

MIDDLETON SELECT BOARD
MEETING AGENDA
FULLER MEADOW SCHOOL, NATHAN MEDIA CENTER
143 SOUTH MAIN STREET, MIDDLETON, MA 01949
TUESDAY, NOVEMBER 30, 2021
6:00 PM

This meeting is being recorded

This meeting will be a hybrid of in-person and remote via Zoom. To join the meeting remotely, go to:

<https://us02web.zoom.us/j/84423280418?pwd=bE5yS2pkeHZDaUluNFFWdDJXd1dxQT09>

- 1 6:00 Warrants: 2211 and 2212
 Minutes: Open Session: November 2, 2021 and November 16, 2021
 Town Administrator updates and reports
- 2 6:20 Public Comment Period
- 3 6:30 Recognize the Trash Queens so-called for their continuing efforts to keep Middleton clean: Claudia Johnson, Pam Hartman, Judy Reynolds, Susan Piccole
- 4 6:35 Review and vote to accept the Curtis Brothers' Sawmill Commemorative from the Middleton Stream Team; Sandy Rubchinuk, Pike Messenger
- 5 6:40 Review and vote to support the application of the Middleton Historical Commission to adorn traffic control boxes with historic scenes of Middleton: Anne Cote
- 6 6:45 Review and comment on draft Memorandum of Understanding for Establishment and Maintenance of the Essex County Tri-Town Shared Health Initiative between Middleton, Topsfield, and Boxford
- 7 6:50 Vote to accept the recommendation of the Town Building Committee and Town Administrator to award a contract for owner's project management services to PCA360
- 8 7:00 Debt Issuance:
 - Review S&P Global Ratings' action on Town's bond rating
 - Review and vote to approve bond results for issuance of \$66,135,000 in debt associated with the public facilities project at 105 South Main Street and the FY22 capital budget
- 9 7:20 FY2022 Tax Classification Hearing
 Review of Fiscal Year 2022 final valuations approved by state Department of Revenue; votes required under Massachusetts General Law, Chapter 59, Section 2:
 1. To discount up to 25% of Open Space (No, as there are no qualifying parcels)
 2. To adopt up to a 20% Residential Exemption (Yes or No, and if Yes, at what %)
 3. To adopt up to a 10% Small Commercial Exemption (No, as there are no eligible parcels)
 4. To determine the percentage of the tax levy to be borne by the two main property classes:

Residential and CIP (Commercial, Industrial and Personal):

 1. 100% factor or unity for both classes
 2. A CIP factor between 100-150% of Residential factor as shown on options chart

- 10 7:30 Review and vote on the petition of MMS Hospitality, Inc. d/b/a Stefanelli for the transfer of the on-premises restaurant all alcohol liquor license, change of manager to Marco Stefanelli, and change of common victualler and entertainment licenses held by North Shore Cantina, Inc. d/b/a Chanco's at 119 South Main Street: Marco Stefanelli
- 11 7:40 Review and vote on petitions of the Members Lounge, 19th Hole Restaurant, and Halfway House Snack Bar, all located at the Ferncroft Country Club, 8-10 Village Road, for change of manager from Ronald E. Rice to Danielle Arnson Gentile: Mann & Mann
- 12 7:45 Review and vote to accept the following donations:
 - \$500 from Abhishek Ranjan to the Middleton Food Pantry
 - \$500 from PTC Custodial IRA on Behalf of David Conley to the Middleton Food Pantry
- 13 7:50 Review and approve FY2023 Budget and May 10, 2022 Annual Town Meeting calendar
- 14 8:00 Review and vote to adopt holiday schedule for 2022
- 15 8:05 New Business: Reserved for topics that the Chair did not reasonably anticipate would be discussed

Upcoming Meetings: December 14 & 28
January 11 & 25

Regular SB Meetings
Regular SB Meetings

The Board reserves the right to consider items on the agenda out of order. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.

