

Acct	Description	FY24	FY24	FY25	Increase/ Decrease	% Increase/ Decrease
		5/6/23 ATM	Feb STM & Trnfs			
	DRAFT	APPROVED	REVISIONS	REQUESTED	Increase (Decrease)	Increase (Decrease)
100	GENERAL GOVERNMENT					
114	Moderator	375.76	0.00	390.79	15.03	4%
115	Constable	739.06	0.00	768.62	29.56	4%
122	Select Board Elected	16,200.00	0.00	16,848.00	648.00	4%
122	Select Board Expenses	4,400.00	0.00	4,400.00	0.00	0%
122	Select Board Secretary	4,500.00	0.00	4,698.00	198.00	4%
122	Grant writing wages	5,000.00	0.00	5,000.00	0.00	0%
122	Grant writing expenses	250.00	0.00	250.00	0.00	0%
122	CART (Communication Access Real Time Translation)	2,300.00	0.00	2,820.00	520.00	23%
123	Town Administrator	80,808.30	0.00	84,040.63	3,232.33	4%
123	Town Administrator Expenses	3,000.00	0.00	3,000.00	0.00	0%
120	Office Assistant Wages	8,456.40	0.00	8,457.00	0.60	0%
120	Office Assistant Procurement, Training & Expenses	250.00	0.00	250.00	0.00	0%
131	Finance Committee Expenses	500.00	0.00	500.00	0.00	0%
131	Finance Committee Clerk	1.00	0.00	1.00	0.00	0%
132	Town Reserve Fund	30,000.00	-824.00	30,000.00	824.00	3%
135	Town Accountant Services	39,300.00	0.00	40,800.00	1,500.00	4%
135	Accounting/Treasurer Software	6,950.00	0.00	7,230.00	280.00	4%
135	Annual Audit	17,500.00	0.00	0.00	(17,500.00)	-100%
135	GASB75	2,750.00	0.00	2,750.00	0.00	0%
141	Assessors Elected	5,229.00	0.00	5,438.16	209.16	4%
141	Principal Assessor Salary	47,443.09	0.00	49,340.81	1,897.72	4%
141	Assistant to the Principal Assessor	1.00	0.00	1.00	0.00	0%
141	Assessors Clerk Wages	11,469.12	0.00	12,301.20	832.08	7%
141	Assessors Expenses	20,900.00	0.00	6,411.00	(14,489.00)	-69%
141	Assessors Software	13,750.00	0.00	19,018.00	5,268.00	38%
145	Treasurer Services	39,750.00	0.00	40,950.00	1,200.00	3%
145	Treasurer Expenses	7,200.00	0.00	7,600.00	400.00	6%
146	Tax Collector Elected Salary	27,855.35	0.00	28,969.56	1,114.21	4%
146	Tax Collector Expenses	5,900.00	0.00	6,550.00	650.00	11%
146	Tax Collector Software	8,200.00	0.00	8,250.00	50.00	1%
151	Legal Fees & Expenses	21,500.00	0.00	21,500.00	0.00	0%
152	Shared Human Resource Director <i>rename Human Resources Consulting</i>	4,000.00	0.00	19,000.00	15,000.00	375%
154	Meeting Warrants Printing & Postage	2,700.00	0.00	3,000.00	300.00	11%
155	IT expenses	12,500.00	0.00	37,900.00	25,400.00	203%
155	Broadband Services (town hall)	2,000.00	0.00	2,000.00	0.00	0%
158	Tax Title Legal Services	5,000.00	0.00	2,500.00	(2,500.00)	-50%
160	Town Clerk Wages	17,916.00	0.00	16,672.00	(1,244.00)	-7%
160	Town Clerk Expenses	5,400.00	0.00	8,110.00	2,710.00	50%
162	Election	6,850.00	0.00	9,784.00	2,934.00	43%

