

CLASSIFICATION TAX ALLOCATION
Fiscal Year 2023

	LA4 VALUES		FFCV PERCENTS		SHIFT OPTIONS
Residential	583,695,815	Residential	96.1065	Min Res Factor at 150%	97.9743
Open Space	0	Open Space	0.0000	Min Res Factor at 175%	0.0000
Commercial	10,180,552	Commercial	1.6763	Chapter 3	0.0000
Industrial	968,260	Industrial	0.1594	Lowest Historical Res%	78.0590
Pers Prop	12,497,981	Pers Prop	2.0578	Prior FY LA5 Res Shift%	95.9274
Total	607,342,608	Total %	100.0000	Lowest Res Factor	97.9743
			INPUT OPTIONS		OPEN SPACE DISCOUNT
Estimated Levy	3,674,686	Resid Factor Selected	1.000000	Open Space Discount %	0.0000
		Com/Ind/PP Shift	1.000000	Open Space Factor	1.00000
		Single Tax Rate	6.05		
	SHIFT PERCENTS		TAX RATES		
Residential %	96.1065	Residential	6.05		
Open Space %	0.0000	Open Space	0.00		
Commercial %	1.6763	Commercial	6.05		
Industrial %	0.1594	Industrial	6.05		
Pers Prop %	2.0578	Pers Prop	6.05		
Total %	100.0000				

RESIDENTIAL EXEMPTION OPTIONS & CALCULATIONS (Upload Exemption Calculation Worksheet)

Total Residential Value	583,695,815	/ Total Res Parcel Count	0	= Average Residential Value	0
Avg Residential Value	0	X Res Exemption%(max35)	0.0000	= Residential Exemption	0
No. Eligible Res Parcels	0.000000	Total Res Value Exempted	0		
Total Residential Value	583,695,815	- Total Res Value Exempted	0	= Tot Res Value After Exemption	0
Total Residential Value	583,695,815	/ # Eligible Res Parcels	0.000000	= Approx. Break-Even Value	0

SENIOR MEANS TESTED EXEMPTION OPTIONS & CALCULATION (Upload Exemption Calculation Worksheet)

No. Eligible Res Parcels	0	Total Res Value Exempted	0		
Total Residential Value	583,695,815	- Total Res Value Exempted	0	= Total Res Val After Exemption	583,695,815

COMBINED IMPACT OF SENIOR MEANS TESTED AND RESIDENTIAL EXEMPTIONS

Residential Exemption	0	+ Senior Means Tested Exemption	0	= Combined Res Value Exempted	0
Total Residential Value	583,695,815	- Combined Res Value Exempted	0	= Total Res Val After Exemptions	583,695,815
Net Value of 101 Parcels After Combined Exemptions			0		

SMALL COMMERCIAL EXEMPTION OPTIONS & CALCULATION

CLASSIFICATION TAX ALLOCATION

Fiscal Year 2023

No. Eligible Com Parcels	0	X Total Value of Eligible Parcel	0	= Total Com Value Exempted	0
Com Exemp % (max 10%)	0.0000	- Total Com Value Exempted	0	= Com & Ind Val after Exemption	11,148,812
Tot Com & Indus Value	11,148,812				

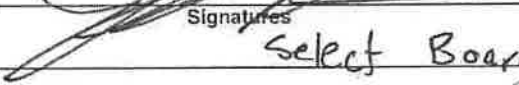
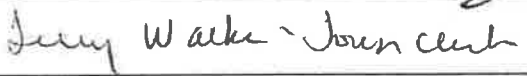
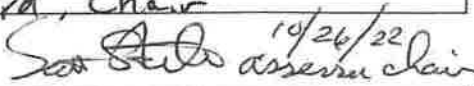
LA5 Certification

Public Hearing Held on: Date Time at Adopted on Date

The LA-5 excess capacity for the current fiscal year is calculated as 1,180,496.94

The LA-5 excess capacity for the prior fiscal year is calculated as 773,190.23

If adopting a residential or senior means tested exemption, the Exemption Calculation Worksheet must be uploaded to submit the LA - 5.

