

**ANNUAL REPORT**  
**of the**  
**Officers of the Town of**



**Monterey, Massachusetts**  
**For the Fiscal Year 2019**  
**(July 1, 2018 - June 30, 2019)**

**[www.monterey.gov](http://www.monterey.gov)**

## Commonwealth of Massachusetts

**Established:** 1735 (under Tyringham)

**Incorporated as a Town:** April 12, 1847

**Land Area:** 26.55 square miles

**Location:** Southwestern Massachusetts; bordered on the North by Tyringham; on the East by Otis; on the Southeast by Sandisfield; on the South by New Marlborough; and on the West by Gt. Barrington.

**Main Roads:** Route 23 and Route 57

**Topographical Features:** Elevations range from 920 to 2,160 feet above mean sea level.

Rough and stony soil with a belt of good texture loam. The Konkapot Brook runs through the town and there are two lakes: Lake Garfield and Lake Buel.

### **Regular Office Hours:**

*Town offices are located at 435 Main Rd. in the Town Hall Monterey Grange #291 building.*

**Administrative Assistant:** Monday - Friday 8:30am – 4:00pm

**Tax Collector:** Tuesdays & Saturdays 9:30— 12:30pm

**Building Inspector:** Monday 8 – 10am, Tuesday and Thursday 4:30 – 6:00pm and by appointment

**Town Clerk:** Tuesdays 4 – 7pm, Wednesdays 10am to 5pm and Saturdays 8am – 2pm

**Gun Permits:** Issued by the Police Chief please call 413.528.1443 x225 for an appointment

### **Regular Meeting Schedules**

*If the meeting date falls on a legal Massachusetts holiday, the meeting will be cancelled.*

**Select Board:** 1st Wednesday of the month at 6:30pm, 3rd Wednesday of the month at 9am

**Cemetery Committee:** first Thursday of the month 7:00pm (bi-monthly starting in January)

**Conservation Commission:** 2<sup>nd</sup> Wednesday of each month at 6:00pm

**Board of Health:** 1<sup>st</sup> & 3<sup>rd</sup> Monday of each month at 4pm

**Library Trustees:** 2<sup>nd</sup> Monday of each month at 7:00pm at the Library except in July, August, & December

**Park Commission:** 1<sup>st</sup> Wednesday of each month at 6:00pm

**Planning Board:** 2<sup>nd</sup> & 4<sup>th</sup> Thursday of each month at 7:00pm

**Board of Assessors:** Saturdays 9am – 12noon. Clerk is available on Wednesdays 4:00 – 6:00pm and Saturdays 7:30am – 12:30pm

**Zoning Board of Appeals:** As needed

**Council on Aging:** 2<sup>nd</sup> and 4<sup>th</sup> Mondays at 10am

**Library Hours:** *located at 452 Main Rd.*

Monday 7:00 - 9:00pm, Tuesday 9am – 12:30pm, Wednesday 2:00 - 5:00pm, Thursday 4:00 - 6:00pm, Friday 4:00 – 7:00pm & Saturday 9:30am - 12:30pm & 7:00 - 9:00pm

### **Transfer Station Hours:**

Wednesday 8:00 - 1:00pm, Saturday 8:00 - 1:00pm, & Sundays 10:00 - 6:00pm in the summer and 10:00 - 4:30pm in the winter (*hours change when we change the clocks*)

Town Seal designed by Edith L. Wilson

## Telephone Directory

### Local Emergency Numbers:

To report an EMERGENCY	911
Ambulance	528-3900
Fairview Hospital	528-0790
Police	528-3211
Police NON EMERGENCY	528-1443 x116
Fire NON EMERGENCY	528-3136

Assessors	Phone: 528-1443 x115 Email: <a href="mailto:assessors@montereyma.gov">assessors@montereyma.gov</a>
Board of Health	Phone: 528-1443 x111 Email: <a href="mailto:admin@montereyma.gov">admin@montereyma.gov</a>
Building Commissioner/Zoning Enforcement Officer	Phone: 528-1443 x118 Email: <a href="mailto:buildingsafety@montereyma.gov">buildingsafety@montereyma.gov</a>
Cemeteries – Linda Thorpe	Phone: 528-2164
Children’s Health Program	Phone: 528-9311
Conservation Commission	Phone: 528-1443 x230 Email: <a href="mailto:ccagent@montereyma.gov">ccagent@montereyma.gov</a>
Library	Phone: 528-3795 Email: <a href="mailto:montereylibrary@gmail.com">montereylibrary@gmail.com</a>
Local Cultural Council	P.O. Box 308 Monterey, MA 01245
Parks Commission	Phone: 528-1443 x248 Email: <a href="mailto:parks@montereyma.gov">parks@montereyma.gov</a>
Planning Board	P.O. Box 308 Monterey, MA 01245 Email: <a href="mailto:planningboard@montereyma.gov">planningboard@montereyma.gov</a>
Post Office	Phone: 528-4670
Schools (Southern Berkshire Regional School District)	
Superintendent	229-8778
Mt. Everett, Sheffield	229-8734
Undermountain Elementary	229-8754
New Marlborough, Mill River	229-8867
Select Board	Phone: 528-1443 x114 Email: <a href="mailto:admin@montereyma.gov">admin@montereyma.gov</a>
Tax Collector	Phone: 528-1443 x117 Email: <a href="mailto:montereytax@yahoo.com">montereytax@yahoo.com</a>
Town Offices	Phone: 528-1443
Town Clerk:	Phone: 528-1443 x113 Email: <a href="mailto:clerk@montereyma.gov">clerk@montereyma.gov</a>
Transfer Station	Phone: 528-3523
Veteran’s Services	Phone: 528-1580 <a href="mailto:trigger3183@gmail.com">trigger3183@gmail.com</a>



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## ELECTED TOWN OFFICERS

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<b>Department</b>	<b>Term</b>	<b>Member</b>		<b>Term Ends</b>
		<b>First Name</b>	<b>Last Name</b>	
Board of Appeals	5 years	Stanley	Ross	2021
Board of Appeals		Gary	Shaw	2022
Board of Appeals		Scott	Jenssen	2023
Board of Appeals		Jonathan	Levin	2019
Board of Appeals		Susan	Cooper	2020
Board of Assessors	3 years	Donald Seth	Hopkins III	2021
Board of Assessors		Stanley	Ross, Chair	2019
Board of Assessors		Julio	Rodriguez	2020
Board of Health	3 years	Roy	Carwile	2021
Board of Health		Julio	Rodriguez	2019
Board of Health		John	Makuc, Chair	2020
Cemetery Committee	3 years	Linda	Thorpe, Chair	2021
Cemetery Committee		Mary	Makuc	2019
Cemetery Committee		David	Brown	2020
Constable	3 years	Raymond	Tryon	2019
Finance Committee	3 years	Rebecca	Wolin	2021
Finance Committee		Jonathan	Sylbert	2019
Finance Committee		George	Cain	2020
Library Trustees	3 years	Ann	Canning	2021
Library Trustees		Mary Paul	Yates	2021
Library Trustees		Mickey	Jervas	2019
Library Trustees		Lisa	Smyle	2019
Library Trustees		Shannon	Amidon Castille	2020
Library Trustees		John	Higgins	2020
Moderator	1 year	Mark	Makuc	2019
Park Commission	3 years	Peter	Poirier	2021
Park Commission		Michal	Strawbridge	2021
Park Commission		Julio	Rodriguez	2019
Park Commission				2019
Park Commission		Pamela	Johnson	2020
Planning Board	5 years	Roger	Tryon	2019
Planning Board		Larry	Klein	2021
Planning Board		Stephen	Enoch	2020
Planning Board		Donald Seth	Coburn	2022
Planning Board		Scott	Jenssen	2023
Planning Board		Tom	Sawyer	2019
Planning Board		Pat	Salomon	2020
Select Board	3 years	Carol	Edelman	2019
Select Board		Kenneth	Basler	2020
Select Board		Donald	Coburn	2021
SBRSD Committee				
Representative	4 years	Maryellen	Brown	2020
Tax Collector	3 years	Anne Marie	Enoch	2019
Tree Warden	1 year	Kevin	Fitzpatrick	2019

## APPOINTED OFFICIALS

Department/ Committee	Appt. Term	Member First Name	Member Last Name	Appt. Start Date	Appt. Expires
911 Coordinator	no expiration date	Shawn	Tryon	7/5/2016	no expirator
ADA Co-ordinator	1 year	Mary	Makuc	6/27/2018	6/30/2019
Administrative Assistant	no expiration date	Melissa	Noe	7/5/2016	no expirator
Alternate Builging Commissioner	2 years	Don	Fitzgerald	6/27/2018	6/30/2020
Berkshire Regional Transit Authority (BRTA) Advisory Board Representative	1 year	Donald	Coburn	6/6/2018	6/6/2019
Board of Appeals, Alternates (2 members)	5 years	Ian	Jenkins	6/27/2018	6/30/2023
Board of Appeals, Alternates (2 members)	5 years	Cliff	Weiss	6/27/2018	6/30/2019
Broadband Committee	1 year	BJ	Johnson	2/6/2019	6/30/2019
Broadband Committee	1 year	Kenneth	Basler	6/27/2018	6/30/2019
Broadband Committee	1 year	Larry	Klein	6/27/2018	6/30/2019
Inspector of Buildings, Building Commissioner and Code Enforcement Officer	2 years	Donald	Torrigo	7/5/2016	6/30/2019
Care of Soldiers' Graves	3 years	James	Dutcher	4/24/2019	6/30/2022
Civil Defense Coordinator	3 years	Peter	Brown	6/28/2017	6/30/2020
Conservation Commission	3 years	Jeremy	Rawitz	5/23/2018	6/30/2021
Conservation Commission	3 years	Mark	Little	3/10/2017	6/30/2020
Conservation Commission	3 years	Marion	Simon	9/20/2017	6/30/2020
Conservation Commission	9 months	Kimberly	Wetherell	9/20/2018	6/30/2019
Conservation Commission Agent	9 months	Kimberly	Wetherell	9/20/2018	6/30/2019
Council on Aging	3 years	Ruth	Champigny	6/27/2018	6/30/2021
Council on Aging	3 years	Kyle	Pierce	5/23/2018	6/30/2021
Council on Aging	3 years	Rosalyn	Halberstader	7/18/2018	6/30/2021
Council on Aging	3 years	Norma	Champigny	12/5/2018	12/5/2021
Council on Aging	3 years	Ilene	Marcus	5/23/2018	6/30/2021
Cultural Council (max: 2 consecutive terms)	3 years	Wendy	Berjamin	9/5/2018	9/5/2021
Cultural Council (max: 2 consecutive terms)	3 years	Laura	Berliner	9/5/2018	9/5/2021
Cultural Council (max: 2 consecutive terms)	3 years	Cheryl	Zellman	9/5/2018	9/5/2021
Cultural Council (max: 2 consecutive terms)	3 years	Meagan	Duffy	11/8/2017	11/8/2020
Cultural Council (max: 2 consecutive terms)	3 years	Susan	Cain	11/8/2017	11/8/2020
Cultural Council (max: 2 consecutive terms)	3 years	Wendy	Germain	6/20/2018	6/30/2021
Cultural Council (max: 2 consecutive terms)	3 Years	Harryet	Candee	6/27/2018	6/30/2021



# APPOINTED OFFICIALS

Director of Operations for Highways Buildings and Town Property	no expiration	Shawn	Tryon	7/5/2016	no expiration
<b>Election Warden</b>	<b>1 year</b>				
Election Workers	1 year	Raymond	Tryon	6/27/2018	6/30/2019
Election Workers	1 year	Norma	Champaign	6/27/2018	6/30/2019
Election Workers	1 year	Ruth	Champaign	6/27/2018	6/30/2019
Election Workers	1 year	Melissa	Noe	6/27/2018	6/30/2019
Election Workers	1 year	Meagan	Duffy	6/27/2018	6/30/2019
Election Workers	1 year	Michal	Strawbridge	6/27/2018	6/30/2019
Election Workers	1 year	Rebecca	Wolin	6/27/2018	6/30/2019
Election Workers	1 year	Gary	Shaw	6/27/2018	6/30/2019
Election Workers	1 year	Mary Ellen	Brown	6/27/2018	6/30/2019
Election Workers	1 year	Steve	Pullen	6/27/2018	6/30/2019
Election Workers	1 year	Deborah	Mielke	6/27/2018	6/30/2019
Election Workers	1 year	Rick	Mielke	6/27/2018	6/30/2019
Emergency Management Director	3 years	Gareth	Backhaus	6/27/2018	6/30/2021
Emergency Manager, Deputy	3 years	Shawn	Tryon	6/28/2017	6/30/2020
Fence Viewer	3 years	Peter	Brown	7/5/2016	6/30/2019
<b>Field Driver</b>	<b>3 years</b>				
Fire Department	no expiration	Shawn	Tryon, Chief	7/5/2016	no expiration
Fire Department	no expiration	Mark	Makuc, Captain	7/5/2016	no expiration
Fire Department	no expiration	Del	Martin, Captain	7/5/2016	no expiration
Fire Department	no expiration	Patrick	Sheridan, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Warren	Thomson, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	John	Makuc, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Robert	Rodgers, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Paul	Rapp, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Chris	Tryon, Deputy Chief	7/5/2016	no expiration
Fire Department	no expiration	Cody	Funk, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Jeffrey	Spratt, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Claudia	Martin, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Justin	Makuc, Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Sam	Hungate	6/27/2018	no expiration
Fire Department	no expiration	Kevin	Fitzpatrick	6/27/2018	no expiration
Fire Department	no expiration	Kyle	Hutson	6/27/2018	no expiration
Fire Department	no expiration	Jake	Martin	6/27/2018	no expiration
Fire Department	no expiration	Tom	Ryan	5/15/2019	no expiration
Fire Department	no expiration	Keegan	Wellauer, Junior Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Henry	Carroll, Junior Firefighter	7/5/2016	no expiration
Fire Department	no expiration	Randon	Ziegler, Junior Firefighter	12/20/2017	no expiration

# APPOINTED OFFICIALS

Fire Department	no expiration	Jacob	Makuc, Junior Firefighter	4/24/2019	no expiration
Fire Department	no expiration	Maddie	Makuc, Junior Firefighter	4/24/2019	no expiration
Fire Inspector	1 year	Shawn	Tryon	6/27/2018	6/30/2019
Gas Inspector	2 years	Robert	Krupski	7/5/2016	6/30/2018
Harbormaster, Lake Garfield & Lake Buel	3 years	Gareth	Backhaus	6/27/2018	6/30/2021
Hearings Officer	1 year	Robert	Burnick	6/27/2018	6/30/2019
Historical Commission	3 years	Barbara	Tryon	6/28/2017	6/30/2020
Historical Commission	3 years	Linda	Hebert	7/5/2016	6/30/2019
Historical Commission	3 years	Cynthia	Weber	7/5/2016	6/30/2019
Historical Commission	3 years	Kathleen	Purcell	7/5/2016	6/30/2019
Historical Commission	3 years	Steven	Weisz	6/28/2017	6/30/2020
Inspector of Wires	2 years	Nick	Fredsall	7/5/2016	6/30/2018
Inspector of Wires, Alternate	2 years	Jim	Kern	2/25/2016	until further r
Lake Garfield Working Group	1 year	Greg	Carnese	6/27/2018	6/30/19
Lake Garfield Working Group	1 year	Steve	Snyder	6/27/2018	6/30/19
Lake Garfield Working Group	1 year	Alice	Berke	6/27/2018	6/30/19
Lake Garfield Working Group	1 year	Carol	Edelman	6/27/2018	6/30/19
Lake Garfield Working Group	1 year	Michael	Germain	6/27/2018	6/30/19
Local Emergency Planning Committee (LEPC)	3 years	Gareth	Backhaus	7/5/2016	6/30/2019
Alternate Building Commissioner	2 years	Jeffrey	Clemens	4/5/2017	6/30/2019
Local Building Commissioner	2 Years	Owen	Wright	2/6/2019	2/6/2021
Materials Recycling Facility (MRF)	1 year				
Advisory Board Representative	1 year				
Memorial Day Coordinator	3 years				
Municipal Lighting Plant (MLP)	1 year	Kenneth	Basler	6/27/2018	6/30/19
Municipal Lighting Plant (MLP)	1 year	Cliff	Weiss	6/27/2018	6/30/19
Municipal Lighting Plant (MLP)	1 year	Bill	Johnson	6/27/2018	6/30/19
Parks Commission	until next elect	Ilene	Marcus	5/23/2018	5/7/2019
Planning Board	until next elect	Nancy	Marcus	7/18/2018	until next ele
Plumbing Inspector	2 years	Robert	Krupski	7/5/2016	6/30/2018
Plumbing Inspector, Alternate	2 years	Donald	S. Hopkins III	7/6/2015	6/30/2017
Police Department, Part Time - Reserve	1 year	Shaun	Courtney	6/27/2018	6/30/2019
Intermittent Police Officer	1 year	Matthew	Bodnar	6/27/2018	6/30/2019
Intermittent Police Officer	1 year	Keith	Avalle	6/27/2018	6/30/2019
Intermittent Police Officer	1 year	Ian	Mangosan	6/27/2018	6/30/2019

## APPOINTED OFFICIALS

Police Department, Part Time - Reserve												
Intermittent Police Officer	1 year probation	Jeffrey	Spratt					12/5/2018		12/5/2019		
Police Department, Police Chief	1 year	Gareth	Backhaus					6/27/2018		6/30/19		
Police Department, Sergeant	3 years	Brian	Fahy					10/4/2017		6/30/2020		
Records Access Officer	1 year	Terry	Walker					11/7/2018		6/30/2019		
Records Liason Officer for Select Board	1 year	Melissa	Noe					6/27/2018		6/30/19		
Regional Hazard Mitigation Team	2 years	Gareth	Backhaus					6/28/2017		6/30/2019		
Registrars of Voters	3 years	Pat	Salomon					11/15/2017		11/15/2020		
Registrars of Voters	3 years	Maureen	Banner					6/27/2018		6/30/2021		
Registrars of Voters	3 years	Meagan	Duffy					6/27/2018		6/30/2021		
Registrars of Voters	3 years	Michal	Strawbridge					6/27/2018		6/30/2021		
Registrars of Voters	3 years	Rebecca	Wolin					6/27/2018		6/30/2021		
Sanitary Inspector	2 years	Peter	Kolodziej					6/28/2017		6/30/2019		
Telecommunications Department Delegate	1 year	Larry	Klein					6/27/2018		6/30/2019		
Town Accountant	1 year	Marybeth Er	Baystate Municipal Accountant					6/27/2018		6/30/2019		
Town Clerk	1 year	Terry	Walker					6/27/2018		6/30/2019		
Town Clerk, Assistant	1 year	Gary	Shaw					11/7/2018		6/30/2019		
Town Counsel	1 year	Jeramia	Pollard, Esq					6/27/2018		6/30/2019		
Transfer Station Manager	no expiration date	Shawn	Tryon					7/5/2016		no expirator		
Transfer Station Swap Shack Attendant	no expiration date	Beth	Parks					7/5/2016		no expirator		
Transportation Advisory Committee (Berkshire MPO)	1 year											
Treasurer	1 year	Stephenie G	Baystate Municipal Accountant					6/27/2018		6/30/2019		
Veteran Service Officer	1 year	Julio	Rodriguez					6/27/2018		6/30/2019		
Veteran's Agent	1 year	Laurie	Hils					6/27/2018		6/30/2019		
Veterans Memorial Committee	2 years	Frank	D'amato					6/28/2017		6/30/2019		
Veterans Memorial Committee	2 years	Raymond	Tryon					7/5/2016		6/30/2018		
Wilson McLaughlin House Committee	1 year	Joe	Baker					6/27/2018		6/30/2019		
Wilson McLaughlin House Committee	1 year	Christine	Goldfinger					6/27/2018		6/30/2019		
Wilson McLaughlin House Committee	1 year	Elizabeth	Maschmeyer					6/27/2018		6/30/2019		
Wilson McLaughlin House Committee	1 year	Laurie	Shaw					6/27/2018		6/30/2019		
Wilson McLaughlin House Committee	1 year	Evelyn	Vallianos					6/27/2018		6/30/2019		
Wilson McLaughlin House Committee	1 year	Mary	Makuc					6/27/2018		6/30/2019		
Wilson McLaughlin House Committee	1 year	Cynthia	Weber					6/27/2018		6/30/2019		