Acct	Description	FY24	FY24	FY25	Increase/ Decrease	% Increase/ Decrease
		5/6/23 ATM	Feb STM & Trnfs			
	DRAFT	APPROVED	REVISIONS	REQUESTED	Increase (Decrease)	Increase (Decrease)
163	Annual Street List/Census Expenses	750.00	0.00	750.00	0.00	0%
171	Conservation Comm.	1,500.00	0.00	1,600.00	100.00	7%
171	Conservation Commission Agent Wages	14,000.00	0.00	14,560.00	560.00	4%
175	Planning Board expenses	1,400.00	824.00	3,200.00	976.00	44%
175	Planning Board Clerk	0.00	0.00	0.00	0.00	#DIV/0!
175	BRPC Assessment	932.21	0.00	955.52	23.31	3%
176	Board of Appeals expenses	250.00	0.00	250.00	0.00	0%
176	Board of Appeals Clerk	1.00	0.00	1.00	0.00	0%
192	Town Offices	42,400.00	0.00	37,550.00	(4,850.00)	-11%
195	Town Report	1,200.00	0.00	1,200.00	0.00	0%
	Subtotal	551,277.29	0.00	577,566.30	26,289.01	5%
200	PROTECTION, PERSONS & PROPERTY					
210	Current Police Chief Salary	88,322.38	0.00	91,855.28	3,532.90	4%
210	Full Time Officer 1	58,240.00	0.00	60,802.56	2,562.56	4%
210	Full Time Officer 2	58,240.00	0.00	60,802.56	2,562.56	4%
210	Part Time Officers	52,175.80	0.00	54,471.04	2,295.24	4%
210	Police Expenses	41,990.00	0.00	43,100.00	1,110.00	3%
210	Police Rental Facilities	1,000.00	0.00	1,000.00	0.00	0%
220	Fire Dept Equipment & Maintenance	66,300.00	0.00	60,800.00	(5,500.00)	-8%
220	Fire Dept Other Expenses	10,100.00	0.00	15,600.00	5,500.00	54%
220	Fire Dept Compensation	129,920.00	0.00	322,210.00	192,290.00	148%
220	Fire Hall Lease	17,000.00	0.00	98,000.00	81,000.00	476%
221	Fire Inspector Stipend	3,516.18	0.00	3,656.83	140.65	4%
222	Berk. Cty. Sheriff Comm.	11,858.00	0.00	12,213.74	355.74	3%
240	Building Inspector Wages	42,730.33	0.00	44,430.96	1,700.63	4%
240	Alternate Building Inspector Wages	1,000.00	0.00	1,000.00	0.00	0%
240	Building Inspector Expenses	8,532.00	0.00	9,132.00	600.00	7%
243	Plumbing /Gas Inspector Exp	100.00	0.00	100.00	0.00	0%
245	Wiring Inspector Expenses	100.00	0.00	100.00	0.00	0%
291	Southern Berkshire Regional Emergency Planning Committee Assessment	500.00	0.00	500.00	0.00	0%
292	Animal Control/Dog Officer	1.00	0.00	1.00	0.00	0%
292	Animal Control Expenses	500.00	0.00	500.00	0.00	0%
293	Animal Inspector	600.00	0.00	624.00	24.00	4%
294	Tree Warden Salary	4,000.00	0.00	4,160.00	160.00	4%
294	Tree Warden Expenses	49,000.00	0.00	52,000.00	3,000.00	6%
	Subtotal	645,725.69	0.00	937,059.96	291,334.27	45%
300	EDUCATION					
301	School Committee Stipend	1,612.01	0.00	1,676.49	64.48	4%
380	Schools: Capital	38,644.00	0.00	39,803.32	1,159.32	3%
380	Schools: Operating & Transportation	1,751,821.00	0.00	1,804,375.63	52,554.63	3%
380	Loan & Interest SBRSD bond	40,064.00	0.00	41,265.92	1,201.92	3%

