement I gained an interest and understanding of the Utility and some of the revenue, cost, and pricing issues and challenges involving the Utility.

I have a successful track record of working on volunteer projects including being the Chairperson of the Lansdowne Facilities & Grounds Committee, a member of the Lansdowne Pool committee, and a member of the Lansdowne Board of Directors for three years. Additionally I was responsible for planning, organizing, and managing the tour portion of a major convention held in Baltimore in 2010.

My professional background includes over 30 years of senior and executive management experience in the information technology industry. I was responsible for managing nationwide professional services organizations specializing in system integration solutions and consulting services for both commercial and government clients. I have a broad and extensive experience in operations management, project and program management, service delivery, organizational change management, personnel management, and P&L management.

Thank you for considering my offer to serve on the URAC.

My contact information is:

John Caron
18999 Rocky Creek Drive
Leesburg, Va. 20176

Phone: 571-333-3739

Email: jvcaron@smartneighborhood.net

GREG A. HUDSON

111 Bridgette Place, N.E.
Leesburg, Virginia 20176

Home: 703-777-4784

gahuds@gmail.com

Cell: 202-747-4735

SENIOR EXECUTIVE - MANAGER

An expert with extensive experience and exceptional success in conceiving, developing, and executing strategic and tactical sales and operational initiatives that drive top-line performance and bottom-line results. An energetic leader who promotes teamwork while initiating change to achieve positive results.

EXPERIENCE SUMMARY

Well rounded legal support professional with over 18 years of corporate management experience in the print and legal support industry: 3 years Director of Business Development, 1.5 years as General Manager, 3 years as Director of Operations, 3 years Customer Service Manager, 4 years Purchasing and Accounts Payable Manager, 3 years Facilities Management Service Representative. Top performer and valuable contributor to corporate executive teams. Experienced backed judgment and extremely versatile with high-caliber cross functional management qualifications. Outstanding role model, talented team builder, mentor and leader.

Professional Experience

DataBank, IMX.
12000 Baltimore Avenue
Beltsville, Maryland 20705

September 2011 – Present
General Manager – Jeff Lawrence
301-837-0197
www.databankimx.com

Mid-Atlantic Director of Business Development – Accounts Payable Automation & Document Management

DataBank, IMX. is a leading national provider of document management, records management and automated accounts payable solutions. Our clients range from local and federal government, universities, medical and corporations partnering with them to transform records from paper to digital to provide greater efficiencies in their business operations.

Evolver, Inc.
1943 Isaac Newton Square
Suite 260
Reston, Virginia 20190

September 2010 – September 2011
President – Michael O’Kane
703-742-4090
www.evolverlegal.com

National Director of Business Development

Evolver Legal Services, Inc. is a privately held I.T. and e-discovery company ranked in the top 17% of privately held organizations (Inc. Magazine, Inc. 5000). Evolver, Inc. transitioned into the legal services

industry three years ago having serviced government agencies with electronic discovery components needed as part of their broad range of service needs. With a strong IT infrastructure in-place, Evolver expanded to include a legal services division.

Evolver Legal provides the full spectrum of the EDRM. The company is a premium solutions provider for the document review tool, Relativity.

As National Director of Business Development for Evolver Legal Services:

- Currently engaged with multiple corporate legal departments throughout the United States assisting with e-discovery readiness and compliance issues utilizing our professional support team as well as suggesting best of breed solutions to meet the needs of the internal corporate legal department.
- Currently providing support on a multi-year discovery and hosting matter with an AMLAW 50 Law Firm and Fortune 500 corporation related to an ongoing intellectual property issue.
- Introduced Evolver Legal Services proprietary Case Management System to an AMLAW 50 Law Firm interested in implementing a version of the tool in-house to manage and track their data on a national scale. Currently in the early phase of engagement and beta-testing.
- Providing management with strategic corporate sponsorship opportunities to market the Evolver Legal name as a growing leader for IT based discovery solutions and consultation.

TechLaw Solutions, Inc.
14500 Avion Parkway
Suite 301
Chantilly, Virginia 20151

July 2009 – September 2010
Sales Director – Chris Anzivino
(703) 818-3225
www.techlawsolutions.com

Southeast Regional Director

TechLaw Solutions, Inc. is a privately held and nationally respected electronic discovery and litigation support organization with base operations in the Washington, D.C. area. The company provides end-to-end solutions from document imaging, computer forensics, processing of ESI and hosting in multiple solutions: Relativity and Case Logistix.

As the Southeast Regional Director for TechLaw Solutions:

- Working directly with the President of TechLaw Solutions and through an engagement with kCura, I identified and qualified an opportunity to sell a large license of kCura's Relativity to the United States Department of Justice - Environmental and Natural Resources Division. This engagement lasted several months and went through numerous negotiated revisions before being implemented in the late summer of 2010 and announced to the public in early 2011. This direct sale was valued alone at \$750,000 with an additional license of kCura's Method, legal hold management solution. This sale also opened the door for the implementation of Relativity into the Executive Office of the United States Attorneys (EOUSA) in the Spring of 2011 after I had departed TechLaw.
- Assisted with presentations and demonstrations of multiple review tool applications including kCura's Relativity and Case Logistix document review tools.
- Engaged corporate legal departments and law firms throughout the Southeast United States for services provided by TechLaw Solutions including forensic services, ESI processing and hosting.
- Engaged prospective clients at industry events to include: Georgetown University Advanced E-Discovery Institute, LegalTech New York, ILTA Las Vegas.

