


**DISCLOSURE BY SPECIAL STATE EMPLOYEE  
OF FINANCIAL INTEREST IN A STATE CONTRACT  
AS REQUIRED BY G. L. c. 268A, § 7(d)**

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	<b>SPECIAL STATE EMPLOYEE INFORMATION</b>
Name of <b>special state employee</b> :	Kathleen Burgener
Put an X beside one statement.	<p>I am a <b>special state employee</b> because:</p> <p><input type="checkbox"/> I serve in a state position for which <b>no compensation</b> is provided.</p> <p><input checked="" type="checkbox"/> I am not an elected official, and I earned <b>compensation for fewer than 800 hours</b> in the preceding 365-day period.</p> <p><input type="checkbox"/> By the classification of my position by my state agency or by the terms of a contract or my conditions of employment, I am <b>permitted to have personal or private employment during normal business hours</b>.</p> <p><input type="checkbox"/> I work for a company or organization which has a contract with a state agency, and I am a "<b>key employee</b>" because the contract identifies me by name or it is otherwise clear that the state is contracting for my services in particular, and the <b>contract states that I am a special state employee or indicates that I meet one of the three requirements listed above</b>.</p>
Title/ Position	Of Counsel at Krokidas & Bluestein, representing state agencies listed on Attachment A.
<b>Fill in this box if it applies to you.</b>	<p>If you are a special state employee because a state agency has contracted with your company or organization, please provide the name and address of the company or organization.</p> <p>Krokidas &amp; Bluestein, 600 Atlantic Avenue, Boston, MA 02210</p>
State Agency/ Department:	<p>This is "my State Agency."</p> <p>See Attachment A</p>
Agency Address:	See Attachment A
Office phone:	617-482-7211
Office e-mail:	kburgener@kb-law.com
	Check one: <input type="checkbox"/> Elected or <input checked="" type="checkbox"/> Non-elected
Starting date as a special state employee.	See Attachment A
<b>BOX # 1</b>  N/A  Select either <b>STATEMENT #1</b> or <b>STATEMENT #2</b> .	<p><b>ELECTED SPECIAL STATE EMPLOYEE</b></p> <p>I am an <b>elected special state employee</b>.</p> <p><input type="checkbox"/> <b>STATEMENT #1:</b> I had a financial interest in a contract made by a state agency <b>before</b> I was elected to a compensated special state employee position. I will continue to have this financial interest in a state contract.</p> <p><input type="checkbox"/> <b>STATEMENT #2:</b> I will have a <b>new</b> financial interest in a contract made by a state agency.</p>

<p><b>Write an X by your financial interest.</b></p>	<p><b>My financial interest in a contract made by a state agency is:</b></p> <p><input type="checkbox"/> A compensated, non-elected position with a state agency.</p> <p><input type="checkbox"/> A contract between a state agency and myself.</p> <p><input type="checkbox"/> A financial benefit or obligation because of a contract that a state agency has with another person or with a company or organization.</p> <p><input type="checkbox"/> Other work because a state agency has a contract with my company or organization and I am a "key employee" because the contract identifies me by name or it is otherwise clear that the state is contracting for my services in particular.</p>
<p><b>BOX #2</b></p> <p><b>Select either STATEMENT #1 or STATEMENT #2.</b></p> <p><b>Write an X by your financial interest.</b></p>	<p><b>NON-ELECTED SPECIAL STATE EMPLOYEE</b></p> <p>I am a <b>non-elected special state employee</b> (compensated or uncompensated).</p> <p><input type="checkbox"/> <b>STATEMENT #1:</b> I had a financial interest in a contract made by a state agency, other than an employment contract, <b>before</b> I took a non-elected, compensated special state employee position. I will continue to have this financial interest in a state contract.</p> <p><b>My financial interest in a contract made by a state agency is:</b></p> <p><input type="checkbox"/> A contract between a state agency and myself, but not an employment contract.</p> <p><input type="checkbox"/> A financial benefit or obligation because of a contract that a state agency has with another person or with a company or organization.</p> <p><b>OR</b></p> <p><input checked="" type="checkbox"/> <b>STATEMENT #2:</b> I will have a <b>new</b> financial interest in a contract made by a state agency.</p> <p><b>My financial interest in a contract made by a state agency is:</b></p> <p><input type="checkbox"/> A compensated, non-elected position with a state agency.</p> <p><input type="checkbox"/> A contract between a state agency and myself.</p> <p><input type="checkbox"/> A financial benefit or obligation because of a contract that a state agency has with another person or with a company or organization.</p> <p><input checked="" type="checkbox"/> Other work because a state agency has a contract with my company or organization and I am a "key employee" because the contract identifies me by name or it is otherwise clear that the state is contracting for my services in particular.</p>
<p><b>FINANCIAL INTEREST IN A STATE CONTRACT</b></p>	
<p>Name and address of state agency that made the contract</p>	<p>This is the "contracting agency."</p> <p>See Attachment A and B</p>
<p>Write an X to confirm this statement.</p>	<p><input checked="" type="checkbox"/> In my work as a special state employee for my State Agency, I <b>do not participate in or have official responsibility for any of the activities of the contracting agency.</b></p>
<p><b>FILL IN THIS BOX OR THE NEXT BOX</b></p> <p>N/A</p>	<p><b>ANSWER THE QUESTION IN THIS BOX IF THE CONTRACT IS BETWEEN THE STATE AGENCY AND YOU.</b></p> <p>- Please explain what the contract is for.</p>