Acct	Description	FY24	FY24	FY25	Increase/ Decrease	% Increase/ Decrease
		5/6/23 ATM	Feb STM & Trnfs			
	DRAFT	APPROVED	REVISIONS	REQUESTED	Increase (Decrease)	Increase (Decrease)
	Subtotal	1,832,141.01	0.00	1,887,121.36	54,980.35	3%
400	PUBLIC WORKS & FACILITIES					
422	Highway Operations	227,275.00	0.00	226,400.00	(875.00)	0%
422	Director Of Operations Salary	83,242.24	0.00	86,571.93	3,329.69	4%
422	Foreman Wages	60,552.00	0.00	62,974.08	2,422.08	4%
422	Hwy 2 Wages	57,420.00	0.00	59,716.80	2,296.80	4%
422	Hwy 3 Wages	55,332.00	0.00	57,545.28	2,213.28	4%
422	Hwy 4 Wages	53,244.00	0.00	45,601.92	(7,642.08)	-14%
422	Temporary Highway Employee	1.00	0.00	1.00	0.00	0%
422	Hwy Overtime (not winter)	2,500.00	0.00	2,500.00	0.00	0%
422	OSHA updates & compliance	6,142.50	0.00	6,200.00	57.50	1%
422	Highway Capital	142,000.00	0.00	146,000.00	4,000.00	3%
423	Snow & Ice, Salt & Sand	150,000.00	0.00	150,000.00	0.00	0%
423	Winter Overtime	22,500.00	0.00	22,500.00	0.00	0%
424	Public Lighting	4,800.00	0.00	4,000.00	(800.00)	-17%
425	Fuel	60,000.00	0.00	60,000.00	0.00	0%
430	Dam Inspection & Maint.	5,000.00	0.00	5,000.00	0.00	0%
433	Transfer Station Operations	90,000.00	0.00	129,352.85	39,352.85	44%
433	Transfer Station Part Time Employee Wages	39,573.48	0.00	39,949.91	376.43	1%
435	Group Purchasing Regional	2,900.00	0.00	1,500.00	(1,400.00)	-48%
491	Cemetery Maintenance & Lawn Care	22,500.00	0.00	22,500.00	0.00	0%
491	Soldiers Graves	1,200.00	0.00	1,200.00	0.00	0%
	Subtotal	1,086,182.22	0.00	1,129,513.77	43,331.55	4%
500	HUMAN SERVICES					
510	Board of Health Elected Salary	1,200.00	0.00	1,248.00	48.00	4%
510	Board of Health Expenses	2,325.00	0.00	2,550.00	225.00	10%
510	Board of Health Clerk Stipend	1.00	0.00	0.00	(1.00)	-100%
510	Sanitary Inspector Wages	23,113.33	0.00	24,037.86	924.53	4%
510	Public Health Services	2,400.00	0.00	2,400.00	0.00	0%
541	Council on Aging	4,422.00	0.00	4,422.00	0.00	0%
541	COA Outreach Coordinator Wages	10,498.16	0.00	10,137.24	(360.92)	-3%
543	Veterans Benefits	5,000.00	0.00	5,000.00	0.00	0%
543	Veterans Assessment	6,525.80	0.00	7,783.65	1,257.85	19%
	Subtotal	55,485.29	0.00	57,578.75	2,093.46	4%
600	CULTURE & RECREATION					
610	Library General	37,455.00	0.00	59,095.00	21,640.00	58%
610	Library Wages	64,565.00	0.00	67,825.00	3,260.00	5%
610	Library Maintenance	15,875.00	0.00	0.00	(15,875.00)	-100%
630	Park Commission	20,604.00	0.00	4,440.00	(16,164.00)	-78%
630	Lifeguard Payroll/Administrative fees	32,193.00	0.00	32,193.00	0.00	0%
630	Parks Lawn maint., spring/fall clean up	6,713.88	0.00	17,094.00	10,380.12	155%
650	Community Center Operations	16,800.00	0.00	22,433.00	5,633.00	34%

