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ELECTED TOWN OFFICERS

FY22 Elected Officials

Department	Term	Member First Name	Member Last Name	Term Ends
Board of Appeals	5 years	Michael	Banner	2026
Board of Appeals		Gary	Shaw	2022
Board of Appeals		Scott	Jenssen	2023
Board of Appeals		Jonathan	Levin	2024
Board of Appeals		Susan	Cooper	2025
Board of Assessors	3 years	Teresa	Steibel	2024
Board of Assessors		Scott	Steibel	2022
Board of Assessors		Gary	Shaw	2023
Board of Health	3 years	Roy	Carwile	2024
Board of Health		Julio	Rodriguez	2022
Board of Health		John	Makuc, Chair	2023
Bylaw Review Committee	2 years			2024
Bylaw Review Committee	2 years			2024
Bylaw Review Committee	3 years			2025
Bylaw Review Committee	3 years			2025
Bylaw Review Committee	1 year			2023
Cemetery Committee	3 years	Linda	Thorpe, Chair	2024
Cemetery Committee		James	Dutcher	2022
Cemetery Committee		David	Brown	2023
Constable	3 years	Julio	Rodriguez	2022
Finance Committee	3 years	Katrina	Fitzpatrick	2024
Finance Committee		Jonathan	Sylbert	2022
Finance Committee		Michele	Miller	2023
Library Trustees	3 years	Ann	Canning	2024 Resigned 6/28/21
Library Trustees	until next election	Nancy	Kleban	until next election
Library Trustees		Cheryl	Zellman	2024
Library Trustees		Mickey	Jervas	2022
Library Trustees		Lisa	Smyle	2022 resigned 11/8/21
Library Trustees		Shannon	Amidon Castille	2023 resigned 10/13/21
Library Trustees	until next election	Judy	Kaminstein	until next election
Library Trustees		John	Higgins	2023
Moderator	1 year	Mark	Makuc	2022
Park Commission	3 years	Tracey	Brennan	2024
Park Commission		Thomas	Mensi	2024
Park Commission		Gerard	Clarín	2022
Park Commission		Steven	Snyder	2022

APPOINTED OFFICIALS

FY22 Appointments

Department/ Committee	Appt. Term	Member First Name	Member Last Name	Appt. Start Date	Appt. Expires	Notes
911 Coordinator	no expiration	Shawn	Tryon	7/5/2016	no expiration date	
ADA Coordinator	1 year					
Administrative Assistant						
Alternate Building Commissioner	2 years	Don	Fitzgerald	6/16/2021	06/30/23	
Board of Health	5 months	Mort	Salomon	12/9/2021	until the May 2022 election	
BRPC, Alternate	1 year	Laura	Mensi	7/21/2021	06/30/22	
Berkshire Regional Transit Authority (BRTA) Advisory Board Representative	1 year	Justin	Makuc	6/16/2021	06/30/22	
Board of Appeals, Alternates (2 members)	5 years					
Board of Appeals, Alternates (2 members)	5 years					
Bylaw Review Committee	Until May 2022	Mari	Enoch	11/24/2021	until the May 2022 election	
Bylaw Review Committee	Until May 2022	Jeff	Zimmerman	11/24/2021	until the May 2022 election	
Bylaw Review Committee	Until May 2022	David	Myers	11/24/2021	until the May 2022 election	
Bylaw Review Committee	Until May 2022	Stuart	Litwin	11/24/2021	until the May 2022 election	
Bylaw Review Committee	Until May 2022	Pauline	Banducci	11/24/2021	until the May 2022 election	
Inspector of Buildings, Building Commissioner and Code Enforcement Officer	2 years	Donald	Torrico	6/16/2021	06/30/23	
Care of Soldiers' Graves	3 years	James	Dutcher	4/24/2019	06/30/22	
Civil Defense Coordinator	3 years	Peter	Brown	6/24/2020	06/30/23	
Conservation Commission	3 years	Jeremy	Rawitz	6/16/2021	06/30/24	resigned 1/30/22
Conservation Commission	3 years					
Conservation Commission	3 years	Margo	Drohan	8/28/2019	06/30/22	
Conservation Commission	3 years	Nancy	Tomasovich	1/15/2020	01/15/23	resigned 1/30/22
Conservation Commission	3 years					
Conservation Commission	3 years	Michael	Zisser	1/6/2021	01/06/24	resigned 1/31/22
Conservation Commission	3 years	Noel	Wicke	5/4/2022	05/04/25	
Conservation Commission	3 years	Leslie	Lichter	4/21/2021	04/21/24	resigned 1/31/22
Conservation Commission	3 months	Chris	Blair	4/27/2022	09/15/22	
Conservation Commission	3 months	Tim	Lovett	4/27/2022	09/15/22	
Conservation Commission	4 months	Dave	Dempsey	5/5/2022	09/15/22	
Conservation Commission Agent	90days	Caleb	Mitchell	8/10/2021	11/08/21	resigned 12/1/21

APPOINTED OFFICIALS

FY22 Appointments

Conservation Commission Agent, Temporary	1 year	Kimberly	Wetherell	4/12/2022	up to 90 days not to exceed 8 consecutive months	04/12/23
Council on Aging	Temporary	Mary	Stucklen	4/21/2021	resigned 8/30/21	
Council on Aging	3 years	Ruth	Champligny	6/16/2021		
Council on Aging	3 years	Kyle	Pierce	6/16/2021	06/30/24	
Council on Aging	3 years	Rosalyn	Halberslader	6/16/2021	06/30/24	
Council on Aging	3 years	Norma	Champligny	12/5/2018	12/05/21	
Council on Aging	3 years	Ilene	Marcus	6/16/2021	06/30/24	resigned 1/1/22
Council on Aging	3 years	Joanne	Bell	7/3/2019	06/30/24	
Council on Aging	3 years	Maureen	Banner	2/17/2022	02/17/25	
Council on Aging	3 years	Linda	Saberski	11/23/2020	11/23/23	
Cultural Council (max: 2 consecutive terms)	3 years	Maggie	Barkin	9/18/2019	09/18/22	
Cultural Council (max: 2 consecutive terms)	3 years	Wendy	Germain	6/16/2021	06/30/24	
Cultural Council (max: 2 consecutive terms)	3 years	Carole	Clarin	6/16/2021	06/30/24	
Cultural Council (max: 2 consecutive terms)	3 years	Janet	Jensen	9/18/2019	06/18/22	
Cultural Council (max: 2 consecutive terms)	3 years	Dorene	Beller	5/6/2020	05/06/23	
Cultural Council (max: 2 consecutive terms)	3 years	Stephanie	Sloane	12/29/2021	12/29/24	
Cultural Council (max: 2 consecutive terms)	3 years	Erica	Stern	12/16/2020	12/16/23	
Director of Operations for Highways						
Buildings and Town Property	no expiration date	Shawn	Tryon	7/5/2016	no expiration date	
Election Warden	3 years	Albeth	Lewin	4/27/2022	04/27/23	
Election Workers	1 year	Evelyn	Vallianos	6/16/2021	06/30/22	
Election Workers	1 year	Gary	Shaw	6/16/2021	06/30/22	
Election Workers	1 year	Steve	Pullen	6/16/2021	06/30/22	
Election Workers	1 Year	Scott	Steibel	6/16/2021	06/30/22	
Election Workers	1 year	Rosemary	McAlister	6/16/2021	06/30/22	
Election Workers	1 year	Susan	Cooper	6/16/2021	06/30/22	
Election Workers	1 year	John	Higgins	5/5/2021	05/05/22	
Election Workers	1 year	Ilene	Marcus	5/5/2021	05/05/22	
Election Workers	1 year	Pauline	Bardiucci	5/5/2021	05/05/22	
Election Workers	1 year	Albeth	Lewin	4/27/2022	04/27/23	
Emergency Management Director	3 years	Gareth	Backhaus	6/16/2021	06/30/24	
Emergency Manager, Deputy	3 years	Shawn	Tryon	6/24/2020	06/30/23	
Fence Viewer	3 years	Peter	Brown	6/16/2021	06/30/24	MGL 40 s 18
Field Driver	3 years					
Fire Department	no expiration date	Shawn	Tryon, Chief	7/5/2016	no expiration date	
Fire Department	no expiration date	Mark	Makus, Captain	7/5/2016	no expiration date	
Fire Department	no expiration date	Del	Martin, Captain	7/5/2016	no expiration date	
Fire Department	no expiration date	Patrick	Sheridan, Firefighter	7/5/2016	no expiration date	
Fire Department	no expiration date	John	Makus, Firefighter	7/5/2016	no expiration date	
Fire Department	no expiration date	Robert	Rodgers, Firefighter	7/5/2016	no expiration date	

APPOINTED OFFICIALS

FY22 Appointments

Fire Department	no expiration	Chris	Tryon, Deputy Chief	7/5/2016	no expiration date
Fire Department	no expiration	Cody	Funk, Firefighter	7/5/2016	no expiration date
Fire Department	no expiration	Justin	Makuc, Firefighter	7/5/2016	no expiration date
Fire Department	no expiration	Charly	Loy, Firefighter	1/15/2020	no expiration date
Fire Department	no expiration	Kevin	Fitzpatrick	6/27/2018	no expiration date
Fire Department	no expiration	Kyle	Hulson	6/27/2018	no expiration date
Fire Department	no expiration	Tom	Ryan	6/5/2019	no expiration date
Fire Department	no expiration	Keegan	Wellauer, Junior Firefighter	7/5/2016	no expiration date
Fire Department	no expiration	Random	Ziegler, Junior Firefighter	12/20/2017	no expiration date
Fire Department	no expiration	Chris	Isner, Firefighter	8/5/2020	no expiration date
Fire Department	no expiration	Nate	Miorawiec, Probationary Firefighter	1/6/2021	no expiration date
Fire Department	no expiration	Brian	Dillon, Probationary Firefighter	6/30/2021	no expiration date
Fire Department	no expiration	Nathan	Reynolds, Probationary Firefighter	8/18/2021	no expiration date
Fire Department	no expiration	Tyler	Collins, Firefighter	8/18/2021	no expiration date
Fire Department	no expiration	Felix	Carrol, Firefighter	2/9/2022	no expiration date
Fire Department	no expiration	Kyle	Pettibone	5/5/2022	no expiration date
Fire Department	no expiration	Darien	Houlihan	5/5/2022	no expiration date
Fire Department	no expiration	Jim	Hunt, Firefighter	8/18/2021	no expiration date
Fire Inspector	1 year	Shawn	Tryon	6/16/2021	06/30/22
Gas Inspector	2 years	Robert	Krupski	6/24/2020	06/30/22
Harbormaster, Lake Garfield & Lake Buel	3 years	Gareth	Backhaus	6/16/2021	06/30/24
Historical Commission	3 years				
Historical Commission	3 years				
Historical Commission	3 years				
Historical Commission	3 years				
Historic District Study Committee	7 months	Barbara	Swann	11/24/2021	06/30/22
Historic District Study Committee	7 months	Leon	Leon	11/24/2021	06/30/22
Historic District Study Committee	1 year	Rob	Nelson	1/6/2021	01/06/22 deceased
Historic District Study Committee	1 year	Don	Barkin	10/20/2021	10/20/22
Historic District Study Committee	6 months	Robert	Rausch	1/5/2022	06/30/22
Historic District Study Committee	1 year	Kate	Lascar Budak	6/16/2021	06/30/22
Historic District Study Committee	6 months	Maureen	McFarland	1/5/2022	06/30/22
Historic District Study Committee	1 year	Stephanie	Sloane	6/16/2021	06/30/22
Inspector of Wires	2 years	Nick	Fredsal	6/24/2020	06/30/22
Inspector of Wires, Alternate	2 years	Jim	Kern	6/16/2021	6/20/2023
Inspector of Wires, Alternate	2 years	Warren	Harrison	6/16/2021	6/20/2023
Lake Garfield Working Group	1 year	Steve	Weisz	6/30/2021	06/30/22
Lake Garfield Working Group	1 year	Greg	Carnese	6/30/2021	06/30/22
Lake Garfield Working Group	1 year	Steve	Snyder	6/30/2021	06/30/22
Lake Garfield Working Group	1 year	Trevor	Hurst	11/10/2021	11/10/22
Lake Garfield Working Group	1 year	Michael	German	6/30/2021	06/30/22
Library Trustee	until next election	Nancy	Kleban	8/5/2021	05/10/22
Library Trustee	until next election	Judy	Kaminstein	10/21/2021	until next election

FY22 Appointments

Library Trustee	until next election	Rebecca	Wolin	2/23/2022	until next election
Local Emergency Planning Committee (LEPC)	3 years	Gareth	Backhaus	6/19/2019	6/30/22
Alternate Building Commissioner	2 years	Jeffrey	Clemons	6/19/2019	6/30/21
Local Building Commissioner	2 years	Owen	Wright	2/6/2019	2/6/21
Local Building Commissioner	2 years				
Materials Recycling Facility (MRF)	1 year				
Advisory Board Representative	3 years				
Memorial Day Coordinator	4 months	Ilene	Marcus	2/23/2022	6/1/22
Memorial Day Parade Committee	4 months	Tom	Sawyer	2/23/2022	6/1/22
Memorial Day Parade Committee	4 months	Justin	Makuc	2/23/2022	6/1/22
Monterey Community Center Committee	1 year	Laurie	Shaw	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Mary	Makuc	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Wendy	Jensen	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Elahe	Lynch	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Kyle	Pierce	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Roz	Halberstadter	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Wendy	Germain	6/16/2021	06/30/22
Monterey Community Center Committee	1 year	Joann	Bell	6/16/2021	06/30/22
Monterey Community Center Committee	3 months	Catherine	Hurst	3/23/2022	06/30/22
Monterey Community Center Committee, Alternate	1 year	Dennis	Lynch	6/16/2021	06/30/22
Outreach Coordinator	1 Year	Emily	Hadsell	11/17/2021	11/17/22
Planning Board	until next election	Lauren	Behrman	6/16/2021	until next election
Planning Board Clerk	1 year				
Plumbing Inspector	2 years	Robert	Krupski	6/24/2020	6/30/22
Plumbing Inspector, Alternate	2 years	Donald	S. Hopkins III	6/22/2020	6/30/22
Police Department, Part Time - Reserve	1 year	Nathan	Semini	6/16/2021	6/30/22
Police Department, Part Time - Reserve	1 year	Keith	Avalle	6/16/2021	6/30/22
Police Department, Part Time - Reserve	1 year	Ian	Mangosan	6/16/2021	6/30/22
Police Department, Part Time - Reserve	1 year	Sabrina	Wilson	6/16/2021	6/30/22
Police Department, Part Time - Reserve	1 year	Lauren	Nelson	12/29/2021	12/29/22
Police Department, Part Time - Reserve	1 year	Santi	Messina	5/5/2021	6/30/22
Police Department, Part Time - Reserve	1 year	Mitchell	Hamilton	4/27/2022	4/27/23
Police Department, Police Chief	1 year	Gareth	Backhaus	6/16/2021	6/30/22
Police Department, Sergeant	3 years	Brian	Fahey	7/1/2020	6/30/23

APPOINTED OFFICIALS

FY22 Appointments

Procurement Officer	no expiration d	Melissa	Noe		6/5/2019	no expiration date	
Records Access Officer	1 year	Melissa	Noe		6/30/2021	06/30/22	
Records Liaison Officer for Select Board	1 year	Melissa	Noe		6/30/2021	06/30/22	
Regional Hazard Mitigation Team	2 years	Garath	Backhaus		6/16/2021	6/30/23	
Registrars of Voters	3 years	Rebecca	Wolin		6/16/2021	6/30/24	
Registrars of Voters	3 years	Katrina	Fitzpatrick		1/15/2020	1/15/23 resigned 4/29/22	
Registrars of Voters	3 years	Steve	Pullen		1/29/2020	1/29/23	
Registrars of Voters	3 years	Scott	Steibel		1/29/2020	1/29/23	
Renewable Energy Working Group	1 year	Peter	Murkett		11/10/2021	11/10/22	
Renewable Energy Working Group	1 year	Chris	Aidun		2/9/2022	6/30/22	
Renewable Energy Working Group	1 year	Peter	Grealish		2/9/2022	6/30/22	
Renewable Energy Working Group	1 year	Rob	Hoogs		2/9/2022	6/30/22	
Renewable Energy Working Group	1 year	John	Prusinsky		2/9/2022	6/30/22	
Sanitary Inspector	2 years	James	Wilusz		6/16/2021	6/30/23	
School Committee Representative	until the next E	Laura	Rodriguez		9/22/2021	until the next Biennial election	
Town Accountant	1 year	Lisa	Kelly		6/16/2021	6/30/22	
Town Charter Committee	1 year	Mickey	Jervas		11/3/2021	11/3/22	
Town Charter Committee	1 year	Jon	Sylbert		11/3/2021	11/3/22	
Town Charter Committee	1 year	Catherine	Hurst		11/3/2021	11/3/22	
Town Charter Committee	1 year	Ronald	Winters		11/3/2021	11/3/22	
Town Clerk	1 year	Terry	Walker		6/16/2021	6/30/22	
Transfer Station Manager	no expiration d	Shawn	Tryon		7/5/2016	no expiration date	
Transfer Station Swap Shack Attendant	no expiration d	Beth	Parks		7/5/2016	no expiration date	
Transfer Station Committee	4 months	Susan	Cooper		2/9/2022	6/30/22	
Transfer Station Committee	4 months	Ilene	Marcus		2/9/2022	6/30/22	
Transfer Station Committee	4 months	Kenn	Basler		2/9/2022	6/30/22	
Transfer Station Committee	4 months	Dave	Glimore		2/9/2022	6/30/22	
Transportation Advisory Committee (Berkshire MPO)	1 year						
Treasurer	1 year	Sara	Hunter		6/16/2021	6/30/22	
Veteran Service Officer	1 year	Julio	Rodriguez		6/16/2021	6/30/22	
Veteran's Agent	1 year	Laure	Hils		6/16/2021	6/30/22	
Veterans Memorial Committee	2 years						
Veterans Memorial Committee	2 years						