No signatures to display.	 Signatures 10/26/22 Select Board, Chair
 Town Clerk 10/26/22	 Assessor Chair 10/26/22
No documents have been uploaded.	Documents



TOWN OF MONTEREY

Building Department
435 Main Rd. P.O. Box 308
Monterey, MA 01245
Phone: 413.528.1443 x118 Fax: 413.528.9452
buildingsafety@montereyma.gov
www.montereyma.gov

October 20, 2022

Selectboard

Dear Board Members,

Request is made by the Plumbing/Gas and Electrical Inspectors to increase our inspectional fees for those disciplines to \$ 75.00/ inspection.

Our current fee is \$60.00/inspection which was adopted on April 4, 2016. The inspector received \$54.00 of this fee and the remaining balance went to the town for permitting and administrative services.

With the proposed \$75.00 fee, \$70.00 would go to the inspector and \$5.00 to the town. They have asked for the increase to be compensated fairly and to cover travel expenses.

The towns of Mount Washington, Alford, Egremont, Sheffield and New Marlborough have increased their fee schedules for plumbing/gas and electrical inspections to \$75.00/ inspection.

I would suggest an effective date of January 1, 2023 to provide ample notice to the contractors so that they plan accordingly for the fee increase.

I support this proposal and hope you will as well.

Sincerely,

Don R. Torrico
Building Commissioner

Town Administrator

From: Justin Makuc
Sent: Tuesday, October 25, 2022 10:41 PM
To: Scott Jenssen; Susan Cooper
Cc: Town Administrator; Town Clerk
Subject: Fw: Monterey / Board of Registrars

FYI

From: Donna Brewer <dbrewer@miyares-harrington.com>
Sent: Tuesday, October 25, 2022 9:37 AM
To: Justin Makuc <justin@montereyma.gov>
Subject: Re: Monterey / Board of Registrars

You are correct, Justin, there is no exception for those who are elected. An elected official cannot be a member of the board of registrars, even in towns of under 2000. Those 2 positions must be filled by others.

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

From: Justin Makuc <justin@montereyma.gov>
Date: Tuesday, October 25, 2022 at 12:21 AM
To: Donna Brewer <dbrewer@miyares-harrington.com>
Subject: Monterey / Board of Registrars

Hi Donna,

I have a few questions about the Board of Registrars:

Mass General Law: Part I, Title VIII, Chapter 51, Section 25 (bolding my own):

“Every person appointed as a registrar or assistant registrar who is not regularly employed by the registrars shall be a voter of the city or town where he is appointed. **No person appointed as a registrar or assistant registrar shall hold an office in the city or town for which he is appointed either by election or by direct appointment of the mayor or of the board of selectmen or of a city manager or town manager or hold an office by election or appointment under the government of the United States or of the commonwealth or of the city or town, except as a justice of the peace, notary public or officer of the state militia; provided, however, that in a town with a population of under two thousand residents, a person may be appointed a registrar or assistant registrar who holds an office in the town for which he is directly appointed by the board of selectmen or town manager, or who holds an office by appointment under the government of the United States or of the commonwealth. The acceptance by a registrar or assistant registrar of any such office shall vacate his appointment as registrar or assistant registrar.** Nothing in this section shall prohibit a registrar or assistant registrar from becoming a candidate for election and serving as a member of a home rule charter commission or as a town meeting member.”

Questions: Two of the four members of our Town’s Board of Registrars hold elected office – one is on the Board of Assessors, one is on the Library Board of Trustees. By holding these elected offices, have these members of the Board of Registrars “vacated” their appointments? Is Monterey exempt from this provision as we are a Town under two thousand

residents (we have fewer than eight hundred voters)? However, these positions are elected rather than “directly appointed by the board of selectmen,” so it seems like they are not excluded.

Please let me know if you have any questions -- if you are able to answer prior to our Board meeting on Wednesday at 6:00pm that would be especially helpful.