Acct	Description	FY24	FY24	FY25	Increase/ Decrease	% Increase/ Decrease
		5/6/23 ATM	Feb STM & Trnfs			
	DRAFT	APPROVED	REVISIONS	REQUESTED	Increase (Decrease)	Increase (Decrease)
650	Community Center Administrative Staff	10,800.00	0.00	13,529.12	2,729.12	25%
675	Beach Monitor	3,600.00	0.00	3,726.00	126.00	4%
692	Memorial Day	2,000.00	0.00	2,000.00	0.00	0%
	Subtotal	210,605.88	0.00	222,335.12	11,729.24	6%
700	DEBT SERVICE					
700	Highway Truck Principal	41,430.40	0.00	0.00	(41,430.40)	-100%
700	Highway Truck Interest	2,569.60	0.00	5,636.14	3,066.54	119%
700	Medical Rescue Vehicle Principal	0.00	0.00	0.00	0.00	#DIV/0!
700	Medical Rescue Vehicle Interest	0.00	0.00	5,000.00	5,000.00	#DIV/0!
700	Tandem Axle Principal	50,000.05	0.00	66,667.00	16,666.95	33%
700	Tandem Axle Interest	6,814.95	0.00	4,672.63	(2,142.32)	-31%
700	Library Loan Principal	100,000.00	0.00	70,950.00	(29,050.00)	-29%
700	Library Loan Interest	35,000.00	0.00	32,085.75	(2,914.25)	-8%
	Subtotal	200,815.00	0.00	152,925.77	(47,889.23)	-24%
900	MISCELLANEOUS EXPENSES					
911	Berk. County Retirement	148,440.00	0.00	150,244.00	1,804.00	1%
913	Unemployment Insurance	5,000.00	0.00	1,000.00	(4,000.00)	-80%
914	Health Insurance	137,596.00	0.00	173,887.44	36,291.44	26%
915	Life Insurance	300.00	0.00	300.00	0.00	0%
916	Medicare	17,033.63	0.00	17,460.00	426.37	3%
945	Bonds & Insurance	112,000.00	0.00	120,000.00	8,000.00	7%
	Subtotal	420,369.63	0.00	462,891.44	42,521.81	10%
	Total Operating Expenses	5,002,602.01	0.00	5,426,992.48	424,390.47	8%
	Proposed change to operating budget			8.48%		
	Total of FY22 Operating Expenses (current year)	5,002,602.01				
	Total of Special Articles (Raise and appropriate)	0.00	0.00	573,722.00	573,722.00	
	Total of Special Articles Free Cash Used	406,180.19	0.00	0.00	(406,180.19)	
	Total of Special Articles Gen. Stabilization Funds Used	0.00	0.00	284,000.00	284,000.00	
	Total of Special Articles Health Stabilization Funds Used	17,906.00	0.00	18,635.00	729.00	
	Total of Special Articles Borrowing	129,000.00	0.00	1,050,000.00	921,000.00	
	Subtotal	553,086.19	0.00	1,926,357.00	1,373,270.81	
	Total	5,555,688.20	0.00	7,353,349.48	1,797,661.28	
	Total: Less: Special Articles of Borrowing	5,426,688.20	0.00	6,303,349.48	876,661.28	
	Total	5,555,688.20		7,353,349.48		
	Proposed change to budget after use of outside funds			32.36%		

SPECIAL ARTICLES These appear as written articles on warrant not as a spreadsheet

	Stabilization Fund Approp	0.00	0.00	0.00	0.00	#DIV/0!
--	---------------------------	------	------	------	------	---------