ACCOUNTANT REPORT

MONTEREY
Combined Balance Sheet - All Fund Types and Account Groups
as of June 30, 2022
(Unaudited)

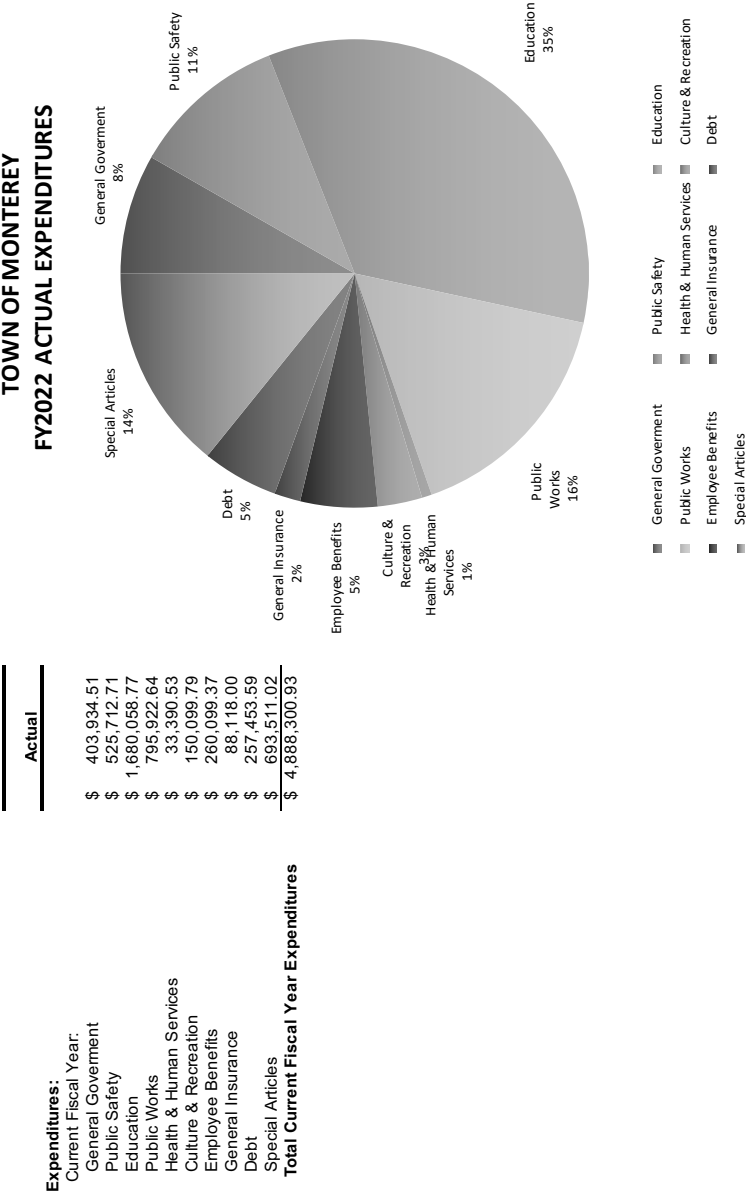
ASSETS						
Cash and cash equivalents	1,432,983.14	355,580.77	29,626.21	862,496.56	2,680,686.68	0.00
Investments						
Receivables:						
Personal property taxes	158.61				158.61	
Real estate taxes	92,860.29				92,860.29	
Allowance for abatements and exemptions	(83,105.18)				(83,105.18)	
Tax liens	30,758.02				30,758.02	
Deferred taxes						0.00
Motor vehicle excise	17,628.15				17,628.15	
Due from other governments	4,082.00				4,082.00	
Other receivables						0.00
Amounts to be provided - payment of bonds					150,000.00	
Amounts to be provided - vacation/sick leave						0.00
Total Assets	1,495,365.03	355,580.77	29,626.21	0.00	862,496.56	2,893,068.57
LIABILITIES AND FUND EQUITY						
Liabilities:						
Warrants payable						0.00
Accounts payable						0.00
Accrued payroll	2,754.00				2,754.00	
Withholdings						0.00
Other liabilities	3,600.00				3,600.00	
Deferred revenue:						
Real and personal property taxes	9,913.72				9,913.72	
Tax liens	30,758.02				30,758.02	
Deferred taxes						0.00
Foreclosures/Possessions						0.00
Motor vehicle excise	17,628.15				17,628.15	
Due from other governments						0.00
Other receivables						0.00
Agency Funds				5,465.48	5,465.48	
Notes payable		143,266.70	1,056,733.30		1,200,000.00	
Bonds payable					150,000.00	
Vacation and sick leave liability						0.00
Total Liabilities	58,299.89	149,620.70	1,056,733.30	0.00	5,465.48	1,420,119.37
Fund Equity:						
Reserved for encumbrances	49,555.28				49,555.28	
Reserved for expenditures	655,381.00				655,381.00	
Reserved for continuing appropriations	135,150.48				135,150.48	
Undesignated fund balance	596,978.38	205,960.07	(1,027,107.09)	857,031.08	632,862.44	
Unreserved retained earnings						0.00
Total Fund Equity	1,437,065.14	205,960.07	(1,027,107.09)	0.00	857,031.08	1,472,949.20
Total Liabilities and Fund Equity	1,495,365.03	355,580.77	29,626.21	0.00	862,496.56	2,893,068.57

ACCOUNTANT REPORT

**TOWN OF MONTEREY, MASSACHUSETTS
STATEMENT OF REVENUES
GENERAL FUND - ESTIMATE AND ACTUAL
FOR THE YEAR ENDED JUNE 30, 2022**

	Estimate	Actual	Increase (Decrease)
Revenues:			
Property Taxes	\$ 3,953,347.77	\$ 3,909,808.16	\$ (43,539.61)
Excise & Other Taxes	\$ 145,000.00	\$ 177,737.10	\$ 32,737.10
Interest on Delinquent Taxes	\$ 15,000.00	\$ 17,804.88	\$ 2,804.88
Charges for Services-Solid Waste Fees	\$ 55,000.00	\$ 65,726.25	\$ 10,726.25
Licenses, Permits & Fees	\$ 70,000.00	\$ 150,132.40	\$ 80,132.40
Other	\$ 10,000.00	\$ 100,439.58	\$ 90,439.58
Fines & Forfeits	\$ 3,000.00	\$ 5,054.77	\$ 2,054.77
Interest from Investments	\$ 2,000.00	\$ 1,445.74	\$ (554.26)
State Revenue	\$ 308,935.00	\$ 312,408.00	\$ 3,473.00
Total Subtotal Revenues	\$ 4,562,282.77	\$ 4,740,556.88	\$ 178,274.11
 InterFund Operating Transfers	 \$ -	 \$ -	 \$ -
Total Revenue and Interfund Transfers	\$ 4,562,282.77	\$ 4,740,556.88	\$ 178,274.11

TOWN OF MONTEREY, MASSACHUSETTS
GENERAL FUND EXPENDITURE CHART
FOR THE YEAR ENDED JUNE 30, 2022



ACCOUNTANT REPORT

TOWN OF MONTEREY FY2022 GENERAL FUND EXPENDITURE REPORT

Account Number	Description	Balance Forward	Budget	Budget Revisions	Revised Budget	Expended	Balance	Close	Encumbered/ Carry Forward
GENERAL GOVERNMENT									
01-114-5150-00000-0	Moderator Stipend	\$	349.00	\$	\$	349.00	\$	\$	
01-115-5185-00000-0	Constable Stipend	\$	686.00	\$	\$	686.00	\$	\$	
01-116-5185-00000-0	Police Assistant Salary	\$	15,037.00	\$	\$	14,790.78	\$	\$	
01-120-5190-00000-0	BOA Secretary	\$	10,000.00	\$	\$	1,875.00	\$	\$	
01-122-5190-00000-5	Communication Access Real Time Trans	\$	2,000.00	\$	\$	1,408.18	\$	\$	
01-122-5300-00000-5	BOA Advertising	\$	150.00	\$	\$	150.00	\$	\$	
01-122-5304-00000-1	BOA Disposition	\$	125.00	\$	\$	34.60	\$	\$	
01-122-5345-00000-1	BOA Postage & Mailing	\$	75.00	\$	\$	75.00	\$	\$	
01-122-5420-00000-1	BOA Office Supplies	\$	3,150.00	\$	(100.00)	3,050.00	\$	\$	
01-122-5580-00000-1	BOA Other Expenses	\$	500.00	\$	\$	500.00	\$	\$	
01-122-5590-00000-3	Grant Writer Expense	\$	725.00	\$	\$	725.00	\$	\$	
01-122-5730-00000-1	BOA Dues & Memberships	\$	75,000.00	\$	\$	75,000.00	\$	\$	
01-123-5110-00000-2	Town Administrator Salary	\$	3,000.00	\$	\$	3,000.00	\$	\$	
01-123-5580-00000-4	Temporary Employee Salary	\$	1,000.00	\$	\$	1,000.00	\$	\$	
01-131-5125-00000-0	Finance Committee Dues	\$	500.00	\$	\$	500.00	\$	\$	
01-131-5170-00000-0	Finance Committee Dues & Memberships	\$	30,000.00	\$	(24,038.18)	5,961.82	\$	\$	
01-132-5700-00000-0	Annual Audit	\$	17,500.00	\$	\$	17,500.00	\$	\$	
01-135-5300-00000-3	BOA Professional Services	\$	37,800.00	\$	\$	37,800.00	\$	\$	
01-135-5315-00000-4	Accountant Financial Services	\$	5,960.00	\$	\$	5,960.00	\$	\$	
01-135-5385-00000-2	Accountant Software Licenses	\$	300.00	\$	\$	300.00	\$	\$	
01-135-5580-00000-1	Accountant Other Expense	\$	44,033.00	\$	\$	43,817.21	\$	\$	
01-141-5110-00000-1	BOA Principal Assessor	\$	10,115.00	\$	\$	10,034.46	\$	\$	
01-141-5115-00000-5	BOA Principal Assessor's Assistant	\$	100	\$	\$	100	\$	\$	
01-141-5185-00000-0	BOA Elect Stipends	\$	4,846.00	\$	\$	4,846.00	\$	\$	
01-141-5300-00000-3	BOA Professional Services	\$	4,000.00	\$	\$	3,125.00	\$	\$	
01-141-5305-00000-3	BOA Postage & Mailing	\$	200.00	\$	\$	200.00	\$	\$	
01-141-5385-00000-0	BOA Software Licenses & Agreements	\$	13,449.00	\$	\$	13,577.90	\$	\$	
01-141-5400-00000-3	BOA Office Supplies	\$	200.00	\$	\$	200.00	\$	\$	
01-141-5580-00000-3	BOA Other Expenses	\$	200.00	\$	(250.00)	50.00	\$	\$	
01-141-5710-00000-3	BOA Business Travel	\$	350.00	\$	\$	350.00	\$	\$	
01-141-5715-00000-3	BOA Dues & Memberships	\$	36,000.00	\$	\$	36,000.00	\$	\$	
01-145-5314-00000-5	Treasurer Financial Services	\$	3,500.00	\$	\$	3,290.55	\$	\$	
01-145-5314-00000-5	Treasurer Payroll Services	\$	1,600.00	\$	\$	1,600.00	\$	\$	
01-145-5345-00000-0	Treasurer Postage & Mailing	\$	1,200.00	\$	\$	1,200.00	\$	\$	
01-145-5380-00000-0	Treasurer Bank Fees	\$	25,862.00	\$	\$	25,862.00	\$	\$	
01-146-5110-00000-0	Collector Other Expenses	\$	2,590.00	\$	\$	2,590.00	\$	\$	
01-146-5110-00000-0	Collector Salary	\$	5,757.00	\$	\$	5,757.00	\$	\$	
01-146-5345-00000-1	Collector Postage & Mailing	\$	1,600.00	\$	\$	1,600.00	\$	\$	
01-146-5385-00000-2	Collector Software Licenses & Agreements	\$	17,000.00	\$	2,945.90	19,945.90	\$	\$	
01-146-5385-00000-2	Collector Other Expenses	\$	7,500.00	\$	\$	7,500.00	\$	\$	
01-146-5730-00000-1	Clerk Assistant Salary	\$	2,731.00	\$	\$	2,731.00	\$	\$	
01-151-5110-00000-0	Clerk Assistant Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Expenses	\$	26,382.00	\$	\$	26,382.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	4,933.00	\$	\$	4,933.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	200.00	\$	\$	200.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,700.00	\$	\$	2,700.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Supplies	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Salary	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Postage & Mailing	\$	2,000.00	\$	\$	2,000.00	\$	\$	
01-151-5303-00000-0	Legal Counsel Other Expenses	\$	2,000.00	\$	\$	2,000.0			

ACCOUNTANT REPORT

TOWN OF MONTEREY, MASSACHUSETTS FOR THE YEAR ENDED JUNE 30, 2022

	Fund Balances June 30, 2022	Beginning Balance	Revenue	Expenditures	Ending Balance
Special Revenue:					
Federal Grants:					
Comm Dev Block Grant (CDBG)	\$ 35,083.88	\$ 415.17	\$ 84,396.11	\$ 49,727.40	\$ 35,083.88
COGB Contingency STM 3/17 Article 3	\$ 20,000.00	\$ 20,000.00			\$ 20,000.00
DOJ Bullet Proof Vest Replacement Program	\$ 0.00	\$ (447.50)	\$ 447.50		\$ 0.00
J Byrnes Mem Justice Assistance Grant	\$ -	\$ (39,911.69)	\$ 39,911.69		\$ -
Emergency Management Grant	\$ (2,499.73)	\$ (2,499.73)	\$ 2,500.00	\$ 2,500.00	\$ (2,499.73)
COVID-19 CARES	\$ -	\$ 5,619.76	\$ 19,624.47	\$ 25,244.23	\$ -
COVID-19 FEMA	\$ -	\$ (11,050.35)	\$ 31,750.57	\$ 20,700.22	\$ -
AFG - FEMA	\$ 83,094.95	\$ -	\$ 38,933.33	\$ 30,933.33	\$ 83,094.95
ARPA American Rescue Plan Act	\$ -	\$ -	\$ 138,094.95	\$ 55,000.00	\$ -
ARPA July 2021 Storm Damage	\$ -	\$ -	\$ 10,208.00	\$ 10,208.00	\$ -
State Grants:					
CC Regional HR Manger Grant	\$ 1,337.00	\$ 75,000.00		\$ 75,000.00	\$ -
Comm of Ma Extended Polling Hours	\$ 57.52	\$ 159.88		\$ 102.36	\$ 1,337.00
Early Voting	\$ 40,000.00	\$ -	\$ 40,000.00		\$ 40,000.00
Town Master Plan Grant	\$ 3,200.00	\$ 3,200.00			\$ 3,200.00
VFA Fire Grant	\$ -	\$ 3,200.00			\$ -
COVID Emergency Supplemental Grant	\$ -	\$ (3,500.00)	\$ 18,775.00	\$ 15,275.00	\$ -
Freightier Safety Equip Grant	\$ -	\$ (2,600.00)	\$ 5,925.00	\$ 5,925.00	\$ -
Mass DEP Lake Garfield Drainage Project	\$ (635.99)	\$ 500.00	\$ 8,150.00	\$ 9,285.99	\$ (635.99)
MVP Grant - R123/MainRd Culvert Replacement Study	\$ -	\$ (14,197.00)	\$ 19,800.00	\$ 5,603.00	\$ -
CC IT Grant - Road Surface/Temp Msmt System	\$ -	\$ 82,000.00		\$ 82,000.00	\$ -
CC Town Watershed Mgmt Plan Grant	\$ 35,000.00	\$ -	\$ 35,000.00		\$ 35,000.00
SMRP - Food Waste	\$ 5,680.00	\$ 5,680.00			\$ 5,680.00
Small Scale Grant	\$ 500.00	\$ 500.00			\$ 500.00
SMRP - Mattress Recycling Program	\$ 380.00	\$ 380.00			\$ 380.00
DEP Recycling Dividend Program	\$ 4,677.55	\$ 2,547.55	\$ 3,150.00	\$ 1,020.00	\$ 4,677.55
Title V Grant	\$ 3,388.83	\$ 3,388.83			\$ 3,388.83
EOEA Formula Grant	\$ (132.56)	\$ 3,816.50		\$ 3,949.06	\$ (132.56)
MCOA Direct Grant	\$ 91.18	\$ (10,952.76)	\$ 11,084.54	\$ 40.60	\$ 91.18
State Aid to Libraries	\$ 17,050.85	\$ 13,036.83	\$ 4,302.16	\$ 288.14	\$ 17,050.85
MBLC Library Building Grant 2018	\$ (143,266.70)	\$ (143,266.70)			\$ (143,266.70)
MBLC Hot Spot Grant	\$ 1,003.64	\$ -	\$ 3,000.00	\$ 1,996.36	\$ 1,003.64
Nutrient Loading Matching Grant	\$ -	\$ (0.21)	\$ 0.21		\$ -
Mass Cultural Council	\$ 1,511.35	\$ 4,167.52	\$ 8,000.00	\$ 10,656.17	\$ 1,511.35
Receipts Reserved for Appropriation:					
RRA Water Pollution Abatement Trust	\$ 21,647.85	\$ 21,647.85			\$ 21,647.85
RRA Sale of Cemetery Lots	\$ 3,503.43	\$ 3,403.43	\$ 100.00		\$ 3,503.43
TNC Ride Share Distribution	\$ 1.50	\$ 1.50			\$ 1.50
Revolving Funds:					
Wetlands Protection	\$ 2,039.98	\$ 4,223.23	\$ 3,179.80	\$ 5,363.05	\$ 2,039.98
Wetlands Bylaw Fees	\$ 200.00	\$ -	\$ 200.00		\$ 200.00
Scenic Mountaint Act	\$ 400.00	\$ -	\$ 400.00		\$ 400.00
Zoning Board	\$ 2,792.48	\$ 2,205.57	\$ 3,590.65	\$ 3,003.74	\$ 2,792.48
Building & Fire Inspection	\$ 816.94	\$ 816.94			\$ 816.94
Inspector Fees	\$ 8,380.88	\$ 1,732.88	\$ 15,666.00	\$ 9,018.00	\$ 8,380.88