Town of Middleton
Summary of Weekly Bills Payable and Payroll Warrants
Office of the Town Accountant

Warrant Date: November 18, 2021

Warrant Number: # 2211

Payroll Warrant Total:

\$ 752,230

<u>Department</u>	<u>Amount</u>	<u>Detail of Expenses</u>
Board of Health	\$9,305	
COA	\$9,575	
Election	\$0	
Electric Light	\$89,384	\$29,230 Overtime; \$2,493 Call Out
Fire	\$73,461	\$18,365 Overtime; \$9,824 Part time
Inspections	\$9,194	
Library	\$18,427	
Memorial Hall	\$34,761	
Planning	\$4,259	
Police	\$62,340	\$7,963 Overtime; \$629 Reserves
Police Details	\$21,084	
Public Works	\$33,421	\$0 Snow; \$1,070 Overtime
Recreation	\$0	
Senior Work Off	\$0	
School	\$387,017	
Teacher Balloon Pay	\$0	
Town Officers	\$0	

Bills Payable Warrant Total:

\$ 1,243,926

<u>Department</u>	<u>Amount</u>	<u>Detail of Expenses</u>
All Payroll Deductions	\$97,564	
Administrator	\$3,391	\$1,045 Electricity
Accounting	\$25	Miscellaneous Expenses
Assessor	\$6,713	\$6,025 Patriot Support FY22
Clerk	\$0	
Cultural Council	\$0	
COA	\$2,748	Miscellaneous Expenses
DPW	\$198,181	\$161,480 Paving; \$13,815 Waste Disposal
Fire	\$9,051	\$3,355 Ambulance Related; \$1,780 Fuel
Health Director / IT	\$10,394	\$7,089 IT Related
Historical Comm.	\$0	
Inspections	\$499	Miscellaneous Expenses
Library	\$13,732	\$10,706 Purchase Books; \$1,241 Electricity
MELD	\$680,309	\$633,370 Purchase Power
Planning	\$331	Miscellaneous Expenses
Police	\$9,030	\$3,613 Licenses; \$2,594 Training
Recreation	\$600	Pumpkin Festival
School	\$179,477	\$50,039 Tuition; \$36,818 IT Related; \$34,166 Café; \$17,916 Transportation
Treasurer	\$29,654	\$27,566 Refunds
Veterans' Agent	\$2,228	\$1,808 Veterans' Aid

MEETING MINUTES

BOARD OF SELECTMEN

FULLER MEADOW SCHOOL, NATHAN MEDIA CENTER
143 SOUTH MAIN STREET, MIDDLETON, MA 01949
TUESDAY, NOVEMBER 2, 2021
7:00 PM

This meeting was recorded

Present: Chair Brian Cresta, Tim Houten, Kosta Prentakis, Rick Kassiotis, Jeff Garber

Absent: None

Others Attending: Town Administrator Andy Sheehan, Assistant Town Administrator/HR Director Jackie Bresnahan, Paul Pellicelli, Finance Director Sarah Wood, Town Moderator Barbara Piselli, Town Clerk Ilene Twiss, Chief William Sampson, Sgt./Capt. Matt Armitage, George Dow, and others

7:01 PM With a full board present, Chair Brian Cresta called the meeting to order.

ROUTINES

- **Warrant Approval:** Town Administrator Andy Sheehan provided a brief review of Warrant #2210: Payroll: \$758,181; Bills Payable: \$3,264,494, noting that the Town Accountant had reviewed the warrants and requested the Board's approval. After a brief discussion, the Board took the following action:

On a **MOTION** made by **Prentakis**, second by **Houten**, the Select Board **VOTED** unanimously to approve the warrant as presented.

- **Minutes:** After a brief review of available minutes, the Board took the following action:

On a **MOTION** made by **Prentakis**, second by **Kassiotis**, the Select Board **VOTED** unanimously to accept the minutes of October 19, 2021, and October 27, 2021, as written.