Capital Novus Solutions
10521 Rosehaven Street
Suite 300
Fairfax, Virginia 22030

April 2008 – July 2009
Vice President – Thomas Skelly
(703) 226-1500

Sr. Account Executive

Capital Legal Solutions (now Capital Novus Solutions) is a privately held and internationally respected electronic discovery and computer forensics organization. In 2008, Capital Legal Solutions expanded its global operations to include offices in New York, New York as well as Tokyo, Japan complimenting established operations in Washington, D.C. as well as India. In 2009, Capital Legal Solutions was recognized by Law Technology News with the Bronze Award for Excellence in Electronic Discovery Preservation.

As the Sr. Account Executive for Capital Legal Solutions:

- Responsible for the marketing and business development for the global operations of Capital Legal Solutions reporting directly to the Vice-President and CEO. Sales and business development based on a team approach.
- Key member of the management team providing strategic collaboration on business development action plans. Re-established open dialogue with lost buyers and partnered with the management team to effectively develop working business relationships with corporate litigation departments; an area Capital Legal Solutions had not actively pursued until my return in April 2008.
- Currently assisting with the continued expansion and growth of the organization with total gross revenue of \$12 million in 2008 and expected 2009 revenue between \$14 to \$16 million dollars in a challenging economic environment.

Encore Legal Solutions
8201 Greensboro Drive, LL1
McLean, Virginia 22192

September 2006 – March 2008
CEO – Greg Mazares
www.encodediscovery.com

General Manager

Encore Legal Solutions was ranked as a Top 10 Service Provider of electronic discovery services in the 2007 Socha-Gelbmann Electronic Discovery survey and was also ranked as one of the fastest growing providers of electronic discovery services in the October 2007 AmLaw Tech survey. Encore was a national organization with offices in Texas, Arizona, California, Chicago, Virginia and Washington, D.C.

As General Manager of Encore Legal Solutions Northern Virginia Marketplace:

- Responsible for a staff of 25 full-time and six part time employees working two shifts with revenue in fiscal year 2007 at \$2.4 million with three Account Executives managing the territory.
- Reversed a marketplace that had been producing consecutive months of double digit percentage operating contribution losses in fiscal year 2006 to one that produced five consecutive months of single and double digit operating contributions in 2007.
- In fiscal year 2006, labor as a percentage of revenue was consistently between 40-45% before taking over the management of the marketplace. After leading a change initiative in 2007; labor as a percentage of revenue was steadily reduced and was between 26-30% during the last two quarters of the fiscal year – a company best between Encore Legal Solutions five national operations.

- As General Manager, also oversaw and managed the single largest revenue producing account in 2007 generating revenue of \$350, 000.00 between two regional offices and a single account growth of 541% compared to 2006.
- Working with the marketplace Office Manager, reduced marketplace DSO (Days Sales Outstanding) in the last half of 2006 from 96 days to a company best 62 days in the 2nd Quarter of 2007.
- Right sized the marketplace by reducing the workforce and managing costs through strict budget management, stringent inventory control and a no overtime policy only in extreme client driven circumstances.
- Reported directly to the company CEO and Vice President of National Operations.

Capital Legal Solutions
150 South Washington Street
Suite 500
Falls Church, Virginia 22046

October 2003 – September 2006
CEO – Dharmesh Shingala

www.capitallegals.com

Director of Operations

Capital Legal Solutions is a privately held, electronic discovery company whose original business model was to provide local electronic discovery processing to the Washington, D.C. area as well as consulting services to the largest law firms and corporate legal departments on the East Coast. Capital Legal Solutions original business model changed in 2005 with the opening of a international development center in India and with expanded global service offerings of data collections, computer forensics, software development and electronic discovery processing.

As Director of Operations for Capital Legal Solutions:

- Responsible for the daily operation and management of a rapidly growing start-up electronic discovery operation in October 2003 with a staff of eight engineers, two account executives, one business developer and one receptionist. In September 2006, Capital Legal Solutions employed a regional staff of fifty employees through the company corporate headquarters and internationally employed 45 software engineers developing Capital Legal Solutions proprietary review tool – eZReview.
- Oversaw tremendous growth over a three year period: 2003 revenue: \$1.5 million; 2004 revenue: \$3.5 million; 2005 revenue: \$7.0 million and 2006 revenue: \$8.0 million (estimated).
- Oversaw the day to day management of the Administrative and Quality Control Groups as well as oversaw all matters related to human resources.
- Reported directly to the company CEO on the success and challenges facing each business group and offered suggestions and solutions to the unique challenges facing a rapidly growing small business.
- Assisted with the conceptual development of an electronic based project management system eliminating the paper based job ticket system.
- Worked with the Director of Marketing and Business Development on company marketing strategy meeting with consultants and marketing professional in the print media.