ACCOUNTANT REPORT

TOWN OF MONTEREY, MASSACHUSETTS
FOR THE YEAR ENDED JUNE 30, 2022

	Fund Balances June 30, 2022	Beginning Balance	Revenue	Expenditures	Ending Balance
Capital Projects:					
Hwy Chapter 90	\$ (0.00)	\$ (65,947.51)	\$ 66,431.00	\$ 483.49	\$ (0.00)
Library Construction	\$ (856,733.30)	\$ (949,458.30)	\$ 92,725.00	\$ -	\$ (856,733.30)
Hwy Dump Truck	\$ (170,373.79)		\$ 170,373.79	\$ 170,373.79	\$ (170,373.79)
Total Capital Projects	\$ (1,027,107.09)	\$ (1,015,405.81)	\$ 159,156.00	\$ 170,857.28	\$ (1,027,107.09)

ACCOUNTANT REPORT

TOWN OF MONTEREY, MASSACHUSETTS FOR THE YEAR ENDED JUNE 30, 2022

		Fund Balances June 30, 2022		Beginning Balance		Revenue		Expenditures		Ending Balance	
Trust Funds:											
	\$	44,919.00	\$	44,862.26	\$	56.74				\$	44,919.00
Cemetery Perpetual Care	\$	547,138.35	\$	546,994.77	\$	143.58				\$	547,138.35
General Stabilization	\$	139,398.61	\$	109,387.45	\$	30,011.16				\$	139,398.61
Retiree Health Life Stabilization	\$	15,000.98	\$	15,000.00	\$	0.98				\$	15,000.98
Fire Stabilization	\$	41,238.11	\$	41,231.90	\$	6.21				\$	41,238.11
Conservation Trust	\$	45,158.28	\$	30,158.27	\$	15,000.01				\$	45,158.28
Bridges Roads & Culverts Stabilization	\$	13,281.97	\$	10,700.00	\$	2,581.97				\$	13,281.97
Nightingale Graveston Care Trust	\$	8,032.60	\$	10,621.58	\$	2.08	\$	2,591.06		\$	8,032.60
Library Abercrombie Trust	\$	2,863.18	\$	2,862.97	\$	0.21				\$	2,863.18
Library Memorial Trust											
Agency Funds:											
Agency Other	\$	80.00	\$	80.00						\$	80.00
Agency House Rental Escrow	\$	1,038.05	\$	1,037.87	\$	0.18			\$	-	1,038.05
Agency Due to Deputy Collector	\$	204.00	\$	588.00	\$	1,236.00			\$	1,620.00	204.00
Agency Fire Arms Fees Due to State	\$	2,232.53	\$	2,157.53	\$	1,050.00			\$	975.00	2,232.53
Agency Police Offduty Details	\$	(427.50)	\$	(2,878.83)	\$	126,363.10			\$	123,911.77	(427.50)
PR Withholdings Federal Taxes	\$	-	\$	48.13	\$	124,086.10			\$	124,134.23	-
PR Withholdings State Taxes	\$	-	\$	17.64	\$	50,731.87			\$	50,749.51	-
PR Withholdings County Retirement	\$	-	\$	2,313.54	\$	64,560.65			\$	66,874.19	-
PR Withholdings OBRA/Great West	\$	-	\$	1,079.04	\$	35,204.54			\$	36,283.58	-
PR Withholdings Health Insurance	\$	1,925.54	\$	462.88	\$	49,299.83			\$	47,837.17	1,925.54
PR Withholdings Retiree Insurance	\$	504.55	\$	1,425.90	\$	15,204.64			\$	16,125.99	504.55
PR Withholdings Life Insurance	\$	41.78	\$	38.37	\$	64.00			\$	60.59	41.78
PR Withholdings Deferred Compensation	\$	(29.30)	\$	95.70	\$	3,815.34			\$	3,940.34	(29.30)
PR Withholdings AFLAC	\$	(127.96)	\$	42.96	\$	2,359.49			\$	2,530.41	(127.96)
Dental Withholdings	\$	23.79	\$	936.97	\$	2,450.14			\$	3,363.32	23.79
Total Trust Funds	\$	862,496.56	\$	819,264.90	\$	524,228.82	\$	480,997.16	\$		862,496.56

ANIMAL INSPECTOR REPORT

Report of the Monterey Animal Inspector

July 1, 2021 – June 30, 2022

The Animal Inspector is responsible for an annual census of domestic farm animals, as well as certifying that the health and living conditions of those animals are acceptable. Domestic pets such as dogs, cats, and other non-agricultural animals are not included in this census. Census information is kept confidential with Massachusetts' Division of Animal Health. This information is used to aid the state during periods when animal health is threatened by disease.

The Animal Inspector is also responsible for establishing quarantines related to potential rabies exposures.

In FY 2022 there were no quarantines issued and all agricultural animals appeared to be well maintained in adequate housing with adequate food and water.

Totals of the census taken by Animal Inspector Julio Rodriguez, during the end of year 2021:

<u>Animal Type</u>	<u>Adults</u>	<u>Young</u>
Dairy Cattle	31	7
Beef Cattle	13	14
Goats	28	8
Sheep	5	
Llamas/Alpacas	8	
Equines	8	
Poultry: Chickens	63	
Waterfowl	29	

Respectfully submitted 12/28, 2022

John Makuc, DVM Animal Inspector for FY 2023

ASSESSORS REPORT

REPORT OF THE ASSESSORS

RECENT ASSESSMENT CHANGES: Neighborhoods have been redefined and it acknowledges that sales are the driving force.

CYCLICAL updating of property evaluations: The Board of Assessors for the Town of Monterey at the Direction of the State Board of Assessors will now update values on a yearly basis. The new process will avoid sharp increases or decreases in the annual tax rate.

Total Taxable Properties	1221	1218	
Total Exempt Bills	91	91	
Total Personal Property Bills	167	167	
Total Count of Bills	1479	1476	Total Real/P.P./Exempt
REPORT OF THE ASSESSORS CONCERNING NEW GROWTH VALUES			
Type of Land	FY. Values 2021	FY. Values 2022	Difference in Value
Residential			
Single Family	\$421,583,300	\$426,493,900	\$4,910,600
Condominium	\$3,606,400	\$3,640,400	\$34,000
Two/Three Family	\$3,425,900	\$3,546,500	\$120,600
Multi Family	0		
Vacant	\$41,774,300	\$42,269,600	\$495,300
Other	\$45,306,284	\$44,975,959	(330,325)
TOTAL RESIDENTIAL	<u>\$515,696,184</u>	<u>\$520,926,359</u>	<u>\$5,230,175</u>
COMMERICAL	\$7,784,020	\$7,597,845	(\$186,175)
CHAPTER 61, 61A, 61B	\$1,704,495	\$1,707,686	\$3,191
INDUSTRIAL	\$590,196	\$887,396	\$297,200
PERSONAL PROPERTY	\$10,154,191	\$11,922,991	\$1,838,800
TOTAL	<u>\$535,929,086</u>	<u>\$543,042,277</u>	<u>\$7,183,191</u>

BOARD OF HEALTH REPORT

FY 2022 Board of Health Annual Report

The Board of Health met nine times in FY 2022. The COVID – 19 pandemic continued to be the major public health focus, however other issues were discussed and addressed. The Southern Berkshire Public Health Collaborative consisting of ten towns took shape, was formally adopted by the participating towns, and began to provide much needed public health services for the region. The Collaborative, a project spearheaded by Jim Wilusz, the health agent for Tri-Town Health Department and also for Monterey, has been initially funded by a grant from the Federal Government. The Collaborative quickly filled the void created by the departure of several Visiting Nurse Associations, which for years had provided some basic public health services to many of the towns in the region. The COVID-19 pandemic reinforced the need for such an organization to help the local towns monitor and respond to the needs created by the pandemic.

Sadly, during this period the Board saw the passing of one of its members, Roy Carwile. Roy was a thoughtful and proactive member of the board. He helped spearhead a local Adhoc group that worked tirelessly to assist individuals obtain COVID vaccines during the initial vaccine rollout phase. Mort Salomon was appointed by the town selectboard to fill Roy's vacancy until the next regularly held town elections. Julio Rodriquez was appointed to the role of Town Animal Inspector, a vacancy also created by Roy's passing.

The Board also welcomed a representative from Berkshire Harm Reduction for a presentation on the services it provides for all of Berkshire County. This program provides services to those suffering addictions and addresses many of the issues that result from addiction problems. Each town must approve of the services in order for them to be provided and the Board of Health voted in favor of such.

Permits issued for FY 202 are as follows: Septic permits (total): 19

Well permits:	5
Camp permits:	4
Food service permits:	8
Septic hauler:	7
Septic Installer:	8
Soil Perc tests:	11
Beach/Pool:	3
Beaver trapping:	6

The Board of Health is always open to hear and discuss any related issues the town residents may have. Meetings, once again live and in the Town Hall, are on the third Mondays of every month at 2 pm. Monday holidays may necessitate scheduling changes and meetings will be cancelled if there are no items for the agenda. Notify the Town Administrator in the Town Hall at least 48 business hours prior to a scheduled meeting in order to be placed on the agenda.

Respectfully submitted: John Makuc, DVM, Chair, Board of Health

BUILDING DEPARTMENT REPORT

Report of the Building Department FY22

The Building Department's goal is to assist all applicants in the permitting process in a timely fashion. Please use our department as a resource in any building or zoning inquiries.

Total Permits Issued	117
Total Fees Collected	\$103,086

Respectfully Submitted,
Donald R. Torrico, C.B.O.
Building Commissioner and Zoning Enforcement Officer

Electrical Permits
Permit Applications Received - 105
Total fees collected: \$10,620

Nick Fredsall
Electrical Inspector

Plumbing & Gas Permits
Plumbing & Gas Permit Applications Received – 124
Total fees collected: \$20,640

Robert Krupski
Plumbing & Gas Inspector

CEMETERY REPORT

Cemetery Commission

Annual Report

July 1, -June 30, 2022

It was a quiet year for the Cemeteries. There were fourteen internments. Maintenance was routine. We had no major storm damage from trees and bad weather in any of our five cemeteries.

In the coming year we will be working on the rules and regulations as well as design layout for the new section of Corashire Cemetery.

Linda Thorpe, Chairman

David Brown

James Dutcher

COMMUNITY CENTER

ANNUAL REPORT July 1, 2021 to June 30, 2022 Monterey Community Center

We kicked off July with Maggie Barkin's "What's Happening?" series under the tent. We heard about the plans and garden tour information from the Biodiversity Group. We also discussed the production of "The Women of Tyringham." Later in the month we had Lisanne Finnston and Melanie Brandston giving us an update on Gould Farm's plans for the new Roadside Store. There was also an update on the Monterey General Store by Chapin Fish.

In July and August we had three genealogy classes from Bryna O'Sullivan of Charter Oak Genealogy on Zoom. We learned all about family records searching and ancestry trees online.

We organized a successful and thought provoking Pops Peterson multimedia event called "The Making of a Protest Artist" in the summer.

We also hosted Mahjong and have had volunteers teaching how to play. Mahjong has been going on for several years now.

We also had a tag sale put on by Myrna Rosen and Carole Clarin which gave many folks an opportunity to clear out their closets for a good cause.

All summer we hosted Tai Chi, Chair Yoga, and Ping Pong but in the winter the Tai Chi and Chair Yoga classes ended up at the library due to space issues with Covid-19.

The fall brought us some very lively programs, such as Tim Van Egmond's folk concert and Stephanie Sloane's theater production, "The Perfect Storm."

We also had some Zoom programs including Dr. Barry Rose speaking on his book about compassionate care in medicine, and a furniture restorer, Frank MacGruer, showing us the inside secrets of his trade.

The mushroom walk and talk with John Wheeler in the fall was so popular, it seems this will become an annual event.

Sandrine Harris taught us "Mindfulness Meditation for Turbulent Times" over the fall, winter, and spring.

As Thanksgiving rolled around we had our second annual Chestnut Talk and Roasting. Thanks to Janet Jensen, the Miner Family, Rob Hoogs, and Kevin West for all they did.

Two days after Thanksgiving was the Monterey Lights the Holidays Celebration at the Library. The MCC volunteers, especially Dennis and Elaine Lynch, organized the event with help from the Cultural Council and the Library. Thanks to Joe Baker and Bonner MacAllester for providing the live music.

COMMUNITY CENTER

Another one of our initiatives was to collaborate with volunteers who were planning the Town 175th celebrations, swag, and events. We had a kick off at our Winterfest, over President's Day weekend. Enjoyable music from the DJ, dancing, food and crafts rounded out the day with special appreciation to Catherine Hurst, Laurie Shaw, Wendy Jensen, Tom Ryan, and Andrew Shaw.

This year we added in Very Gentle Yoga with James Boneparth, plus Yoga Nidra and Reiki classes with Nancy Monk.

We helped promote and coordinate the Dignity Talk with Lauren Behrman. It was featuring Doctor Donna Hicks. We held a follow up discussion.

We also coordinated vaccination efforts with the Council on Aging, and CHP.

We enjoyed having a contingency in the Monterey Memorial Day parade which was also celebrating the 175th Anniversary of Monterey.

Every year we host more meetings for town officials and groups, including the Renewable Energy Working Group, the Bylaw Review Committee, the Planning Board, the Cultural Council, and the Native Plant and Pollinators group.

Other events and programs we held included: Matter of Balance, Improving Your Posture with Jill Esterson, COA Board meetings and an Open House, Nurse visits, Tie Dye T Shirts with Jilly Lederman, Wreath Making with Catherine Hurst, Plein Air Painting and Drawing with Ann Getsinger, Diabetes Support Group, Birdwatching Walk with Joe Baker, A Candidate Night with Susan Cooper, Free the Tree, Elder Law and Estate Planning, Al Anon, and Lake Garfield Pollution Mitigation.

Visits to the Community Center and the Community Center programs totaled over 2,000 this year. This is a huge increase over 2019 when our attendance sheets totaled 432 for the year.

We are still concerned that there is inadequate lighting in the parking lot which is a significant safety issue. We hope to see some progress on this in the upcoming year.

We applied for federal ARPA grant funding for a pavilion to provide safe, outdoor space for people to meet.

BUDGET

Approved Town Meeting Operating Expenses: \$11,349.00

Actual Expended Monies: 11,203.50

Income from garden plots and rental: \$1,160.00

Approved Town Meeting Monies for Outdoor Lighting: \$29,000.00

Actual Expended Monies for Outdoor Lighting: \$93.50 (used for advertising for RFP)

COMMUNITY CENTER

Approved Town Meeting Staff Wages: \$8,431.00 (10 hours per week at 52 weeks at 16.15/ hr)

Actual Expended Wages: \$8,463.65

Actual Cost to Town: \$18,827.15 (this includes operating, lighting project, and staff, offset by rental income).