Acct	Description	FY24	FY24	FY25	Increase/ Decrease	% Increase/ Decrease
		5/6/23 ATM	Feb STM & Trnfs			
	DRAFT	APPROVED	REVISIONS	REQUESTED	Increase (Decrease)	Increase (Decrease)
	Retiree Group Health/Life Stabilization Fund Approp	30,000.00	0.00	30,000.00	0.00	0%
	Retiree Group Health/Life Insurance (from stabilization acct)	17,906.00	0.00	18,635.00	729.00	4%
	Fire Company Capital Improvements/Expenses	30,000.00	0.00	0.00	(30,000.00)	-100%
	Milfoil Control Lake Garfield	50,000.00	0.00	50,000.00	0.00	0%
	Cultural Council	3,000.00	0.00	3,600.00	600.00	20%
	Resurface Greene Park baseball Field (Parks)	10,000.00	0.00	0.00	(10,000.00)	-100%
	Police Radios	25,621.00	0.00	0.00	(25,621.00)	-100%
	Police Cruiser	64,920.00	0.00	0.00	(64,920.00)	-100%
	SBVA Annual Appropriation	51,670.00	0.00	70,122.00	18,452.00	36%
	Opioid	1,863.19	0.00		(1,863.19)	-100%
	Med 9 vehicle (Fire)	129,000.00	0.00	0.00	(129,000.00)	-100%
	Open Space Recreation Plan Grant Town Share	3,000.00	0.00	0.00	(3,000.00)	-100%
	Hydraulic Rescue Tool	52,000.00	0.00	0.00	(52,000.00)	-100%
	Monitor/Nozzle	10,000.00	0.00	0.00	(10,000.00)	-100%
	Fire Department Pagers	6,600.00	0.00	0.00	(6,600.00)	-100%
	Town Hall Repairs & Maintenance	49,600.00	0.00	60,000.00	10,400.00	21%
	RT23 Culvert Match	0.00	0.00	360,000.00	360,000.00	#DIV/0!
	1 ton pickup (highway)	0.00	0.00	84,000.00	84,000.00	#DIV/0!
	mid range wing truck	0.00	0.00	200,000.00	200,000.00	#DIV/0!
	Fire Truck	0.00	0.00	1,050,000.00	1,050,000.00	#DIV/0!
					0.00	#DIV/0!
	Totals	535,180.19	0.00	1,926,357.00	1,391,176.81	260%

free cash	free cash & stab	Stabilization
Borrow		

WARRANT
COMMONWEALTH OF MASSACHUSETTS
COUNTY OF BERKSHIRE, SS.
TOWN OF MONTEREY

To: Julio Rodriguez, Constable of the Town of Monterey in the County of Berkshire,

Greetings:

In the name of the Commonwealth of Massachusetts, you are hereby directed to notify and warn inhabitants of said Town qualified to vote in Town affairs to meet in the Firehouse of the Monterey Fire Company Ltd. in said Town on Saturday, March 2, 2024, at 1:30 o'clock in the afternoon, then and there to act on the following articles:

ARTICLE xx. To see if the Town will vote to transfer the sum of \$1,074.64 or any other sum from Free Cash to the School Committee Representative Account to pay wages of a prior year, or take any other action relative thereto.

This requires a 9/10 vote.

ARTICLE xx. To see if the Town will vote to transfer the sum of \$1,000 or any other sum from Free Cash to the Transfer Station Operations Account to pay for a bill of a prior year, or take any other action relative thereto.

This requires a 9/10 vote.

ARTICLE xx. To see if the Town will vote to transfer the sum of \$1,300 or any other sum from Free Cash to the Meeting Warrants Postage & Printing Account, or take any other action relative thereto.

ARTICLE xx. To see if the Town will vote to transfer the sum of \$40,000 or any other sum from Free Cash to the Transfer Station Operations Account, or take any other action relative thereto.

ARTICLE xx. To see if the Town will vote to transfer the sum of \$3,332.00 or any other sum from Free Cash to the Community Center Operations Account, or take any other action relative thereto.

ARTICLE xx. To see if the Town will vote to transfer the sum of \$10,000 or any other sum from Free Cash to the IT Expenses Account, or take any other action relative thereto.

ARTICLE xx. PB Solar Zoning Bylaw

ARTICLE xx. To see if the Town will vote to authorize and direct the Select Board to petition the General Court for a special act creating a recall election procedure for the

Commented [TA1]: We could use leftover monies from the storm damage special article that are left (\$6807.60) to pay for this article and the 1st and 2nd articles instead of using free cash

Commented [TA2]: We could use leftover monies from the storm damage special article that are left (\$6807.60) to pay for this article and the 1st and 2nd articles instead of using free cash

Commented [TA3]: We could use leftover monies from the storm damage special article that are left (\$6807.60) to pay for this article and the 1st and 2nd articles instead of using free cash

Town of Monterey in the form set forth herein; provided, however, that the General Court may make clerical or editorial changes of form only to the bill.

SECTION 1. Any holder of an elective town office may be recalled and removed from office by the registered voters of the town as provided herein.