Thanks,
Justin

**Town of Monterey
Policy Statement**

REQUEST TO USE LEGAL COUNSEL – FORM

Prior to completing this form, please check this box to confirm that you are familiar with the Town's policy for Contacting Town Counsel: <input checked="" type="checkbox"/>
Name: Justin Makuc
Department/multimember group: Select Board
If multimember group, was this request approved by group at a meeting? No
Date submitted: 10/25/2022
Requesting contact with: <input checked="" type="checkbox"/> Town Counsel <input type="checkbox"/> Special Counsel
Form of questions: <input checked="" type="checkbox"/> Written questions via email <input type="checkbox"/> Phone conversation <input type="checkbox"/> Other:
Description of legal services needed/issue faced (attach written questions if applicable and/or explanatory documentation): Question about the Board of Registrars: Mass General Law: Part I, Title VIII, Chapter 51, Section 25 (bolding my own): <p style="margin-left: 40px;">“Every person appointed as a registrar or assistant registrar who is not regularly employed by the registrars shall be a voter of the city or town where he is appointed. No person appointed as a registrar or assistant registrar shall hold an office in the city or town for which he is appointed either by election or by direct appointment of the mayor or of the board of selectmen or of a city manager or town manager or hold an office by election or appointment under the government of the United States or of the commonwealth or of the city or town, except as a justice of the peace, notary public or officer of the state militia; provided, however, that in a town with a population of under two thousand residents, a person may be appointed a registrar or assistant registrar who holds an office in the town for which he is directly appointed by the board of selectmen or town manager, or who holds an office by appointment under the government of the United States or of the commonwealth. The acceptance by a registrar or assistant registrar of any such office shall vacate his appointment as registrar or assistant registrar. Nothing in this section shall prohibit a registrar or assistant registrar from becoming a candidate for election and serving as a member of a home rule charter commission or as a town meeting member.”</p>
1. Two of the four members of our Town's Board of Registrars who hold elected office – one is on the Board of Assessors, one is on the Library Board of Trustees. By holding these elected offices, have these members of the Board of Registrars “vacated” their appointments? Is Monterey exempt from this provision as we are a Town under two thousand residents (we have fewer than eight hundred voters)? However, these positions are elected rather than “directly appointed by the board of selectmen,” so it seems like they are not excluded.
Is this matter time sensitive? If so, please explain: Yes. We discussed this item at our meeting last week Wednesday, October 19 th . While a request to contact Counsel was not approved, the discussion generally emphasized the importance of moving along on this issue in a timely manner. Based on the Select Board discussion, the Town Administrator reached out to Michelle K. Tassinari, Director and Legal Counsel of the Elections Division in the Office of the Secretary of the Commonwealth. Tassinari referred us to MGL, failed to answer our question, and

**Town of Monterey
Policy Statement**

recommended that we “consult [our] town counsel for further clarification.” Based on these facts, I feel that consulting Town Counsel prior to our meeting on Wednesday, October 26th is appropriate.

Is this matter confidential/subject to attorney-client privilege? If so, please explain:

No

REQUEST: Approved Denied

_____	_____
Date	10/25/22
	JSM
	Select Board, Chair
_____	_____
Date	Select Board
_____	_____
Date	Select Board

For use by Select Board Chair (or alternate Counsel Liaison) if request is reviewed by less than a majority of the Select Board. I deem this matter to be: Time sensitive Confidential



Town of Monterey Memorandum

TO: Town Clerk, Police Chief, Building Inspector, Council on Aging Outreach Worker, Director of Operations, Fire Chief, Community Center Administrative Staff, Office Assistant and all appointed Boards and Commissions

FROM: Select Board

CC: Town Administrator, Human Resource Director

DATE: 10/26/22

SUBJ: Direct Supervision and Reporting

As part of the ongoing process to clarify town policies and procedures, as well as distance the Board from human resource functions allowing us to stay focused on policy setting and those responsibilities assigned to us under Massachusetts General Laws, the following memo outlines the procedures for immediate supervision.

As one of the departments named above you report directly to the Town Administrator who is responsible on a town-wide basis for success of programs accomplished through others. The Town Administrator will work with you to analyze program objectives, review work operations, assist with estimates and allocations for the financial and staff resources required, including recommendations to the Select Board for the hiring, training, and disciplining of employees. The Town Administrator is tasked with supervising and the efficient administration of all departments, commissions, boards and officers.


Effective immediately all day to day operational items, including but not limited to: time off requests, benefit concerns or questions, financial questions and staffing should be reported directly to the Town Administrator whether in person or via email (admin@montereyma.gov). If you have a concern that involves a negative interaction with the Town Administrator you would contact the Human Resource Director for guidance by phone (413-854-3213) or email (hr@montereyma.gov).