	<p><b>ANSWER THE QUESTIONS IN THIS BOX IF THE CONTRACT IS BETWEEN THE STATE AGENCY AND ANOTHER PERSON OR ENTITY</b></p> <ul style="list-style-type: none"> <li>- Please identify the person or entity that has the contract with the state agency. Krokidas &amp; Bluestein LLP</li> <li>- What is your relationship to the person or entity? Of Counsel</li> <li>- What is the contract for? See Attachment A and B</li> </ul>
What is your financial interest in the state contract?	<ul style="list-style-type: none"> <li>- Please explain the financial interest and include the dollar amount if you know it.</li> </ul> <p>See Attachment A and B</p>
Date when you acquired the financial interest	See Attachment A and B
What is the financial interest of your immediate family?	<ul style="list-style-type: none"> <li>- Please explain the financial interest and include the dollar amount if you know it.</li> </ul> <p>N/A</p>
Date when your immediate family acquired the financial interest	N/A
Employee signature:	
Date:	10.26.21

Attach additional pages if necessary.

File your completed, signed Disclosure with:  
State Ethics Commission, One Ashburton Place, Room 619, Boston, MA 02108

## Kathleen Burgener Attachment A

Name & Address of State Agency	Original Contract Start Date	Subject of contract/K&B representation	Hourly Billing Rate of Responding Attorney	Contract Maximum
Department of Housing & Community Development 100 Cambridge Street, Suite 300 Boston, MA 02114	9/3/2019	Representation of DHCD in financings of affordable housing projects for the benefit of other state and municipal agencies as MassDocs lenders	Elizabeth Ross Kathleen Burgener Gabriel Balzano-Brookes	None \$430.00 \$360.00 \$225.00
City on a Hill, Inc. City on a Hill Charter Public School 31 Heath Street Jamaica Plain, MA 02130 <i>(for work for City on a Hill Charter Public School, City on a Hill Charter Public School II and City on a Hill Charter Public School New Bedford)</i>	7/18/2005	general legal advice, financing, real estate, contracts, student affairs, and compliance with state and federal law	Elka Sachs Kathleen Burgener	None \$420.00 \$370.00
Conservatory Lab Charter School 2120 Dorchester Ave. Dorchester, MA 02124	8/12/2002	general legal advice, financing, real estate, and compliance with state and federal law	Elka Sachs Anthony Cichello Kathleen Burgener	None \$420.00 \$370.00
Massachusetts Development Finance Agency 99 High Street Boston, MA 02110	8/12/2013	Representation in connection with various real estate matters	Kathryn Murphy Kathleen Burgener Gabriel Balzano-Brookes	None \$430.00 \$370.00 \$240.00

## Kathleen Burgener

### Original Contract **Attachment B**

Name & Address of State Agency	Start Date	Subject of contract/K&B representation	Contract Maximum
Academy of the Pacific Rim Charter Public School One Westinghouse Plaza Hyde Park, MA 02136	3/1/2012	bylaws review	None
Alma Del Mar Charter School 515 Bellville Ave. New Bedford, MA 02746	10/1/2018	Procurement	None
Benjamin Banneker Charter School 21 Notre Dame Ave. Cambridge, MA 02142	10/10/2000	general legal advice re: the ongoing operations of the school, student affairs	None
Boston Collegiate Charter School 215 Sydney Street Dorchester, MA 02125	5/29/2012	general legal advice, corporate structure, compliance with state and federal law, contracts, financing, real estate, and construction	None
Boston Preparatory Charter School 1286 Hyde Park Avenue Boston, MA 02136	5/13/2016	Governance and statutory requirements	None
Codman Academy Charter Public School 637 Washington Street Dorchester, MA 02124	1/10/2019	Transfer of Condominium Unit and Lease	None
Community Charter School of Cambridge 245 Bent Street Cambridge, MA 02141	2/3/2017	Lottery questions	None
Edward W. Brooke Charter School 190 Cummins Way Roslindale, MA 02131	10/28/2010	general legal advice, corporate structure, employment matters, contracts, and compliance with state and federal law	None