# ACCOUNTANT / TREASURER REPORT

**Town of Monterey, MASSACHUSETTS**  
**Combined Balance Sheet - All Fund Types and Account Groups**  
**as of June 30, 2019**  
**(Unaudited)**

	Governmental Fund Types		Proprietary Fund Types		Fiduciary	Account	Totals (Memorandum Only)
	General	Special Revenue	Capital Projects	Enterprise	Trust and Agency	Long-term Debt	
<b>ASSETS</b>					1,204,506.51		2,549,067.28
Cash and cash equivalents	863,286.65	135,122.26	346,151.86				-
Investments							-
Receivables:							
Personal property taxes	457.19						457.19
Real estate taxes	113,445.98						113,445.98
Deferred taxes							-
Allowance for abatements and exemptions	(51,473.59)						(51,473.59)
Special assessments							-
Tax liens							-
Tax foreclosures							-
Motor vehicle excise	17,039.82						17,039.82
Other excises							-
Utility Charges							-
Departmental							-
Other receivables							-
Due to/from other funds							-
Due from other governments	24,597.00						24,597.00
Prepays							-
Inventory							-
Fixed assets, net of accumulated depreciation						729,670.00	-
Amounts to be provided - payment of bonds							-
Amounts to be provided - vacation and sick leave							-
<b>Total Assets</b>	<b>967,353.05</b>	<b>135,122.26</b>	<b>346,151.86</b>	<b>-</b>	<b>1,204,506.51</b>	<b>729,670.00</b>	<b>3,382,803.68</b>
<b>LIABILITIES AND FUND EQUITY</b>							
Liabilities:							
Deferred revenue							-
Real and personal property taxes	62,429.58						62,429.58
Deferred taxes							-
Prepaid taxes/fees							-
Special assessments							-
Tax liens							-
Tax foreclosures							-
Motor vehicle excise	16,987.11						16,987.11
Other excises							-
Utility Charges							-
Departmental							-
Deposits receivable							-
Other receivables							-
Due from other governments	24,597.00						24,597.00
Due to other governments							-
Accounts payable	78,532.42	13,266.93	115,006.12				215,187.25
Warrants payable						8,381.78	-

# ACCOUNTANT / TREASURER REPORT

	Governmental Fund Types			Proprietary Fund Types		Fiduciary Fund Types	Account Groups	Totals
	General	Special Revenue	Capital Projects	Enterprise	Internal Services	Trust and Agency	Long-term Debt	(Memorandum Only)
Accrued payroll and withholdings	18,238.44	3,628.00				(1,442.60)		20,423.84
Other liabilities		3,600.00						3,600.00
IBNR								
Bonds payable			1,986,595.00				729,670.00	729,670.00
Notes payable								1,986,595.00
Vacation and sick leave liability								-
<b>Total Liabilities</b>	<b>200,784.55</b>	<b>20,494.93</b>	<b>2,101,601.12</b>			<b>6,939.18</b>	<b>729,670.00</b>	<b>3,059,489.78</b>
<b>Fund Equity:</b>								
Reserved for encumbrances	18,500.00							18,500.00
Reserved for expenditures	124,623.36							124,623.36
Reserved for continuing appropriations								
Reserved for petty cash								
Reserved for appropriation deficit	(5,301.20)							(5,301.20)
Reserved for snow and ice deficit								
Reserved for debt Service								
Reserved for premiums								
Reserved fund balance	628,746.34	114,627.33	(1,755,449.26)			1,137,949.09		1,137,949.09
Undesignated fund balance						59,618.24		(952,457.35)
Unreserved retained earnings								
Investment in capital assets								
<b>Total Fund Equity</b>	<b>766,568.50</b>	<b>114,627.33</b>	<b>(1,755,449.26)</b>			<b>1,197,567.33</b>		<b>323,313.90</b>
<b>Total Liabilities and Fund Equity</b>	<b>967,353.05</b>	<b>135,122.26</b>	<b>346,151.86</b>			<b>1,204,506.51</b>	<b>729,670.00</b>	<b>3,382,803.68</b>

# ACCOUNTANT / TREASURER REPORT

**Town of Monterey, MASSACHUSETTS**  
**General Fund Revenue Analysis**  
**as of June 30, 2019**  
**(Unaudited)**

Receipt Description	Estimated	Actual	Surplus (Shortfall)
Motor Vehicle Excise	137,880.00	153,144.39	15,264.39
Meals Excise			-
Room Excise			-
Other Excise			-
Penalties & Interest on Taxes and Excises	17,500.00	22,679.53	5,179.53
Payment in Lieu of Taxes	12,000.00	11,500.00	(500.00)
Departmental Fees	10,000.00	8,400.60	(1,599.40)
Charges for Services - Solid Waste Fees	45,000.00	33,274.35	(11,725.65)
Rentals	12,600.00	-	(12,600.00)
Other Departmental Revenue	8,300.00	-	(8,300.00)
Licenses & Permits	50,000.00	58,210.00	8,210.00
Special Assessments			-
Fines & Forfeits	5,000.00	19,954.67	14,954.67
Investment Income	2,000.00	5,164.22	3,164.22
Medicaid Reimbursement			-
Misc. Recurring			-
Misc. Non-Recurring			-
	300,280.00	312,327.76	12,047.76

Local Receipts (Recap Page 3)

Receipt Description	Estimated	Actual	Surplus (Shortfall)
Tax Title (Fees & Interest Only)		2,508.03	2,508.03
Disposition of Town Assets			-
Excess from Revolving Closed to GF (Tab: Revolving Surplus)			-
Closed Capital Projects Funded by Free Cash Closed to GF			-
Excess Mass Extended Polling Hours Grant Close to GF		852.00	852.00
Misc Revenues - Prior Year Vendor Acct Refunds		4,750.53	4,750.53
			-

Not Estimated

# ACCOUNTANT / TREASURER REPORT

	Estimated	Actual	Surplus (Shortfall)
	-	8,110.56	8,110.56
<b>Chapter 70</b>			
Charter School Reimbursement			-
Unrestricted Governmental Aid	47,806.00	47,806.00	-
Veterans' Benefits			-
VBS and Elderly Exemptions	6,231.00	5,781.00	(450.00)
State Owned Land	228,874.00	228,874.00	-
State Vocational Transportation Reimbursements	-	-	-
	282,911.00	282,461.00	(450.00)
<b>Cherry Sheet State Aid</b>			
			-
<b>Changes In Receivables</b>			
	<b>PY</b>	<b>CY</b>	<b>Change</b>
Real Estate	137,593.07	113,445.98	24,147.09
Personal Property	436.72	457.19	(20.47)
Tax Liens	9,432.16	-	9,432.16
Foreclosures			-
Def & Rollback			-
	147,461.95	113,903.17	33,558.78

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**ACCOUNTANT / TREASURER REPORT**

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**Town of Monterey, MASSACHUSETTS**  
**Revolving Fund Surplus Balance Analysis**  
**as of June 30, 2019**  
**(Unaudited)**

Fund				9,283.06	-
Dept	Description	Surplus Cap	Ending Fund Bal.	Transfer to GF	
240	Inspectional Services	25,000.00	3,233.38		-
176	Zoning Board of Appeals	3,000.00	643.00		-
433	Composting Bins	1,500.00	367.26		-
240	Building and Fire Education	5,000.00	438.94		-
675	Community Center	50,000.00	4,600.48		-
					-
					-
					-
					-
					-
					-
					-
<b>Totals</b>		<b>84,500.00</b>	<b>9,283.06</b>		<b>-</b>



# ACCOUNTANT / TREASURER REPORT

**Town of Monterey, MASSACHUSETTS**  
Other Funds Activity Schedule  
as of June 30, 2019

Fund Number	Fund Name	(6/4) Fund Bal. 6/30/18	(1) Tax Revenue	(1) State/Federal Revenue	(1) Other Revenue	(1) Other Financing Sources/Transfers	(6) Salary/Wage (51) Expenses	(6) Other (52-57) Expenses	(6) Capital (58) Expenses	(6) Other Financing (59) Uses/Transfers	(6/4) Fund Bal. 6/30/19
20-000-3590-201002-0	RRA Water Pollution Abatement Trust (WPAT)	(31,443.85)	-	-	-	-	-	-	-	4,898.00	(26,545.85)
20-491-3590-201001-0	RRA Sale of Cemetery Lots	(3,403.43)	-	-	-	-	-	-	-	-	(3,403.43)
21-000-3590-000000-0	FB Berkshire Housing	(569.00)	-	-	7,315.00	-	7,315.00	-	-	-	(569.00)
21-000-3590-211000-0	Insurance Reimbursements Under 550k	(0.00)	0.30	-	-	-	-	-	-	-	(0.70)
21-000-3590-211001-0	TNC Ride Share Distribution	(2,822.45)	-	-	-	-	-	-	-	-	(2,822.45)
23-170-3590-231002-0	FB Veterans Memorial	81.11	-	-	-	-	-	-	-	-	81.11
23-171-3590-231001-0	FB Conservation SHELZ	-	-	-	-	-	-	-	-	-	-
23-171-3590-231002-0	FB Wetlands Property Fines SHELZ	-	-	-	3,495.00	-	5,050.00	-	-	-	(2,012.40)
23-171-3590-231006-0	FB Wetlands Protection Revolving SHELZ	-	-	-	6,499.60	-	1,432.60	-	-	-	(643.00)
23-176-3590-231008-0	FB Zoning Board SHELZ	-	-	-	1,132.40	-	1,132.40	-	-	-	(438.94)
23-220-3590-231005-0	FB Building & Fire Inspection	-	-	-	14,305.00	-	288.38	-	-	-	(3,233.38)
23-240-3590-231007-0	FB Inspector Fees	-	-	-	150.00	-	9,636.52	-	-	-	(9,672.28)
23-510-3590-231004-0	FB Composting Bins	(217.26)	-	-	14,237.00	-	-	-	-	-	(6,600.48)
23-600-3590-231009-0	FB Community Center Revolving	-	-	-	-	-	-	-	-	-	(350.00)
23-600-3590-231010-0	FB Fire Wreaths & Donations	(162.00)	-	-	-	-	-	-	-	-	(162.00)
25-541-3590-251004-0	FB CCDC	(200.00)	-	-	160.00	-	200.00	-	-	-	(8.88)
25-675-3590-251001-0	FB Lake Garfield Gifts & Donations	(3,868)	-	-	-	-	-	-	-	-	(450.00)
25-675-3590-251002-0	FB Ice Risk Gifts & Donations	-	-	-	-	-	-	-	-	-	-
28-135-3590-281015-0	FB Community Compact Financial Regionalization	-	9,840.00	-	-	-	3,660.00	-	-	-	(6,180.00)
28-155-3590-281024-0	FB CCIT Grant Equip Gen Govt	-	472.00	-	-	-	-	-	-	-	-
28-162-3590-281003-0	FB Comm of Ma Extended Polling Hours	-	5,000.00	-	-	-	-	-	-	852.00	(1,210.00)
28-162-3590-281017-0	FB Early Voting	(738.00)	-	-	-	-	-	-	-	-	-
28-220-3590-281014-0	FB 2017 Municipal Vulnerability Preparedness	7,859.04	-	-	-	-	(2,869.04)	-	-	-	(2,000.00)
28-220-3590-281044-0	FB VFA Fire Grant	(2,000.00)	-	-	-	-	-	-	-	-	(2,000.00)
28-220-3590-281045-0	FB EMPD 2018	2,297.85	-	-	-	-	-	-	-	-	2,297.85
28-293-3590-281011-0	FB Management Grant	(84,469)	-	-	-	-	-	-	-	-	(84,469)
28-422-3590-281015-0	FB Massachusetts Blue Hill Rd Reconstruction	-	3,769.57	-	-	-	2,647.11	-	129,846.70	-	25,996.67
28-422-3590-281016-0	FB Food Waste	(5,680.00)	100,247.03	-	-	-	-	-	-	-	(5,680.00)
28-433-3590-281018-0	FB Small Scale Grant	(5,000.00)	-	-	-	-	-	-	-	-	(5,000.00)
28-433-3590-281019-0	FB SMRP - Mattress Recycling Program	(380.00)	-	-	264.56	-	-	-	-	-	(80.00)
28-433-3590-281020-0	FB DEP Recycling Dividend Program	(5,550.00)	-	-	-	-	-	-	-	-	(5,550.00)
28-510-3590-281004-0	FB Septic System Repairs	(89,554.06)	-	-	-	-	-	-	-	-	(89,554.06)
28-510-3590-281004-0	FB Title V Grant	(3,388.88)	-	-	-	-	-	-	-	-	(3,388.88)
28-510-3590-281005-0	FB ECEA Formula Grant	(2,390.73)	-	5,368.42	-	-	8,081.84	-	-	-	(1,797.98)
28-541-3590-281006-0	FB State Aid to Libraries	(10,000.00)	2,044.71	-	-	-	8,29.97	-	-	-	(11,997.98)
28-610-3590-281001-0	FB MHC Library Building Grant	(569,768.88)	371,135.00	-	2,656.31	-	-	-	944,206.33	-	708.44
28-610-3590-281002-0	FB Nutrient Loading Matching Grant	0.21	-	-	-	-	-	-	-	-	0.21
28-675-3590-281012-0	FB Mass Cultural Council	(7,580.67)	4,500.00	-	-	-	2,600.00	-	-	-	(9,480.67)
28-699-3590-281001-0	FB Comm Dev Block Grant CDBG	57,894.71	-	-	129.29	-	468,764.72	-	-	-	(145.59)
29-122-3590-291001-0	ATM 3/17 A13 CDBG Contingency	(20,000.00)	-	-	525,475.69	-	-	-	-	-	(20,000.00)
29-122-3590-291002-0	FB D01 Bulle Proof Vest Replenishment Program	-	-	-	-	-	-	-	-	-	-
30-422-3590-000000-0	FB Mass Highway Chapter 90	896.50	-	11,730.00	-	-	5,370.00	-	12,430.00	-	1,965.50
31-610-3590-311001-0	FB Library Construction	(64,739.35)	4,313.88	-	-	-	-	-	1,953,766.94	-	1,753,862.76
31-610-3590-311002-0	FB Center Periodical Care	(1,398.58)	-	-	-	-	-	-	-	-	(1,398.58)
80-000-3590-801001-0	FB Reserve Health Life Stabilization	(64,446.05)	536.96	-	-	-	-	-	-	-	(64,446.05)
80-000-3590-801007-0	FB Fire Stabilization	-	-	-	-	-	-	-	-	11,000.00	(103,982.03)
80-171-3590-801004-0	FB Conservation Trust	(60,696.05)	311.59	-	-	-	-	-	-	-	(61,007.64)
80-422-3590-801006-0	FB Bridges Roads & Culverts Stabilization	(60,134.65)	22.53	-	-	-	-	-	-	-	(60,157.18)
80-610-3590-801002-0	FB Library Abercrombie Trust	(13,659.28)	104.44	-	-	-	-	-	-	90,000.00	(10,618.68)
80-610-3590-801003-0	FB Library Memorial Trust	(1,313.03)	1,416.58	-	-	-	50.00	-	-	-	(2,879.61)
		(1,727,582.45)	99,067.34	1,040,434.42	59,067.34	210,000.00	15,994.00	512,861.14	2,844,709.67	106,750.00	443,240.60

# ACCOUNTANT / TREASURER REPORT

**Town of Monterey, MASSACHUSETTS**  
**Appropriation Control**  
**as of June 30, 2019**  
**(Unaudited)**

Dept	Name	Encumbrances	Reserve Fund	Recap	ATM5/18 Act4	STM5/18 Other	STM5/18	ATM5/19	EOY Transfers	Total Budget
114	Moderator				324					324
115	Constable				637					637
120	Administrative Assistant				51,254					51,254
122	Board of Selectmen				29,965					29,965
123	Town Administrator				2					2
124	Temporary Employees				1,500				(1,422)	78
131	Finance Committee				1,150					1,150
132	Reserve Fund	(12,500)			20,000					7,500
135	Accountant				37,800					37,800
141	Assessors				78,308		7,800			86,108
145	Treasurer				20,500					20,500
146	Collector				33,775					33,775
151	Legal		217		13,682					13,899
154	Meeting Warrant				1,100					1,100
155	Technology				11,200					11,200
158	Tax Title				1,500					1,500
160	Clerk				27,160					27,160
161	Registrations				500					500
162	Elections				3,000					3,000
163	Census				2,250					2,250
171	Conservation				1,000					1,000
175	Planning Board				1,080					1,080
176	Zoning Board		320	747	501					501
192	Town Office		3,006		35,000				537	38,543
195	Printing				1,000					1,000
210	Police		4,500		219,072				375	223,947
220	Fire				140,500				3,117	143,617
221	Fire Inspector				100					100
222	Communications				10,229					10,229
240	Building Insp.				37,125					37,125
243	Gas Insp.				100					100
245	Electrical Insp.				500					500
291	Emergency Management				501					501
292	Animal Control				900					900
293	Animal Insp.				29,410					29,410
294	Tree Warden				1,298					1,298
301	School Committee				1,600,395					1,600,395
380	Regional School				551,888				(159)	551,729
422	Highway				172,500					172,500
423	Snow & Ice				3,100					3,100
424	Street Lighting		244		25,000				159	25,456
405	Fuel		456		5,800				100	5,800
430	Dam Inspection				3,700					3,700
431	S. Berkshire Waste Dist.				1,086					1,086
432	Household Hazardous Waste				112,469					112,469
433	Transfer Station				700					700
435	Regional Group Purchasing				26,750					26,750
491	Cemetery				28,421					28,421
510	Board of Health									

# ACCOUNTANT / TREASURER REPORT

541	Council on Aging		3,215			3,215
543	Veterans District		5,000		(3,595)	6,170
545	Community Support & Outreach	4,765	3,502			3,502
610	Library		74,803		888	75,691
630	Parks		47,454			47,454
650	Monterey Community Center		8,000	(4,250)		3,750
692	Memorial Day Celebrations		2,000			2,000
699	Cultural Council		3,000			3,000
700	Debt Services		256,603			256,603
911	County Retirement		124,352			124,352
913	Unemployment Insurance		1,000			1,000
914	Health Insurance		172,640	11,000	6,907	162,000
915	Life Insurance		490	(21,640)		490
916	Medicare		12,750			12,750
945	Liability Insurance	3,758	70,338			74,096
990	Transfers					210,000
		-	4,133,779	135,000	75,000	4,349,108
		5,512	146,000	(18,090)	81,907	