SECTION 2. Thirty registered voters of the town may initiate a recall petition by filing with the town clerk an affidavit containing the name of the officer sought to be recalled and a statement of the grounds for recall. The town clerk shall thereupon deliver to the voters making such affidavit sufficient number of copies of petition sheets in blank demanding such recall and removal, each bearing the town clerk's signature and official seal. The petition blanks shall be addressed to the Select Board, dated, and shall contain the names of all persons to whom they are issued, the name of the person whose recall is sought, the grounds of recall as stated in the initial affidavit, and shall demand the election of a successor to such office within seven (7) days of receipt of the affidavit, the Town Clerk shall deliver to the voters. A copy of the petition shall be entered in a record book to be kept in the office of the town clerk. The recall petition(s) shall be returned and filed with the town clerk within twenty-one (21) days after filing the affidavit and shall be signed by at least fifteen (15) percent of the registered voters of the Town as of the date the affidavit was filed with the town clerk. The number and street of each person's residence shall appear after their signature. The town clerk will forthwith submit the petition sheets to the board of registrars of voters, which within five (5) working days of receipt of the recall petition sheets shall forthwith verify the number of signatures which are the names of registered voters of the town.

SECTION 3. If the total recall petition sheets shall be found and certified by the board of registrars of voters to be sufficient, the certified petition shall be submitted forthwith with the certificate of the town clerk to the Select Board. The Select Board shall give written notice of the receipt of the petition to the officer sought to be recalled. If the officer does not resign within five (5) days of the date notice is given by the Select Board, then the Select Board shall promptly order an election to be held on a date fixed by the Select Board which is not less than 60 nor more than 90 days after receipt of the certified petition. However, if any other town election is scheduled to occur within 100 days after the date of receipt of the certified petition, the Select Board may postpone the holding of the recall election to the date of the other election and may include the question of recall on the ballot for that other election.

SECTION 4. An officer sought to be recalled may be a candidate to succeed the officer in an election to be held to fill the vacancy. The nomination of candidates, the publication of the warrant for the recall election and the conduct of the nomination and publication, shall be in accordance with the law relating to elections, unless otherwise provided in this act. A majority of those voting at the recall election shall be sufficient to recall and remove such elected officer.

SECTION 5. The incumbent shall continue to perform the duties of the office until the recall election. If the incumbent is not recalled, the incumbent shall continue in office for

the remainder of the unexpired term, subject to recall as before, except as provided in this act. If not re-elected in the recall election, the incumbent shall be considered removed from office immediately and the office vacant. No recall petition may be filed against an officer within the first six (6) months of their term of office or within six (6) months of a recall election wherein the officer was not recalled and removed.

SECTION 6. Ballots used in a recall election shall contain the following propositions:

FOR the recall of (name of officer) _____

AGAINST the recall of (name of officer) _____

Next to each proposition there shall be a place to mark a vote. Under the propositions shall appear the word "Candidates" and the direction "Vote for One", and beneath this the names of candidates nominated as herein before provided. Next to the name of each candidate shall be a place to mark a vote.

If a majority of the votes cast on the recall question is in the affirmative, then the candidate who received the highest number of votes in the special election to fill the vacancy shall be elected. If a majority of the votes on the question is in the negative, the ballots for candidates to fill the potential vacancy need not be counted, nor any action taken relative thereto.

ARTICLE xx. FD Capital (transfer of existing \$90k)

Hereof fail not and make return of this Warrant with your doings thereon to the Clerk of said Town at or before the time of said meeting.

Given under our hands this 13th day of February, 2024.

Justin Makuc, Chair

Susan Cooper

Frank Abbott
MONTEREY SELECT BOARD

A true copy attest.

Pursuant to the within Warrant, I have this 13th day of February, 2024, notified and warned inhabitants of the Town of Monterey in accordance with the Town Bylaws and the General Laws of the Commonwealth of Massachusetts.

Julio Rodriguez, Constable

Monterey Town Hall
Monterey Transfer Station
U.S. Post Office
Monterey General Store
Main Rd. at/near intersection of Swann Rd.
Select Board file

Town of Monterey

Town Administrator



THE COMMUNITY

Monterey is a small hill town of approximately 1,000 people in the rural heart of the Southern Berkshires that has a rich history and vibrant culture. Monterey was settled in 1739 along the main road from Westfield to Great Barrington. In the late 1800s and into the 1900s, Monterey attracted summer visitors who enjoyed its cool mountain air and beautiful lakes, Garfield and Buel. Some of the visitors built cottages; boarding houses were abundant, and Monterey became an early resort community. Summer Camps were plentiful and Monterey village was a lively place.