The Town Administrator and Human Resource Director will be reaching out to you to schedule a meeting to review your current job description as well as any comments, concerns or suggestions you may have with regard to your department.

We thank you for your cooperation on this matter.

Sincerely,

Justin Makuc, Chair
Monterey Select Board

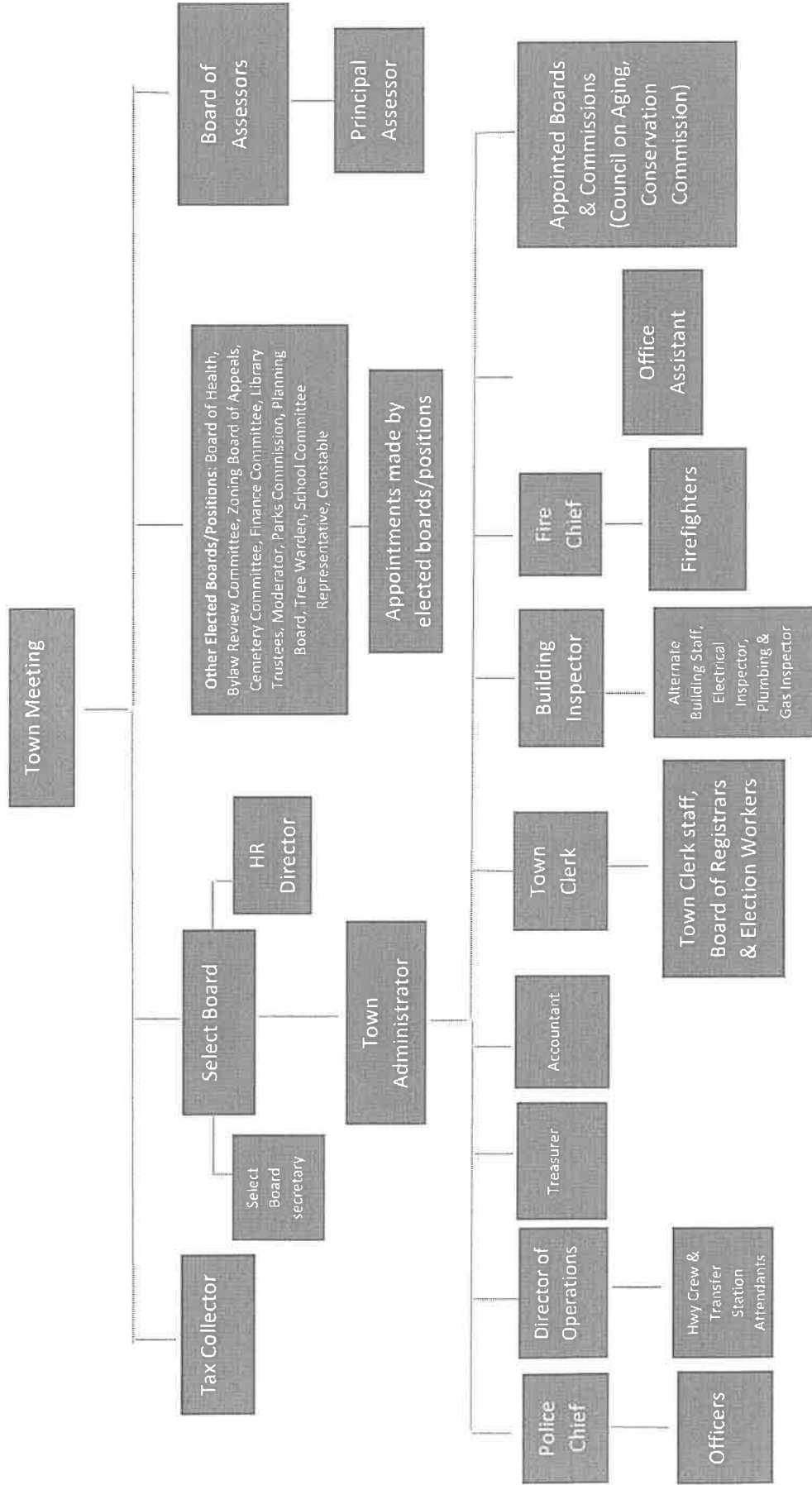
A handwritten signature in black ink, appearing to be "Susan Cooper", with a large, stylized loop at the end.