# ACCOUNTANT / TREASURER REPORT

**Town of Monterey, MASSACHUSETTS**  
**Approved Stabilization Activity**  
**as of June 30, 2019**  
**(Unaudited)**

TM	Art	FY	Eff. Date	Description	Transfers In	Transfers Out	Income	Balance
<i>General Stabilization</i>								
May-18	10	19	6/30/18	Ending Fiscal 2018 Balance				867,114.98
			7/1/18	Transfer from General Fund - R&A	75,000.00			942,114.98
			6/30/19	Fiscal 2019 Year to Date Interest	-		7,187.98	<b>949,302.96</b>
<i>Fire Stabilization</i>								
May-19	13	19	6/30/18	Ending Fiscal 2018 Balance				15,000.00
			5/4/19	Transfer from General Fund - Free Cash	15,000.00			<b>15,000.00</b>
			6/30/19	Fiscal 2019 Year to Date Interest			-	
<i>Retiree Health/Life</i>								
May-18	10	19	6/30/18	Ending Fiscal 2018 Balance				54,446.06
May-18	12	19	7/1/18	Transfer from General Fund - R&A	30,000.00			84,446.06
May-19	14	19	5/4/19	Transfer to General Fund	-	11,000.00		73,446.06
			5/4/19	Transfer from General Fund - Free Cash	30,000.00			103,446.06
			6/30/19	Fiscal 2019 Year to Date Interest			516.96	<b>103,963.02</b>
<i>Roads and Bridges Stabilization</i>								
May-18	10	19	6/30/18	Ending Fiscal 2018 Balance				60,134.65
May-18	7	19	7/1/18	Transfer from General Fund - R&A	30,000.00			90,134.65
May-19	12	19	5/4/19	Transfer to General Fund	-	90,000.00		134.65
			5/4/19	Transfer from General Fund - Free Cash	30,000.00			30,134.65
			6/30/19	Fiscal 2019 Year to Date Interest			22.53	<b>30,157.18</b>

**ACCOUNTANT / TREASURER REPORT**

**Town of Monterey, MASSACHUSETTS  
Certified Free Cash/Retained Earnings Activity  
as of June 30, 2019  
(Unaudited)**

TM	Art	FY	Eff. Date	Description	Free Cash
May-19			4/26/19	Free Cash Certification	251,140.00
May-19	6	19	5/4/19	Collins Center	(6,000)
May-19	7	19	5/4/19	Coa Outreach	(6,048)
May-19	8	19	5/4/19	Police Computer	(5,000)
May-19	9	19	5/4/19	Fire Thermal Camera	(10,000)
May-19	10	19	5/4/19	Highway Furnace	(8,500)
May-19	16	19	5/4/19	Fire House Improvements	(30,000)
May-19	12	19	5/4/19	Transfer to Roads Stabilization	(30,000.00)
May-19	13	19	5/4/19	Transfer to Fire Stabilization	(15,000.00)
May-19	14	19	5/4/19	Transfer to Retiree Stabilization	(30,000.00)
Balance; Unappropriated					110,592.00

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## ANIMAL INSPECTOR REPORT

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Report of the Monterey Animal Inspector  
July 01, 2018 to July 01 2019

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. Dogs, cats, ferrets, and rabbits are exempt from the census for now.

There were no violations found in Monterey last year and no quarantines were required. Following are the animal counts which were collected towards the end of 2018 by Roy Carwile (Animal Inspector) and Dr. John Makuc DVM (Chairman of the Board of Health).

Animal Type	Adults	Young
Dairy Cattle	30	7
Beef Cattle	17	9
Steers/Oxen		2
Goats	33	8
Sheep	8	5
Swine		
Breeders	4	
Feeders	2	18
Llamas/Alpacas	17	
Equines (horses etc.)	17	
Waterfowl	60	
Poultry		
Chickens	146	
Turkeys	9	

Respectfully submitted: October 04, 2019  
Roy H Carwile Animal Inspector

# 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	1216	1217	
Total Exempt Bills	92	92	
Total Personal Property Bills	147	157	
Total Count of Bills	1455	1466	Total Real/P.P./Exempt
<b>REPORT OF THE ASSESSORS CONCERNING NEW GROWTH VALUES</b>			
Type of Land	FY. Values 2018	FY. Values 2019	Difference in Value
<b>Residential</b>			
Single Family	\$392,491,700	\$411,333,600	\$18,841,900
Condominium	\$3,389,600	\$3,606,400	\$216,800
Two/Three Family	\$4,868,800	\$3,425,900	(\$1,442,900)
Multi Family	0	0	
Vacant	\$41,306,100	\$40,820,900	(\$485,200)
Other	\$47,721,103	\$46,407,084	(\$1,313,929)
<b>TOTAL RESIDENTIAL</b>	<b>\$489,777,213</b>	<b>\$505,593,884</b>	<b>\$15,816,671</b>
COMMERCIAL	\$8,189,959	\$7,782,320	(\$407,639)
CHAPTER 61, 61A, 61B	\$1,668,592	\$1,664,602	(\$3,990)
INDUSTRIAL	\$585,828	\$590,196	\$4,368
PERSONAL PROPERTY	\$8,794,521	9,595,412	\$800,891
<b>TOTAL</b>	<b><u>\$509,016,113</u></b>	<b><u>\$525,226,414</u></b>	<b><u>\$16,210,301</u></b>

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# BERKSHIRE VISITING NURSES ASSOCIATION REPORT

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165 Tor Court  
Pittsfield, MA 01201  
Fax (413) 447-2869

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Central Office (413) 447-2862

Toll Free (800) 788-2862

## Monterey Public Health Services Annual Report - July 1, 2018 to June 30, 2019

As part of the Berkshire Health System network, the Berkshire Visiting Nurse Association provides comprehensive, multidisciplinary healthcare to individuals and families in the community. Community public health services include **Disease Surveillance and Investigation**, **Active TB Disease Management**, **Disease Screening and Immunizations**, and **Health Promotion**. A description of services follow:

**Disease Surveillance and Investigation** of reportable and communicable diseases involves the receipt and processing of reports for specific diseases and implementation of appropriate follow-up measures. This is accomplished with the use of the Massachusetts Virtual Epidemiologic Network (MAVEN), an electronic disease surveillance system.

There were **21** diseases investigated during this time frame:

- Hepatitis C -2
- Human Granulocytic Anaplasmosis – 4
- Influenza – 9
- Lyme Disease - 6

**Active TB disease management** follows all cases of active disease in accordance with MDPH requirements and MA regulations. This includes contact investigation, skin testing, multiple months of case management and direct observation therapy.

There were no cases of active TB in Monterey this past year.

**Disease Screening and Immunizations** for individual and community disease prevention are provided as necessary. An established distribution station is maintained in accordance with MDPH requirements for the management of state supplied vaccine. A two-hour town clinic for seasonal influenza and pneumonia vaccination is offered. Opportunity for those who are unable to come to the town clinic is made available at subsequent health promotion clinics.

Vaccinations administered:

- Influenza – 16

**Health promotion services** provide health education and screening to encourage wellness and early identification of illness or disease. A health promotion clinic is held monthly at the town offices. Blood sugar testing is offered regularly to those with diabetes and annually for all clinic participants. Two residents were identified as having Stage I Hypertension (140-159/90-99mm/Hg) and 1 resident was identified as having Stage II Hypertension (>160/100mm/HG). Resident with Stage II Hypertension was referred for medical follow-up.



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## BERKSHIRE VISITING NURSES ASSOCIATION REPORT

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BVNA/Monterey Annual Report

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During clinic visits, 14 residents received health instruction related to medication management, diet, disease management and instruction on healthy lifestyle activities.

**Clinic Statistics:**

- Visits – **33**
- Blood Pressure up to 140/90mm/Hg - **5**
- Stage I Hypertension (140-150/90-99mm/Hg) – **2**
- Stage II Hypertension (>160/100mm/Hg) – **1**
- Clinical Instruction Provided
  - Medication Management - **14**
  - Diet – **14**
  - Disease Management – **14**
  - Life Style Changes - **14**
- Referrals Health education presentation
  - Primary Care Physicians – **2**
  - Emergency Department - **1**

Health education presentations this year included:

- Tick Education
- Foot and Mouth Disease
- Flu Education
- Falls Education
- Disaster Preparedness for Elders
- Cholesterol Clinic/Education
- Measles Education
- Choking Treatment
- Noro Virus Education
- Benefits of Participating in Activities

Printed resource material was offered to participants for future reference on each subject.

As the Board of Health Coordinator, I collaborate with the Council on Aging to provide coordination of services for residents. As a member of the community health care continuum of Berkshire Health Systems, collaboration with and referrals to other health care professionals are readily made.

The Berkshire Visiting Nurse Association wishes to thank the Select Board and the Board of Health for the opportunity to serve its residents. Please feel free to call the BVNA for information at 800-788-2862. We look forward to our continued relationship in maintaining and promoting good health in Monterey.

Respectfully submitted,

Nancy Slattery, RN, B.S.  
Board of Health Coordinator

/jfg

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## BOARD OF HEALTH REPORT

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FY 2019 Board of Health Annual Report

The Board of Health was scheduled to meet 24 times, however only 9 meetings were held in FY 2019.

During FY 2019 BOH meetings the board once again had many discussions regarding private septic systems. Also discussed was input to the Zoning Board of Appeals regarding the second cell tower, and the board listened to concerns regarding cyanobacteria in the town's lakes.

The board began the process of transitioning to online permitting. It is generally felt that online permitting is more efficient for both the customer and the BOH.

Peter Kolodziej, the town sanitarian/ health agent indicated that he would like to retire during FY 2020. He recommended the board consider filling the position with Jim Wilusz, the existing health agent for Tri-town health department which serves Lee, Lenox, and Stockbridge. This is a position that Peter himself once held. The board will miss Peter.

Permits issued for FY 2019 are as follows:

Septic permits:	10
New:	3
Upgrade/Replace:	5
Repair:	2
Well permits:	6
Camp permits:	4
Food Service permits:	13
Septic hauler/installer:	10

Once again, Monterey continues to have few general public health issues. The VNA assists the board with this monitoring. The BOH is always open to hear and discuss any related issues the town residents may have. Meetings are held at the town hall at 4:00pm on the first and third Mondays of every month. Monday holidays may necessitate scheduling changes. Notify the administrative assistant 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

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## BUILDING DEPARTMENT REPORT

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### Report of the Building Department FY19

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.

<b>Total Permits Issued</b>	<b>109</b>
<b>Total Fees Collected</b>	<b>\$60,093</b>

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

<b>Electrical Permits</b>
Permit Applications Received - 131
<b>Total fees collected: \$14,995</b>

Nick Fredsall  
Electrical Inspector

<b>Plumbing &amp; Gas Permits</b>
Plumbing Permit Applications Received – 29
Gas Permit Applications Received - 52
<b>Total fees collected: \$8,280</b>

Robert Krupski  
Plumbing & Gas Inspector

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## CEMETERY REPORT

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### CEMETERY REPORT July 1, 2018 - June 30, 2019

As your elected three-member Cemetery Commission, we are charged with overseeing the five Town owned cemeteries and the Veteran's Memorial Park. We meet as needed and by appointment, and are governed by Massachusetts General Laws, and Code of Regulations (CMR). We are funded by you, the voters, through line items in the warrant of the Annual Town Meeting.

The tree work of the last several years is ending, making the cemeteries a safer place for people to visit, and safer for the monuments and markers that are vulnerable to falling limbs and trees.

Our next project will be to ready the new section for use.

There were 13 burials in Corashire in the past year.

Again, we would like to remind everyone that visitors are welcome from sunrise to sunset (per MGL Chapter 114, section 42A), but we respectfully request that you not park on the grass as there are unmarked graves, and that you please clean up after your four-footed friends who walk with you.

If you have any questions pertaining to any of the cemeteries, or the Veterans Memorial Park, please contact any member of the Commission.

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## COMMUNITY CENTER

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### The Monterey Community Center

Fiscal Year 2018-2019 was a year where we experienced a lot of growth and transition. We started the year having several events, activities or programs each week, and ended it having a program or two almost every day of the month, each month. We were preparing to go from being a private non-profit group with some municipal support and private support to being a fully municipal entity. This included a change in oversight and governance as well. The Wilson House, as it was called, had been run completely by volunteers and overseen by the FWMH (Friends of the Wilson-McLaughlin House) Board with program advice by the Program Committee.

This year a Community Center Coordinator was hired for 5 hours per week and supervised by Joe Baker, Executive Director of the FWMH. That position began September of 2018.

The Community Center Coordinator's role was to schedule events, keep the online calendar up to date, distribute print calendars, be a liaison to the Selectboard, and other town committees, plus gather statistics for programs and events, assist with the MCC Planning Committee, public relations, and handle bookkeeping tasks as needed. The Coordinator handles the emails, phone, mail and social media queries for the center except those addressed to the Executive Director.

Several programs which began in 2017 continued: chorus, painting, yoga, and cards and bridge, plus Darn Yarners. Other new programs and activities commenced, and became regular: Ping Pong, Alanon, plus Mahjong, met weekly, and Multi Cultural Bridge held meetings quarterly.

The MCC continued to be a favorite venue for COA events and trainings such as Balance Review, Safe Driving, Estate Planning and Navigating the Real ID process. Thanks to Adam Chait installing Fiber Connect, we were able to offer and enjoy WiFi.

Many non-profit agency board meetings were held here as well as periodic Town committee meetings as an overflow from Town Hall: the Planning Board, the Parade Committee, the Lake Garfield Working Group, and the Cultural Council. We hosted some of the Bidwell House planning meetings and Board Meetings, plus the Stevens Lake annual meeting. We also became a venue for Climate Change films and discussion.

For cultural / entertainment events we hosted 2 musical performers: Linda Worster and Tim Van Egmond.

Our second holiday arts and crafts sale was held in December featuring local artisans and a Cookie Swap event was put on by Hume New England also in early December.

The raised garden bed near the MCC door was planned and implemented this year by Wendy Jensen and Libby Wolf, all gratis. Many garden angels stopped by to weed and water. 16 garden plots were utilized by citizens who grew vegetables and / or flowers. Appreciation goes to Bonner MacAllester for all she did to check on the garden about daily from start to finish and the Greenagers who helped supervise MERHS students with garden prep and constructing raised beds. Three of the students were from Monterey.

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## COMMUNITY CENTER

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Local people including Mary Kate Jordan led gatherings and gave how-to talks: Sonia Pilcer, writing, Marilyn Cromwell, making mosaics, Wendy Jensen, yogurt making, Steve Moore, knife sharpening, and Kevin West, preserving fruits and vegetables. We were also used for a celebration of life.

Arbor Day was held at the MCC on April 28. Dennis and Elaine Lynch kindly donated a flowering crab apple tree and kicked off the event to find the oldest tree in Monterey in conjunction with Steve Moore and the Monterey News.

Maureen Banner, another volunteer continues to make lovely posters as called on. The Program Committee was comprised of Joe Baker, Wendy Jensen, Wendy Germain, Kyle Pierce, Roz Halberstadter, Dorene Beller, Elaine Lynch, Dennis Lynch, Mary Makuc, JoAnn Bell, Doug McTavish, Sue Cain, Libby Wolf, and Steve Pullen.

Sadly, we lost two of our long time, stalwart Board Members, Shirley Olds, and Cynthia Weber. Their families asked that donations in their memory go to FWMH/ MCC.

We sincerely wish to thank Joe Baker, who for fourteen years gave so much of his time, energy and creativity to bring the Wilson House to where it is now, an active community center. Because of his grant writing, planning, construction skills and enthusiasm we were able to open and thrive. Joe brought in Mike Banner who was really instrumental in finishing the renovation of the Wilson House. Joe had encouraged many others who joined in and shared their talents, such as Steve Moore, and Eric Pedersen. Joe retired from day to day operation, maintenance, and overseeing the MCC on June 30 2018, Starting July 1, we would be in a new era as a fully municipal community center.

The income brought in by events and programs was almost 2,200 dollars.

Thank you to all taxpayers for your support. Let us know what YOU want to see, learn, do, teach, or make at YOUR community center.

Respectfully submitted  
FWMH Committee

Joe Baker  
Christine Goldfinger  
Dennis Lynch  
Mary Makuc  
Laurie Shaw  
Evelyn Vallianos

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## COMMUNITY HEALTH PROGRAMS

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### Community Health Programs - Report on FY19 Activities for the Town of Monterey

October, 2019

We are pleased to report on the following Community Health Programs (CHP) services that were provided to Monterey residents during the past year to promote the health and well-being of the young children and families of the town. As a safety net for families in need, CHP provides comprehensive support to promote the long term health and development of children. CHP believes that your health should not depend on where you were born, where you live, or your economic status – and CHP’s maternal-child health services ensure that the youngest of the town’s citizens can develop to their fullest potential. Through patient and client records, playgroup attendance sheets, event attendance records, and WIC participant data, we know that hundreds of Monterey residents were served by CHP during FY19.

CHP provided primary and preventive care to Monterey residents of all ages who were patients at one or more of CHP’s medical or dental centers. Residents had access to primary and preventive care, dental services, and comprehensive women’s health care – regardless of their ability to pay, their immigration status, or insurance coverage. CHP provided medical care to over 200 town residents – approximately 20% of the town’s population – through 600 individual appointments. Patients received medical and dental care at Berkshire OB/GYN, the Great Barrington Community Health Center, Lee Family Practice, the Pittsfield Neighborhood Health Center and Berkshire Pediatrics practices, and on the Mobile Health Unit.

During the year, CHP offered high quality integrated family-centered programs throughout rural southern Berkshire County. CHP helped vulnerable children and families overcome isolation and reach their full potential by providing coordinated family and community supports. This includes providing WIC nutrition services to dozens of the town’s youngest and most vulnerable citizens. Additionally, many of the town’s young children and families attended free playgroups at 11 sites in 9 towns throughout Southern Berkshire County, and attended parent support and educational groups offered at CHP Family Services in Great Barrington. CHP Family Services activities – all free to participants – included weekly playgroups, workshops for caregivers, clothing and book exchanges, a lending library, playroom, and a staff of nutritionists, social workers, early childhood educators, and breastfeeding support counselors. CHP provided free and emergency food, hosted monthly healthy food distribution events, provided fuel and holiday relief funds, and distributed donated childcare necessities. South Berkshire Women, Infants, Children (WIC) program, part of CHP Family Services, provided essential nutrition education and WIC checks for healthy foods to town pregnant or postpartum women, newborns, toddlers, and children under the age of five.

We are grateful for the support that the town of Monterey has provided that has helped make such a difference in the lives of so many residents, regardless of their economic status. The generosity of the Town will help CHP to continue to provide critically needed healthcare and family support services to the town’s most vulnerable residents. Hundreds of individuals and families in Monterey will have their lives improved through this support.