- **Town Administrator's Report:** Town Administrator Andy Sheehan provided the Board with information and updates on the following:
 - **River Street Water Main Work:** Sheehan reported that the water main work on River Street will be wrapping up this week. The road will be closed to through traffic today and Thursday while they do the paving. There will be a post-project meeting to discuss how they can do things better for future projects like this one.
 - **Tax Classification Hearing:** Sheehan reported that the Tax Classification Hearing is scheduled for November 30th, at 7:20PM, adding that it will be posted in the *Salem News* the week before.

- **Turkey Trot:** Sheehan reported that the annual Turkey Trot will take place on Thanksgiving morning, November 25th, noting that it will be the same route as the last few years. There was a coordination meeting yesterday with sponsors, and public works, library, police, and fire. Proceeds will go to the food pantry and Middleton veterans.
- **99 Restaurant Project:** Sheehan reported that the construction is moving along, adding that the framing is partially up. Sheehan commented that it will be nice to have that corner redeveloped.
- **DoubleTree Hotel Management Change:** Sheehan advised the Board that Whitney Gillings, the legal rep for DoubleTree, called to let the Town know that the hotel manager at DoubleTree left as of last Friday. The management company also is going to be changing and the general manager will change as a result. Gillings will follow up in writing and keep the Town up to date on changes. Kassiotis asked that they adhere to the Board's prior directive to file for changes within 30 days. Sheehan will pass it along to the management reps.

7:11 PM Public Comment Period: There were no public comments.

7:11 PM Meeting with Finance Director Sarah Wood to review the FY2021 4th Quarter Report and FY2022 1st Quarter Report: Finance Director Sarah Wood provided the Board with the FY21 Q4 report as she reviewed the highlights. Some of the highlights included Free Cash being certified at \$3.9M. Despite the continuation of the COVID-19 pandemic the Town had surplus revenues totaling \$1,253,383. Real estate and personal property taxes were over 100% of the anticipated budgets due to the decrease in revenue collection in FY20. The majority of the FY20 receivables were collected in FY21 causing this increase. Of the local receipts, there were only four categories that are lower than 95% of their budgeted revenues: Rooms Excise, Departmental Revenues - Libraries, Fines & Forfeitures, and Investment Income. A discussion ensued on the revenues and expenditures for FY21.

Wood continued with highlights of the 1st Quarter in FY22, which included a summary of the 1st quarter results as of September 30, 2021 for the General Fund, CPA Fund, Water Enterprise Fund, and Revolving Accounts. The General Fund accounts for the Town's annual operating and most of the capital budget. Exceptions include MELD and SESD assessments, which are accounted for as enterprise funds and capital budget items that are for another fund. Wood noted that as of September 30, 2021, 27% of the FY 2022 General Fund budget had been expended.

7:36 PM Meeting with Police Chief William Sampson: Chief Sampson met with the Board to discuss the following:

- **Review and Vote to Appoint Matthew Armitage as Captain of the Department:** Sampson provided the Board with information on Sgt. Armitage's background and experience, recommending him to be promoted to the position of Captain. Sampson added that will necessitate the hiring of another police officer, as a current full-time officer will be promoted to the Sergeant position.
- **Update on the Department and Contemplated Organizational Ideas:** Sampson provided the Board with an update on the plan he implemented to build relationships within his department, along with other departments, including nearby police departments. He's been looking at department policies and revising s necessary. These include internal affairs investigations and additional new training requirements. Sampson explained the new programs to the Board, as well as how the department

would be organized moving forward, with a Captain and four Sergeants and their responsibilities. Sampson expects to have a recommendation for the open Sergeant position by January. A discussion ensued on the new training requirements under the Police Reform Law and how it will be paid for. After discussion, the Board took the following action:

On a **MOTION** made by **Prentakis**, second by **Houten**, the Select Board **VOTED** unanimously to accept the Chief's recommendation and appoint Matthew Armitage as Captain of the Police Department. **(Kassiotis abstained)**