- Capital Legal Solutions was ranked by AmLaw.com as a top twenty nationally ranked electronic discovery provider in 2006.
- Involved with all planning aspects of business and infrastructure expansion planning a potential move to a state of the art secure forensics laboratory.
- Participated in the formulation of the company management structure, labor policies, employee handbook and operating guidelines working with the CEO and company Vice-Presidents.

Balmar Services, Inc.
2818 Fallfax Drive
Falls Church, Virginia 22046
www.balmar.com

September 2001 – September 2003
Vice President – Jim P. Morgan

Customer Service Manager – Corporate Office

Balmar Services, Inc. is a privately held printing and graphics company ranked as a top national provider of printing and graphics services located in the Washington, D.C. region. Balmar provides on-site services through their facilities management operations with a strong focus on associations and law firms.

As Customer Service Manager for Balmar Services, Inc. corporate office:

- Promoted to the position of Customer Service Manager based in the corporate office of Balmar Services, Inc. in September 2001 to use the model of service excellence created in the Washington marketplace during my time as manager and bring the leadership and philosophy to the corporate operation.
- Responsible for the daily operations and management of a twelve member customer service team based out of the corporate office focusing on large print, digital print and legal production needs. Annual revenue in fiscal year 2002 of \$15.6 million.
- Reduced employee overtime by 45% in fiscal year 2002 compared to previous year by restructuring the customer service departments work hours and workloads.
- Department received consistently high online client feedback marks (4.25 out of 5) for exceptional service.
- Developed a team creed that became the Balmar Services, Inc. service philosophy:
 Create a Can Do Attitude
 Serve the needs of our clients: Internal and External
 Respond to these needs effectively to achieve positive results

Customer Service Manager – Washington, D.C. Legal Facility (December 2000-September 2001)

- Responsible for the daily operations and management of a four person customer service department with services focused on the reprographic and small print needs of associations and legal clientele in Washington, D.C.

- Oversaw the day to day service management of twelve off site facilities management offices located in major law firms and associations.
- Reported directly to the Vice-President of Balmar Services, Inc. providing weekly feedback on service and client feedback.
- Created an excellence in service initiative increasing the marketplace service favorability rating from a 3.5 out of 5 when taking over the department in December 2000 to a 4.2 rating out of 5 in a client survey presented in August 2001.

Accounts Payable Supervisor – Washington, D.C. Legal Facility (April 2000 – December 2000)

Returned to Balmar Washington's legal production facility for the purpose of auditing all vendor invoices for the period October 1999 – March 2000. As a direct result of the extensive equipment and invoice audit, Balmar, Inc. was credited over \$80,000.00 by various vendors for payments that had been applied in error by the previous accounting team.

Experience prior to April 2000 includes: Six months as Account Executive – Merrill Corporation; Four years as Purchasing Agent and Accounts Payable Manager – Balmar, Inc.; Two years as Customer Service Representative – Balmar, Inc.

TRAINING AND EDUCATION

- *Sales Management Leadership in the 21st Century, Topline Leadership, Inc., May 2007*
- *Effective Selling Techniques, Xerox University, November 1999*
- *Coaching Skills for Managers and Supervisors, Fred Pryor Seminars, June 1999*
- *Through Education, Accomplishment and Motivation, Greenhouse Group, 1998*
- *The Complete Purchasing Manager, Dun and Bradstreet, January 1997*
- *Effective Time Management, Dun and Bradstreet, February 1996*

George Mason University, 1990 – 1992

Working toward the completion of B.A. Communications with a focus on Radio/Television

Northern Virginia Community College, 1989 – 1990

Relevant Courses Completed: Psychology, Sociology, Public Speaking, Business Marketing, Business Administration, Small Business Management, Creative Writing

Brevard College, 1988 – 1989

Studies focused on Religion, Psychology and General Studies

PRESENTED January 8, 2013

RESOLUTION NO. 2013-

ADOPTED _____

A RESOLUTION: MAKING APPOINTMENTS AND RE-APPOINTMENTS TO THE UTILITY RATE ADVISORY COMMITTEE

WHEREAS, participation by public-spirited citizens on town boards, commissions and committees is vital to the success of town government and the democratic process; and

WHEREAS, boards, commissions and committees serve an indispensable role in providing recommendations concerning town policy and programs; and

WHEREAS, Council desires to appoint effective individuals to serve at its will and pleasure on these advisory boards; and

WHEREAS, certain council members terms have expired and have been re-elected; and

WHEREAS, vacancies exist for out-of-town customer representatives on the committee.

THEREFORE, RESOLVED that the Council of the Town of Leesburg in Virginia hereby:

SECTION I. Appoints Misha Ptak and John Caron to terms ending December 31, 2016.

SECTION II. Re-appoints Kimberly Hicks to a term ending on December 31, 2014 and Greg Hudson and Frank Holtz to terms ending on December 31, 2016.

PASSED this 8th day of January, 2013.

Kristen C. Umstatt, Mayor
Town of Leesburg

ATTEST:

Clerk of Council