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# CONSERVATION COMMISSION REPORT

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## **Report of the Conservation Commission for Fiscal Year 2019**

It is the work of the Monterey Conservation Commission to locally administer the Wetlands Protection Act (WPA – MGL Ch 131, S 40) which prohibits any filling, excavation or other alteration of the land surface, water levels, or vegetation in wetlands, regardless of ownership, without a permit from the local Conservation Commission. Additionally, the Riverfront areas have been included as requiring protection under their own paragraph. The WPA regulations, though not official, may be found online here <http://www.mass.gov/eea/docs/dep/service/regulations/310cmr10a.pdf>. The official version may be purchased at the State House Book Store or reviewed at Monterey Town Hall. The Conservation Commission also administers the local Scenic Mountain Act (SMA), in effect in Monterey since November 10, 2004. The SMA regulations can be found on the town website: [www.montereyma.gov](http://www.montereyma.gov) .

The Conservation Commission heard 15 Requests for Determination of Applicability (RDA) under the Wetlands Protection Act (WPA), 7 Notices of Intent (NOI or ANOI) under the WPA, and 2 Notice of Intents under the SMA. The Commission also issued 4 Certificates of Compliance (COC) under the WPA, 2 WPA Emergency Certificates and 3 WPA Enforcement Orders. The members were also responsible for reviewing several potential projects during the year to determine if they fell under the jurisdiction of the Commission prior to a building permit being issued.

Fiscal Year 19 membership included Mark Little, Marion Simon, Jeremy Rawitz, and Kimberly Wetherell. The Commission is currently seeking to fill three vacancies and anyone interested is encouraged to contact the Board of Selectmen.

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 post legal notices required for public hearings. Please check the Town's website for submission deadlines. 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,  
Kimberly Wetherell



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## COUNCIL ON AGING REPORT

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Monterey Council on Aging Town Report 7/1/2018 – 6/30/2019

The Monterey Council on Aging serves our elders with funding from the Commonwealth and the Town and volunteer services, including community offerings. In FY 2019, we served 107 elders, and there were 1695 units of service. These include the foot nurse, 18 elders, 51 visits, card games at the Community Center, pitch and bridge, sometimes twice a week, which brought in people from other towns, also, and SBETC, the Southern Berkshire Elderly Transport Corp, which reported 141 van rides. We had multiple socialization opportunities: the holiday luncheon and concert at Mount Everett, monthly movie nights, several local Roadside luncheons, the Boston Flower Show. Cultural activities included a local folksinger, a bus trip to Mount Greylock, an award-winning play at Monument Mountain High School. We had several intergenerational offerings, line dancing and the Pittsfield Suns baseball game. We had several educational programs, the Real ID license information and Elder Law presentation, mandala workshops. We started a pedestrian safety program, and with the help of the police, have given out many yellow safety vests. We provided the Monterey Community Center with an automatic external defibrillator. We assisted in the honoring of our Veterans on Veterans Day. We have weekly balance review classes, and the Berkshire VNA nurse has a monthly wellness clinic. The issues which concern seniors remain the same: affordable housing, isolation, transportation. We expect to start an outreach program next year, there are many seniors we have not reached. We sponsored a change in the CoA bylaws this year to reflect the actual Board membership, and also increased the size of the potential Board from 5 to 7 members. We have 6 members at present: Kyle Pierce, Chair, Ilene Marcus, Clerk, and Norma Champigny, Ruth Champigny, Rosalyn Halberstadter, and JoAnn Bell. The Board meets 1-2 times per month and welcomes townspeople to come and tell us their concerns.

Kyle Pierce, Chair

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**CULTURAL COUNCIL REPORT**

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Monterey Cultural Council  
Annual Report Fiscal Year 2019  
Report not submitted

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## HIGHWAY DEPARTMENT REPORT

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### FY2019 Highway Report

For fiscal year 2019 the Highway Department dealt with many repairs, maintenance and upgrades to the 48 miles of roads as well as our machinery and facilities. The work completed included repair of frequent mud events due to warm days during winter, snow/ice removal, grading and compacting of roads, brush/tree removal, adding gravel, roadside mowing, along with resurfacing the town hall parking lot. The majority of gravel hauled was applied to Wellman, Fairview, Hupi and many others received gravel for repairs. Brush cutting and hazard tree removal including log cleanup from National Grid tree removals was done on all parts of the town with the assistance of the tree warden. We continued to clean water runs and ditches throughout. The summer of 2018 was the first year to mow the roadsides with town purchased tractor after being unable to find a new contractor. Also completed was 4 culvert replacements with additional drainage added to Gould road near the transfer station to improve drainage due to washouts. The department replaced the aging loader along with adding a boom mower attachment for mowing hard to reach areas to combat brush growth. Winter operations were tough due to the wide range of weather patterns. Many storms that started as rain and ended as snow used approximately 1300 tons of salt and 2500 tons of sand. Many repairs to the snow equipment were done in house along with sending equipment out to be repaired

Director of Ops

Shawn Tryon

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## FINANCE COMMITTEE REPORT

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### Monterey's Financial Health A report on Fiscal Year 2019

The primary duties of the Finance Committee are to advise and make recommendations to town meeting on the budget and other areas of finance. It is the Finance Committee's responsibility to receive the budgets from the executive branch (either as a collective whole or individually by department), analyze them, have hearings where the department heads and the public can testify, and present a balanced budget to town meeting. That budget should reflect the Finance Committee's decisions based upon their best judgment of the issues and finances of the town. The budget before town meeting is the Finance Committee's and it is their job to explain and defend it.

—Adapted from *A Guide to Financial Management for Town Officials* and the *Finance Committee Handbook*.

For FY19, the town raised a total of \$4,874,581.42 at two town meetings (May 5, 2018 and June 29, 2018), of which \$3,886,675.42 was levied in taxes, \$585,206 was received from estimated State and Local receipts, \$301,700 was appropriated from Free Cash, and \$101,000 was appropriated from Other Available Funds (Stabilization Funds).

An additional \$6,907 was appropriated for FY19 from Raise and Appropriate at the town meeting of May 4, 2019.

The FY19 Maximum Allowable Levy was \$4,265,405. This included \$266,182 in Debt Exclusions. The FY19 Total Tax Levy was \$3,886,675.42; as a result, our FY19 Excess Capacity was \$378,730. (Maximum Allowable Levy minus Total Tax Levy equals Excess Capacity.) Our Excess Capacity reflects additional amounts available for appropriations before requiring a Proposition 2 1/2 Override.

General fund revenues as of June 30, 2019 (actual, unaudited) were as follows:

Local receipts:	\$312,327.76
Not estimated:	\$8,110.56
State Aid (Cherry Sheet)	\$282,461.00
Changes in receivables:	\$113,903.17

FY19 Free Cash was certified at \$251,140, of which \$140,548 was appropriated at the May 4, 2019 town meeting, resulting in an unappropriated balance of \$110,592 as of June 30, 2019.

FY19 Stabilization Fund balances as of June 30, 2019 were as follows:

General:	\$949,302.96
Fire:	\$15,000.00
Retiree Health/Life:	\$103,963.02
Roads and Bridges:	\$30,157.18

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## FINANCE COMMITTEE REPORT

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FY19 total indebtedness of \$729,670 included the following outstanding debt as of June 30, 2019:

Highway Grader:	\$75,200
Highway F550 Truck	\$49,572
Fire Truck	\$400,000
Transfer Station	\$200,000
Septic System Betterment	\$4,898

This \$729,670 debt represents 14 percent of the \$4,874,581.42 FY19 budget.

Please note that while the tax rate and your assessed value are used in the calculation of your tax bill, the determining factor in the amount of total property tax paid is a function of the town budget. If the town budget increases, your taxes will increase.

Here is a chart showing the Average Single Family Tax Bill since FY2000:

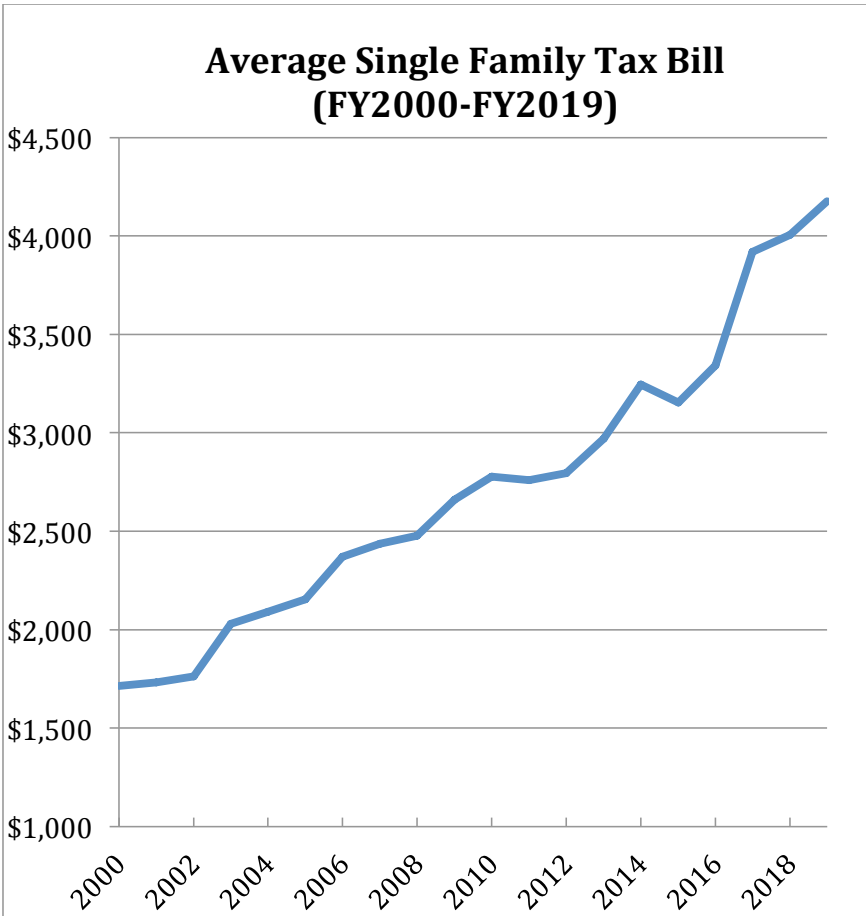
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## FINANCE COMMITTEE REPORT

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Here is a chart showing the Tax Rate since FY2000:

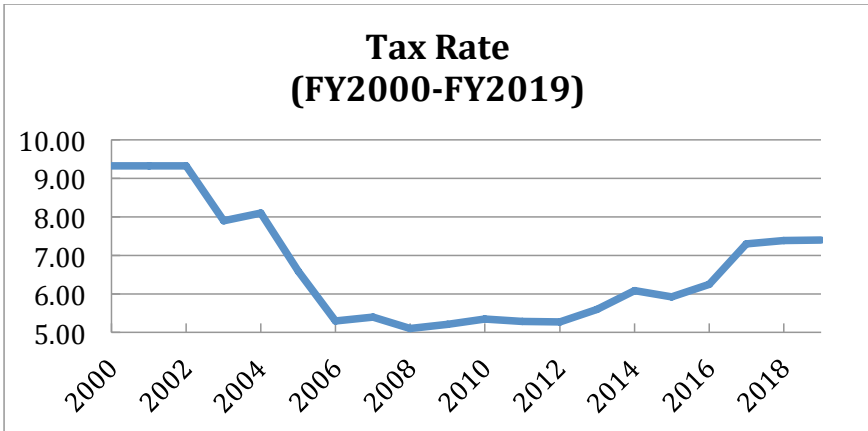
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## FINANCE COMMITTEE REPORT

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As you can see, the tax rate can fall, as it did between FY2000 and FY2008, while your taxes increase. The tax rate can also remain stable (FY2008-FY2012) while your taxes increase. Even when the tax rate rises slowly (FY2013-FY2019), your taxes can rise rapidly. The tax rate is not the *determinant* factor to your tax bill. For example, in FY2000, the tax rate was 9.32 and the Average Single Family Tax Bill was \$1,733. In FY2019, the tax rate was 7.40 and the Average Single Family Tax Bill was \$4,175.

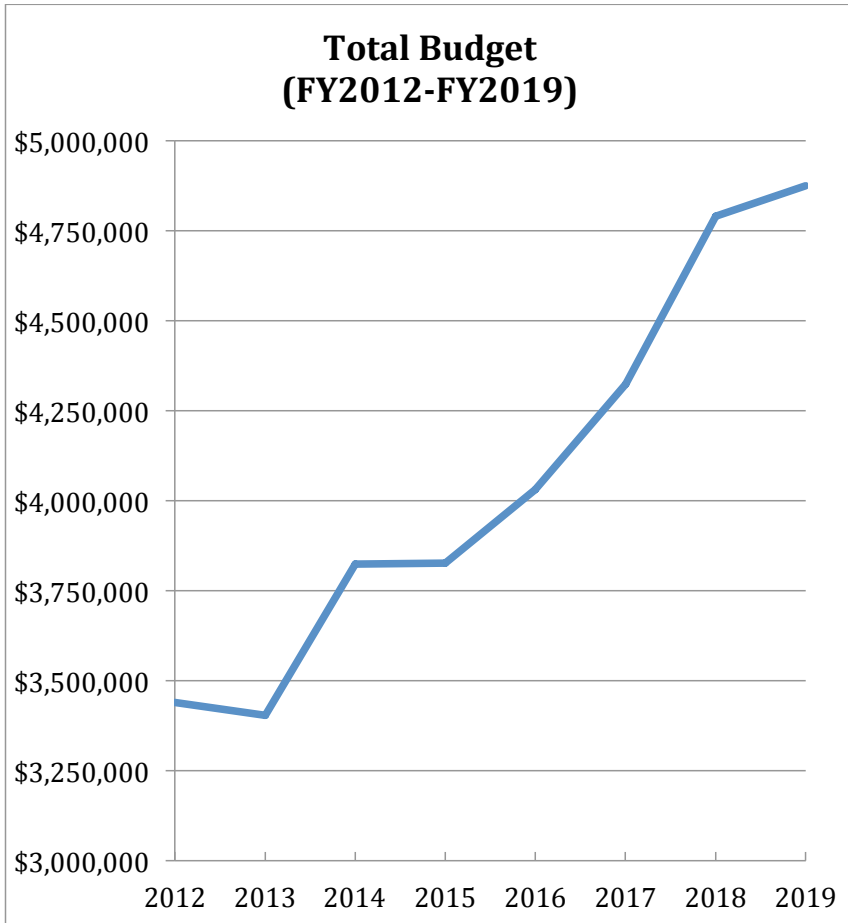
For your information, here is a chart showing the town budget since FY2012:

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## FINANCE COMMITTEE REPORT

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If you compare this chart to the Average Single Family Tax Bill chart, you can see that your taxes increase as an effect of budget increases.

Please note, however, that any improvements made to your property will also increase your assessment and your taxes. This is separate from how the town budget affects everyone's property taxes.

Our property tax increases might lead residents to wonder if Monterey's taxes are rising more rapidly than neighboring towns, and if Monterey is a more expensive town to live in compared to our small-town neighbors. The answer to both is no.



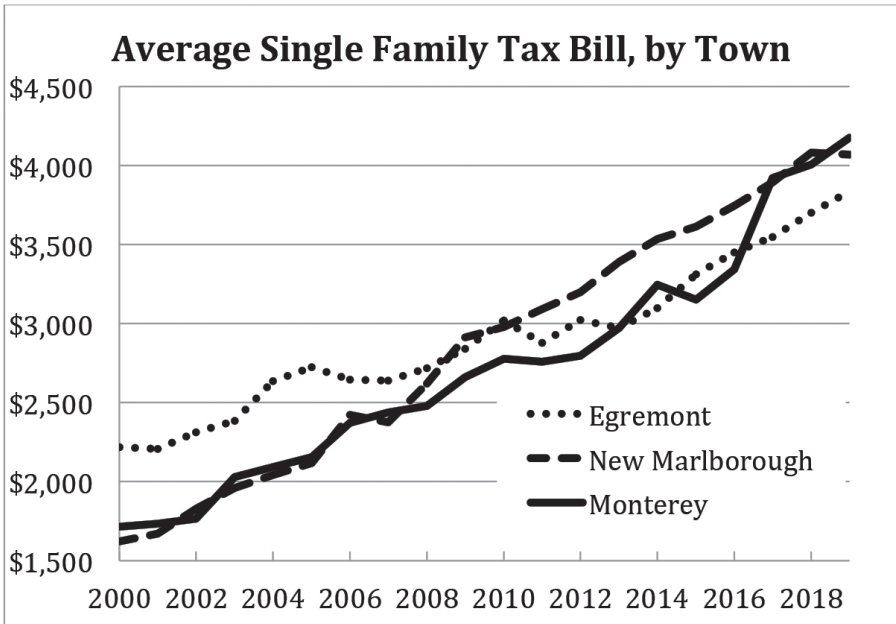
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## FINANCE COMMITTEE REPORT

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The chart above shows the Average Single Family Tax Bill for Monterey, Egremont, and New Marlborough. As you can see, the long-term tax trend is the same. This is also true for the towns of Alford, Tyringham, Sandisfield, and Otis. No Southern Berkshire town has escaped property tax increases, which reflect higher cost-of-living increases in New England and the inexorable shift of municipal costs from Federal and State to Local taxes.

The Finance Committee is committed to recommending a cost-effective budget for the services—and the level of services—the town wishes. The best way residents can make their wishes known is to communicate with the Finance Committee and the Select Board during the budget process and, for registered voters, to vote at town meeting.

Respectfully submitted,  
Jonathan Sylbert, Chair  
Georgy Cain  
Rebecca Wolin  
Monterey Finance Committee

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## **FIRE DEPARTMENT REPORT**

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FY2019 Fire Department

The Fire Department responded to a wide range of calls in the 2019 fiscal year. Total number of calls was up from last year at 131 responses. Fire related calls received the most responses for the year at 64.89%. Medical was at 35.11%. The department completed 50 weeks of fire/medical training to complete all continuing education and refreshers for certifications needed for the service.

Medical-46

Fire-85

Total-131

Chief Shawn Tryon

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## LIBRARY TRUSTEES REPORT

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### LIBRARY TRUSTEES REPORT

REPORT OF THE MONTEREY LIBRARY TRUSTEES  
JULY 1, 2018 – JUNE 30, 2019

The 2019 fiscal year marked a major milestone in the 128-year history of the Monterey Library. A \$3.1MM construction project was undertaken to meet the demands of the 21<sup>st</sup> century and forward the Monterey Library’s mission: *To be a community gathering place that supports life-long learning, seeking to respond to the community’s informational, educational, cultural and recreational needs by providing print and non-print materials, technological resources and programs for children and adults. The library endeavors to be responsive to the changing needs of the community in a friendly and professional manner.* The library is staffed by employees Esther Heffernan, Rosemary McAlister and Molly Goodchild, under the supervision of Library Director Mark Makuc. The board extends our appreciation for their continued service, particularly during this most unusual and challenging year.

In early July of 2018, the construction project was put out to bid, and the library trustees voted to recommend local contractor Allegrone Construction Co. Inc., to the Select Board, who voted to formally award Allegrone the job. In the months leading up to construction, the Library Director organized volunteers to help remove all contents of the library, and on September 24, the property became a construction site. The Town, along with local and state officials, came together October 6 to celebrate the official ground-breaking of the new library.

