



TOWN OF MONTEREY

435 Main Rd. P.O. Box 308
Monterey, MA 01245

Transfer of Appropriations Request Form

Date requested: 7/5/23

Pursuant to MGL Chapter 44, § 33B, please transfer the amount requested below.*

Requested by: Melissa Noe

Name and account # to transfer from: 01-120-5112 Office Asst

Name and account # to transfer to: 01-151-5110 legal

Amount to be transferred: 495-

Additional Information: _____

Select Board

Date

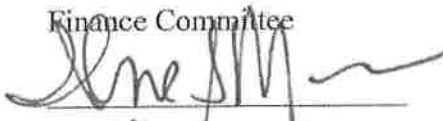
Finance Committee

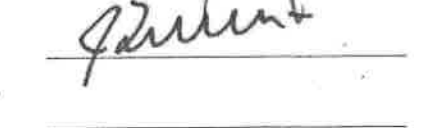
Date



Tom Abbott

7/5/23
7/5/23
7/5/23





7/5/23
7/5/23

* A town may, by majority vote at any meeting duly held, transfer any amount previously appropriated to any other use authorized by law. Alternatively, the selectmen, with the concurrence of the finance committee or other entity established under section 16 of chapter 39, may transfer within the last 2 months of any fiscal year, or during the first 15 days of the new fiscal year to apply to the previous fiscal year, any amount appropriated, other than for the use of a municipal light department or a school department, to any other appropriation.

Phone: 413.528.1443 Fax: 413.528.9452

accountant@montereyma.gov

www.montereyma.gov

Updated 10/3/19



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Monterey, MA 01245

Transfer of Appropriations Request Form

Date requested: 7/5/23

Pursuant to MGL Chapter 44, § 33B, please transfer the amount requested below.*

Requested by: Melissa Noe

Name and account # to transfer from: 01-423-5535-00000-2 S + I

Name and account # to transfer to: Transfer Station 01-433-5320
hauling

Amount to be transferred: \$ 9000 -

Additional Information: _____

Select Board

Date

Finance Committee

Date

[Signature]
[Signature]
Frank Abbott

7/5/23
7/5/23
7/5/23

[Signature]
[Signature]

7/5/23
7/5/23

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TO: ILENE MARCUS, CHAIR
FINANCE COMMITTEE
and
JUSTIN MAKUC, CHAIR
SELECT BOARD
FROM: MICKEY JERVAS, CHAIR
BOARD of LIBRARY TRUSTEES
DATE: June 27, 2023
RE: TRANSFER of FUNDS REQUEST

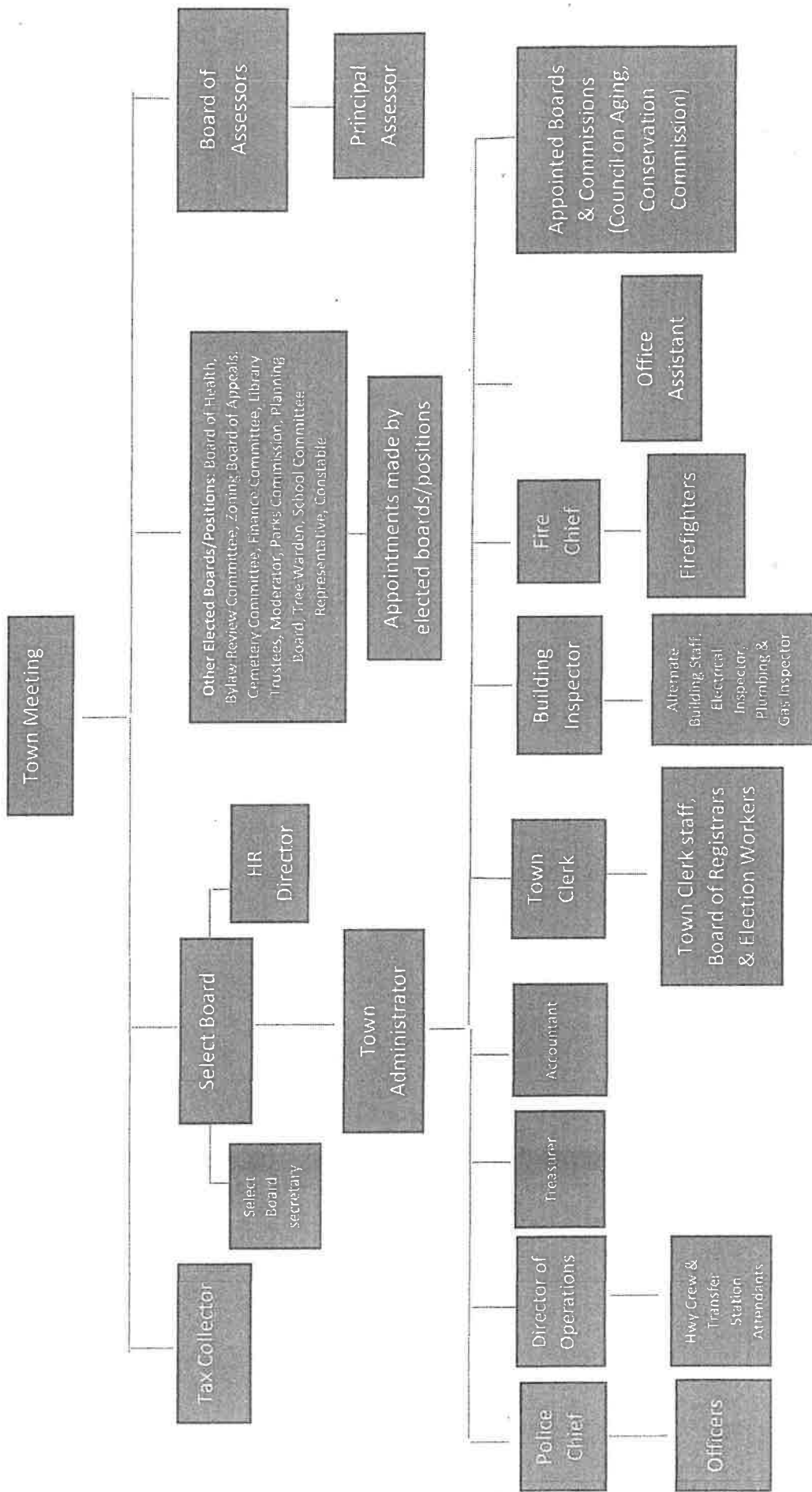
Please be advised that Sophia Bletsos, Human Resource Director, has scheduled a mandatory training meeting for August 1, 2023.

The Library had no knowledge of this meeting prior to late May and therefore was unable to budget for this time in our annual budget request. We will need to request a transfer of funds, after the meeting, in the amount of:

$\$20.87/\text{hour} \times 4\text{ hours} = \$83.48 \times 2\text{ staff members} = \$166.96.$

This request will cover this meeting only. As of this date we do not know of any other mandatory meetings that our staff will be required to attend between now and the end of the fiscal year June 30, 2024.

We do not know if other departments are aware of future meetings and how they intend to cover the added cost.



May 2022

HUMAN RESOURCE DIRECTOR - PRIMARY AREAS of CONCERN

Managing payment and benefits for an organization's staff is the primary role for an HR director.

Proper management of compensation, time off and insurance is what keeps employees' satisfaction high.

Human Resource primary activities include:

- Recruitment
- Administration
- Compensation and benefits
- Training and development
- Employee relations
- Performance management

What areas has Monterey requested its HR director to focus on:

- Development of appropriate employee performance review formats
- Perform employee performance reviews
- Development of employee handbook
- Appropriate and state mandated employee training sessions