- **Review and Vote to Adopt Policy 1.03, Reporting Abuse, Excessive Force, or Misconduct by Law Enforcement Personnel**

On a **MOTION** made by **Prentakis**, second by **Houten**, the Select Board **VOTED** unanimously to approve Policy 1.03, Reporting Abuse, Excessive Force, or Misconduct by Law Enforcement Personnel. **(Kassiotis abstained)**

8:13 PM November 16, 2021 Special Town Meeting:

- **Review Warrant Articles:** Town Administrator Andy Sheehan provided a copy of the Town Meeting Warrant to the Board members to read as he reviewed the warrant articles with them. Sheehan noted that some of the warrant articles have a ballpark figure for the dollar amount, so voters will have an idea on the cost. While reviewing Article 8, a brief discussion ensued on funds that will be coming in from the new over-55 housing project as well as the funds for the design of the sidewalk. Finance Director Sarah Wood provided information on the designated funds.
- **Consider an Adjustment to the Quorum for the November 16, 2021 Special Town Meeting Pursuant to GL c. 92, S. 7 of the Acts of 2020:** A lengthy discussion ensued on whether to consider lowering the quorum for the Special Town Meeting, with the Board, the Town Administrator, the Town Clerk, and the Town Moderator contributing to the discussion. At the end of the discussion, the Board took the following action:

On a **MOTION** made by **Prentakis**, second by **Kassiotis**, the Select Board **VOTED** unanimously not to adjust the quorum for the Special Town Meeting.

8:46 PM Review and Vote on New Precinct and District Boundaries: A brief discussion ensued on the new precinct and district boundaries, with the Town Clerk noting that the precincts map has been changing over the past weeks. Once reviewed by the Town, they will send it back to the Secretary of State, and then there will be additional information coming from them. The Town Administrator advised they will not be voting on it tonight, noting that full information should be forthcoming before the Special Town Meeting. He suggested that the Board tentatively plan to vote on the new district boundaries and precincts at a meeting at 6PM, before the Special Town Meeting on November 16th. The Board agreed.

8:51 PM Follow up Discussion on the Pedestrian Safety Summit Held on October 27, 2021: Town Administrator Andy Sheehan thanked Chair Brian Cresta for hosting and leading the event and everyone who showed up, including town boards and committees, as well as residents. He advised the Board that

he, along with the Assistant Town Administrator, and the Town Planner, will follow up with action items and plans they can work on. He will keep the Board updated on progress.

8:56 PM Review and Vote to Amend the Veterans & Senior Tax Work-Off Program: Town Administrator Andy Sheehan provided the Board with information on the Veterans and Senior Tax Work-Off Program amendments which will allow individuals to sign up for the program in \$500 increments. Sheehan publicly thanked Administrative Assessor Terry Fontaine for all her work with Jackie Bresnahan on this initiative. After a brief discussion, the Board took the following action:

On a **MOTION** made by **Prentakis**, second by **Houten**, the Select Board **VOTED** unanimously to approve the amendment to the Veterans & Senior Tax Work-Off Program.

8:58 PM Review and Comment on Draft Memorandum of Understanding for Establishment and Maintenance of the Essex County Tri-Town Shared Health Initiative between Middleton, Topsfield, and Boxford: Town Administrator Andy Sheehan advised the Board that this came out of the pandemic. The current shared health initiative has been a great asset to the Town. Sheehan noted that he wanted to provide it to the Board so members can read through it, and that no vote is requested at this time. A brief discussion ensued. It will be put on for discussion at a later time.