During the fiscal year, the Library Director planned and oversaw the relocation of the library, and most of its contents, three times – first to neighboring United Church of Christ, then to the Monterey Firehouse, returning to the renovated library site in late June. At no time were library services and hours altered to prevent operating in “business as usual” mode, 6 days a week for a total of 19.5 hours. The library collection was curated by the Director to accommodate the temporary locations, and other library assets were either stored, disposed of, or sold. A Certificate of Occupancy was issued for the new site by the town Building Inspector on June 29, 2019.

The library’s collection, consisting of books, periodicals, audio and video materials, as well as e-books and other materials in electronic format, contained approximately 94,360 items. We provide 29 subscriptions, both print and electronic.

The approximate totals expended by the Monterey Library Board of Trustees for last year included total payroll expenses of \$39,688 and costs for circulating materials of \$19,032. The Abercrombie Fund has a balance of \$10,619 and the Memorial Fund an additional \$2,880. These funds are earmarked for circulating materials and library enhancements.

Despite the construction, which took place over nine months of the fiscal year, more than 250 patrons attended 20 programs. Many programs required substitute locations, such as the annual egg hunt at Greene Park and the Halloween event at the Firehouse.

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## LIBRARY TRUSTEES REPORT

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In trustee news, Lisa Smyle made the decision to step down as Chair after serving six years in that role and navigating the Board through some of its most challenging times, including the construction project. The Board elected Ann Canning to pick up the reins from Lisa. We thank Lisa for her enormous contributions over the past several years, and for her continued service on the Board.

While the Knox Gallery was unable to exhibit during construction, we are grateful to MaryPaul Yates, Julie Shapiro, and Michael Banner for their guidance in ensuring the new space will be conducive to future exhibits that continue to enhance the artistic life of the community.

The support of The Friends of the Monterey Library proved to be critical to the successful completion of the construction project. The Friends committed \$80,000 in contracted payments to the Project Manager, P3, so that the construction budget could include state-mandated “contingency funds.” Several important purchases for the new library were made possible by funding from The Friends, including \$39,000 for new furniture and \$10,000 for an audio visual system. The Friends also covered \$10,000 in rent to the Monterey Fire Co. in FY19, as well as many other costs.

The Board of Library Trustees would like to recognize each and every person in the community for your commitment to this project through your tax dollars and charitable contributions to The Friends of the Monterey Library, your many volunteer hours, and your vital patronage of the library.

Respectfully submitted,

Board of Library Trustees

Ann Canning, Chair  
Shannon Amidon Castille  
John Higgins  
Mickey Jervas, Secretary  
Lisa Smyle  
MaryPaul Yates

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## PARKS COMMISSION REPORT

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Parks Commission Annual Report:  
June 2018 to July 2019.

We started this year by setting up Boat Racks for community use and this has been well received .

The town beach has been running well; contracted lifeguards kept swimmers safe; no incidents were reported.

At Green Park we made changes to basketball court by removing the tiles that were tripping players to reduce the danger of falls.

We started landscaping work on the baseball field; that needed work and will continue in the coming year

The mowing of the parks and their over-all maintenance has been going well

The ice rink, sponsored by the parks commission, is used and loved by the Monterey community;

Weekly chair yoga (Tuesdays, 9AM) at the Monterey Community Center is always well-attended.

The parks commission has full membership for the first time in a long time and its members are collaborating well.

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# PLANNING BOARD REPORT

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Planning Board Town Report July 2018—June 2019

## **Members**

As of June 2018 Planning Board members were:

- Larry Klein
- Nancy Marcus
- Pat Salomon
- Roger Tyron
- Scott Jenssen\*
- Stephen Enoch (Co-Chair)\*
- Tom Sawyer (Co - chair)

\*Scott Jenssen Resigned in April 2019

\*Stephen Enoch Resigned in June 2019

## **Number of meetings**

The Planning Board held 16 regularly Scheduled meetings this fiscal year.

## **Work on Zoning Bylaws**

Considered Marijuana Bylaws until the Select board issued a Moratorium that was passed at town meeting.

Considered Short term rental Bylaw but decided to wait until the state issued a regulation in 2018

Created a solar overlay district on Fox Hill Road to comply with the Green Communities initiative.

## **General**

The board struggled with Attendance this year combined with two members resigning.

## **Site Plans**

Hume Ropes Course Site Plan - Approved

Hume Family Camp Site Plan - Rejected and sent to Land court for Advise

Gould Farm New Community Building - Approved

## **Town Meeting - May 2019**

Town voted positive on the Green community Solar Overlay district By Law

## **Form A's**

69 Fairview road New Home

Hupi Road to Break up an 11 acre parcel

36 Elephant Rock Road

Blue Hill Road to split up a 5 acre parcel

## **Sign Permits**

Hume Temporary sign

## **Special Permit reviews**

None

Respectfully submitted,  
Tom Sawyer, co-chair

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## POLICE DEPARTMENT REPORT

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### REPORT OF THE POLICE DEPARTMENT

Throughout the 2018 -2019 fiscal year, the Monterey Police Department responded to over 600 calls for service and information. The following lists the many of these calls:

Abandoned 911 calls -----	13
Arrests - -----	20
Arrest Summons-----	19
Assist medical /Lift Assist -----	28
Assist citizen-----	45
Automobile Accidents .....	12
Automobiles stolen -----	1
Automobiles disabled or abandoned -----	13
Breaking & Entering car or home -----	2
Burglar alarms -----	46
Suspicious person, vehicle, substance or activity-	15
Carbon Monoxide or Fire Alarm-- -----	24
Complaints-----	22
Disturbances, loud music, gunshots, fireworks---	18
Animal complaints: bear, raccoons, horses, cows-	12
Dogs: lost/loose -----	18
Dog, cat bites-----	1
Dog complaints-----	8
Death Notification-----	1
Unattended Deaths-----	1
Domestic disturbances /abuse calls or restraining	
orders-----	2
Larceny-----	5
Lockout from home or car -----	9
Lost/found property -----	9
Missing persons -----	8
Mutual aid to other agencies/departments -----	27
Rabid or injured animals euthemized - -----	2
Response to trees or wires in the road -----	33
Serve warrant, summon, order -----	1
Trespass -----	6
Vandalism -----	1
Well-being checks-----	14
Mental Health Crisis-----	5
Identity theft, credit card fraud, phone scams-----	10

For Fiscal year 2018-2019 we hired Jeffrey Spratt, a resident of Monterey and member of the fire department. Jeffrey also works in Sheffield as a part-time police officer. Our department now consists of: Sgt. Brian Fahey and part-time officers Shaun Courtney, Matthe Bodnar, Keith Avelle, Jeffrey Spratt and Ian Mangosan. I would like to thank all the members of our police department for their dedication and hard work. I would also like to thank the town's people for their continued support.

*Respectfully Submitted,*

Gareth J. Backhaus  
Chief of Police

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**SBREPC**

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SBREPC  
Annual Report Fiscal Year 2019  
Report not submitted



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## SCHOOL COMMITTEE REPORT

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### Monterey School Committee Representative Annual Report Fiscal Year 2019

SBRSD is a small, close-knit community of inspired faculty and staff, partnering with committed families, engaged students and supportive neighbors, to create an environment for learning where students are known and understood, nurtured as creative thinkers and challenged to think about and prepare for their futures. We proudly represent the southern Berkshire towns of Alford, Egremont, New Marlborough, Monterey, and Sheffield. Our neighbors and local businesses actively support our mission with their time, talents and resources.

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## SELECT BOARD REPORT

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**Green Communities:** After attending the Renewable Energy Summit, we met with the Department of Energy Resources, and along with the Planning Board took steps toward application for Green Communities status, which will enable the town to receive grant monies from the state for energy efficiency measures.

**Broadband:** Work has been ongoing and frustrating. The state Flexible Grant Program is apparently not flexible enough to meet the needs of many small towns who still remain without, or with limited, broadband access. A privately funded, local provider has connected numerous residences, but the town continues to seek comprehensive coverage.

**Financial Services:** The Board committed to annual audits by a state approved, professional firm in order to provide greater clarity and accountability. Records are being examined and corrected going back several years, while better management practices are put in place.

**MIIA [Municipal Interlocal Insurance Agency]** with the cooperation of Police, Fire and DPW and town Administrative Assistant Melissa Noe, we achieved significant cost savings and discounts on town insurance premiums by adopting best practices in compliance with OSHA standards. This creates a safer, more efficient workplace while saving tax dollars.

**Transfer Station:** Strange but true, the “Dump” continues to be one of the most happening places in town to schmooze and shop at our fine Swap Shack. We added convenient and environmentally sound amenities including mattress recycling and composting. Thank you Beth and Dave for your friendly, helpful service to the town.

Crafting the annual town budget is always a daunting task. The Finance Committee and Select Board hammered out a responsible budget, attempting to balance increased expenses with the needs and limits of our residents and their resources. Our tax rate continues to be among the lowest in Berkshire County.

We extend sincere thanks to staff, volunteers and members of departments who give time, energy, skill and effort throughout the year.

Submitted by,  
Carol Edelman, Chair

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**SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT**

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**THE SOUTHERN BERKSHIRE  
REGIONAL SCHOOL DISTRICT  
FY19 BUDGET**

**AS ADOPTED  
MARCH 15, 2018**



**TOWN MEETING INFORMATIONAL BOOKLET  
MAY 2018**

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**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

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## SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT

April 26, 2018

Fellow Citizens of Alford, Egremont, Monterey, New Marlborough and Sheffield:

On behalf of the Southern Berkshire Regional School District School Committee, I am writing to express our support for the FY19 District Budget and to encourage each of you to support the budget warrant items at your annual town meeting.

As you will see from the detailed report that follows, the district, based on anticipated revenue, is putting forward a budget that has an increase of only 1.98%. Throughout the year, open meetings of the Finance and Buildings, Grounds and Technology subcommittees of the School Committee were held and budget requests by all district divisions were presented. Facing the issue of decline in enrollment and rising fixed costs, coupled with pleas from several of our towns to respect their citizens' tight financial circumstances, many requests from departments that we believe fell into the "we would love to have this to enhance education" as opposed to the "we have to have this to deliver education" had to be rejected this year.

At the request of one of our member towns, the SC took action earlier this month to agree to serve as the convening body to examine the issue of how towns are assessed. As you can readily see from this report, fluctuations can be quite large based on a change of five or six students in one town. Only by vote of the towns to change the regional agreement can the method of assessment be altered. We hope to convene the first meeting of town representatives later in May and then step back as they work to establish a more equitable means of assessing towns for the cost of education. Naturally, both the School Committee and the district will gladly serve as resources to this committee.

We believe the SBRSD provides students with an excellent education and we know that this budget is mindful of both cost and providing high quality service.

Sincerely,

E. Bonnie Silvers,  
Chair  
SBRSD School Committee

Beth Regalbuto

*Superintendent*

Christine Regan

*Business Administrator*

E. Bonnie Silvers

*School Committee Chair*

Françoise Lartigue

*School Committee Vice Chair*

*School Committee Members*

Arthur J. Batacechi, Jr.

Marcella Bush

Maryellen Brown

H. Dennis Sears

Carl Stewart

David Travis



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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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## *Letter from the Superintendent of Schools*

The Southern Berkshire Regional School District is pleased to present its Annual Budget for Fiscal Year 2019. Shaped by input from key stakeholders, the proposal is approved by the Southern Berkshire Regional School Committee and is before you for consideration at the annual town meetings in all five communities. This \$16,690,011 budget supports our work throughout the 2018-2019 school year. It represents a 1.98% increase over the FY18 operating budget of \$16,366,713. I believe that the budget as presented supports the vision of the District, aligns resources with the goals of the School Committee and our District Improvement Plan, and sustains the commitment to providing educational excellence within our means.

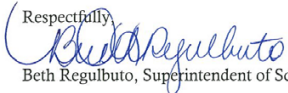
More specifically, the FY19 Budget funds investments in the following strategic initiatives:

- Ensuring a rigorous program 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 social and emotional learning and behavioral supports for all
- Continuing to evolve our network to support safety and wellness of the whole child
- Infusing technology into learning and developing technology safety/citizenship protocols
- Developing clear systems of accountability for staff and students with the goal of continuous growth/improvement
- Ensuring college readiness and alternative pathways to careers through involvement with businesses, community partnerships, mentoring and internship opportunities

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 District Improvement Goals
- 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 clearly communicate with all stakeholders
- To allocate resources strategically to create an aligned system Pre-K to 12
- To be proactive rather than reactive
- To make decisions and recommendations based on data and what is 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 FY19 Budget Proposal strives to bring our school community closer to achieving this vision.

Respectfully,  
  
Beth Regalbuto, Superintendent of Schools

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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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## FY19 BUDGET PROCESS

### THE STATE BUDGET PROCESS

Each year, the Governor of Massachusetts must propose the Commonwealth's budget for the following year by the 4<sup>th</sup> 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). ***The House Ways and Means Committee released its budget on April 26<sup>th</sup>.*** The entire state budget process is typically completed sometime in June or July each year.

### BUDGET CALENDAR

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 FY19 budget</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> <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> <p>Submit preliminary draft budget to Finance Sub-Committee with estimated expenditures and estimated assessments to the towns</p> <p>Post and hold a capital plan walk-through, with Town officials invited.</p>



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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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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> <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> <p>Submit preliminary draft budget to Finance Sub-Committee with estimated expenditures and estimated assessments to the towns</p> <p>Post and hold a capital plan walk-through, with Town officials invited.</p>
January - June	<p>Revenue estimates are received from the state via Cherry Sheet, Governor's Budget, House Budget, Senate Budget and Conference Committee Budget</p>
February - March	<p>Meet with appropriate town and District sub-committees as revenue figures materialize</p> <p>Revise expense and revenue estimates as necessary throughout period</p> <p>Present preliminary budget to town Finance Committees.</p> <p>The District must post a tentative operating budget in the town hall of each member town, publish it in a newspaper in general circulation in the district and provide copies to the chairman of the Board of Selectmen and chairman of the Finance Committee in each member town. Assuming the public hearing date to be March 8, 2018, and allowing for 2 weeks for above notifications (and not scheduling a meeting during February break), <b>tentative budget</b> will be voted on <b>February 15, 2018</b>. Post notifications as described above.</p> <p>School Committee must hold a <b>public hearing</b> no less than 5 days before the budget adoption. Assuming a budget adoption date of March 15, 2018, the public hearing will be held on <b>March 8, 2018</b> (no later than March 10, 2018).</p> <p>School Committee must <b>adopt the FY19 budget</b> at least 45 days prior to the first member town's annual town meeting. Assuming the first annual town meeting is May 1, 2018, budget adoption will be at the <b>March 15, 2018</b> School Committee meeting (no later than March 17, 2018).</p>
April	<p>Send <b>assessment letters</b> to the towns within 30 days of the budget adoption. Assuming an adoption date of March 15, 2018, assessments would be sent out by <b>April 13, 2018</b> (no later than April 14, 2018).</p>
May	<p>Alford, Egremont, Monterey, New Marlborough and Sheffield Town Meetings - public vote on SBRSD budget. Projection is that first town meeting would be held on May 1,</p> <p>Changes made and potential amendments voted until Governor signs final budget</p>
June - July	<p><b>Governor signs state budget</b></p> <p><b>School Committee votes amended budget if changes have been made. Assessment notifications would follow within 30 days of adoption of amended budget.</b></p>

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## FY19 BUDGET OVERVIEW

<b>FY19 BUDGET</b>	
OPERATING	14,744,965
TRANSPORTATION	<u>1,313,568</u>
OPERATING & TRANSPORTATION	<u>16,058,533</u>
CAPITAL (NON-BOND)	358,461
CAPITAL - BOND	<u>273,017</u>
GRAND TOTAL	<u><u>16,690,011</u></u>

<b>FY19 ASSESSMENTS</b>	
OPERATING	12,175,107
TRANSPORTATION	<u>771,263</u>
OPERATING & TRANSPORTATION	<u>12,946,370</u>
CAPITAL (NON-BOND)	358,461
CAPITAL - BOND	<u>273,017</u>
GRAND TOTAL	<u><u>13,577,848</u></u>

<b>EXPENDITURES</b>		
FY18 BUDGET	\$	16,366,713
FY19 BUDGET	<u>\$</u>	<u>16,690,011</u>
DOLLAR INCREASE	\$	323,298
PERCENTAGE INCREASE		1.98%

<b>ASSESSMENTS</b>		
FY18 ASSESSMENTS	\$	13,176,806
FY19 ASSESSMENTS	<u>\$</u>	<u>13,577,848</u>
DOLLAR INCREASE	\$	401,042
PERCENTAGE INCREASE		3.04%

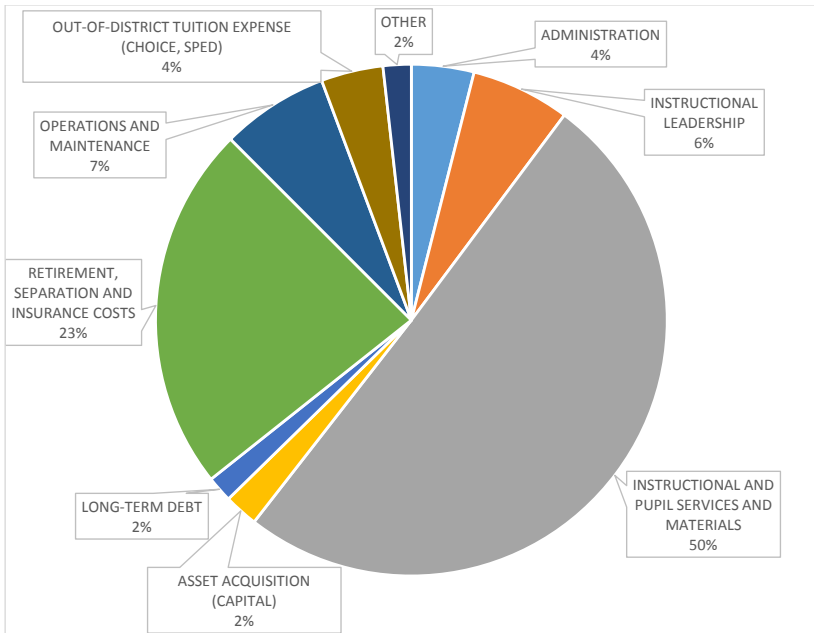
<b>REVENUES</b>	<b>FY18</b>	<b>FY19</b>	<b>CHANGE</b>		
CHAPTER 70	\$ 1,947,431	\$ 1,960,311	\$ 12,880	0.7%	
CHAPTER 71 - TRANSPORTATION	\$ 586,476	\$ 542,305	\$ (44,171)	-7.5%	
MEDICAID REIMBURSEMENT	\$ 100,000	\$ 120,000	\$ 20,000	20.0%	
TOWN ASSESSMENTS	\$ 13,176,806	\$ 13,577,848	\$ 401,042	3.0%	
EXCESS & DEFICIENCY FUND	\$ 500,000	\$ 463,547	\$ (36,453)	-7.3%	
TUITION (OTHER THAN SCHOOL CHOICE)	\$ 48,000	\$ 18,000	\$ (30,000)	-62.5%	
OTHER	<u>\$ 8,000</u>	<u>\$ 8,000</u>	<u>\$ -</u>	<u>0.0%</u>	
	\$ 16,366,713	\$ 16,690,011	\$ 323,298	1.98%	

**Note:** The revenue and expenditure budgets (operating, transportation and capital) are increasing by a total of 1.98%. The assessments are increasing by 3.04%, as other offsetting revenue sources are projected to come in at lower levels in FY19 than in the current fiscal year, FY18.