Susan Cooper

A handwritten signature in blue ink, appearing to be "Scott Jenssen", with a large, stylized loop at the end.

Scott Jenssen

Attachments: Organizational Chart



Town Meeting

Tax Collector

Select Board

Select Board secretary

HR Director

Town Administrator

Other Elected Boards/Positions: Board of Health, Bylaw Review Committee, Zoning Board of Appeals, Cemetery Committee, Finance Commission, Library Trustees, Moderator, Parks Commission, Planning Board, Tree Warden, School Committee Representative, Constable

Appointed boards/positions

Police Chief

Officers

Director of Operations

Hwy Crew & Transfer Station Attendants

Accountant

Town Clerk

Town Clerk staff, Board of Registrars & Election Workers

Building Inspector

Alternate Building Staff, Electrical Inspector, Plumbing & Gas Inspector

Fire Chief

Firefighters

Office Assistant

Appointed Boards & Commissions (Council on Aging, Conservation Commission)

Board of Assessors

Principal Assessor

Job Description

Title: Director of Operations
Department of Highways, Buildings and Properties

Supervision:

Supervision Scope: Performs highly responsible duties requiring independent judgment and initiative in planning, organizing and directing the work of streets, transfer station, town vehicles, public property maintenance, work within the enforcement of safety regulations and DEP regulations.

Supervision Received: This position reports directly to the Town Administrator acting under the direction of the Select Board. ~~Works under the general direction of the Board of Selectmen,~~ and according to the applicable provisions of the Massachusetts General Laws, Town ordinances and contemporary public works maintenance practices.

Supervision Given: Supervises Highway Employees, Transfer Station, Public Buildings & Properties. Directs daily activities of Highway Employees through general directions and sets guidelines.

Hours/Compensation: This position is a full time, salaried, exempt position. Due to the nature of the job additional hours beyond the normal workweek may be necessary.

Benefits: Full benefits. Please see the Employee Manual for more details.

Job Environment: The nature of duties require the employee to frequently conduct work outdoors and may involve the presence of unpleasant or irritating elements, such as odors, toxins/fumes, dust, loud noises, electricity, explosive materials, smoke, heat, cold, oil, dirt or grease. Work may be performed outdoors regardless of weather conditions. The employee is required to work beyond normal business hours to attend evening meetings and in response to man-made or natural emergency situations on a 24/7 basis, 365 days per year.

Responsibilities:

The essential duties and responsibilities listed include the minimum requirements for the position. This position includes additional duties that are a natural progression from that position's essential duties. The omission of specific statements of duties does not exclude them from the responsibility of the employee in the position if the work is similar, related, or a logical assignment to the position.

- The Director is responsible for the operation of the Department of Highways, Buildings and Properties and the employees of the department. This include all planning, scheduling, payroll, record keeping, emergency operations, tree removal and planting, repair, maintenance, and reconstruction of all Town roads, working with the Parks

Committee and the Cemetery Committee for future consolidation for efficiency, and any other duties that may arise.