Today, the population is about half year-round residents and half seasonal residents, many of whom are multi-generational Montereyans. The village is small and tight knit – anchored by the Monterey Library, Church, Post Office, Community Center, the General Store (in the process of being updated), Town Hall, and many lovely historic homes.

Monterey is approximately 27 square miles. The lakes and mountains are still a main draw, along with thousands of acres of state forest and other conserved open space, and an abundance of wonderful hiking trails, including the Appalachian Trail, Bob's Way, BNRC's Konkapot Ridge Reserve, the Bidwell House Museum, and Gould Farm. It is truly a wonderful place to live.

THE POSITION

The Town of Monterey seeks a Town Administrator to serve as the Administrative Officer, reporting to a three-member Select Board. The Town Administrator implements the priorities and vision of the Select Board and is the Select Board's day-to-day voice in running the town, responsible for maintaining and improving the effectiveness and efficiency of all areas under their direction and control, including management of staff and coordination and support of boards and commissions. The Town Administrator will be expected to provide policy recommendations based on sound research and analysis and anticipating both existing and future needs.

THE GOVERNMENT

Monterey has an Open Town Meeting legislative structure, with a three-member Select Board, elected for staggered three year terms. The day-to-day administrative responsibilities of the Board are delegated to the Town Administrator with major policy decisions remaining with the Board. The appointment of most municipal employees is approved by the Select Board. Monterey does not have a Charter, but it is governed by a set of by-laws that are updated as needed.

Elected multi-member bodies include the Select Board, Zoning Board of Appeals, Board of Health, Planning Board, Board of Assessors, Bylaw Review Committee, Cemetery Commission, Finance Committee, Library Trustees, and Parks Commission. Elected positions include Tree Warden, Constable, School Committee representative, Tax Collector and the Town Moderator. The Town Clerk, Accountant, and Treasurer were changed from elected to appointed positions.

The Select Board also appoints many multi-member bodies and positions, including: Police Chief and officers, Director of Operations and highway staff, Fire Chief and firefighters, Director of Municipal Inspections and other inspectors, Town Counsel, Conservation Commission, Council on Aging, Historical Commission, Open Space and Recreation Planning Committee, Community Center Committee, Registrar of Voters, Renewable Energy Working Group, Lake Garfield Working Group, and Transfer Station Committee.

Town of Monterey



FINANCIAL INFORMATION

FY2024 BUDGET

Municipal	\$ 3,256,220
School	\$ 1,832,141

2024 Tax Base Breakdown

2024 Uniform Tax Rate	\$ 6.13
Residential	92.26%
Commercial	1.55%
Industrial	0.01%
Personal Property	2.18%

2024 Revenue by Source

Tax Levy	\$ 4,313,494
Estimated State Aid	\$ 548,987
Estimated Local Receipts	\$ 350,000

Reserve Balances

Free Cash	\$ 451,160
Stabilization Funds	\$ 665,542

CHALLENGES AND OPPORTUNITIES

The financial position of the Town is favorable. However, like most small towns, the Town faces the challenge of raising revenue that is predominantly for a residential tax base with less than two percent commercial/industrial. Monterey is in an envious position of having \$1.2 million in unused levy capacity. Select Board members seek a Town Administrator that is versed in municipal finance and who will be able to develop a long-term budget strategy to stabilize the annual fluctuation in the average residential property tax bill, and plan for increasing public safety costs for an aging population.