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## EXPENDITURES

ADMINISTRATION	659,395
INSTRUCTIONAL LEADERSHIP	1,044,131
INSTRUCTIONAL SERVICES AND MATERIALS	6,569,969
PUPIL SERVICES	1,830,014
OPERATIONS AND MAINTENANCE	1,134,017
RETIREMENT, SEPARATION AND INSURANCE COSTS	3,869,427
ASSET ACQUISITION (CAPITAL)	358,461
LONG-TERM DEBT	273,017
OUT-OF-DISTRICT TUITION EXPENSE (CHOICE, SPED)	655,000
OTHER	296,579
<b>TOTAL</b>	<b>16,690,011</b>



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## SELECT BOARD REPORT

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2018-2019 was another year of major projects and initiatives for the Select Board working closely with town boards and committees. Many of these departments will provide details in their annual reports, but here is an overview of some concerns with which we were involved.

**Library:** We were awarded the grant from the Massachusetts Board of Library Commissioners, and with massive community support transformed our beloved vintage library into a spectacular modern town center for communications and arts. Working with bond counsel for financial guidance, we moved, broke ground, problem solved, agonized, schlepped and miraculously reopened in less than a year. An outstanding achievement for all, from fundraising Friends of the Library, to the Library Trustees, numerous volunteers, with special thanks to Library Director Mark Makuc.

**Community Center:** The Board assumed operations and responsibility from the Friends of the Wilson-McLaughlin House, and hired a coordinator in charge of programming. The calendar of events is filled with recreational, social and cultural activities.

**Infrastructure:** In addition to the ongoing requirements of road and bridge maintenance, we addressed the Curtis Road Bridge and Blue Hill Road deficiencies. After many bumps in the road, revisions and setbacks, the Curtis Road Bridge was rebuilt with minimal disturbance to neighbors and others who use Gould Road. The town was awarded a million dollar Mass Works grant to fund the Blue Hill Road project. We solicited and received feedback from residents and began planning. Thanks to the skill and dedication of Shawn Tryon, Director of Operations and his crew, Monterey has some of the safest roads in southern Berkshire County.

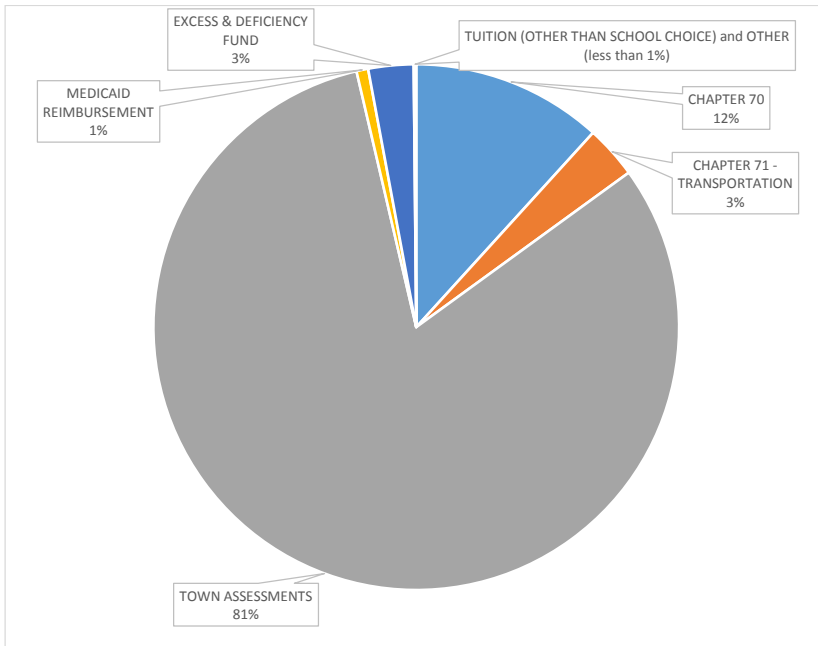
**CDBG Grant and Program:** Once again, Monterey received a state grant used for rehabilitating housing for those within limited income guidelines. Several projects have been completed and more are in the works.

**Southern Berkshire Regional School District:** We met with representatives of the five member towns to revise the school assessment formula to provide greater consistency and stability; an agreement was reached and approved. We attended Superintendent's Round Table discussions of district matters. We also participated in an ad hoc Southern Berkshire Educational Future group representing four south Berkshire school districts (SBRSD, BHRSD, Lee and Lenox) to discuss possible solutions to problems we are all facing, including declining enrollment, funding challenges, transportation and administration.

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## REVENUES

REVENUES	FY19	%
CHAPTER 70	\$ 1,960,311	11.7%
CHAPTER 71 - TRANSPORTATION	\$ 542,305	3.2%
MEDICAID REIMBURSEMENT	\$ 120,000	0.7%
TOWN ASSESSMENTS	\$ 13,577,848	81.4%
EXCESS & DEFICIENCY FUND	\$ 463,547	2.8%
TUITION (OTHER THAN SCHOOL CHOICE)	\$ 18,000	0.1%
OTHER	\$ 8,000	0.0%
	<u>\$ 16,690,011</u>	<u>100.0%</u>



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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

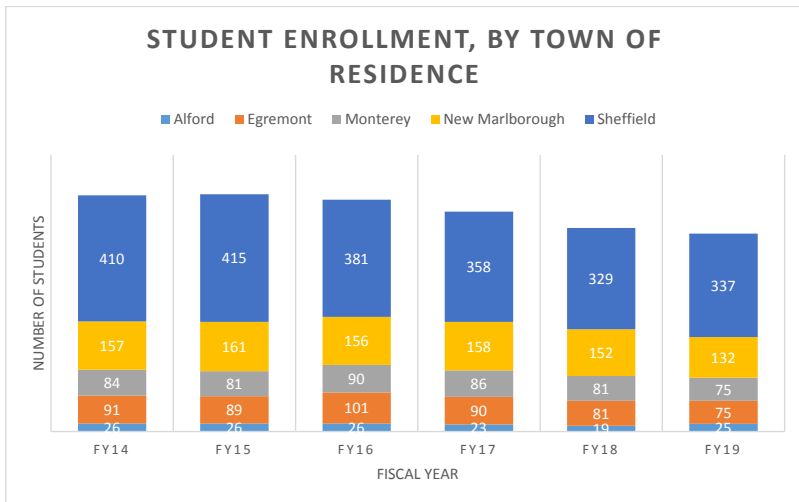
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## FY19 BUDGET ANALYSIS

### 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 a decrease of 18 students from FY18 to FY19, and a total decrease of 124 students from FY14 to FY19 (from 768 to 644 students). This represents a 2.7% decrease since FY18 and a 16.1% decrease since FY14. From FY18 to FY19, Alford and Sheffield are seeing an increase of 6 and 8 students, respectively, while Egremont, Monterey and New Marlborough are seeing decreases of -6, -6 and -20.



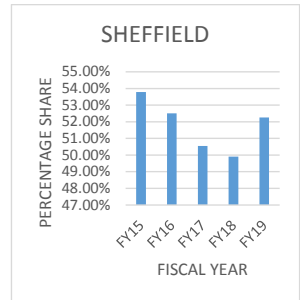
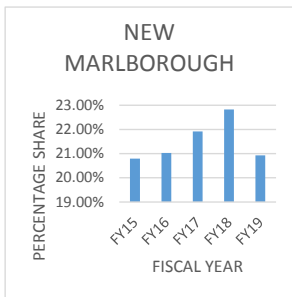
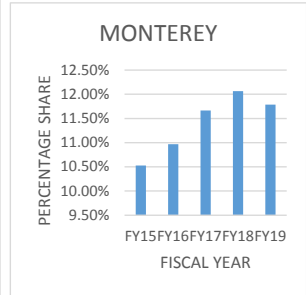
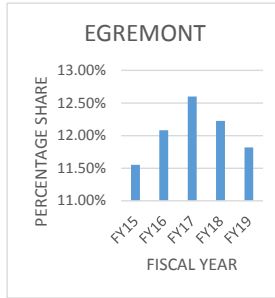
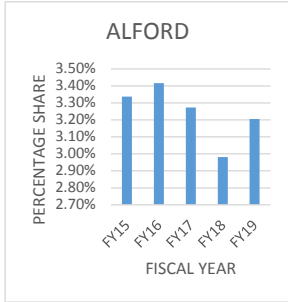
These changes in enrollment, along with implementation of the Chapter 70 funding formula, result in a change in the percentage share of our annual budget for which each town is responsible.

Each town’s share of the SBRSD operating and capital budgets, per the five-town regional agreement, is based on the minimum required contribution that is established by the Commonwealth of Massachusetts. Four main factors that affect this figure 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

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

A look at each town's percentage share of the assessments from 2015 through 2019 shows the changes that occur annually.



As evidenced by the charts below, even a small percentage increase in the District budget can cause very significant shifts in a town's assessment from year to year. This makes it very difficult for the towns to anticipate or plan for upcoming changes in their assessments. For this reason, a committee is being established for town officials from the five member towns to examine the regional agreement in an effort to review options and to create an assessment method that will have fewer peaks and valleys from year to year.

Chart #1 below provides another look at the change in percentage shares for each of the member towns from FY15 through FY19.

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

	FY15	FY16	FY17	FY18	FY19	Change, FY18-FY19
<b>Chart # 1</b>	<b>\$ 12,050,444</b>	<b>\$ 12,037,478</b>	<b>\$ 12,738,283</b>	<b>\$ 13,176,806</b>	<b>\$ 13,577,848</b>	<b>\$ 401,042</b>
Alford	3.34%	3.42%	3.27%	2.98%	3.21%	0.2%
Egremont	11.55%	12.08%	12.60%	12.22%	11.82%	-0.4%
Monterey	10.53%	10.97%	11.67%	12.06%	11.79%	-0.3%
New Marlborough	20.80%	21.03%	21.92%	22.83%	20.93%	-1.9%
Sheffield	53.79%	52.51%	50.55%	49.90%	52.26%	2.4%
	100.00%	100.00%	100.00%	100.00%	100.00%	0.0%

Chart #2 shows the actual assessments based on the percentage shares in effect for each year, along with the change in dollar amount in each town's assessment from FY18 to FY19.

	FY15	FY16	FY17	FY18	FY19	Change, FY18-FY19
<b>Chart # 2</b>	<b>\$ 12,050,444</b>	<b>\$ 12,037,478</b>	<b>\$ 12,738,283</b>	<b>\$ 13,176,806</b>	<b>\$ 13,577,848</b>	<b>\$ 401,042</b>
Alford	402,198	411,300	416,972	392,858	435,265	\$ 42,407
Egremont	1,392,220	1,454,499	1,604,701	1,610,788	1,604,723	\$ (6,065)
Monterey	1,268,468	1,320,041	1,485,935	1,589,739	1,600,394	\$ 10,655
New Marlborough	2,505,998	2,531,301	2,791,613	3,008,071	2,841,454	\$ (166,617)
Sheffield	6,481,561	6,320,337	6,439,061	6,575,351	7,096,013	\$ 520,663
	12,050,444	12,037,478	12,738,283	13,176,806	13,577,848	401,042

Charts #3 and #4 show what the FY19 assessments *would have been* if the percentage share for each town did not change from FY18. Sheffield and New Marlborough are the extreme examples. If assessment percentage shares did not change, Sheffield would have seen a \$200,120 increase from FY18 to FY19 rather than the \$520,663 increase shown in Chart #2. New Marlborough would have seen a \$91,556 increase from FY18 to FY19, rather than the \$166,617 decrease shown above.

	FY19 Calculated Assessments	FY19 if at FY18 Calculated % Share	Variance
<b>Chart # 3</b>	<b>\$ 13,577,848</b>	<b>\$ 13,577,848</b>	<b>\$ 401,042</b>
Alford	435,265	404,813	\$ (30,451)
Egremont	1,604,723	1,659,811	\$ 55,088
Monterey	1,600,394	1,638,126	\$ 37,732
New Marlborough	2,841,454	3,099,627	\$ 258,174
Sheffield	7,096,013	6,775,471	\$ (320,542)
	13,577,848	13,577,848	-

	FY18 Current Assessments	FY19 if at FY18 Calculated % Share	Change, FY18-FY19
<b>Chart # 4</b>	<b>\$ 13,176,806</b>	<b>\$ 13,577,848</b>	<b>\$ 401,042</b>
Alford	392,858	404,813	\$ 11,955
Egremont	1,610,788	1,659,811	\$ 49,023
Monterey	1,589,739	1,638,126	\$ 48,387
New Marlborough	3,008,071	3,099,627	\$ 91,556
Sheffield	6,575,351	6,775,471	\$ 200,120
	13,176,806	13,577,848	401,042



# 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 FY15 through the proposed FY19 budget are as follows:

	FY15 Actual	FY16 Actual	FY17 Actual	FY18 Budget	FY19 Budget	FY19 vs FY18
TUITION - REGULAR	\$ 150,156	\$ 112,696	\$ 69,946	\$ 48,000	\$ 18,000	-63%
STATE- CHAPTER 70 DISTRIBUTION	\$ 1,869,289	\$ 1,888,246	\$ 1,927,571	\$ 1,947,431	\$ 1,960,311	0.7%
STATE-CHAPER 71 TRANSPORTATION REIMBURSEMENT	\$ 428,500	\$ 568,200	\$ 633,365	\$ 586,476	\$ 542,305	-7.5%
STATE-MEDICAID REIMBURSEMENTS	\$ 93,606	\$ 201,783	\$ 140,163	\$ 100,000	\$ 120,000	20.0%
ASSESSMENTS- OPERATING AND ANNUAL CAPITAL - ALFORD	\$ 402,196	\$ 411,300	\$ 412,493	\$ 380,037	\$ 426,513	
ASSESSMENTS - BOILER/ROOF PROJECT BOND - ALFORD				\$ 12,821	\$ 8,752	
	<u>\$ 402,196</u>	<u>\$ 411,300</u>	<u>\$ 412,493</u>	<u>\$ 392,858</u>	<u>\$ 435,265</u>	10.8%
ASSESSMENTS- OPERATING AND ANNUAL CAPITAL - EGREMONT	\$ 1,392,218	\$ 1,454,499	\$ 1,587,465	\$ 1,558,222	\$ 1,572,456	
ASSESSMENTS - BOILER/ROOF PROJECT BOND - EGREMONT				\$ 52,566	\$ 32,267	
	<u>\$ 1,392,218</u>	<u>\$ 1,454,499</u>	<u>\$ 1,587,465</u>	<u>\$ 1,610,787</u>	<u>\$ 1,604,723</u>	-0.4%
ASSESSMENTS- OPERATING AND ANNUAL CAPITAL - MONTEREY	\$ 1,268,476	\$ 1,320,041	\$ 1,469,974	\$ 1,537,862	\$ 1,568,214	
ASSESSMENTS - BOILER/ROOF PROJECT BOND - MONTEREY				\$ 51,877	\$ 32,180	
	<u>\$ 1,268,476</u>	<u>\$ 1,320,041</u>	<u>\$ 1,469,974</u>	<u>\$ 1,589,739</u>	<u>\$ 1,600,394</u>	0.7%
ASSESSMENTS- OPERATING AND ANNUAL CAPITAL - NEW MARLBOROUGH	\$ 2,505,997	\$ 2,531,301	\$ 2,761,626	\$ 2,909,910	\$ 2,784,319	
ASSESSMENTS - BOILER/ROOF PROJECT BOND - NEW MARLBOROUGH				\$ 98,161	\$ 57,135	
	<u>\$ 2,505,997</u>	<u>\$ 2,531,301</u>	<u>\$ 2,761,626</u>	<u>\$ 3,008,071</u>	<u>\$ 2,841,454</u>	-5.5%
ASSESSMENTS- OPERATING AND ANNUAL CAPITAL - SHEFFIELD	\$ 6,481,557	\$ 6,320,337	\$ 6,369,896	\$ 6,360,776	\$ 6,953,330	
ASSESSMENTS - BOILER/ROOF PROJECT BOND - SHEFFIELD				\$ 214,576	\$ 142,683	
	<u>\$ 6,481,557</u>	<u>\$ 6,320,337</u>	<u>\$ 6,369,896</u>	<u>\$ 6,575,352</u>	<u>\$ 7,096,013</u>	7.9%
TRANSFERS FROM E&D FUND	\$ 336,500	\$ 540,120	\$ 511,803	\$ 500,000	\$ 463,547	-7.3%
EARNINGS ON INVESTMENTS	\$ 6,249	\$ 9,181	\$ 6,510	\$ 7,000	\$ 7,000	0.0%
OTHER	\$ 18,487	\$ 15,366	\$ 932	\$ 1,000	\$ 1,000	0.0%
<b>TOTAL REVENUE</b>	<b>\$14,953,230</b>	<b>\$15,373,069</b>	<b>\$15,891,743</b>	<b>\$16,366,713</b>	<b>\$16,690,011</b>	<b>1.98%</b>

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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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## INFORMATION ON GENERAL FUND REVENUES

### TUITION – REGULAR

This revenue has historically been revenue received from the Town of Mount Washington for students tuitioning in to this district. The number of students has decreased over the years, resulting in a projected reduction in revenue of \$30,000 from FY18 and \$132,156 from FY15.

### CHAPTER 70 STATE AID

With a decrease in enrollment and a resulting reduction in the “foundation budget” that the State calculates for each district each year, our increases in Chapter 70 funding have been minimal over a number of years. The increases that we have been receiving have been based solely on “minimum aid”, which in FY19 is calculated at \$20 per student, for a total of \$12,880, for a .7% increase from FY18 to FY19. Chapter 70 funding and increases from FY15 – FY19 are shown below. Our FY19 allocation is 4.87% higher than was our FY15 allocation.

CHAPTER 70 AID					
	TOTAL		Increase from Prior Year		
FY15	\$	1,869,289	\$	19,193	1.0%
FY16	\$	1,888,246	\$	18,957	1.0%
FY17	\$	1,927,571	\$	39,325	2.1%
FY18	\$	1,947,431	\$	19,860	1.0%
FY19 - PRELIMINARY	\$	1,960,311	\$	12,880	0.7%

### 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 special transportation for students whose individual education plans required transportation or for school choice transportation. The FY19 projection was calculated at a 68% reimbursement rate of anticipated eligible costs. 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 FY19 budget includes a projection of \$120,000 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 SBRSD regional agreement regarding assessments is very simple and straightforward. It requires that the assessment for each town be based solely on the each town’s proportionate share of the required contribution established by the state. The following chart outlines the makeup of the FY18 assessments.