Respectfully submitted by

Mary Makuc, Coordinator,

Monterey Community Center Committee

Laurie Shaw, Chairperson

JoAnn Bell

Wendy Germain

Roz Halberstadter

Catherine Hurst

Dennis Lynch

Elaine Lynch

Kyle Pierce

COMMUNITY HEALTH PROGRAMS

Community Health Program
Annual Report Fiscal Year 2022
Report not submitted

CONSERVATION COMMISSION REPORT

Report of the Conservation Commission for Fiscal Year 2022

It is the work of the Monterey Conservation Commission to locally administer the Wetlands Protection Act (WPA – MGL Ch 131, S 40) and regulations which prohibits any filling, excavation or other alteration of the land surface, water levels, or vegetation in and adjacent to wetlands, regardless of ownership, without a permit from the local Conservation Commission. Additionally, Riverfront areas have been included as requiring protection under their own paragraph. WPA regulations can found on the town website. The Conservation Commission also administers the local Scenic Mountain Act (SMA), in effect in Monterey since November 10, 2004. The SMA regulations can also found on the town website: www.montereyma.gov .

The Conservation Commission heard 8 Requests for Determination of Applicability (RDA) under the Wetlands Protection Act (WPA), 2 Requests for Determination of Applicability under the Scenic Mountains Act (SMA), 2 Notices of Intent (NOI or ANOI) under the WPA and 2 Notice of Intent under the SMA. Additionally, for the WPA the Commission processed 3 Certificates of Compliance, 2 Emergency Permits, 2 Enforcement Orders, 3 OOC extensions and 2 amendments to OOC. Under the SMA we processed 3 Certificates of Compliance.

Fiscal Year 22 membership included Christopher Blair, Tim Lovett, David Dempsey, Noel Wicke, and Roslyn Dolber. Prior members Jeremy Rawitz, Michael Zisser, Nancy Tomasovich, and Leslie Lichter resigned by letter on or about 31 January 2022. Margo Drohan was not reappointed when her term expired.

We welcome questions anytime from citizens with concerns about the Wetlands Protection Act and/or the Scenic Mountain Act. The public should be aware that filings must be received with sufficient time to publish legal notices required for public hearings. Please check the town website for submittal deadlines, requirements, and meeting schedule. The Conservation Commission can be reached by email at ccagent@montereyma.gov or by voicemail at x230. The board appreciates all those who have made filings and have sought to abide by the Town, State and Federal requirements regarding these areas.

Respectfully submitted,

Christopher Blair, Chairperson
Monterey Conservation Commission

COUNCIL ON AGING REPORT

Council on Aging Annual Report

In July, the COA prepared a report for the Massachusetts Office of Elder Affairs on the grant completed June 30. The COA had hired two temporary, part-time Outreach Workers to visit a sample of residents 60 years and older to evaluate their awareness of the Monterey COA and the services they might need. We reached 49 households. Most residents visited, though aware of the COA, did not identify as seniors and generally were not aware of COA activities. A desire for a wide range of social activities was, however, frequently expressed. Many residents reported a desire to help others in Monterey. They also frequently mentioned anticipating needing assistance in the future, especially with transportation and referrals to home care or assisted living. One resident suggested forming a Parkinson's Disease Support Group, and the COA embraced this idea immediately and began the planning process. An Open House was held in the Community Center to share the ideas for activities that had been suggested during the Outreach Worker visits.

COVID remained an issue over the summer even though cases declined significantly. It again became a major impediment to activity in the fall and winter. Events were kept to a minimum and either held outdoors, or indoors with masks. Tai Chi was held outdoors under the tent at the Community Center during the summer, and in the fall continued indoors in the library, with masks, throughout the year. The COA supported the weekly classes with \$100 per month from January through April. Movie Night resumed in October. The foot nurse services and blood pressure checks continued to be offered throughout this fiscal year.

The first Parkinson's Support Group was held on November 8 and the group now meets monthly on the first Thursday of every month. The meeting starts with a one-hour informational presentation, and then an hour of facilitated discussion, with the caregivers and individuals with Parkinson's Disease meeting separately. Participants and the COA are very enthusiastic about this program. At the first meeting there were 8 pairs attending and participation continues to grow.

In December the COA hired a part-time Outreach Worker, with a grant from the State, to support our work. The town subsequently funded this position at \$6,000 for one fiscal year.

The COA revised its Policies and Procedures, focusing on Board job descriptions and the number of Board Members, as well as designating all Monterey residents 60 and older automatic members of the COA. In December, Lin Saberski was elected Secretary/Treasurer for three years, and also Acting Chair through February. In June she volunteered to be the Chair for FY 2022-2023 since no other interested parties had stepped forward, and the Board approved this appointment. We added a new member and have a full Board as of this writing.

Van transportation costs continue to be very high - \$5,500 annually. Alternatives are being explored but this is a complex process. The COA began advertising the van service in the Monterey News.

The COA consolidated our mailing list and began to send regular emails about events of interest on Mail Chimp, which allows recipients to easily opt out. We then circulated a survey asking residents to indicate the activities they are most interested in.

Events

Open House coffee to discuss ideas for new activities

CULTURAL COUNCIL REPORT

LOCAL CULTURAL COUNCIL

The Monterey Cultural Council receives funding from the Commonwealth as well as from the town of Monterey. Following a statewide online application process, our local council received and reviewed more than 30 grant applications. Of those, 20 were chosen, with more than \$7,000 committed to cultural programming that benefited members of our community.

The 2022 Awards

Among the 2022 awards were the Greenagers, Flying Cloud Institute, the Berkshire South Community Center, the Monterey Library Summer Programs, the Monterey Community Center's Coffee House music series, two events at the Bidwell House Museum, Artist talks in the Knox Gallery, and support for Monterey's 175th Birthday events and the formation of an anniversary book for this occasion.

Most of the activities that our local cultural council supports take place right here in Monterey, but some of our awards also fund events in nearby towns. For example, funding was given to a movement workshop series for under-served youth at Berkshire Pulse in Housatonic, to a variety of monthly music programs at historic Dewey Hall in Sheffield, and cultural events sponsored by the New Marlborough Arts Council. Over the autumn weekend, we provided support to activities at the Mahaiwe Theater, which culminated in an outdoor event to support Indigeneous Peoples Day with songs, drumming and speeches.

Seeking input and reaching out to the community

Local cultural councils are charged with reaching out to the community and seeking input. Thanks to the Public Forums led by the Master Plan committee and the survey they intend to collect in the coming year, we hope to learn more in order to help sponsor programming that fulfills the needs and wishes of our community.

Each fall, we consider grant applications. This process takes place over several months and awards are made in the winter. We try to follow up with our applicants and attend many of the events we learned about by reading applications. If you would like to join us, please contact us through our email account on the Monterey Town Website. We are always looking for new members. We meet once a month throughout the year and try to help generate enthusiasm for the many activities which occur all year long to benefit our cultural climate.

HIGHWAY DEPARTMENT REPORT

FY 2022

Highway Department Annual Report

The Highway Department has taken delivery of two Freightliner brand dump trucks equipped with full snow fighting gear. These two units replaced the aging OshKosh for roughly the same cost. The OshKosh was traded to the dealer. Training was smooth and seamless. Highway also replaced the 2007 Kenworth with a 2021 Kenworth. Green Mountain Kenworth was the sole bidder, and the 2007 was sold through Municbid auctions. Many repairs are performed in-house and emission related issues are sent to the local dealers. Most preventative maintenance is performed in-house as well.

Roadside mowing and brush work continues in order to allow sunlight to reach the road surface, increase visibility and reduce interference with utilities. The Emerald Ash Borer continues to effect the ash tree population and will prove to be a challenge in the coming years. Numerous ash trees have been removed and many more need to be. We work closely with the tree warden and will continue to make every effort to address sick or dead trees.

Snow and ice operations required the purchase of 816 tons of rock salt, 498 tons of sand, 324 tons of stone chips and 4300 gallons of liquid magnesium chloride.

Mud season resulted in the use of 125 ton of 3" stone, 210 ton of 1.5" stone and 125 ton of .75" stone. Fairview Road, Brett Road, Griswold Road and Beartown Mountain Road continue to be a challenge with freeze thaw cycles. The remaining 18 miles of gravel required stone treatments and were allowed to remain open.

We have hired four new employees to fill vacancies. Winter operations went well with the new team and summer maintenance is in full swing. We thank the former employees for their hard work and dedication, and wish them well in their future endeavors.

It is with tremendous sadness that we acknowledge the passing of retired member Rich Crittenden. Rich will always be remembered for his dedication and reliable service to the community.

Respectfully Submitted,

James Hunt

Director of Operations.

FINANCE COMMITTEE REPORT

TOWN REPORT

In Monterey, as in other MA towns, the Finance Committee works to create and maintain an accurate picture of the Town's Financial needs and priorities in the short term and the longer term.

Specifically we approve Reserve Fund transfers, review and update the Capital Plan for Infrastructure and Equipment and prepare a budget for Annual Town Meeting. The Finance Committee reviews the Accountants reports and other relevant information in order to advise the Town on the best course of action.

The Finance Committee collaborates with the Select Board in setting Financial Policy and presenting the Budget at Annual Town Meeting.

The coming years are sure to pose new challenges in choosing between what we want and what we need. Policy and planning will only be more important.

Michele Miller

FIRE DEPARTMENT REPORT

FY22 Fire Department Report

During the fiscal year the Fire Department over the fiscal year dealt with continued challenges due to the covid-19 pandemic. As the restrictions eased the call volume rose greatly due to a higher amount of people living full time in the area. Which then stressed minimally staffed departments greatly and proved that a staffed station during the night was still worthy of continuing. As calls increase and staffing in departments decrease mutual aid is becoming mandatory source of staffing for many calls the town receives due to low turn outs. The department will continue to provide the best possible service to the citizens of Monterey.

Calls Answered: 200

58% of calls were Fire Calls

42% of calls were Emergency Medical (EMS) calls

Monterey Fire Department Responded to:

- **86-Rescues**
- **26- Fires**
- **8-Hazardous Conditions**
- **14- Service Calls**
- **11- Good Intent**
- **53- False Alarms**
- **2-Various emergencies including: Public assistance, Weather related responses**

LIBRARY TRUSTEES REPORT

Annual Report 2021-22

Elections, Resignations, and Appointments; Meeting Times

The year saw significant turnover of membership of the Trustees. Esther Heffernan declined to run in the 2021 election, and at the Town Election in May, Ann Canning and Cheryl Zellman were elected. Ann Canning subsequently resigned from the board in June, and the Trustees nominated Nancy Kleban to fill her unexpired term. In October Shannon Amidon Castille resigned from the Trustees. We nominated Judy Kaminstein as a replacement. In November Lisa Smyle resigned from the Trustees and the Board voted to nominate Rebecca Wolin to take over. In May four members were elected at the Town Election: Rebecca Wolin and Mickey Jervas for full three-year terms; Judy Kaminstein for one year to 2023; and Nancy Kleban for two years to 2024. At the June meeting, John Higgins was elected Chair for the coming year; Mickey Jervas was elected Secretary.

Our long-time volunteer, David Lamoreux, left us for a library job in Great Barrington. Thank you, David, for your excellent service.

The Trustees voted to amend the By-Laws regarding meetings to read: “The Trustees, when necessary, may change the day and week of a meeting by a majority vote at the previous meeting. Such a change shall not constitute a violation of the By-laws.”

COVID-19 Response

COVID-19 continued to affect everything the Monterey Library did in 2021-22. The Library continues to require all persons in the building to mask. No new policies or procedures were implemented during the year.

Statistics

There was an increase in Library use FY21 which continued in FY22. Our numbers were up in FY21 because we were open during COVID more than neighboring libraries; in FY22, other libraries in the area had reopened, but attendance at the Monterey Library went from 6,871 to 8,988. FY22 saw a drop in DVD borrowing, probably a result of people streaming movies from home. Overall circulation was up substantially, going from 24,110 to 27,316 loans; that includes downloadable materials and loans to other libraries. In the future circulation of library materials in downloadable format will continue to increase. Over the course of this year the use of the library as observed by library staff has increased notably.

Library Programming and the Knox Gallery

LIBRARY TRUSTEES REPORT

Several children's summer programs were held outside this summer. Rain on several days forced a change in venue to the Community Center's tent. We thank the Monterey Community Center wholeheartedly for their cooperation. The Library held our traditional Halloween program in October, and the Egg Hunt in April.

The Knox Gallery continues to flourish, with art exhibitions throughout the year. At the end of FY2, the Monterey Historical Society was planning an exhibit for July 2022.

In conjunction with the 175th Anniversary of Monterey, the Monterey Quilters completed a quilt for the occasion, and both it and the quilt created a quarter-century ago for the 150th Anniversary are now hanging permanently in the Library.

Many groups from the Monterey community are making use of the multi-purpose room. The Monterey Community Center uses the room from time to time, for indoor tai chi, chair yoga, and other activities. The Monterey Council on Aging has begun showing a movie on a monthly basis.

Library Building

The Monterey Library continues to increase hours of opening in response to the needs of library patrons. We are now open 31.5 hours per week, up from 11.5 only a few years ago.

Maintenance of the new library building is a continuing concern, but since the building is new there are few major problems. The areas where we see new challenges are in HVAC

The biggest issue for the Library during 2021-22 was working with the Monterey Historical Society. Discussion with the Historical Society over the course of the year resulted in an agreement to offer the Society space in the basement of the library to store their collection, and to offer space in the multi-purpose room for a display case of artifacts illustrating the history of Monterey. The Historical Society organized a month-long exhibit during the summer in 2022 on the theme of "Monterey's Attic." Discussions continue with the Historical Society to open the basement room to the public on a limited basis.

Beginning the 5-year strategic plan.

Mark began soliciting participants for a committee to develop a five-year strategic plan. A good number responded and began to meet in the autumn of 2022.

Friends

Finally, the Library Trustees wish to acknowledge the help of the Friends of the Monterey Library throughout the year. Their fundraising has allowed us to offer more and better programming. Thank you very much.

LIBRARY TRUSTEES REPORT

The Friends paid for plaques, lighting, deck furniture, and landscaping of the Library grounds. They are also working to produce a 175th Anniversary book for Monterey. The Friends also acknowledged Franny Huberman with Franny's Cupboard in the children's section containing toys for children to use in the library.

The annual Book and Plant Sale in July was the most successful ever, with donations totaling over \$4,000. The Trustees and Friends have been working on a wish-list of projects that the Friends might be willing to fund.

On April 17th, the Friends sponsored an egg hunt on the Library lawn. In May at the Monterey 175th Parade, the Friends created a float with Esther Heffernan at the old library desk, and distributed goodies, including notebooks, to the on-lookers.

PARKS COMMISSION REPORT

Parks Commission Fiscal Year 2022 Report (July 1, 2021-June 30, 2022)

The Parks and Recreation Department is committed to enhancing the quality of life for all Monterey residents by striving to provide the best recreational programming and park facilities possible. Meetings are scheduled as needed to address the issues of each season and posted in advance on the town's website.

Committee Members	Term Expires
Christopher Andrews	2023
Tracey Brennan	2024
Gerard Clarin	2025
Thomas Mensi	2024
Steve Snyder, senior member	2025

As our community progressed past the Covid-19 challenges of the previous year, utilization of Monterey's numerous recreational facilities saw a significant increase in usage. Our town beach and Greene Park were the more popular sites.

Available spots for kayaks and canoes were quickly filled. The boat ramp received frequent use and the recent resurfacing held up well. Twenty tons of sand were added to the beach to replenish sand lost from erosion. The public works department graded the new sand into the existing surface, creating an even slope to the beach. Safety upgrades include the placement of large buoys separating the boat launch area from swimmers. Contracted lifeguards provided a safe swimming experience despite a shortened season of coverage due to limits of available trained individuals. "Yoga on the beach" continued this season and was well attended. The Parks Commission contributed to a successful celebration of Monterey 175 Day at the beach park. The deteriorating brick monument holding the historic marble plaque commemorating the action of town and summer residents to control the water level of the lake in 1913, was removed and will be preserved in a new stone monument to be placed in the park. The "pollinator group" was given space for a raised garden bed to display native plants that would encourage bee activity. The portable toilet maintenance frequency was increased to twice weekly because of increased beach activity.

PARKS COMMISSION REPORT

The basketball court at Greene Park was used for the traditional Sunday morning games. A painted outline for a pickle ball court will be placed over the basketball lines to provide for enthusiastic players to enjoy this popular sport. Improvement of the neglected condition of the baseball infield is a major project to complete before next baseball season. The Parks Commission plans a free Outdoor Movie Event at Greene Park, with complementary cotton candy and popcorn. Funding is being solicited for replacing the rapidly aging playground gym.

Bidwell Park received a major cleanup of numerous fallen trees, the result of the devastating effects of emerald ash borers. Unfortunately, soon after their removal, a strong rain and wind storm caused more significant tree damage requiring closing of the park until the situation can be resolved.

The Parks Commission continues to support the popular ice rink at the firehouse pavilion for recreational hockey and open skating. A pond hockey tournament is planned for January 28th on Lake Buel, that is partially sponsored by the Parks and Recreation Commission.

Respectfully submitted,

The Parks and Recreation Commission

PLANNING BOARD REPORT

Planning Board Town Report July 2021—June 2022

Members

As of June 2022, Planning Board members are:

- Tom Sawyer (Co-Chair)
- Laura Mensi (Co Chair)
- Roger Tyron
- Chip Allen
- Lauren Behrman
- Noel Wicke
- Margy Abbott

Number of meetings

- The Planning Board held 22 regularly scheduled meetings this fiscal year.