- Receives instructions from Board of Selectman and implements those instructions in a timely manner.
- Report on a regular basis to the Board of Selectman to keep the Board up to date on all projects and programs, and plans.
- Responsible for the annual budget of the Department and shall submit a yearly budget to the Board of Selectman and Finance Committee by January 15th of each year. He shall be responsible for the planning of projects and budgeting of said projects.
- Apply for all State & Federal Grants that are applicable to the Town of Monterey and be responsible for administering those grants.
- Responsible for a long-range plan for capital expenditures for the Department in conjunction with the Finance Committee. Areas of capital expenditures shall include all town vehicles and large equipment, Highway garage, Transfer Station, Town Hall, School and Wilson Houses and any other buildings the Town may acquire, and shall be responsible for overseeing any new construction by the Town.
- Plan for winter snow removal and direct all winter operations. He shall have on hand enough materials, including salt and sand, to maintain the roads in keeping with the direction of the Select Board.
- During the winter months the Director and Foreman shall maintain a “road watch” to monitor the roads in order to keep conditions safe.
- Responsible for the administration, maintenance and operation of the Town transfer station, including overseeing the sale of transfer station stickers and the renovations to the Transfer Station.
- Responsible for the maintenance of all Town Buildings and equipment. All shall be kept in a good state of repair.
- Work with all other Town Departments to ensure safe and efficient operation of Town Operations, especially during an emergency. Works with the Police Department by removing dead animals, assisting with traffic control, reporting unsafe conditions or accidents or any other assistance the Police Department may require.
- The Director, or while he is not available, his Foreman, shall be available 24 hours, 7 days a week, for any emergency or condition that would require his presence or his departments presence.
- Keep accurate records of all funds, equipment, fuels, buildings and employees that shall be required by the Select Board.
- Manage all operations of the Lake Garfield Dam as required by the State of Massachusetts. The dam is required to be inspected every 2 years and a report filed with the Office of Dam Safety. Director will keep the Emergency Action Plan up to date. All maintenance and operation of the dam shall be the Directors responsibility.
- Issue trench permits on Town Property and Town Right of Way.

- Issue permits to Access the Public Way (driveway or curb cuts).
- 911 Coordinator-issue 911 address numbers, keep Verizon data base up to date and correct errors
- Review insurance coverage for town buildings and vehicles

Recommended Minimum Qualifications:

Education & Experience:

Must have a High School Diploma or GED plus 5-7 years of construction, heavy vehicle driving and/or heavy equipment operation experience.

Must have hoisting, CDL-B, 2A (minimum) & 4G licenses

While performing the functions of this job, the employee is required to sit, stand, walk and listen for extended periods; may come in contact with toxic or caustic chemicals and risk of electrical shock; is frequently required to talk; uses hands to finger, handle, or feel objects, tools, or controls; reaches with hands and arms; kneels and bends to work on equipment; specific vision abilities required include close and distance vision, peripheral and depth perception and the ability to adjust focus; ability to operate a vehicle and heavy equipment accurately and efficiently; ability to frequently lift up to 60 lbs and occasionally lift up to 100 lbs; must be able to hear normal sounds, distinguish sound as voice patterns or vehicle sounds and communicate through human speech.

Knowledge, Ability and Skill:

Knowledge: Thorough knowledge of public works construction procedures and regulations. Thorough knowledge of safety regulations involving the use of heavy equipment. Thorough knowledge of contract administration.

Ability: Ability to plan, assign, direct and review the work of subordinates with diverse skills and abilities; to prepare and manage budgets; conduct inspections of work in progress; to purchase appropriate equipment, maintain good working relationships and public relations with other officials, boards and committees, and the residents.

Skill: Skill in reviewing and acting upon budgetary reports, public works and capital construction plans, observed field conditions; good organizational and communication skills. Skill in using snow plows, mowing equipment and various heavy equipment, power tools and hand tools.

Job Description

Title: Town Clerk

Supervision: The Town Clerk is hired/appointed by the Board of Selectmen and reports directly to ~~them~~ The Town Administrator.

Hours/Compensation: This position is a part time hourly, non-exempt position for 15 hours per week. The actual hourly rate will be authorized annually by the Select Board and by annual appropriation.

Benefits: As this position requires less than 20 hours per week no Town benefits, including health care and retirement are offered. This position must participate in the OBRA retirement program.

Job Environment: Typical office environment; operates computers, printers, calculators, phones and the copier. The position requires frequent contact with other Town Hall employees, State agencies and the general public.

Responsibilities:

The essential duties and responsibilities listed include the minimum requirements for the position. This position includes additional duties that are a natural progression from that position's essential duties. The omission of specific statements of duties does not exclude them from the responsibility of the employee in the position if the work is similar, related, or a logical assignment to the position.

- Responsible for all duties, authorities and responsibilities associated with local and state elections.
- Responsible for creating and maintaining a budget for the Clerk's office.
- Serves as ex-officio member and Clerk of the Board of Registrars of voters.
- Responsible for all duties, authorities and responsibilities assigned to the Clerk with regard to town meetings.
- Responsible for all duties, authorities and responsibilities associated with vital statistics
- Responsible for the issuance of dog licenses, marriage licenses, business certificates, birth and death certificates
- Responsible for filing and recording all Board of Appeal and Planning Board decisions as well as public utility decisions
- Responsible and accountable for all duties prescribed by MGL.