The Board is looking for a Town Administrator who will facilitate several projects in various stages of implementation. Projects include:

- Controlling escalating costs and maintaining moderate tax rate increases while addressing needed improvements to major roadways and culverts;
- The consideration of regionalizing emergency services to address the shortage of emergency service workforce and address response times to incidents;
- Addressing the anticipated significant cost increases in solid waste disposal in the next five years;
- Addressing the lack of affordable housing;
- Exploring opportunities to promote commercial development including but not limited to the re-opening of the general store;
- Addressing the deferred maintenance needs of Town buildings and the Fire Station;
- Developing a strategy to replace the antiquated IT infrastructure and ensure that the Town's data is secure;
- Working with multiple Departments and multi-member bodies of the Town in implementing the findings of a recent Master Plan review;
- Consistent implementation and periodic review of HR Policies for all municipal employees; and
- Continue to study the implications of climate change on Monterey's natural resources.



Town of Monterey



QUALIFICATIONS

A bachelor's degree in public or business administration, planning or a related field and 3-5 years of municipal management experience; or any equivalent combination of education, training, certification, and related experience are encouraged to apply.

SALARY AND BENEFITS

The successful candidate will receive a compensation package including health and retirement plans. Monterey values diversity and is an Equal Opportunity Employer.

The anticipated hiring rate is \$80,000 to \$85,000 for this full-time salaried position.

THE IDEAL CANDIDATE

The Town Administrator will be:

- A leader who has demonstrated strong interpersonal skills and is a great communicator both internally with staff and externally with residents and other constituencies;
- An individual with foundational municipal financial experience who is able to build a financial team that thrives on open communication to develop an effective and efficient operation and who is able to present data and recommendations to the Select Board;
- An individual who knows municipal management best practices and can implement them;
- A team builder who has the necessary skills to work with the Select Board who are working together with a focus on restoring civility in political discourse in Town;
- A collaborator who can work with staff, independently elected boards and commissions, and the public in the development of a shared strategic vision for the Town;
- An individual who can research and analyze data on various issues and present options and recommendations to the Select Board;
- An individual versed in seeking and writing grant applications to supplement the Town's budget and offset the need to fund operations with taxation; and
- A person with unquestionable ethics and integrity and commitment to the standards for municipal management professionals.

APPLICATION & SELECTION PROCESS

Please submit a cover letter and resume in a combined PDF file saved as Last Name – Monterey to the Collins Center for Public Management email recruitment.umb@gmail.com.

Last Name and Monterey must appear in the subject line.

The review of resumes begins **February 23, 2024**.

Resumes will be screened by the Collins Center and selected candidates will be interviewed. Final candidates will be presented to the Select Board for interviews.

To learn more about the Collins Center for Public Management, please visit www.umb.edu/cpm

Town Administrator

From: Justin Makuc
Sent: Tuesday, January 30, 2024 5:25 PM
To: Town Administrator; Susan Cooper; frank.montereyma.gov
Subject: Fw: TA evaluation review

For tonight's meeting, regarding agenda item #5:

From: Donna Brewer <dbrewer@harringtonheep.com>
Sent: Tuesday, January 30, 2024 9:57 AM
To: Justin Makuc <justin@montereyma.gov>
Subject: Re: TA evaluation review

Hi Justin, the personnel file should include personnel evaluations even though there are disagreements. Per G.L. c. 140, § 52C, when there are disagreements the personnel file should include all parties' positions, not be excluded. In this instance, the composite evaluation, the individual evaluations, Melissa's responses to everyone's evaluations, and your response to Melissa should be in the file. A personnel file is not a public record, but as you know the composite evaluation is a public record as it was discussed at an open session. If Melissa's responses were also discussed in open session, those would also be public records.

Donna Brewer
dbrewer@harringtonheep.com
(617) 804-2423 dd

From: Justin Makuc <justin@montereyma.gov>
Date: Tuesday, January 30, 2024 at 7:54 AM
To: Donna Brewer <dbrewer@harringtonheep.com>
Subject: TA evaluation review

Hi Donna,

The Board voted more than a month ago to approve the composite TA evaluation. The TA drafted and submitted a response indicating areas that she did not agree with. I submitted a response regarding a few of the items she raised.

I asked her recently what was put in the personnel file and she responded that nothing was because of the disagreements.

What should be deposited in the personnel file? The evaluation and all of the responses?

This is on the agenda for tonight's meeting. Please let me know if you need any further information or want to chat on the phone.

Thanks,
Justin