Work on Zoning Bylaws

- Reviewed for board familiarity and potential edits.

General

- The Board is now at full membership of 7 for the first time in many years
- Meetings continue to be held remotely and in person at the Community Center or Town Hall
- The Hume case was ruled on and was a split decision. The ruling was appealed to the Mass. Land Court.
- Laura Mensi is the BRPC Rep for this year.

Site Plans

- Preliminary – Mt Hunger Road

Town Meeting – May 2022

- Announcement of the Master Plan effort

Form A's

- 409 Main Road
- 235 Main Road

PLANNING BOARD REPORT

Special Permits Reviewed

- 32 Sylvan Road
- 19 Buckingham Lane
- 22 Point Road
- 10 Northwest Cove
- 16 Laurel Banks
- 7 Buckingham Lane
- 19 Laurel Banks

Sign Permits

- Bidwell House

Master Plan

- Grant received
- RFP Sent out to multiple bidders
- Award given to Berkshire Regional Planning Commission
- Work started with a kickoff public forum in June; target completion date June 2023

Respectfully submitted,
Monterey Planning Board

POLICE DEPARTMENT REPORT

REPORT OF THE POLICE DEPARTMENT

Throughout the 2021-2022 fiscal year, the Monterey Police Department responded to over 650 calls for service and information. The following lists the majority of these calls:

Abandoned 911 calls-----	32
Arrests -----	01
Assist medical -----	19
Assist citizen -----	71
Automobile Accident.....	22
Automobiles stolen -----	00
Automobiles disabled or abandoned-----	09
Breaking & Entering car or home-----	01
Burglar alarms -----	50
Calls regarding suspicious person, vehicle or substance -----	08
Carbon Monoxide or fire alarm -----	24
Complaints -----	25
Disturbances, loud noise, gunshots -----	04
Animal Complaints: bears, raccoons, cows etc. -----	07
Dog/cat loose or missing -----	11
Dog Complaints -----	03
Dog, cat bites -----	00
Death Notification-----	01
Domestic disturbances /abuse calls or restraining Orders-----	03
Larceny -----	10
Lockout from home or car -----	05
Lost/found property -----	03
Medical Emergency-----	47
Missing persons -----	01
Mutual aid to other agencies/departments	26
Rabid or injured animals euthemized ----	07
Response to trees or wires in the road ---	25
Serve Warrant/Summonses to Court ----	04
Trespass -----	04
Vandalism -----	02
Well-being checks-----	04
Mental Health Crisis -----	03
Identity theft, credit card fraud, phone scams	06

PUBLIC HEALTH COLLABORATIVE REPORT

DATE: January 31, 2023

TO: The Honorable Board of Selectmen

FROM: James J. Wilusz, R.S., Health Agent

RE: Fiscal Year 2022 Health Agent Report

COVID-19 Pandemic: Fiscal Year 2022 continued navigating through the pandemic. Staff and board members continued to collaborate and work together towards combating COVID-19. Vaccinating schools and the community were a top priority.

In FY21, several towns joined together and submitted a comprehensive grant application and created a new partnership called the Southern Berkshire Public Health Collaborative. This multiyear grant will allow towns to build a comprehensive public health nursing program that will be shared equally across 12 towns.

Permits/Inspections

18 Septic Permits	7 Septic Installer permits
5 well permits	7 Food permits
30 septic inspections	12 Food Inspections
2 complaints investigated	6 Emergency Beaver Trapping Permits
11 percolation tests	2 Pool permits
5 Septage Hauler permits	4 Camp/Campground permits
1 beach permit	

Many thanks to the Board and Melissa for their valued assistance and dedication. We look forward to a healthy and safe 2023.

Respectfully submitted,

James J. Wilusz, R.S.

Registered Sanitarian/Health Agent

SBREPC

SBREPC FY22 SUMMARY

The Southern Berkshire Regional Emergency Planning Committee (SBREPC) would like to take this opportunity to thank the Town of Monterey for its continued support. The SBREPC works with Massachusetts Emergency Management Agency (MEMA), Berkshire Regional Planning Commission (BRPC) and the Western Region Homeland Security Advisory Council (WRHSAC), along with state and local police, fire services, public health, emergency medical services, and other disciplines in the twelve towns of South Berkshire County.

SBREPC holds monthly meetings at the Great Barrington Fire Station on the 4th Tuesday of each month at 8:00 AM. While it is important to have representation from all the disciplines, Selectboard members are especially encouraged to attend since it is the Local Elected Officials that will have the authority to designate resources in the case of an emergency. Participation in the SBREPC fulfills your town's obligation to belong to a LEPC or REPC and assures you are meeting the goals and missions of SARA Title III.

During FY22, the SBREPC has completed the following:

- Through a grant, coordinated with ambulance and first responder services regarding EMS response, dispatch protocols, and coverage issues.
- Helped to coordinate and obtain information for the update of the EMS Zone Service Plan, which is required by the State.
- Coordinated requests and delivered personal protective equipment for first responders and other organizations.
- Applied for and obtained grants for regional response equipment and training, including upcoming Rescue Task Force training.
- Continued to update the Regional Shelter Plan. This included surveying each town's emergency shelters. Inventoried the shelter equipment container located at Simon's Rock College.
- Updated contact lists for towns and organizations in the region

We are geared up for a busy FY23 as we continue to work to expand resources available to our towns during all hazards. Thank you for your support and involvement to strengthen emergency preparedness in Berkshire County.

SCHOOL COMMITTEE REPORT

School Committee Report October 2021-October 2022

I was appointed as the town's School Committee Rep in October of 2021. It has been an incredible learning experience and a challenge to navigate how the business of the school district gets done. I'm happy to report that despite the numerous logistical challenges we faced in the middle of a pandemic and limited state funding, the district continues to enhance the academic experience and support available to students.

It cannot be overstated how much COVID has impacted the overall function and day to day life at SBRSD schools. SBRSD arrived at a point that implemented systems for testing and reporting have made things manageable. The working relationships with public health advisors in the county have shifted to addressing ongoing mental health issues for our community, including "the warm line" - a call in support line available 4 evenings a week for those in need of support and assistance related to pandemic related stress. This is Also available to Spanish Speakers.

Contracts with the collective bargaining units were negotiated in June of 2021 and renewed for three years. It was an extensive process overseen by Bonnie Silvers and all parties were able to reach a satisfactory agreement. The District's Superintendent's contract was also renegotiated to secure Dr. Regulbuto for another 5 years

The district has partnered with Bard College at Simon's Rock and been awarded an Early College designation that will grant access to students to a college campus and provide credit earning College courses. College classes began within Mt Everett's walls in September of 2022.

Another focus this year is the community internship partnership, which pairs students with areas of work that might interest them. SBRSD is always looking for more internship opportunities so please contact the district's internship coordinator (a new position this school year).

While there are so many positive developments in our tiny district, the challenges of developing a budget this year cannot be ignored. With rising operation costs in almost every sector, transportation was a huge challenge. We only had one bidder despite efforts to interest other carriers

SCHOOL COMMITTEE REPORT

in coming south. The resulting increase in transportation cost for next year is a major contributor to the increase on the town warrant in spring of 2021. I feel it's important to note the year-round work that goes into reducing budget increases, and the tireless work of the administration in grant writing that has offset a huge chunk of expenses to tax payers -over 2.9 million! This is all without the help of a dedicated grant writer.

The School Committee has been developing a work plan to put its Antiracism/Antibias statement into action. The Administrative staff participated in Extensive inclusion training through Cornell University that has informed their curriculum significantly. This Process is ongoing and the School Committee is committed to ongoing review and updates to this action plan.

As an SC member, I was also responsible for sitting on the Regional School District Planning Board (RSDPB). This is the board examining possible models to merge or support collaborative efforts between the two local Regional School districts. In my time sitting on the RSDPB, the group voted to further investigate a model that would merge both districts into a new district and, retain all existing elementary and middle schools, and sent students from grades 9-12 to a newly constructed high school on the current MMRHS campus. In light of the potential cost to tax payers and impact on the future of our community, I want to encourage the Monterey community and leadership to participate in meetings, watch the process closely and to ask questions/comment at meetings or via the 8 towns website.

It was my distinct honor to serve on the School Committee for the brief time period that my schedule permitted and I am committed to continuing as an active member of the public,

-Laura Rodriguez

SELECT BOARD REPORT

FY22 Select Board Report

This year, the Monterey Selectboard faced both internal and external challenges while working for our Residents and Guests. The Covid-19 Pandemic proved persistent and members adjusted to a new type of 'normal'. With that in mind, the Selectboard drafted a 'reopening plan' which allowed Town Hall to reopen to the public, while keeping everyone safe.

The restoration of Beartown Mountain Road became an early focus at the Director of Operations' suggestion. A Massworks Grant was crafted to provide funding. A disagreement as to grant writing roles resulted in the Town Clerks resignation of her grant writing position. In light of this and other issues between town employees, the Selectboard recognized the importance of having professional Human Resource personnel. A job description for such was drafted, with the hope of providing guidance without delay. The Town applied for, and received a grant to join 4 other towns in the hire of a full time HR person. During the wait for a new Human Resource manager, the Board hired an investigator to address employee complaints.

Legal issues emerged as the Selectboard was forced to address a public boycott of Selectboard meetings, several official complaints, and a lawsuit filed by Selectboard Member John Weingold. The lawsuit, filed against the Town, several town employees, the wife of a former Selectboard member and a town consultant, was later dismissed by the Court. Additionally, an ongoing legal matter between the Planning Board and Camp Hume presented challenges. New Town Counsel was hired.

The Selectboard continued the effort to address the town's Bridges and Stream Crossings. State funds to replace the Curtis Road Bridge, was secured by the Town Administrator. Significant progress was also made to plan for a replacement for the large culvert that bisects downtown and Route 23. These positive efforts continued, despite growing issues within the town's Conservation Commission. Following several public complaints and resignations, a new Conservation Commission was formed by the Selectboard and service restored.

Director of Operations, Shawn Tryon retired from his position and the Selectboard hired Jim Hunt.

A Renewable Energy Working Group was empaneled by the Selectboard, as well as a By-Law Review Committee and a Town Charter Committee. A new Master Plan was initiated in partnership with the Berkshire Regional Planning Commission. The Lake Garfield Working Group continued its battle against Eurasian Milfoil and the Selectboard took up suggestions for the use of funds that Monterey was awarded under the American Rescue Plan Act (ARPA).

While the Monterey Selectboard faced a tumultuous year, we persevered. Our commitment to work for the people of Monterey has resulted in a better, cleaner and

SELECT BOARD REPORT

safer Town, with prudent use of Tax Dollars. We couldn't have done it without our dedicated Town Employees, Board & Committee Members and volunteers.

Steven Weisz, Chair
Monterey Selectboard

**THE SOUTHERN BERKSHIRE
REGIONAL SCHOOL DISTRICT
FY23 PROPOSED BUDGET**



**PUBLIC HEARING INFORMATIONAL BOOKLET
MARCH 3, 2022**

**ADOPTED BY SCHOOL COMMITTEE
MARCH 10, 2022**

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

Letter from the Superintendent of Schools

The Southern Berkshire Regional School District is pleased to present its Annual Proposed Budget for Fiscal Year 2023. Shaped by input from key stakeholders, the proposed budget is presented for further input at the Public Budget Hearing on March 3, 2022. It represents a 3.82% increase over the FY22 budget of \$17,794,556. I believe the budget as presented supports our vision of the District, aligns resources with the goals of the School Committee and our District Strategy for Continuous Improvement, and sustains the commitment to providing educational excellence within our means.

More specifically, the FY23 Proposed Budget funds investments in the following strategic initiatives:

- ensuring a rigorous innovative programming that retains and attracts students to the District.
- continuing to support teacher collaboration time to promote curriculum planning, renewal, development, and alignment across all levels;
- programming that develops and supports the social and emotional learning and behavioral needs of all.
- the continuation of the enhancements to our network to support safety and wellness of the whole child.
- the infusion of technology and project-based learning into learning environments for students; and
- the reimagining of what it means to have a successful Pre-K to 12 experiences through the development of programs and pathways to ensure that our students graduate with the knowledge and skills necessary for success in college and career, using strategic partnerships with the broader community.

To support allocations toward these strategic initiatives, the District has successfully identified guiding principles in the budget development process:

- build a budget that is reflective of the District's Vision.
- based on a District Strategy for Continuous Improvement.
- to sustain the District's commitment to educational excellence.
- to develop assessments that are manageable to the member towns.
- to provide effective programming and staffing levels that foster continuous improvement in the most cost-efficient manner.
- to communicate clearly with all stakeholders.
- to allocate resources strategically to create an aligned system Pre-K to 12; and
- to make data-driven decisions and recommendations based on what's best for our students.

As stated in Southern Berkshire Regional School District's Vision Statement: the District envisions "*a rigorous educational environment that prepares and inspires all students to be resilient, curious, and ethical global citizens who embrace the challenges of an ever-changing world through a commitment to our core values.*" By understanding the significant economic realities, and by continuing to create rigorous and relevant educational opportunities for students, I am confident that the District's FY23 Proposed Budget strives to bring our students closer to achieving this vision.

Respectfully,

~ Dr. Beth Regulbuto, Superintendent of Schools

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

FY23 BUDGET PROCESS

THE STATE BUDGET PROCESS

Each year, the Governor of Massachusetts must propose the Commonwealth’s budget for the following year by the 4th Wednesday in January. This preliminary budget is the basis upon which our annual budget is created. The Governor’s budget is sent to the House Committee on Ways and Means. That committee reviews the budget, holds public hearings, and releases its own budget to the full House of Representatives. Once passed by the House, the budget goes to the Senate Committee on Ways and Means. The Senate goes through a similar process, which ends with the Senate sending its own proposed budget to the House Conference Committee. A Conference Committee budget is then developed and sent to the Governor for his approval. The Governor then signs the budget, vetoes parts of the budget, or vetoes the entire budget. A 2/3 vote in each chamber can override the Governor’s veto(s). This proposal is based on the Governor’s numbers. The legislature has not put forth any budget proposals at the time of this hearing.

FY23 OPERATING BUDGET TIMELINE

October	<p>Superintendent presents and School Committee votes to approve Superintendent’s goals (annual action plan).</p> <p>School Committee accepts October 1st enrollment report.</p>
November	<p>Finance Sub-Committee convenes to discuss general budget plan and direction for the upcoming fiscal year.</p>
December	<p>District Administration meets, along with Buildings, Grounds and Technology sub-committee, and compiles capital project lists.</p> <p>Budget guidelines and budget request sheets are distributed to principals, directors and curriculum leaders.</p> <p>Directors, principals and curriculum leaders submit their estimates of FY23 budget requests.</p>
January - February	<p>Review and input initial PreK-12 educational budget plan worksheets</p> <p>Meet to discuss development of figures, justification of new expenditures, proposed significant increases and long-term goals for buildings/programs</p> <p>Central Office records estimated non-salary items as well as contracted salaries into the District budget.</p>
March	<p>Assemble key stakeholders for comprehensive input, analysis and discussion of financial short-term and long-term goals and plans for school district and member towns.</p>

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

FY23 BUDGET OVERVIEW

FY23 BUDGET	
OPERATING	\$15,713,650
TRANSPORTATION	<u>\$2,072,240</u>
OPERATING & TRANSPORTATION	\$17,785,890
CAPITAL (NON-BOND)	\$343,500
CAPITAL - BOND	<u>\$344,750</u>
GRAND TOTAL	\$18,474,140

FY23 ASSESSMENTS	
OPERATING	\$12,560,118
TRANSPORTATION	<u>\$1,656,367</u>
OPERATING & TRANSPORTATION	\$14,216,486
CAPITAL (NON-BOND)	\$274,564
CAPITAL - BOND	<u>\$275,563</u>
GRAND TOTAL	\$14,766,613

TOTAL BUDGET	
FY22 BUDGET	\$17,794,556
FY23 BUDGET	<u>\$18,474,140</u>
DOLLAR INCREASE	\$679,584
PERCENTAGE INCREASE	3.82%

TOTAL ASSESSMENTS	
FY22 ASSESSMENTS	\$14,240,100
FY23 ASSESSMENTS	<u>\$14,766,613</u>
DOLLAR INCREASE	\$526,513
PERCENTAGE INCREASE	3.70%