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### Attachment B

Original Contract

Name & Address of State Agency	Start Date	Subject of contract/K&B representation	Contract Maximum
Excel Academy Charter School 1150 Saratoga Street East Boston, MA 02128 <i>(includes Excel Academy Charter School - Boston II and Excel Academy Charter School - Chelsea)</i>	8/8/2003	general legal advice, non-profit matters, financing, school operations, contracts, compliance with state and federal law, tax matters, and non-profit matters	None
Francis Parker Charter School 49 Antietam Street Devens, MA 10434	2/8/1995	general legal advice, corporate structure, non-profit matters, construction, financing, real estate, compliance with federal and state law, and fundraising	None
Hampden Charter School of Science 20 Johnson Road Chicopee, MA 01022	7/13/2010	public procurement	None
Holyoke Community Charter School 220 Northampton Street Holyoke, MA 01040	9/9/2021	student discipline training	None
KIPP Academy Lynn Charter School/KIPP Academy Boston Charter School 90 High Rock Street Lynn, MA 01902	1/18/2006	general legal advice, financing, real estate, compliance with state and federal law, tax matters, corporate structure, employment matters, construction and financing	None
Lawrence Family Development Charter School 34 West Street Lawrence, MA 01841	12/5/2017	organizational structure	None
Lowell Community Charter Public School 206 Jackson Street Lowell, MA 01852	1/25/2016	employment, governance and regulatory requirements; student affairs	None

## Kathleen Burgener

### Attachment B

Original Contract

Start Date      Subject of contract/K&B representation

Contract  
Maximum

Name & Address of State Agency Marblehead Community Charter School 17 Lime Street Marblehead, MA 01945	3/23/2017	Special Education matters	None
Massachusetts Convention Center Authority 415 Summer Street Boston, MA 02210	6/21/2016	Legal assistance and documentation concerning transactions relating to properties and property development adjacent to the Boston Convention and Exhibition Center	None
Massachusetts Division of Capital Asset Management One Ashburton Place Boston, MA 02108	11/28/2006	Representation in connection with various real estate matters	None
Massachusetts Housing Finance Agency One Beacon Street Boston, MA 02110	9/20/2016	General legal advice	None
Massachusetts Housing Partnership Fund Board 160 Federal Street, 2nd floor Boston, MA 02210	12/31/1988	General legal advice and representation of MHP in connection with financings of affordable housing projects	None
Massachusetts Port Authority One Harborside Drive, Suite 200S East Boston, MA 02128	5/6/2011	Representation in connection with various real estate matters	None
MATCH Charter Public School 1001 Commonwealth Ave. Boston, MA 02215	8/14/2000	general legal advice, finance, financing, real estate, construction, compliance with federal and state law, employment matters, contracts, litigation, charter school compliance, graduate program, corporate structure, and tax	None

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### Attachment B Original Contract

Name & Address of State Agency	Start Date	Subject of contract/K&B representation	Contract Maximum
Neighborhood House Charter School 21 Queen Street Dorchester, MA 02122	5/20/2014	general legal advice and compliance with state and federal law	None
New Heights Charter School of Brockton 1690 Main Street Brockton, MA 02301	12/18/2018	transportation issues	None
Office of the Speaker of the House Office of the Counsel to the House of Representatives State House, Room 139 Boston, MA 02133	11/3/2009	Advice regarding employment matters	None
Office of the State Treasurer and Receiver General State House, Room 139 Boston, MA 02133	7/17/2019	Defense of MCAD complaint	None
Phoenix Academy Charter School 59 Nocholas Street Chelsea, MA 02150	7/20/2016	Regulatory Advice	None
Pioneer Charter School of Science 548 Broadway, Suite C Everett, MA 02149 <i>(Includes Pioneer Charter School of Science II)</i>	6/13/2012	general legal advice, compliance with state and federal law, real estate, contracts, and corporate governance	None
Rising Tide Charter Public School 6 Resnik Road Plymouth, MA 02360	10/29/2004	general legal advice, financing, real estate, contracts, and compliance with state and federal law	None

Kathleen Burgener

Original Contract  
**Attachment B**

Start Date Subject of contract/K&B representation

Contract

Maximum

Name & Address of State Agency

River Valley Charter School  
2 Perry Way  
Newburyport, MA 01950

5/13/2021

general legal advice, and real estate

None

South Shore Charter Public School

100 Longwater Circle  
Norwell, MA 02061

10/3/2002

general legal advice, corporate structure, financing, and compliance with state and federal law

None

University of Massachusetts

One Beacon Street, 31st floor  
Boston, MA 02108

5/20/2008

Miscellaneous projects for UMass Lowell related to real estate and general representation on employment matters

None

Veritas Preparatory Charter School

370 Pine Street  
Springfield, MA 01105

7/31/2017

Governance matters

None