Recommended Minimum Qualifications:

Education & Experience: High school diploma and a valid driver's license.

Knowledge, Ability and Skill:

- Knowledge of Windows programs/operating system as well as other office equipment.

- Excellent organizational skills, the ability to work with minimal supervision and the use of good judgment and tact regarding the requirements of the position.
- Ability to work well with the public and other Town employees.
- Minimal physical effort required to perform functions under typical office conditions.
- Position requires the ability to operate a keyboard.
- Ability to access large, heavy storage boxes/records.

Grant Request/Information Form

Grant Writer Name: Judy Eddy

Project Manager Name: Peter Murkett, Chairperson, Monterey Renewable Energy Working Group

Are you requesting permission to write a grant or research available grants? Write a grant

Type of grant you are proposing to research and how the project you have in mind that you are seeking available grants for: (skip this if you are proposing to write a grant): NA

Name of Grant (if proposing to write a grant): Municipal Energy Technical Assistance

Source of Grant Funding (State or Federal Agency): Mass. Dep't of Energy Resources

Purpose of Grant: Site assessment for rooftop solar at firehouse and pavilion

Maximum amount Town can be awarded: \$15,000

Is there a Town match and if so how much?: No match

How many hours do you estimate it will take you to write this grant?: 10hrs @ \$75/hr = \$750 total.

What is the deadline to file this grant?: 4:00 pm on November 18, 2022

Will this grant require any staff time after it is awarded? If yes, what will this entail, how many hours will need to be devoted and who do you propose will manage the follow up required?: Monterey Renewable Energy Working Group will follow up for whatever time is required.

Additional Comments:

Please attach any information about the grant to help the Select Board in making our decision.

The grant is specifically targeted to the originating purpose of the Renewable Energy Working Group as defined by the Select Board, namely, to research "the potential for renewable energy projects in all aspects - cost, funding, maintenance, environmental, economic and aesthetic impact, etc. and report back to the Select Board." Rooftop solar on town buildings has long been identified by the Working Group as the least controversial first step in establishing a local source of clean energy. This grant will provide the Working Group with the necessary funds to take that step deliberately, with professional expertise and all due consideration.

To be completed by the Select Board

Approved (circle one): YES NO Maximum hours approved for this project: Select Board approval (sign)



Winter Recovery Assistance Program Reimbursement Request

City/Town: Monterey

Project Name: Crack Seal

Contract # 118290

The municipality was apportioned \$ 160,684 in Winter Recovery Assistance Program (WRAP) of which \$ 10520.50 is requested for reimbursement now.

1) Attached are forms which document payment of approved expenditures totaling \$ 10520.50 for which we are requesting \$ 10520.50 at the approved reimbursement rate of 100%.

2) The total WRAP funding expended to date is \$ 130,158.36 including this payment.


3) Has the WRAP Project Report been submitted for this reimbursement? Yes No

If no: complete the WRAP Project Report online¹ before submitting this request.

4) Remarks:

CERTIFICATION

A. I hereby certify under penalties of perjury that the charges for labor, materials, equipment, and services itemized and summarized on the attached forms are true and correct, and were incurred on this project in conformance with the MassDOT Highway Division Policies and established Municipal Standards that were approved for this project.


(Signed)

Director of Operations
(Municipal Highway Official Title)

10/18/2022
(Date)

B. I/we certify under penalties of perjury that the items as listed or summarized on the attached forms were examined; that they are in conformity with our existing wage schedule, equipment rates, and all applicable statutes and regulations; that they are properly chargeable to the appropriation(s) designated for this work; and that Executive Order No. 195, dated April 27, 1981 and Chapter 11, Section 12 is acknowledged as applicable.

REVIEWED AND APPROVED FOR TRANSMITTAL

by  Signed: _____

Town Accountant
(Accounting Officer's Title)

(Duly Authorized)

DATE: _____

Submit this form to the District State Aid Engineer and Highway Director.

¹ <https://www.mass.gov/forms/project-report-form-winter-recovery-assistance-program-wrap>