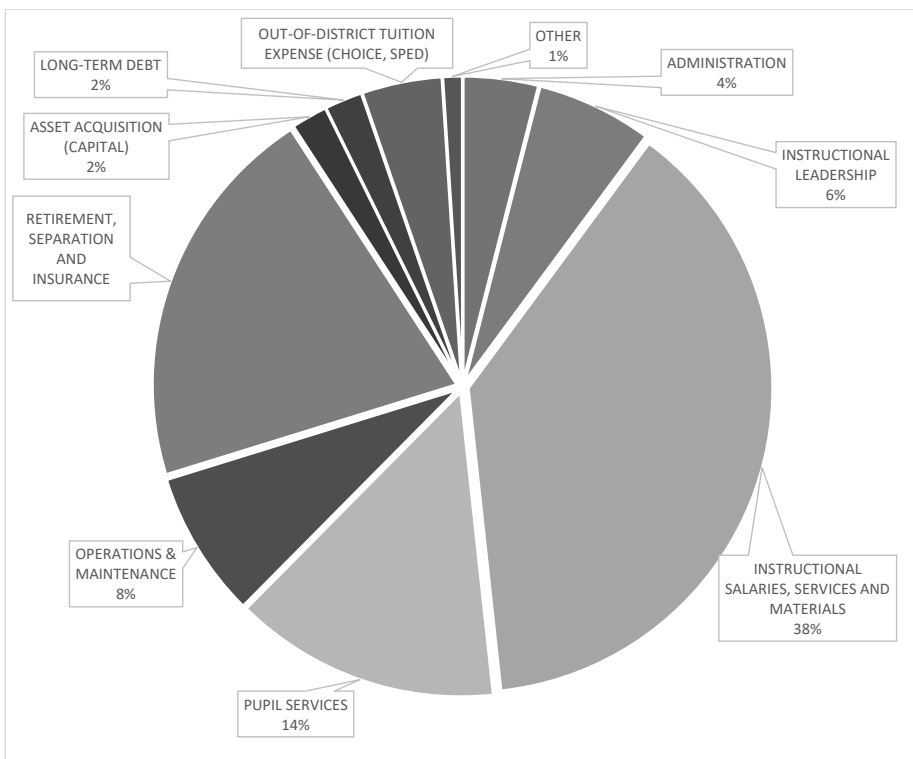
REVENUES	FY22	FY23	CHANGE	
CHAPTER 70	\$2,006,891	\$2,026,391	\$19,500	0.97%
CHAPTER 71 - TRANSPORTATION	\$833,987	\$788,136	-\$45,851	-5.50%
MEDICAID REIMBURSEMENT	\$70,000	\$70,000	\$0	0.00%
TOWN ASSESSMENTS	\$14,240,100	\$14,766,613	\$526,513	3.70%
EXCESS & DEFICIENCY FUND	\$525,000	\$700,000	\$175,000	33.33%
TUITION (OTHER THAN SCHOOL CHOICE)	\$107,578	\$112,000	\$4,422	4.11%
OTHER	<u>\$11,000</u>	<u>\$11,000</u>	<u>\$0</u>	<u>0.00%</u>
	\$17,794,556	\$18,474,140	\$679,584	3.82%

Note: The revenue and expenditure budgets (operating, transportation and capital) are increasing by a total of 3.82%. The assessments are increasing by 3.70%.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

FY23 EXPENDITURES

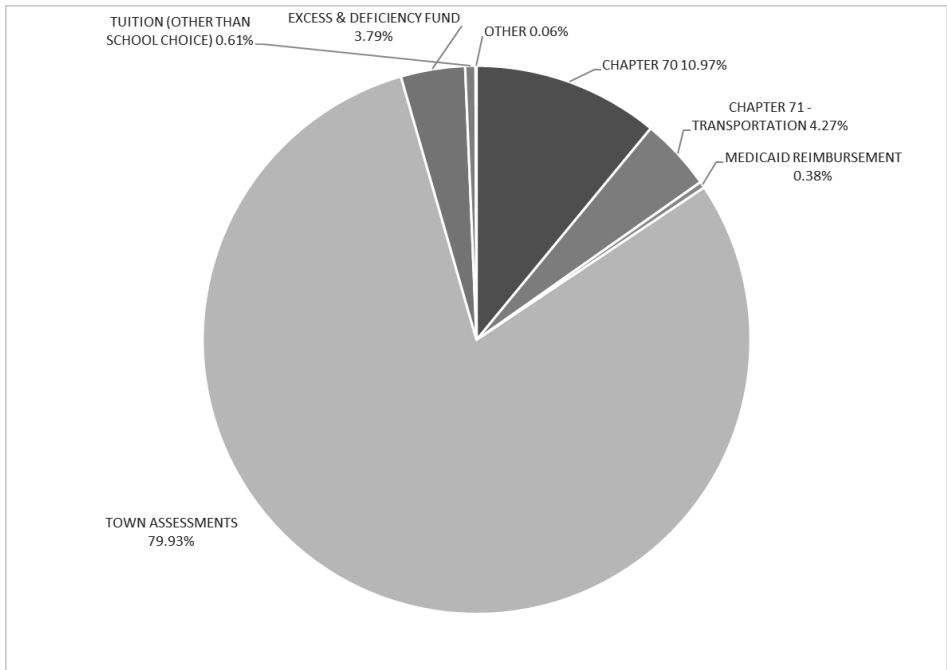
ADMINISTRATION	734,923
INSTRUCTIONAL LEADERSHIP	1,134,857
INSTRUCTIONAL SALARIES, SERVICES AND MATERIALS	7,050,204
PUPIL SERVICES	2,612,656
OPERATIONS & MAINTENANCE	1,440,527
RETIREMENT, SEPARATION AND INSURANCE COSTS	3,804,051
ASSET ACQUISITION (CAPITAL)	354,000
LONG-TERM DEBT	368,750
OUT-OF-DISTRICT TUITION EXPENSE (CHOICE, SPED)	785,702
OTHER	188,470
TOTAL	18,474,140



SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

F23 REVENUES

REVENUES	FY23	%
CHAPTER 70	\$ 2,026,391	10.97%
CHAPTER 71 - TRANSPORTATION	\$ 788,136	4.27%
MEDICAID REIMBURSEMENT	\$ 70,000	0.38%
TOWN ASSESSMENTS	\$ 14,766,613	79.93%
EXCESS & DEFICIENCY FUND	\$ 700,000	3.79%
TUITION (OTHER THAN SCHOOL CHOICE)	\$ 112,000	0.61%
OTHER	\$ 11,000	0.06%
	\$ 18,474,140	100.00%

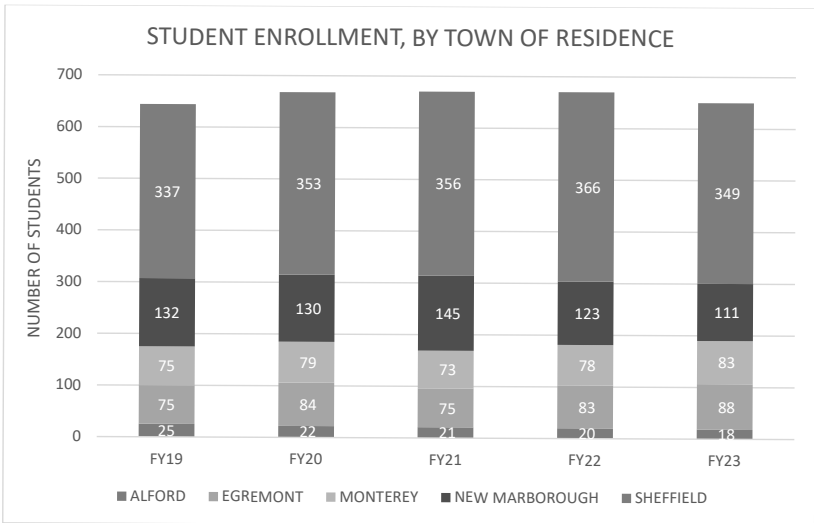


SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

FY23 BUDGET ANALYSIS

FIVE-YEAR HISTORICAL LOOK AT SBRSD ENROLLMENT AND ASSESSMENTS

A look at public school enrollment figures for students living within our five member towns shows the total number of students from FY22 to FY23 has decreased by 20 students, and a total increase of 6 students from FY19 to FY23 (from 644 to 650 students). This represents a 0.93% increase since FY19. From FY22 to FY23, Alford, New Marlborough and Sheffield are seeing a decrease of 1.6, 12.4 and 16.7 students, respectively; while Monterey and Egremont are seeing increases of 5.4 and 5.3 students, respectively.



These changes in enrollment, along with implementation of the Chapter 70 funding formula, result in a change in the percentage share of our annual budget for which each town is responsible.

Each town's share of the SBRSD operating and capital budgets, per the current five-town regional agreement, is based on the minimum required contribution that is established by the Massachusetts Department of Secondary and Elementary Education (DESE). Some of the factors that are included in the Commonwealth's calculation are:

- the number of students residing in each town who are being educated in public schools,
- each town's property wealth (based on the town's equalized valuation of its properties),
- each town's income wealth (based on the total personal income reported to the Department of Revenue by Sheffield residents), and
- how far or close each town's calculated preliminary minimum required contribution is to the state's "target" contribution for that town
- each town's Municipal Revenue Growth Factor, which is based on new growth in the town.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

GENERAL FUND REVENUES

Revenues from federal and state grants, state aid, and local sources support the district's annual overall budget. The budget that towns are taxed on is the General Fund budget. The revenue sources used to support the General Fund budget from FY19 through the proposed FY23 budget are as follows:

Description	FY19 Actual	FY20 Actual	FY21 Actual	FY22 Budget	FY23 Budget	FY23 vs FY22
TUITION - REGULAR	18,589	9,000	116,578	107,578	112,000	4.11%
STATE- CHAPTER 70 DISTRIBUTION	1,966,751	1,986,798	1,986,791	2,006,891	2,026,391	
STATE-CHAPTER 71 TRANSPORTATION REIMBURSEMENT	717,078	922,725	1,071,487	833,987	788,136	
STATE-MEDICAID REIMBURSEMENTS	123,781	66,907	57,642	70,000	70,000	
TOTAL STATE AID	2,807,610	2,976,430	3,115,920	2,910,878	2,884,527	-0.91%
ASSESSMENTS-OPERATING & TRANSPORTATION-ALFORD	411,661	442,251	444,966	430,713	432,854	
ASSESSMENTS-CAPITAL-ALFORD	11,491	11,715	9,490	8,873	8,360	
ASSESSMENT - ROOF/BOILER PROJECT - ALFORD	8,752	12,287	9,677	8,952	8,390	
	431,904	466,253	464,133	448,538	449,604	0.24%
ASSESSMENTS-OPERATING & TRANSPORTATION- EGREMONT	1,517,726	1,661,363	1,634,139	1,688,105	1,878,250	
ASSESSMENTS-CAPITAL-EGREMONT	42,365	44,202	34,853	34,775	36,275	
ASSESSMENT - ROOF/BOILER PROJECT - EGREMONT	32,267	46,358	35,538	35,086	36,407	
	1,592,358	1,751,923	1,704,531	1,757,966	1,950,932	10.98%
ASSESSMENTS-OPERATING & TRANSPORTATION -MONTEREY	1,513,757	1,572,040	1,582,562	1,612,175	1,785,364	
ASSESSMENTS-CAPITAL-MONTEREY	42,251	42,004	33,753	33,211	34,481	
ASSESSMENT - ROOF/BOILER PROJECT - MONTEREY	32,180	44,054	34,416	33,508	34,606	
	1,588,188	1,658,098	1,650,730	1,678,894	1,854,451	10.46%
ASSESSMENTS-OPERATING & TRANSPORTATION -NEW MARLBOROUGH	2,687,903	2,709,542	2,841,216	2,675,158	2,607,499	
ASSESSMENTS-CAPITAL-NEW MARLBOROUGH	75,016	76,210	60,597	55,108	50,359	
ASSESSMENT - ROOF/BOILER PROJECT - NEW MARLBOROUGH	57,135	79,928	61,789	55,601	50,542	
	2,820,053	2,865,680	2,963,602	2,785,867	2,708,400	-2.78%
ASSESSMENTS-OPERATING AND TRANSPORTATION -SHEFFIELD	6,711,302	6,824,991	7,148,394	7,268,052	7,512,518	
ASSESSMENTS-CAPITAL-SHEFFIELD	187,338	184,329	152,460	149,722	145,090	
ASSESSMENT - ROOF/BOILER PROJECT - SHEFFIELD	142,683	193,322	155,458	151,061	145,618	
	7,041,323	7,202,642	7,456,312	7,568,835	7,803,226	3.10%
TOTAL OPERATING AND TRANSPORTATION ASSESSMENTS	12,842,348	13,210,186	13,651,277	13,674,203	14,216,485	
TOTAL CAPITAL ASSESSMENTS	358,461	358,461	291,153	281,689	274,565	
TOTAL ROOF/BOILER PROJECT ASSESSMENTS	273,017	375,950	296,878	284,208	275,563	
	13,473,826	13,944,597	14,239,309	14,240,100	14,766,613	3.70%
TRANSFERS FROM E&D FUND	463,547	530,000	330,000	525,000	700,000	33.33%
EARNINGS ON INVESTMENTS	11,315	12,141	4,949	10,000	10,000	0.00%
OTHER	5,487	77,985	8,679	1,000	1,000	-88.48%
TOTAL REVENUE	16,780,374	17,550,153	17,815,434	17,794,556	18,474,140	3.82%

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

INFORMATION ON GENERAL FUND REVENUES

TUITION – REGULAR

This revenue has historically been revenue received from the Town of Mount Washington for students attending schools in this district. The number of students has increased over the years, resulting in a projected increase in revenue in FY23 to \$112,000.

CHAPTER 70 STATE AID

Our increases in Chapter 70 funding have been minimal over several years. Massachusetts recently passed the Student Opportunity Act (SOA), which recalculated the formula for state aid. While several communities saw a substantial increase in their Chapter 70 funding, SBRSD did not. Increases in Chapter 70 funding from FY19 – FY23 are shown below. Our FY23 allocation is 3.03% higher than was our FY19 allocation.

CHAPTER 70 AID			
	Revenue	Change from Prior Year	
FY19	\$1,966,751	\$19,320	1.0%
FY20	\$1,980,111	\$13,360	0.7%
FY21	\$1,986,791	\$6,680	0.34%
FY22	\$2,006,891	\$20,100	1.01%
FY23	\$2,026,391	\$19,500	0.97%

CHAPTER 71 REGIONAL TRANSPORTATION REIMBURSEMENT

Regional transportation reimbursements from the state are calculated on the prior year's expenditures. Regular transportation costs for children who live at least 1.5 miles away from the school are the only costs eligible for reimbursement. We are not reimbursed for transportation for students whose individual education plans require transportation or for school choice transportation. The FY23 projection is based on preliminary Cherry Sheet figures from the state. This figure could change when the final reimbursement rate is established.

MEDICAID REIMBURSEMENT

In 1988, federal law was amended to allow Medicaid payment for services provided to children under the Individuals with Disabilities Education Act (IDEA). Local education authorities (LEAs), such as regional school districts, can seek payment for providing medically necessary Medicaid services (direct services) to eligible MassHealth-enrolled children when these services are included in their individual education plans (IEPs). Direct service and administrative activities are eligible. The FY23 budget includes a projection of \$70,000 in reimbursements.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

ASSESSMENTS

The state's Chapter 70 formula and our Regional Agreement dictate the calculation of assessments to the individual towns. Once we establish the expenditure side of the budget, we subtract all estimated revenues, other than assessments, from the total of the expenditures. The remainder is what we assess the towns. The following chart summarizes the FY19-FY23 assessments, shows the change from FY22-23 and the percent change by town. The full detail of the assessments for each of the towns by operating, capital, and bond projects can be found on page 9 of this document.

	FY19	FY20	FY21	FY22	FY23	FY22-23	% CHG
ALFORD	384,546	466,253	464,133	448,538	449,604	1,066	0.24%
EGREMONT	1,422,989	1,751,923	1,704,530	1,757,965	1,950,932	192,967	10.98%
MONTEREY	1,378,807	1,658,098	1,650,731	1,678,894	1,854,452	175,558	10.46%
NEW MARLBOROUGH	2,527,490	2,865,680	2,963,602	2,785,867	2,708,400	(77,467)	-2.78%
SHEFFIELD	6,198,936	7,202,643	7,456,312	7,568,836	7,803,226	234,390	3.10%
TOTAL	11,912,768	13,944,597	14,239,308	14,240,100	14,766,613	526,513	3.70%

EXCESS AND DEFICIENCY FUNDS

A regional school district's Excess and Deficiency Fund (E&D) is comparable to a municipality's Free Cash. E&D funds are funds that result from revenues coming in higher and/or expenditures coming in lower than budgeted. The Department of Revenue certifies the amount of E&D funds each year as of July 1st. These funds, once certified, are available as a revenue source in the upcoming year's budget. A regional school district's school committee may use all or part of the certified balance. However, if the certified balance exceeds 5% of the following year's proposed budget, the school committee *must* use the amount in excess of 5% as a revenue source. A historical look at the SBRSD's E&D fund follows:

EXCESS & DEFICIENCY FUND (E&D) SUMMARY				
Date Certified	Amount Certified	Returned to Towns (5% above budget)	Amount Applied to Next Year's Budget	
7/1/2015	\$540,120	\$0	\$400,000	FY16
7/1/2016	\$839,955	\$46,771	\$400,000	FY17
7/1/2017	\$768,713	\$0	\$500,000	FY18
7/1/2018	\$819,257	\$0	\$463,547	FY19
7/1/2019	\$469,389	\$0	\$530,000	FY20
7/1/2020	\$608,238	\$0	\$330,000	FY21
7/1/2021*			\$525,000	FY22
7/1/2022**			\$700,000	FY23

*In process for certification for FY21 est approval \$830K

** This is an estimated use of E&D for FY23

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

INVESTMENT INCOME

Investment income averages \$7,000 - \$10,000 a year and is projected at \$10,000 for FY23.