FY18	OPERATING	TRANSPOR- TATION	OPERATING and TRANSP	ANNUAL CAPITAL	BOND CAPITAL	TOTAL CAPITAL	TOTAL
ALFORD	\$ 346,526	\$ 21,883	\$ 368,409	\$ 11,628	\$ 12,821	\$ 24,449	\$ 392,858
EGREMONT	\$ 1,420,825	\$ 89,721	\$ 1,510,546	\$ 47,676	\$ 52,566	\$ 100,242	\$ 1,610,788
MONTEREY	\$ 1,402,265	\$ 88,546	\$ 1,490,811	\$ 47,051	\$ 51,877	\$ 98,928	\$ 1,589,739
NEW MARLBOROUGH	\$ 2,653,337	\$ 167,544	\$ 2,820,881	\$ 89,029	\$ 98,161	\$ 187,190	\$ 3,008,071
SHEFFIELD	\$ 5,799,914	\$ 366,246	\$ 6,166,160	\$ 194,616	\$ 214,575	\$ 409,191	\$ 6,575,351
<b>TOTAL</b>	<b>\$ 11,622,866</b>	<b>\$ 733,940</b>	<b>\$ 12,356,806</b>	<b>\$ 390,000</b>	<b>\$ 430,000</b>	<b>\$ 820,000</b>	<b>\$ 13,176,806</b>

FY19	OPERATING	TRANSPOR- TATION	OPERATING and TRANSP	ANNUAL CAPITAL	BOND CAPITAL	TOTAL CAPITAL	TOTAL
ALFORD	\$ 390,297	\$ 24,724	\$ 415,021	\$ 11,491	\$ 8,752	\$ 20,243	\$ 435,265
EGREMONT	\$ 1,438,937	\$ 91,153	\$ 1,530,090	\$ 42,365	\$ 32,267	\$ 74,632	\$ 1,604,723
MONTEREY	\$ 1,435,055	\$ 90,907	\$ 1,525,963	\$ 42,251	\$ 32,180	\$ 74,431	\$ 1,600,394
NEW MARLBOROUGH	\$ 2,547,900	\$ 161,403	\$ 2,709,303	\$ 75,016	\$ 57,135	\$ 132,150	\$ 2,841,454
SHEFFIELD	\$ 6,362,917	\$ 403,075	\$ 6,765,992	\$ 187,338	\$ 142,683	\$ 330,021	\$ 7,096,013
<b>TOTAL</b>	<b>\$ 12,175,107</b>	<b>\$ 771,263</b>	<b>\$ 12,946,370</b>	<b>\$ 358,461</b>	<b>\$ 273,017</b>	<b>\$ 631,478</b>	<b>\$ 13,577,848</b>

CHANGE FY18 - FY19	OPERATING	TRANSPOR- TATION	OPERATING and TRANSP	ANNUAL CAPITAL	BOND CAPITAL	TOTAL CAPITAL	TOTAL
ALFORD	\$ 43,771	\$ 2,841	\$ 46,613	\$ (137)	\$ (4,069)	\$ (4,206)	\$ 42,407
EGREMONT	\$ 18,112	\$ 1,432	\$ 19,545	\$ (5,311)	\$ (20,299)	\$ (25,610)	\$ (6,065)
MONTEREY	\$ 32,791	\$ 2,361	\$ 35,152	\$ (4,800)	\$ (19,697)	\$ (24,497)	\$ 10,655
NEW MARLBOROUGH	\$ (105,437)	\$ (6,141)	\$ (111,577)	\$ (14,013)	\$ (41,026)	\$ (55,040)	\$ (166,617)
SHEFFIELD	\$ 563,003	\$ 36,829	\$ 599,832	\$ (7,278)	\$ (71,892)	\$ (79,170)	\$ 520,663
<b>TOTAL</b>	<b>\$ 552,241</b>	<b>\$ 37,323</b>	<b>\$ 589,564</b>	<b>\$ (31,539)</b>	<b>\$ (156,983)</b>	<b>\$ (188,522)</b>	<b>\$ 401,042</b>

CHANGE FY18 - FY19	OPERATING	TRANSPOR- TATION	OPERATING and TRANSP	ANNUAL CAPITAL	BOND CAPITAL	TOTAL CAPITAL	TOTAL
ALFORD	12.6%	13.0%	12.7%	-1.2%	-31.7%	-17.2%	10.8%
EGREMONT	1.3%	1.6%	1.3%	-11.1%	-38.6%	-25.5%	-0.4%
MONTEREY	2.3%	2.7%	2.4%	-10.2%	-38.0%	-24.8%	0.7%
NEW MARLBOROUGH	-4.0%	-3.7%	-4.0%	-15.7%	-41.8%	-29.4%	-5.5%
SHEFFIELD	9.7%	10.1%	9.7%	-3.7%	-33.5%	-19.3%	7.9%
<b>TOTAL</b>	<b>4.8%</b>	<b>5.1%</b>	<b>4.8%</b>	<b>-8.1%</b>	<b>-36.5%</b>	<b>-23.0%</b>	<b>3.0%</b>

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## 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 1<sup>st</sup>. These funds, once certified, are available as a revenue source in the following 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:

<b>EXCESS and DEFICIENCY FUND (E&amp;D)</b>							
<u>Certified E&amp;D</u> <u>at Beginning</u> <u>of Prior Fiscal</u> <u>Year</u>	<u>Returned to</u> <u>Town (amount</u> <u>above 5% of</u> <u>budget)</u>	Returned to Towns (to amend assessments to be =/ appropriated amounts)	<b>Fiscal Year</b> <b>Budgeted for</b>	<b>Budgeted Use</b> <b>of Funds</b>	<b>of Funds</b>	<u>Unexpended at Year</u> <u>End (FY18 figure is</u> <u>projected)</u>	
7/1/2011	\$838,741	\$144,371	\$0:	<b>FY13</b>	\$550,000	\$144,370	
7/1/2012	\$745,913	\$23,714	\$0:	<b>FY14</b>	\$510,000	\$212,199	
7/1/2013	\$440,132	\$0	\$0:	<b>FY15</b>	\$336,500	\$103,632	
7/1/2014	\$569,592	\$0	\$0:	<b>FY16</b>	\$400,000	\$169,592	
7/1/2015	\$540,120	\$0	\$140,120:	<b>FY17</b>	\$400,000	\$0	
7/1/2016	\$839,955	\$46,771	\$65,032:	<b>FY18</b>	\$500,000	\$228,152	
7/1/2017	\$768,713	\$0	\$0:	<b>FY19*</b>	\$463,547	\$305,166	
<i>Total:</i>	\$214,856	\$205,152			\$3,160,047		
<i>Average:</i>	\$662,409				\$449,417		

*NOTE: The only known use of E&D in the FY19 budget is the \$463,547 approved by the School Committee. That could change during the year.*

## INVESTMENT INCOME

Investment income averages just over \$7,000, and is projected at \$7,000 for FY19.

## OTHER

"Other" income is income that does not fit within the other categories listed, and is most often unanticipated. It is projected at \$1,000 in FY19.

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## FOCUS ON TWO ADDITIONAL FUNDING SOURCES USED TO REDUCE ASSESSMENTS

### CIRCUIT BREAKER PROGRAM

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

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 budget per pupil 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.

CIRCUIT BREAKER FUND						
	STANDARD REIMBURSEMENT	EXTRAORDINARY RELIEF	TOTAL REVENUE	EXPENDITURES	USE OF FUNDS	
FY14	\$ 66,201	\$ -	\$ 66,201	\$ 123,831	OUT-OF-DISTRICT TUITION \$123,831	
FY15	\$ 65,982	\$ -	\$ 65,982	\$ 66,201	TEACHER SPECIALIST \$63,270; SUPPLIES \$2,931	
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*	\$ 143,916	\$ -	\$ 143,916	\$ 68,361	OUT-OF-DISTRICT TUITION \$11,000; OT/PT \$57,361	
			<u>\$ 489,703</u>	<u>\$ 453,116</u>		

\* FY18 figures are budgeted, not actual, as the year is still ongoing.

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## SCHOOL CHOICE

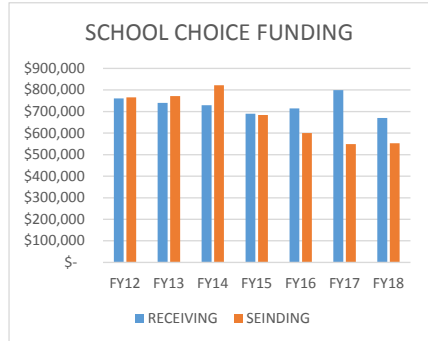
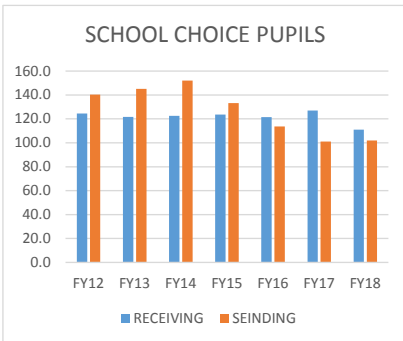
The School Choice program diverts state funding from sending districts to receiving districts. For regular education students who receive no additional special educational services, the funding is \$5,000 per student. For students receiving additional special educational services, incremental funding is sent to cover the cost of those services. Here is a look at revenues and expenditures from these funds from FY15 through the proposed FY19 budget:

<b>SCHOOL CHOICE FUND</b>					
	<u>Beginning</u>			<u>Ending</u>	
	<u>Balance</u>	<u>Revenues</u>	<u>Expenditures</u>	<u>Balance</u>	<u>Use of Funds</u>
FY15	\$287,457	\$689,770	\$775,000	\$202,227	\$775,000 Classroom Teachers
FY16	\$202,227	\$714,799	\$750,000	\$167,026	\$750,000 Classroom Teachers
FY17	\$167,026	\$798,986	\$650,000	\$316,012	\$510,000 Classroom Teachers; \$140,000 Teacher Specialists
FY18	\$316,012	\$665,317	\$900,000	\$81,329	\$760,000 Classroom Teachers; \$140,000 Teacher Specialists
FY19	\$81,329	<u>\$665,317</u>	<u>\$630,000</u>	\$116,646	\$522,900 Classroom Teachers; \$107,100 Teacher Specialists
Total:		\$3,534,189	\$3,705,000		
Average:		\$706,838	\$741,000	\$176,648	

*NOTE: FY18 Revenues are estimated based on FY18 actual and projected receipts  
FY19 Revenues are estimated based on House budget*

A \$270,000 drop in the available use of School Choice funds from \$900,000 in FY18 to \$630,000 in FY19 has resulted in a larger portion of the cost for classroom and specialist teachers being diverted back into the General Fund in FY19.

SBRSD has been receiving more students than we lose through School Choice since FY16. In terms of funding, our choice-in revenue has exceeded our choice-out expenditures since FY15. Analyses will be undertaken to ensure that continuing to accept school choice students remains a programmatic and/or financial benefit to the district. Note: FY18 and FY19 figures are preliminary.



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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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## 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 includes 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. The district recently began the process of applying for Alternative Energy Credits (AECs) to help offset the cost of the project to the towns.

The total cost breakdown and the bond repayment (by fiscal year) schedule are below:

ROOF/BOILER/SPRINKER SYSTEM PROJECT COST BREAKDOWN		
Deitz and Company Architects	\$ 607,191	9%
NETCO Construction Project Managers, Inc. (OPM)	\$ 179,500	3%
Titan Roofing	\$ 3,515,309	54%
M & W Heating (boiler and sprinkler system)	\$ 2,215,236	34%
All Other	<u>\$ 44,087</u>	<u>1%</u>
<b>TOTAL</b>	<b><u>\$ 6,561,323</u></b>	<b>100%</b>

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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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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	\$ 255,000	\$ 7,650	\$ 262,650
	<u>\$ 3,605,000</u>	<u>\$ 944,127</u>	<u>\$ 4,549,127</u>



# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

## SUMMARY OF EXPENDITURES, FY15 – FY19 GENERAL FUND

Description	FY15 ACTUAL	FY16 ACTUAL	FY17 ACTUAL	FY18 BUDGET	FY19 BUDGET	CHANGE, FY18 to FY19
UNDESIGNATED*	\$ -	\$ -	\$ -	\$ 78,000	\$ 200,000	\$ 122,000
ADMINISTRATION	\$ 540,509	\$ 626,195	\$ 587,707	\$ 636,474	\$ 659,395	\$ 22,921 3.6%
INSTRUCTIONAL LEADERSHIP	\$ 916,737	\$ 955,072	\$ 983,259	\$ 1,016,174	\$ 1,044,131	\$ 27,957 2.8%
CLASSROOM AND SPECIALIST TEACHERS	\$ 3,864,308	\$ 3,931,240	\$ 4,143,759	\$ 3,866,350	\$ 4,237,874	\$ 371,524 9.6%
OTHER TEACHING SERVICES	\$ 1,122,047	\$ 1,117,737	\$ 1,317,423	\$ 1,338,135	\$ 1,387,972	\$ 49,838 3.7%
PROFESSIONAL DEVELOPMENT	\$ 124,283	\$ 100,006	\$ 104,018	\$ 105,386	\$ 116,229	\$ 10,843 10.3%
INSTRUCTIONAL MATERIALS, EQUIPMENT, TECHNOLOGY	\$ 187,149	\$ 242,797	\$ 236,951	\$ 287,972	\$ 340,956	\$ 52,984 18.4%
GUIDANCE, COUNSELING AND TESTING	\$ 425,185	\$ 452,825	\$ 438,795	\$ 490,924	\$ 486,938	\$ (3,986) -0.8%
PUPIL SERVICES	\$ 1,658,482	\$ 1,700,201	\$ 1,683,276	\$ 1,902,358	\$ 1,830,014	\$ (72,344) -3.8%
OPERATIONS AND MAINTENANCE	\$ 1,224,706	\$ 1,026,935	\$ 1,134,018	\$ 1,052,084	\$ 1,134,017	\$ 81,933 7.8%
RETIREMENT, SEPARATION AND INSURANCE COSTS	\$ 3,174,603	\$ 3,407,056	\$ 3,692,863	\$ 3,873,971	\$ 3,869,427	\$ (4,544) -0.1%
COMMUNITY SERVICES	\$ -	\$ 29	\$ -	\$ -	\$ -	\$ (5) -100.0%
ASSET ACQUISITION (CAPITAL)	\$ 452,179	\$ 360,553	\$ 326,459	\$ 390,000	\$ 358,461	\$ (31,539) -8.1%
LONG-TERM DEBT	\$ -	\$ -	\$ -	\$ 430,000	\$ 273,017	\$ (156,983) -36.5%
TUITION EXPENSE	\$ 840,039	\$ 777,019	\$ 548,689	\$ 778,000	\$ 655,000	\$ (123,000) -15.8%
<b>TOTAL - OPERATING, TRANSP &amp; CAPITAL</b>	<b>\$ 14,581,536</b>	<b>\$ 14,783,279</b>	<b>\$ 15,308,079</b>	<b>\$ 16,366,713</b>	<b>\$ 16,690,011</b>	<b>\$ 323,298 1.98%</b>

\* NOTE: The "Undesignated" function area is for contingency funds. Funds are transferred from the contingency line into appropriate budget lines as needed. Any balances shown in this category represent amounts not needed to date.

## DETAILED EXPENDITURES, FY15 - FY19 GENERAL FUND

Description	FY15 ACTUAL	FY16 ACTUAL	FY17 ACTUAL	FY18 BUDGET	FY19 BUDGET	CHANGE, FY18 to FY19
0000 CONTINGENCY	\$ -	\$ -	\$ -	\$ 78,000	\$ 200,000	\$ 122,000
0000 UNDESIGNATED *	\$ -	\$ -	\$ -	\$ 78,000	\$ 200,000	\$ 122,000
1110 SCHOOL COMMITTEE	\$ 25,861	\$ 17,347	\$ 21,560	\$ 16,900	\$ 13,700	\$ (3,200) -18.9%
1210 SUPERINTENDENT	\$ 204,365	\$ 198,801	\$ 185,018	\$ 231,837	\$ 234,405	\$ 2,568 1.1%
1230 OTHER DISTRICT ADMINISTRATION	\$ 10,950	\$ 11,805	\$ 6,606	\$ 3,400	\$ 1,500	\$ (1,900) -55.9%
1410 BUSINESS & FINANCE	\$ 217,146	\$ 253,469	\$ 241,413	\$ 260,088	\$ 269,352	\$ 9,265 3.6%
1420 HUMAN RESOURCES	\$ 38,833	\$ 45,709	\$ 43,530	\$ 53,542	\$ 50,938	\$ (2,604) -4.9%
1430 LEGAL SERVICES	\$ 43,354	\$ 72,765	\$ 65,943	\$ 45,000	\$ 61,000	\$ 16,000 35.6%
1450 INFORMATION MANAGEMENT & TECHNOLOGY	\$ -	\$ 26,299	\$ 23,635	\$ 25,708	\$ 28,500	\$ 2,792 10.9%
<b>ADMINISTRATION</b>	<b>\$ 540,509</b>	<b>\$ 626,195</b>	<b>\$ 587,707</b>	<b>\$ 636,474</b>	<b>\$ 659,395</b>	<b>\$ 22,921 3.6%</b>
2110 CURRICULUM DIRECTORS	\$ 166,220	\$ 222,192	\$ 238,722	\$ 233,949	\$ 241,056	\$ 7,107 3.0%
2210 SCHOOL PRINCIPALS/BUILDING LEADERSHIP	\$ 511,920	\$ 541,190	\$ 545,772	\$ 596,138	\$ 602,265	\$ 6,127 1.0%
2220 CURRICULUM LEADERS	\$ 89,222	\$ 47,530	\$ 46,247	\$ 48,780	\$ 50,875	\$ 2,095 4.3%
2250 BUILDING TECHNOLOGY	\$ 149,376	\$ 144,160	\$ 152,518	\$ 137,308	\$ 149,936	\$ 12,628 9.2%
<b>INSTRUCTIONAL LEADERSHIP</b>	<b>\$ 916,737</b>	<b>\$ 955,072</b>	<b>\$ 983,259</b>	<b>\$ 1,016,174</b>	<b>\$ 1,044,131</b>	<b>\$ 27,957 2.8%</b>
2305 CLASSROOM TEACHERS	\$ 2,986,631	\$ 2,937,656	\$ 3,151,810	\$ 2,734,783	\$ 3,168,953	\$ 434,170 15.9%
2310 TEACHER SPECIALISTS	\$ 877,677	\$ 993,584	\$ 991,949	\$ 1,131,567	\$ 1,068,921	\$ (62,646) -5.5%
<b>CLASSROOM AND SPECIALIST TEACHERS</b>	<b>\$ 3,864,308</b>	<b>\$ 3,931,240</b>	<b>\$ 4,143,759</b>	<b>\$ 3,866,350</b>	<b>\$ 4,237,874</b>	<b>\$ 371,524 9.6%</b>
2315 TEAM LEADERS	\$ 980	\$ 2,171	\$ 2,324	\$ 2,400	\$ 2,400	\$ - 0.0%
2320 MEDICAL/THERAPEUTIC	\$ 170,125	\$ 146,349	\$ 139,868	\$ 159,149	\$ 158,049	\$ (1,100) -0.7%
2325 SUBSTITUTES	\$ 188,756	\$ 161,943	\$ 159,515	\$ 147,985	\$ 147,985	\$ - 0.0%
2330 EDUCATIONAL SUPPORT PERSONNEL (PARAPROFESSIONS/ESPs)	\$ 639,511	\$ 677,133	\$ 879,307	\$ 885,629	\$ 932,994	\$ 47,365 5.3%
2340 LIBRARY/MEDIA	\$ 122,676	\$ 130,142	\$ 136,409	\$ 142,972	\$ 146,545	\$ 3,573 2.5%
<b>OTHER TEACHING SERVICES</b>	<b>\$ 1,122,047</b>	<b>\$ 1,117,737</b>	<b>\$ 1,317,423</b>	<b>\$ 1,338,135</b>	<b>\$ 1,387,972</b>	<b>\$ 49,838 3.7%</b>
235x PROFESSIONAL DEVELOPMENT	\$ 124,283	\$ 100,006	\$ 104,018	\$ 105,386	\$ 116,229	\$ 10,843 10.3%
<b>PROFESSIONAL DEVELOPMENT</b>	<b>\$ 124,283</b>	<b>\$ 100,006</b>	<b>\$ 104,018</b>	<b>\$ 105,386</b>	<b>\$ 116,229</b>	<b>\$ 10,843 10.3%</b>

# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

	Description	FY15 ACTUAL	FY16 ACTUAL	FY17 ACTUAL	FY18 BUDGET	FY19 BUDGET	CHANGE, FY18 to
2410	TEXTBOOKS	\$ 18,439	\$ 19,034	\$ 28,058	\$ 17,750	\$ 37,845	\$ 20,095 113.2%
2415	INSTRUCTIONAL MATERIALS	\$ 68,077	\$ 69,685	\$ 49,725	\$ 100,527	\$ 120,642	\$ 20,115 20.0%
2420	INSTRUCTIONAL EQUIPMENT	\$ 1,936	\$ 1,438	\$ 2,909	\$ 7,450	\$ 4,100	\$ (3,350) -45.0%
2430	GENERAL SUPPLIES	\$ 52,991	\$ 47,400	\$ 40,244	\$ 41,470	\$ 44,675	\$ 3,205 7.7%
2440	OTHER INSTRUCTIONAL SERVICES	\$ 36,322	\$ 53,477	\$ 69,491	\$ 66,615	\$ 77,275	\$ 10,660 16.0%
2451	CLASSROOM INSTRUCTIONAL TECHNOLOGY	\$ 8,701	\$ 8,698	\$ 12,698	\$ 6,750	\$ 6,750	\$ - 0.0%
2455	INSTRUCTIONAL SOFTWARE	\$ 683	\$ 43,063	\$ 33,826	\$ 47,410	\$ 49,669	\$ 2,259 4.8%
	<b>INSTRUCTIONAL MATERIALS, EQUIPMENT, TECHNOLOGY</b>	<b>\$ 187,149</b>	<b>\$ 242,797</b>	<b>\$ 236,951</b>	<b>\$ 287,972</b>	<b>\$ 340,956</b>	<b>\$ 52,984 18.4%</b>
2710	GUIDANCE/COUNSELING	\$ 302,538	\$ 329,229	\$ 347,642	\$ 399,203	\$ 392,773	\$ (6,430) -1.6%
2720	TESTING AND ASSESSMENT	\$ 8,203	\$ 4,848	\$ 3,809	\$ 4,000	\$ 4,294	\$ 294 7.4%
2800	PSYCHOLOGICAL SERVICES	\$ 114,444	\$ 118,749	\$ 87,344	\$ 87,721	\$ 89,871	\$ 2,150 2.5%
	<b>GUIDANCE, COUNSELING AND TESTING</b>	<b>\$ 425,185</b>	<b>\$ 452,825</b>	<b>\$ 438,795</b>	<b>\$ 490,924</b>	<b>\$ 486,938</b>	<b>\$ (3,986) -0.8%</b>
3200	SCHOOL HEALTH SERVICES	\$ 151,526	\$ 134,817	\$ 144,427	\$ 144,899	\$ 140,696	\$ (4,203) -2.9%
3300	TRANSPORTATION SERVICES	\$ 1,185,209	\$ 1,045,187	\$ 1,211,043	\$ 1,366,516	\$ 1,313,568	\$ (52,948) -3.9%
3400	FOOD SERVICES	\$ 56,323	\$ 238,076	\$ 57,163	\$ 63,357	\$ 41,637	\$ (21,720) -34.3%
3510	ATHLETICS	\$ 154,063	\$ 154,131	\$ 147,835	\$ 187,500	\$ 188,830	\$ 1,330 0.7%
3520	OTHER STUDENT ACTIVITIES	\$ 73,854	\$ 89,192	\$ 81,784	\$ 91,224	\$ 91,425	\$ 201 0.2%
3600	SECURITY	\$ 37,508	\$ 38,798	\$ 41,024	\$ 48,862	\$ 53,858	\$ 4,996 10.2%
	<b>PUPIL SERVICES</b>	<b>\$ 1,658,482</b>	<b>\$ 1,700,201</b>	<b>\$ 1,683,276</b>	<b>\$ 1,902,358</b>	<b>\$ 1,830,014</b>	<b>\$ (72,344) -3.8%</b>
4110	CUSTODIAL SERVICES	\$ 410,284	\$ 401,044	\$ 411,796	\$ 417,852	\$ 438,026	\$ 20,174 4.8%
4120	HEATING OF BUILDINGS	\$ 233,703	\$ 114,436	\$ 150,515	\$ 126,612	\$ 148,450	\$ 21,838 17.2%
4130	UTILITY SERVICES	\$ 181,359	\$ 226,468	\$ 247,353	\$ 225,422	\$ 260,773	\$ 35,351 15.7%
4210	MAINTENANCE OF GROUNDS	\$ 209,623	\$ 190,862	\$ 199,305	\$ 172,565	\$ 88,335	\$ (84,230) -48.8%
4220	MAINTENANCE OF BUILDINGS	\$ 57,564	\$ 42,322	\$ 53,338	\$ 57,775	\$ 136,969	\$ 79,194 137.1%
4230	MAINTENANCE OF EQUIPMENT	\$ 31,996	\$ 32,424	\$ 36,953	\$ 36,562	\$ 43,500	\$ 6,938 19.0%
44xx	NETWORKING, TELECOMMUNICATIONS, TECHNOLOGY MAINTENANCE	\$ 100,176	\$ 19,381	\$ 34,575	\$ 15,296	\$ 17,964	\$ 2,668 17.4%
	<b>OPERATIONS AND MAINTENANCE</b>	<b>\$ 1,224,706</b>	<b>\$ 1,026,935</b>	<b>\$ 1,134,018</b>	<b>\$ 1,052,084</b>	<b>\$ 1,134,017</b>	<b>\$ 81,933 7.8%</b>
5100	EMPLOYER RETIREMENT CONTRIBUTIONS	\$ 393,519	\$ 405,512	\$ 422,262	\$ 448,903	\$ 463,669	\$ 14,766 3.3%
5150	EMPLOYEE SEPARATION COSTS	\$ -	\$ 12,513	\$ 44,088	\$ 23,000	\$ 10,000	\$ (13,000) -56.5%
5200	INSURANCE - ACTIVE EMPLOYEES	\$ 2,068,385	\$ 2,190,610	\$ 2,453,904	\$ 2,634,568	\$ 2,627,758	\$ (6,810) -0.3%
5250	INSURANCE - RETIRED EMPLOYEES	\$ 670,827	\$ 753,695	\$ 726,717	\$ 719,500	\$ 720,000	\$ 500 0.1%
5260	INSURANCE - OTHER NON-EMPLOYEE	\$ 41,871	\$ 44,727	\$ 45,892	\$ 48,000	\$ 48,000	\$ - 0.0%
	<b>RETIREMENT, SEPARATION AND INSURANCE COSTS</b>	<b>\$ 3,174,603</b>	<b>\$ 3,407,056</b>	<b>\$ 3,692,863</b>	<b>\$ 3,873,971</b>	<b>\$ 3,869,427</b>	<b>\$ (4,544) -0.1%</b>
5300	RENTAL/LEASE EQUIPMENT	\$ 51,309	\$ 51,765	\$ 77,398	\$ 85,200	\$ 85,579	\$ 379 0.4%
5450	SHORT-TERM INTEREST -BANS	\$ -	\$ 22,575	\$ 26,452	\$ 26,250	\$ -	\$ (26,250) -100.0%
5500	OTHER FIXED CHARGES	\$ -	\$ 11,273	\$ 7,008	\$ 9,430	\$ 11,000	\$ 1,570 16.6%
	<b>OPERATIONS AND MAINTENANCE</b>	<b>\$ 51,309</b>	<b>\$ 85,613</b>	<b>\$ 110,858</b>	<b>\$ 120,880</b>	<b>\$ 96,579</b>	<b>\$ (24,301) -20.1%</b>
6200	COMMUNITY SERVICE	\$ -	\$ 29	\$ 5	\$ 5	\$ -	\$ (5) -100.0%
	<b>COMMUNITY SERVICES</b>	<b>\$ -</b>	<b>\$ 29</b>	<b>\$ 5</b>	<b>\$ 5</b>	<b>\$ -</b>	<b>\$ (5) -100.0%</b>
7xxx	ASSET ACQUISITION AND IMPROVEMENTS	\$ 452,179	\$ 360,553	\$ 326,459	\$ 390,000	\$ 358,461	\$ (31,539) -8.1%
	<b>ASSET ACQUISITION (CAPITAL)</b>	<b>\$ 452,179</b>	<b>\$ 360,553</b>	<b>\$ 326,459</b>	<b>\$ 390,000</b>	<b>\$ 358,461</b>	<b>\$ (31,539) -8.1%</b>
8100	DEBT RETIREMENT - SCHOOL CONSTRUCTION	\$ -	\$ -	\$ -	\$ 280,000	\$ 146,667	\$ (133,333) -47.6%
8200	LONG-TERM DEBT - INTEREST	\$ -	\$ -	\$ -	\$ 150,000	\$ 126,350	\$ (23,650) -15.8%
	<b>LONG-TERM DEBT</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 430,000</b>	<b>\$ 273,017</b>	<b>\$ (156,983) -36.5%</b>
9100	TUITION TO MA PUBLIC SCHOOLS	\$ -	\$ 405	\$ -	\$ -	\$ -	\$ - 0.0%
9100	SCHOOL CHOICE TUITION EXPENSE	\$ 689,513	\$ 600,232	\$ 548,689	\$ 580,000	\$ 555,000	\$ (25,000) -4.3%
9200	OUT-OF-STATE TUITION	\$ -	\$ -	\$ -	\$ -	\$ -	\$ - 0.0%
9300	TUITION TO MA PRIVATE SCHOOLS	\$ 150,526	\$ 176,382	\$ -	\$ 198,000	\$ 100,000	\$ (98,000) -49.5%
	<b>TUITION EXPENSE</b>	<b>\$ 840,039</b>	<b>\$ 777,019</b>	<b>\$ 548,689</b>	<b>\$ 778,000</b>	<b>\$ 655,000</b>	<b>\$ (123,000) -15.8%</b>
	<b>TOTAL - OPERATING, TRANSP &amp; CAPITAL</b>	<b>\$ 14,581,536</b>	<b>\$ 14,783,279</b>	<b>\$ 15,308,079</b>	<b>\$ 16,366,713</b>	<b>\$ 16,690,011</b>	<b>\$ 323,298 1.98%</b>

\* NOTE: The "Undesignated" function area is for contingency funds. Funds are transferred from the contingency line into appropriate budget lines as needed. Any balances shown in this category represent amounts not needed to date.

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# SOUTHERN BERKSHIRE REGIONAL SCHOOL DISTRICT REPORT

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## GRANT FUNDED EXPENDITURES, FY15 – (CURRENT) FY18

*(In broad categories)*

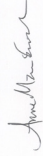
	FY14	FY15	FY16	FY17	FY18 BUDGET
PROFESSIONAL SALARIES and STIPENDS	\$ 173,592	\$ 192,198	\$ 187,200	\$ 148,557	\$ 179,832
EDUCATIONAL SUPPORT PERSONNEL (ESPs)	\$ 221,952	\$ 226,543	\$ 205,004	\$ -	\$ 2,000
OTHER WAGES	\$ -	\$ -	\$ -	\$ -	\$ -
	<u>\$ 395,544</u>	<u>\$ 418,742</u>	<u>\$ 392,204</u>	<u>\$ 148,557</u>	<u>\$ 181,832</u>
CONTRACTED SERVICES	\$ 66,673	\$ 81,278	\$ 124,743	\$ 53,363	\$ 140,104
EMPLOYEE BENEFITS/RETIREMENT CONTRIBUTIONS	\$ 25,874	\$ 19,191	\$ 57,408	\$ 35,523	\$ 14,839
EQUIPMENT	\$ -	\$ -	\$ 2,283	\$ 3,839	\$ -
OTHER INSTRUCTIONAL SERVICES	\$ 1,344	\$ 23,367	\$ 42,806	\$ 19,320	\$ 15,300
SUPPLIES & MATERIALS	\$ 1,049	\$ 54,136	\$ 85,587	\$ 42,681	\$ 27,300
TRANSPORTATION	\$ -	\$ -	\$ 4,111	\$ 2,889	\$ 7,900
TUITION - OUT OF DISTRICT	\$ -	\$ -	\$ -	\$ 267,808	\$ 262,450
	<u>\$ 94,940</u>	<u>\$ 177,971</u>	<u>\$ 316,939</u>	<u>\$ 425,422</u>	<u>\$ 467,893</u>
	<u>\$ 490,484</u>	<u>\$ 596,713</u>	<u>\$ 709,144</u>	<u>\$ 573,980</u>	<u>\$ 649,725</u>

# TAX COLLECTOR REPORT

Town of Monterey  
Tax Collector  
Fiscal Year 2019 Annual Report  
July 1, 2018 - June 31, 2019

	7/1/18 Balance	Commitments	Collected	Exemptions	Abatements	Refunds	6/30/19 Balance
2009 Motor Vehicle	85.00				85.00		-
2010 Motor Vehicle	636.98				636.98		-
2011 Motor Vehicle	180.00				180.00		-
2012 Motor Vehicle	331.25				267.50		63.75
2014 Motor Vehicle	248.75				170.00		78.75
2015 Motor Vehicle	1,049.49		10.31				1,039.18
2016 Real Estate	1,802.76		34.96				1,767.80
2016 Motor Vehicle	1,273.04		218.97		160.00		894.07
2017 Real Estate	28,321.84		26,115.05				2,206.79
2017 Personal Property	181.70		181.70				-
2017 Motor Vehicle	3,081.69		1,831.78		191.77	191.77	1,249.91
2018 Real Estate	107,268.47		75,725.62				31,542.85
2018 Personal Property	255.02		255.02				-
2018 Motor Vehicle	9,045.65		23,521.50		2,329.80	1,786.67	3,710.94
2019 Real Estate		3,815,669.46	3,733,317.81	11,500.00	1,893.50	8,970.39	77,928.54
2019 Personal Property		71,006.06	70,783.81		6.02	240.96	457.19
2019 Motor Vehicle		142,876.88	129,420.18		5,773.49	2,134.39	9,817.60
<b>MV Surcharges</b>	153,761.64	4,048,282.32	4,061,416.71	11,500.00	11,694.06	13,324.18	130,757.37
Deputy Fees			1,060.00				
Late Fees/MLC Fees			1,464.00				
Interest			4,115.00				
<b>TOTAL COLLECTED</b>			\$ 22,602.76				
			4,090,658.47				

Respectfully,



Anne Marie Enoch  
Tax Collector

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# TOWN CLERK REPORT

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## 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.

Early Voting began in 2016 and was very successful during the Presidential Election. Early Voting will continue because it gives voters a chance to vote early without a specific reason. Absentee Voters need a specific reason in order to vote absentee (absence, disability or religious belief).

The following report is based on primary areas of activity during Fiscal Year 2019. 7/1/2018 to 6/30/2019.

Vital Report  
Births-2  
Deaths-5  
Marriages-1

### Dog Licensing

Dog Licensing is required annually each spring. Licenses expire on March 31<sup>st</sup> and dog owners have from March 1<sup>st</sup> until May 1<sup>st</sup> 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, 2018 until June 30, 2019

Compost Buckets	\$ 15.00
Business Licenses:	\$ 150.00
Birth Certificates:	\$ 45.00
Marriages:	\$ 35.00
Death Certificates:	\$ 300.00
Dog Licenses:	\$1,020.00
Copies:	\$ 3.40

My goal is to continue to keep the Town Clerk's office running smoothly and efficiently. I am a member of the International Town Clerks' Association. I would like to thank everyone for your continued support during this past year.

Respectively submitted,  
Terry L. Walker

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## TREE WARDEN REPORT

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### Tree Warden Annual Report Fiscal Year 2019

On July 1<sup>st</sup> we hit the ground running and it's been a busy year in the tree world. With the assistance of the highway department, dying and dangerous trees were removed from the following roads; RT 23, Fairview, Sandisfield, Eaton, Tyringham, Hupi, Mt Hunger, Art School, Beartown Mountain, Gould, River, Blue Hill, Corashire and by the time you read this RT 57. Two trees were also removed at the town hall and replaced with a new flowering crab apple tree.

I would like to give a special thank you to Shawn Tryon and the highway department for all the supplemental take downs and removals they have funded and made possible.

We have come a long way but with normal dieback and a declining ash tree population we still have a long way to go.

Respectfully submitted,  
Kevin Fitzpatrick  
Tree Warden

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## VETERAN'S SERVICES REPORT

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### 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 2019 we have seen a slight increase in all areas of operation and currently have 52 active Chapter 115 claims.

Chapter 115 Submissions and Return from the State:

Town	FY 2019 Submitted 7/01/18-6/30/19	Pmt Due in FY 2020 -FY 2019 - 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	38
ALS/Disability/A&A/Appeals/Life Insurance	48
DD 214s	49
Request for Grave Markers	35
Tax Abatements/SS help/Other requests	73
Flags to funerals homes for veterans	42
Assisted with Dr. appointments	11
Home and Office Visits	272
Veterans Services Phone Calls	1370

For FY 2019 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 2019 DVS budget was \$4,764.70 – this number was based on population percentage on the 2010 Census.

Respectfully Submitted,

Laurie J. Hils

Southern Berkshire District Director for Veteran Services

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# ZONING BOARD OF APPEALS REPORT

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## **Report for the Zoning Board of Appeals FY 2019**

The Zoning Board of Appeals is composed of five elected members and two appointed alternates. Members serve a five-year term. The ZBA 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. During fiscal year 2019 the board held seven (7) such hearings.

<b>Hearing Number</b>	<b>Name</b>	<b>Type of Hearing</b>	<b>Granted/Denied</b>
19-01	Rosenbaum	Special Permit	Withdrew without prejudice
19-02	Rosenbaum	Special Permit	Granted
19-03	Hume/Vertex Towers	Special Permit	Granted
19-04	Steinberg	Appeal	Denied
19-05	Monk	Appeal	Granted
19-06	KSA-Mass LLC	Special Permit	Granted
19-07	Soborski	Special Permit	Withdrew without prejudice

Respectfully Submitted,  
Jonathan Levin, Chair  
Stanley Ross, Clerk  
Susan Cooper  
Gary Shaw  
Scott Jenssen  
Ian Jenkins, Alternate and  
Melissa Noe, Administrative Assistant