OTHER

Other income is income that does not fit within the categories listed and is most often unanticipated. It is projected at \$1,000 in FY23.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

FOCUS ON TWO ADDITIONAL FUNDING SOURCES USED TO REDUCE ASSESSMENTS

CIRCUIT BREAKER PROGRAM

The state special education reimbursement program, commonly known as the circuit breaker program, was started in FY04 to provide additional state funding to districts for high-cost special education students. The threshold for eligibility is tied to four times the state average foundation per-pupil budget as calculated under the Chapter 70 program, with the intent that the state pays 75 percent of the costs above that threshold. For children placed in a school district outside their hometown by the Department of Transitional Assistance or the Department of Children and Families, and for children who have no parents or guardians in the commonwealth, the reimbursement is 100 percent above the threshold rather than 75 percent. Circuit breaker reimbursements are for the district's prior year expenses and must be expended in the fiscal year they are received or in the following year.

In addition to the regular circuit breaker reimbursements, the "extraordinary relief" program provides funding to help districts experiencing a significant increase in their special education costs. Under this program, districts may file an additional claim form in February for the current year's estimated expenses. If the expenses have increased by 25 percent or more over the prior fiscal year, then the district will be eligible for an additional extraordinary relief payment to help fund the increase. Extraordinary relief funds must be expended in the year they are received.

The Student Opportunity Act, recently passed into law in Massachusetts, now allows for out-of-district transportation costs that fit into the Circuit Breaker Program's definitions to be reimbursed. The Department of Elementary and Secondary Education is currently preparing to implement this program. This will assist the district in paying for associated costs for transporting students to out-of-district placements. We continue to monitor this situation as it unfolds.

A summary of activity in the Circuit Breaker Fund for the past five years follows.

CIRCUIT BREAKER FUND						
	STANDARD REIMBURSEMENT	EXTRAORDINARY RELIEF	TOTAL REVENUE	EXPENDITURES	USE OF FUNDS	
FY16	\$ 77,486	\$ -	\$ 77,486	\$ 65,982	OUT-OF-DISTRICT TUITION \$65,982	
FY17	\$ 84,863	\$ 51,255	\$ 136,118	\$ 128,741	OUT-OF-DISTRICT TUITION \$87,951; ADJUSTMENT COUNSELORS \$11,381; OT/PT \$29,409	
FY18	\$ 153,703	\$ -	\$ 153,703	\$ 103,437	OUT-OF-DISTRICT TUITION \$46,076; OT/PT \$57,361	
FY19	\$ 76,893	\$ -	\$ 76,893	\$ 182,045	OUT-OF-DISTRICT TUITION \$182,045	
FY20	\$ 156,447	\$ 38,160	\$ 194,607	\$ 66,500	OUT-OF-DISTRICT TUITION, \$66,500	
FY21*	\$ 224,051	\$ -	\$ 224,051	\$ 116,382	OUT-OF-DISTRICT TUITION, \$116,382	
FY22	\$ 204,564	\$ -	\$ 204,564	\$ 80,382	OUT-OF-DISTRICT TUITION, \$80,382	
			<u>\$ 1,067,422</u>	<u>\$ 743,469</u>		

* FY22 figures are anticipated to the end of the fiscal year and may change.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

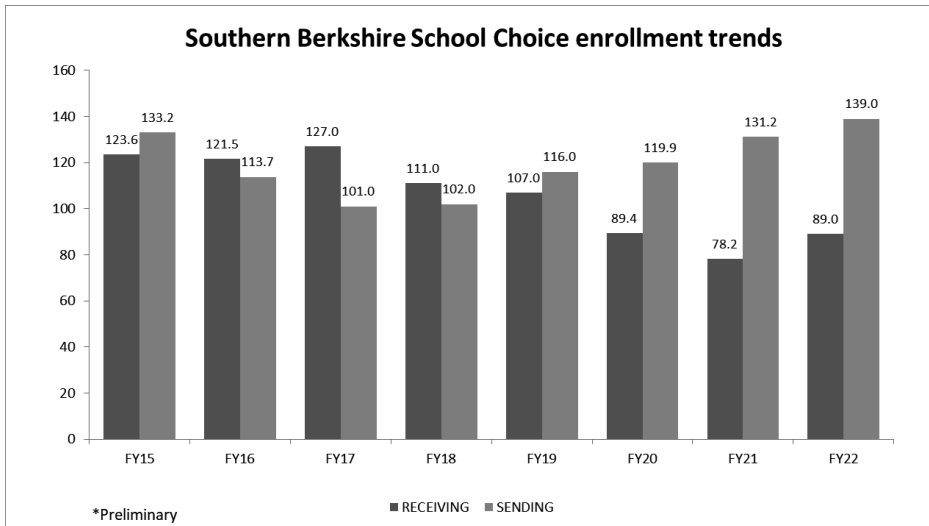
SCHOOL CHOICE

The School Choice program diverts state funding from sending districts to receiving districts. For regular education students who receive no additional special educational services, the funding is \$5,000 per student. For students receiving additional special educational services, incremental funding is sent to cover the cost of those services. Here is a look at revenues and expenditures from these funds from FY19 through the proposed FY23 budget:

SCHOOL CHOICE FUND SUMMARY					
	Beginning Balance	Revenues	Expenditures	Ending Balance	Use of Funds
FY19	\$316,012	\$640,149	\$424,051	\$532,110	Teachers' Salaries/Transportation
FY20	\$532,110	\$472,170	\$710,000	\$294,280	No expenses
FY21	\$294,280	\$453,716	\$187,800	\$560,196	Teachers' Salaries
FY22*	\$560,196	\$510,303	\$600,842	\$469,657	Teachers' Salaries
FY23**	\$469,657	\$570,000	\$700,000	\$339,657	
Totals		\$3,445,324	\$3,272,693		

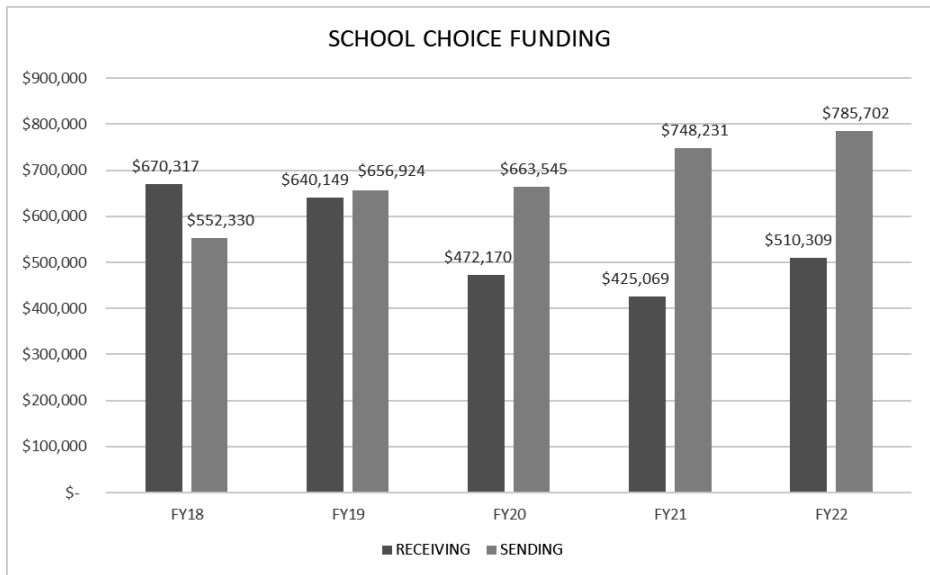
**FY22 reflects anticipated revenues/expenses to the end of the fiscal year.*
**FY23 reflects estimated revenues/expenses.*

SBRSD had been receiving more students than we had lost through School Choice from FY16-FY18. In FY19, that trend reversed, with choice-in revenue had being exceeded by choice-out expenditures. Analysis is ongoing to ensure that continuing to accept school choice-in students remains a programmatic and/or financial benefit to the district. FY23 figures are a result of October 1, 2021 enrollments and will be counted, moving forward, by the DESE as FTEs.



(Source: Massachusetts Department of Elementary and Secondary Education as of December 2021)

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT



(Note: FY22 amounts are per October 1, 2021 enrollment. These will be subject to continued refinement throughout the course of the year.)

ROOF, BOILER and SPRINKLER PROJECT

The roof, boiler and sprinkler project is complete, with final payments having gone out to contractors in March 2017. We received the final audit and reimbursement of \$124,656 from the Massachusetts School Building Authority (MSBA) in August 2017.

Information distributed in advance of the towns' votes to approve the roof and boiler project estimated that the total project costs would be \$7.74 million. The estimated MSBA grant total was \$2.74 million. An additional \$360,000 Department of Energy Resources (DOER) Schools and Public Housing Integrating Renewables and Efficiency (SAPHIRE) grant towards the cost of the pellet boilers left the estimated balance to be paid by the towns at \$4.64 million.

Final costs for the project totaled \$6.6 million, much lower than was originally anticipated. Total costs include the installation of a new sprinkler system, which the MSBA required when it was determined that the existing system was not functioning and needed to be replaced. The final MSBA grant totaled \$2.04 million, due to a reduction in actual and eligible costs. The district took out multiple bond anticipation notes (BANs) to fund the project while it was ongoing. The final BAN of \$4.2 million was paid off when the district issued a 15-year, \$3,605,000 long-term bond in November 2017.

The new boiler uses a renewable energy source (wood pellets) to heat the Undermountain and Mt. Everett schools. The DOER supported this project through its SAPHIRE Grant to assist in the State's efforts to achieve sustainability and meet carbon reduction goals.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

The biomass system that SBRSD installed was recommended by the Department of Energy Resources (DOER) and was identified at the time as meeting the State's requirements for Alternative Energy Credits (AECs). After the system was installed, and upon review of new AEC requirements, it was determined that adjustments to the metering system were needed in order to test and record emission levels. SBRSD received \$111,796 in grant funds from the DOER for a new metering system and for emissions testing. The District has received word that we do now qualify for the AECs. We do not yet have final figures, but we will be receiving a retroactive payment and then ongoing payments. As promised when the project was originally proposed to the taxpayers, this revenue will be earmarked to help pay down the bond.

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT \$3,605,000 GENERAL OBLIGATION SCHOOL BONDS DATED NOVEMBER 29, 2017

Fiscal Year	Principal	Interest	Fiscal Total
2018		\$ 63,877	\$ 63,877
2019	\$ 260,000	\$ 126,350	\$ 386,350
2020	\$ 260,000	\$ 115,950	\$ 375,950
2021	\$ 260,000	\$ 105,550	\$ 365,550
2022	\$ 260,000	\$ 95,150	\$ 355,150
2023	\$ 260,000	\$ 84,750	\$ 344,750
2024	\$ 260,000	\$ 74,350	\$ 334,350
2025	\$ 260,000	\$ 63,950	\$ 323,950
2026	\$ 255,000	\$ 53,550	\$ 308,550
2027	\$ 255,000	\$ 45,900	\$ 300,900
2028	\$ 255,000	\$ 38,250	\$ 293,250
2029	\$ 255,000	\$ 30,600	\$ 285,600
2030	\$ 255,000	\$ 22,950	\$ 277,950
2031	\$ 255,000	\$ 15,300	\$ 270,300
2032	<u>\$ 255,000</u>	<u>\$ 7,650</u>	<u>\$ 262,650</u>
	<u>\$ 3,605,000</u>	<u>\$ 944,127</u>	<u>\$ 4,549,127</u>

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

FY23 PROPOSED BUDGET GENERAL FUND COMPARED TO FY22 VOTED BUDGET

DESE CLASSIFICATION CODES	BUDGET CLASSIFICATION DESCRIPTIONS	FY22 BUDGET	FY23 PROPOSED	% CHG
0000	CONTINGENCY	<u>100,000</u>	<u>100,000</u>	0.00%
		-		
1110	SCHOOL COMMITTEE	13,747	48,600	
1210	SUPERINTENDENT'S OFFICE	262,422	270,899	
1230	OTHER DISTRICT-WIDE ADMINISTRATION	1,500	1,500	
1410	BUSINESS and FINANCE	263,016	267,663	
1420	HUMAN RESOURCES	68,219	68,711	
1430	LEGAL SERVICES	66,000	66,000	
1435	LEGAL SETTLEMENTS	-	-	
1450	DISTRICT-WIDE INFORMATION MANAGEMENT & TECHNOLOGY	29,550	46,050	
	TOTAL ADMINISTRATION	<u>704,454.00</u>	<u>769,423.00</u>	9.22%
2110	CURRICULUM DIRECTORS	293,625	297,515	
2210	SCHOOL PRINCIPALS/BUILDING LEADERSHIP	638,983	606,020	
2220	CURRICULUM LEADERS	60,875	61,445	
2250	BUILDING TECHNOLOGY	155,335	169,877	
	INSTRUCTIONAL LEADERSHIP	<u>1,148,818.00</u>	<u>1,134,857.00</u>	-1.22%
2305/2310	CLASSROOM AND SPECIALIST TEACHERS	<u>4,785,999</u>	<u>4,792,325</u>	0.13%
2315	TEAM LEADERS	-		
2320	MEDICAL/THERAPEUTIC	187,484	190,257	
2325	SUBSTITUTES	186,500	209,000	
2330	EDUCATIONAL SUPPORT PERSONNEL	909,839	708,099	
2340	LIBRARY/MEDIA	165,514	171,113	
	OTHER TEACHING SERVICES	<u>1,449,337.00</u>	<u>1,278,469.00</u>	-11.79%
235x	PROFESSIONAL DEVELOPMENT	<u>61,435</u>	<u>61,445</u>	0.02%
2410	TEXTBOOKS	44,616	18,200	
2415	INSTRUCTIONAL MATERIALS	126,557	126,919	
2420	INSTRUCTIONAL EQUIPMENT	5,400	4,900	
2430	GENERAL SUPPLIES	64,525	66,950	
2440	OTHER INSTRUCTIONAL SERVICES	81,675	80,750	
2451	CLASSROOM INSTRUCTIONAL TECHNOLOGY	21,950	13,850	
2455	INSTRUCTIONAL SOFTWARE	28,791	38,821	
	INSTRUCTIONAL MATERIALS, EQUIPMENT, TECHNOLOGY	<u>373,514.00</u>	<u>350,390.00</u>	-6.19%
2710	GUIDANCE/COUNSELING	410,147	446,177	
2720	TESTING AND ASSESSMENT	13,447	18,400	
2800	PSYCHOLOGICAL SERVICES	107,210	102,998	
	GUIDANCE, COUNSELING and TESTING	<u>530,804.00</u>	<u>567,575.00</u>	6.93%
3200	SCHOOL HEALTH SERVICES	175,599	156,670	
3220		1,800	-	
3300	TRANSPORTATION SERVICES	1,453,198	2,073,740	
3400	FOOD SERVICES	44,491	46,791	
3510	ATHLETICS	171,200	195,630	
3520	OTHER STUDENT ACTIVITIES	99,125	118,425	
3600	SECURITY	42,875	21,400	
	PUPIL SERVICES	<u>1,988,288.00</u>	<u>2,612,656.00</u>	31.40%

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

DESE CLASSIFICATION	BUDGET CLASSIFICATION DESCRIPTIONS	FY22 BUDGET	FY23 PROPOSED	% CHG
CODES				
4110	CUSTODIAL SERVICES	485,147	505,120	
4120	HEATING OF BUILDINGS	157,300	177,450	
4130	UTILITY SERVICES	231,250	247,679	
4210	MAINTENANCE OF GROUNDS	164,948	178,214	
4220	MAINTENANCE OF BUILDINGS	215,245	215,464	
4230	MAINTENANCE OF EQUIPMENT	76,800	75,700	
44xx	NETWORKING, TELECOMMUNICATIONS, TECHNOLOGY MAINTENANCE	36,200	40,900	
	OPERATIONS and MAINTENANCE	1,366,890.00	1,440,527.00	5.39%
5100	EMPLOYER RETIREMENT CONTRIBUTIONS	514,156	572,408	
5150	EMPLOYEE SEPARATION COSTS	18,000	18,000	
5200	INSURANCE - ACTIVE EMPLOYEES	2,389,287	2,355,643	
5250	INSURANCE - RETIRED EMPLOYEES	793,000	796,000	
5260	INSURANCE - OTHER NON-EMPLOYEE	54,000	62,000	
	RETIREMENT, SEPARATION AND INSURANCE COSTS	3,768,443.00	3,804,051.00	0.94%
5300	RENTAL/LEASE EQUIPMENT	78,450	79,400	
5450	SHORT-TERM INTEREST-BANS	-	-	
5500	OTHER FIXED CHARGES	9,070	9,070	
	FIXED CHARGES	87,520.00	88,470.00	1.09%
6200	COMMUNITY SERVICE	-	-	
7xxx	ASSET ACQUISITION (CAPITAL)	352,000	343,500	-2.41%
8100	DEBT RETIREMENT - SCHOOL CONSTRUCTION	260,000	260,000	
8200	LONG-TERM DEBT - INTEREST	95,150	84,750	
	LONG-TERM DEBT	355,150.00	344,750.00	-2.93%
9100	TUITION TO MA PUBLIC SCHOOLS	-	-	
9110	SCHOOL CHOICE TUITION EXPENSE	721,904	785,702	
9200	OUT-OF-STATE TUITION	-	-	
9300	TUITION TO MA PRIVATE SCHOOLS	-	-	
	TUITION EXPENSE	721,904.00	785,702.00	8.84%
	TOTAL BUDGET	17,794,556	18,474,140	3.82%

SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

GRANT ALLOCATIONS FOR FY22

as of February 28, 2022

		Amount Awarded
<u>Entitlement Grants</u>		
(115) ESSER II	\$	571,236.00
(119) ESSER III	\$	1,309,958.00
(140) Title II-A Teacher Quality	\$	20,638.00
(240) IDEA - Special Education	\$	266,900.00
(252) American Rescue Plan IDEA	\$	38,056.00
(262) Early Childhood Special Education	\$	7,632.00
(264) ARP IDEA	\$	3,384.00
(305) Title I	\$	151,177.00
(309) Title IV Part A	\$	12,064.00
Rural School Aid	\$	70,159.16
	\$	2,451,204.16

Competitive Grants

(117) SOA Summer	\$	20,000.00
(125) Math Accelerated Academy	\$	30,000.00
(311) Supporting Students' Social Emotional Learning	\$	38,000.00
(434) MyCap Development and Implementation	\$	4,800.00
(437) Summer Programming	\$	34,190.00
(460) Early College Support	\$	30,000.00
(613) SEL & Mental Health Grant	\$	75,720.00
United Way Summer Step Up	\$	80,000.00
Digital Math Supplement	\$	13,000.00
Math Accelerated Instruction	\$	74,000.00
Berkshire Taconic Wellness	\$	9,210.00
Berkshire Taconic Aquaponic	\$	600.00
Connecting Activities Grant	\$	4,000.00
MA Cultural Council Grant	\$	4,600.00
VHS Learning	\$	475.00
NEA Leadership Grant	\$	5,000.00
EEC Early Childhood Grant	\$	70,000.00
	\$	493,595.00

Pending Grants

(466) Early College Wall to Wall Full Impact	\$	147,668.00
(466) Early College Designation	\$	381,684.00
	\$	529,352.00

Total Grant Applications	\$	3,474,151.16
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SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

GRANT FUNDED EXPENDITURES, FY18 – FY22

(In broad categories)

	FY18	FY19	FY20	FY21	FY22
PROFESSIONAL SALARIES AND STIPENDS	\$ 157,563	\$ 198,905	\$ 155,812	\$ 126,939	\$ 170,244
EDUCATIONAL SUPPORT PERSONNEL	\$ -	\$ -	\$ -	\$ -	\$ -
OTHER WAGES	\$ 4,000	\$ 4,000	\$ 3,000	\$ -	\$ -
	<u>\$ 161,563</u>	<u>\$ 202,905</u>	<u>\$ 158,812</u>	<u>\$ 126,939</u>	<u>\$ 170,244</u>
CONTRACTED SERVICES	\$ 84,604	\$ 146,331	\$ 18,000	\$ -	\$ 159,667
EMPLOYEE BENEFITS/CONTRIBUTIONS	\$ 15,254	\$ 25,244	\$ 22,171	\$ 8,165	\$ -
OTHER INSTRUCTIONAL SERVICES	\$ 45,560	\$ -	\$ 18,977	\$ 10,000	\$ 61,285
SUPPLIES, MATERIALS AND EQUIPMENT	\$ 61,280	\$ 80,998	\$ 1,500	\$ 5,000	\$ 33,954
TRANSPORTATION	\$ 5,000	\$ 6,990	\$ 3,000	\$ 20,000	\$ 228,776
TUITION OUT-OF-DISTRICT	\$ 161,439	\$ 193,303	\$ 319,319	\$ 314,669	\$ 189,351
	<u>\$ 373,137</u>	<u>\$ 452,866</u>	<u>\$ 382,967</u>	<u>\$ 357,834</u>	<u>\$ 673,033</u>
	<u>\$ 534,700</u>	<u>\$ 655,771</u>	<u>\$ 541,779</u>	<u>\$ 484,773</u>	<u>\$ 843,277</u>

TAX COLLECTOR REPORT

Town of Monterey
Tax Collector
July 1, 2021 - June 30, 2022

	7/1/21	Commitments	Collected	Exemptions	Abatements	Refunds	Tax Title	6/30/22
	Balance							Balance
2014 Motor Vehicle	\$ 78.75		\$ -		\$ 78.75			\$ -
2015 Motor Vehicle	\$ 1,020.85		\$ -		\$ 1,020.85			\$ -
2016 Motor Vehicle	\$ 829.69		\$ -					\$ 829.69
2017 Motor Vehicle	\$ 798.96		\$ 65.00					\$ 733.96
2018 Motor Vehicle	\$ 1,806.87							\$ 1,806.87
2019 Real Estate	\$ 4,192.84						\$ 2,239.98	\$ -
2019 Motor Vehicle	\$ 1,687.50		\$ 1,952.86				\$ 2,249.06	\$ 1,512.50
2020 Real Estate	\$ 10,557.56		\$ 175.00					\$ -
2020 Motor Vehicle	\$ 3,868.29		\$ 8,308.50				\$ 2,200.63	\$ 1,492.20
2021 Real Estate	\$ 62,241.07		\$ 2,376.09					\$ 14,399.94
2021 Personal Property	\$ 45.18		\$ 45.18					\$ -
2021 Motor Vehicle	\$ 15,472.91	\$ 15,067.69	\$ 29,026.18		\$ 1,207.51	\$ 988.75		\$ 1,295.66
2022 Real Estate		\$ 3,866,548.42	\$ 3,786,391.52	\$ 13,881.00	\$ 1,590.68	\$ 20,004.63	\$ 6,229.50	\$ 78,460.35
2022 Personal Property		\$ 86,717.80	\$ 86,803.29		\$ 87.48	\$ 331.58		\$ 158.61
2022 Motor Vehicle		\$ 152,341.49	\$ 140,452.41		\$ 3,776.62	\$ 1,844.81		\$ 9,957.27
Interest	\$ 102,600.47	\$ 4,120,675.40	\$ 4,101,236.53	\$ 13,881.00	\$ 7,761.89	\$ 23,169.77	\$ 12,919.17	\$ 110,647.05
MV Surcharges			\$ 14,989.59					
Deputy Fees			\$ 1,420.00					
Late Fees/MLC Fees			\$ 1,236.00					
Misc Fees			\$ 5,260.00					
TOTAL COLLECTED			\$ 289.05					
			\$ 4,124,431.17					

TOWN CLERK REPORT

REPORT OF THE TOWN CLERK

The Town Clerk's office is the official record keeper for the Town of Monterey. Some of the services that this office covers are vital statistics: births, marriages, deaths, posting of meeting notices for all municipal boards and committees, voter registration, town political calendar, annual census, business certificates (DBA), notarization of documents, Town Meeting warrants and minutes and also responsible for by-law changes with the Attorney General's Office.

The following report is based on primary areas of activity during Fiscal Year 2022. 7/1/2021 to 6/30/2022

Vital Report

Births-2

Deaths-8

Marriages-5

Dog Licensing

Dog Licensing is required annually each spring. Licenses expire on March 31st and dog owners have from March 1st until May 1st to renew. If you do not renew your license, a **\$25.00 late fee** per dog will be implemented in addition to your license fee. If you have a dog that is 6 months of age or older licenses are required.

Funds collected from July 1, 2021 until June 30, 2022

Business Licenses:	\$ 100.00
Birth Certificates:	\$ 15.00
Marriages:	\$ 115.00
Death Certificates:	\$ 385.00
Dog Licenses:	\$ 1,029.00
Copies:	\$ 3.90
Labels:	\$ 60.00

My goal is to continue to keep the Town Clerk's office running smoothly and efficiently. I would like to thanks everyone for your continued support during this past year.

Respectively submitted,
Terry L. Walker

TREASURER

Office of the Town Treasurer

July 1, 2021-June 30, 2022

Cash Reported by Bank Account as of June 30, 2022

Unibank Treasurer	\$492.77
Unibank Payroll	\$-15,859.56
Unibank: Building Permit	\$493.24
Unibank: CDBG	\$415.20
Unibank: Library Block Grant	\$10.42
Unibank: AP	\$-19,997.94
Unibank: New AP	\$22,808.25
Pittsfield Co-op Coll	\$1,074,873.64
Berkshire Tenant	\$1,072.83
Citizens Treasurer 9354	\$383,673.34
Unibank: Debit Card 1383	\$1,212.52
Unibank: Program Income	\$34,668.18

Trust & Agency Accounts in Custody of the Treasurer as of June 30, 2022

Cemetery Perpetual Care	\$44,869.05
Jean Nightingale Cemetery	\$13,281.98
Library Memorial Trust	\$1,533.19
Library Abercrombie Trust	\$13,840.62
Conservation Trust	\$41,238.16
House Rental Account	\$1,037.40
Septic Account	\$36,788.87
General Stabilization	\$954,669.55
Fire Stabilization	\$15,000.98
Bridges Roads & Culverts Stabilization	\$196.55
Retirees Group Benefit	\$74,367.44
	\$2,680,686.68

TREASURER

ANNUAL REPORT 2022	Report Gross Amt		
Keith Avelle	26281.12	Police Department	Part Time Police Officer
Gareth Backhaus	88716.21	Police Department	Police Chief
Jennifer Brown	87.16	Police Department	Part Time Police Officer
Michael Carroll	4090.00	Fire Department	Firefighter
Donald Clawson	44591.00	Assessor's Office	Principal Assessor
Tyler Collins	52938.46	Highway Department	Highway 3
Susan Cooper	3436.32	Select Board	Selectboard
Brian Dillion	2480.00	Fire Department	Firefighter
Bruce Eichstedt	11098.85	Transfer Station Manager	Transfer Station Attendant
Anne Marie Enoch	26345.69	Tax Collector	Tax Collector
Brian Fahey	80950.24	Police Department	Police Chief
Donald Fitzgerald	381.60	Building Inspector	Alternate Building Inspector
Kevin Fitzpatrick	1224.32	Tree Warden	
Nicolaos Fredsall	5400.00	Wiring Inspector	Inspector
Cody Funk	18111.51	Fire Department	
David Gilmore	5313.34	Transfer Station Manager	
Molly Goodchild	13108.80	Library	Library Assistant
Emily Hadsell	5274.00	COA Outreach Coordinator	
Linda Hamill	10357.51	Assessor's Office	Assessors Admin Clerk
James Hunt	79468.18	Highway Department	Director of Operations
Kyle Hutson	10880.00	Fire Department	Firefighter
Christopher Isner	10460.00	Fire Department	Firefighter
Scott Jenssen	1734.00	Select Board	Selectboard
William Klahn	10153.48	Transfer Station Manager	Transfer Station
Robert Krupski	7182.00	Plumbing & Gas Inspector	Inspector
Aldeth Lewin	552.00	Election Worker	Election Worker
Charity Loy	4770.00	Fire Department	Firefighter
Mark Makuc	38409.01	Library department	Library Director
John Makuc	2280.65	Board of Health	BOH/Firefighter/Animal Inspector
Justin Makuc	6637.00	Fire Department	
Mary Makuc	8589.85	Community Center	Coordinator
Ian Mangosan	415.36	Police Department	
Delbert Martin	10310.00	Fire Department	Firefighter
Rosemary McAlister	11297.31	Library department	Library Assistant
Laurie McArthur	822.78	Select Board	Select Board Secretary
Santi Messina	12847.31	Police Department	
Nathan Morawiec	2260.00	Fire Department	Firefighter
Austin Mosca	21169.52	Highway Department	Director of Operations
Lauren Nelson	23051.00	Police Department	Police Officer
Melissa Noe	76216.36	Town Administrator	Town Administrator
Beth Parks	739.96	Transfer Station Manager	
Kyle Pettibone	39249.91	Highway Department	Highway Operator
Myles Pierce	2142.56	Tree Warden	Tree Warden
Kathryn Roberts	2205.00	COA Outreach Coordinator	COA Outreach Coordinator
Robert Rodgers	2670.00	Fire Department	Firefighter
Julio Rodriguez	893.50	Election Worker	Election Worker
Laura Rodriguez	1443.26	School Comm Rep	School Committee Rep
James Rourke	9249.58	Transfer Station Manager	Transfer Station Manager
Marie Ryan	277.50	Town Clerk	Interim Town Clerk
Nathanial Sermini	32201.47	Police Department	Part Time Police Officer
Gary Shaw	7661.69	Assessor's Office	BOA Board Member
Patrick Sheridan	9010.00	Fire Department	Firefighter
Scott Steibel	2020.06	Assessor's Office	BOA Board Member
Teresa Steibel	1920.31	Assessor's Office	BOA Board Member
Donald Torrico	34961.17	Building Inspector	Building Inspector
Christopher Tryon	15490.00	Fire Department	Firefighter
Shawn Tryon	20318.53	Fire Department	Fire Chief
Evelyn Vallianos	1263.01	Election Worker	Election Worker
Kate Van Olst	1323.00	Admin Assistant	
Terry Walker	30585.23	Town Clerk	
John Weingold	1818.85	Select Board	
Steven Weisz	1805.38	Select Board	
Kimberly Wetherell	3350.00	Conservation Commission	Conservation Commission
Sabrina Wilson	21272.89	Police Department	Police Officer
Peter Wilson	64757.07	Highway Department	Highway Foreman
James Wilusz	21859.59	Sanitary Inspector	Sanitary Inspector
Randon Ziegler	22376.34	Highway Department	

TREE WARDEN REPORT

Tree Warden Annual Report Fiscal Year 2022

This was a busy and productive year. The National Grid tree cutting program was completed. John Fields tree crews removed a large number of dead and dying Ash trees on Eaton and Corashire Roads, They also removed the large Spruce trees and a couple of pines at the Community Center as well as some dead trees on Eaton Road.

At the end of my term there was still one weeks' worth of tree work left in the budget for the year.

I would like to thank Town Administrator Melissa Noe and the entire Monterey Highway Department for the help and support over the years. I would also like to thank the people of Monterey. I tried to spend your money wisely and leave things better than I found them.

Thank you.

Kevin Fitzpatrick, Tree Warden May 2021 – May 2022

VETERAN'S SERVICES REPORT

REPORT OF THE SOUTHERN BERKSHIRE DISTRICT DEPARTMENT OF VETERANS' SERVICES

To the Honorable Select Board:

Thank you for allowing me to service the member towns, their veterans, and widows. We have made great strides in reaching out to our veterans in our local area, letting them know the various services available to them from Elderly Services, Community Actions and also the local senior centers. During FY 2022 we have seen a slight decrease in all areas of operation and currently have 39 active Chapter 115 claims.

Chapter 115 Submissions and Return from the State:

Town	FY 2022 Submitted 7/01/21-6/30/22	Pmt Due in FY 2023 -FY 2022 - 75%
Monterey	\$0.00	\$0.00

Over the last year we have completed the following for our member town's veterans:

Applications for VA Health Care	21
ALS/Disability/A&A/Appeals/Life Insurance	42
DD 214s	38
Request for Grave Markers	40
Tax Abatements/SS help/Other requests	20
Flags to funerals homes for veterans	25
Assisted with Dr. appointments	15
Home and Office Visits	265
Veterans Services Phone Calls	1175

For FY 2022 District budget was reduced by the reserve resulting in a smaller assessment for the member towns. During these trying financial times all veterans and widows are encouraged to contact this office or the US Department of Veterans Affairs and review current entitlements as many changes have taken place. Monterey's' apportionment towards the FY 2022 DVS budget was \$4,697.85 – this number was based on population percentage on the 2020 Census.

Respectfully Submitted,

Laurie J. Hils

Southern Berkshire District Director for Veteran Services

ZONING BOARD OF APPEALS REPORT

Report for the Zoning Board of Appeals FY 2022

The Zoning Board of Appeals is composed of five elected members and two appointed alternates. Members serve a five-year term on a staggered basis. The ZBA (i) hears appeals relative to the Monterey Zoning Bylaws and conducts hearings in its review of applications for Special Permits and Variances under the terms of the by-law and (ii) holds administrative meetings to address Board and zoning related matters. During fiscal year 2022 the board held eight (8) such hearings.

Hearing Number	Name or Location	Type of Hearing	Granted/Denied
22-1	Rockhead Associates	Special Permit	Granted
22-2	Joseph Cooney	Special Permit	Granted
22-3	Gumowitz	Special Permit	Granted
22-4	Gelbard	Special Permit	Granted
22-5	Oliver	Special Permit	Granted
22-6	Reif-Caplan	Special Permit	Granted
22-7	Saltzman	Special Permit	Granted
22-8	Bernstein	Special Permit	Granted
Administrative Meetings held on August 5, 2021, September 29, 2021 and November 10, 2021			

Respectfully Submitted,
Jonathan Levin, Chair
Gary Shaw, Clerk
Susan Cooper
Scott Jenssen
Michael Banner,
Melissa Noe, Town Administrator