9:04 PM OTHER BUSINESS:

- **Building Project OPM Candidate:** The Town Administrator advised the Board that the Building Committee is beginning to negotiate with its first choice for the OPM. PCA360 worked on the Essex Tech project and have a great deal of experience doing OPM work. He hopes to have a candidate ready for the Board to vote on by November 16th.
- **Charter Review Committee:** At Chair Cresta's request, Assistant Town Administrator/HR Director Jackie Bresnahan provided the Board with an update on the Charter Review Committee. She reported that she met Friday with the Town Moderator who has appointed members to the Committee and will be there to commence them and appoint a chair. They will have public open meetings and hope to have a report ready for Annual Town Meeting in May. A brief discussion ensued.
- **Pumpkin Festival Thanks:** Select Board Member Houten thanked all who attended the Pumpkin Festival, noting there was a great turnout.
- **Special Town Meeting Reminder:** Chair Cresta reminded residents of the Special Town Meeting, scheduled for November 16th, at 7PM, at the Howe-Manning School.
- **Upcoming Select Board Meetings:** Chair Cresta announced that the next regularly scheduled Select Board meetings will be on November 30th, December 14th, and December 28th.

9:09 PM Adjourn

With no further business, on a **MOTION** made by **Houten**, the November 2nd meeting of the Select Board adjourned at 9:09 PM.

Upcoming Meetings:

*Middleton Board of Selectmen
November 2, 2021*

*Meeting Minutes
Page 4*

November 16	Special Town Meeting; SB meeting (6:30PM)
November 30	Regular SB Meeting
December 14 & 28	Regular SB Meetings

Respectfully submitted,


Judith A. Stickney, Minutes Secretary

Timothy P. Houten, Select Board Clerk

Documents either distributed to the Board of Selectmen before the meeting in a packet or at the meeting:

- Agenda: November 2, 2021
- Warrant #2210: Payroll: \$758,481; Bills Payable: \$3,264,49
- Minutes:
 - October 19, 2021
 - October 27, 2021
- Memo and related documents from Finance Director/Town Accountant to Select Board, Re: FY2021 4th Quarter Highlights, 10/28/21
- Memo and related documents from Police Chief to Town Administrator, Re: Recommendation to Promote Police Sergeant Matthew Armitage to Police Captain, 10/18/21
- REPORTING ABUSE, EXCESSIVE FORCE, OR MISCONDUCT BY LAW ENFORCEMENT PERSONNEL
- Special Town Meeting, November 16, 2021
- PUBLIC NOTICE: ADJUSTMENT OF TOWN MEETING QUORUM REQUIREMENTS
- Precinct Boundaries Map
- MEMORANDUM OF UNDERSTANDING FOR THE ESTABLISHMENT AND MAINTENANCE OF THE ESSEX COUNTY TRI-TOWN SHARED HEALTH INITIATIVE

MEETING MINUTES
BOARD OF SELECTMEN
HOWE MANNING SCHOOL GYMNASIUM
26 CENTRAL STREET, MIDDLETON, MA 01949
TUESDAY, NOVEMBER 16, 2021
6:00 PM

This meeting took place before the Special Town Meeting

Present: Chair Brian Cresta, Tim Houten, Kosta Prentakis, Jeff Garber

Absent: Rick Kassiotis

Others Attending: Town Administrator Andy Sheehan

6:12 PM With a quorum present, Chair Brian Cresta called the meeting to order.

Review and vote on new precinct and legislative district boundaries: Town Administrator Andy Sheehan reported that the boundaries have not changed since the Board last reviewed the map. The legal description has been drafted and approved by the Secretary of State's Office. He advised the Board that its vote approving the boundaries is the last outstanding local action that is needed.

After a brief discussion, the Board took the following action:

On a **MOTION** made by **Houten**, second by **Prentakis**, the Select Board **VOTED** unanimously to approve the local precinct and legislative boundaries as presented.

6:19 PM Review and Vote to Amend the Veterans & Senior Tax Work-Off Program: Town Administrator Andy Sheehan advised the Board that conversations are still ongoing with the Assessors. He suggested tabling the item until November 30. After a brief discussion, the chair tabled the item until November 30.

6:21 PM November 30, 2021 Meeting Sheehan advised that the November 30 meeting is quite full with a number of hearings and visitors scheduled. After a brief discussion the Board members agreed to start at 6PM.

6:23 PM Adjourn

With no further business, on a **MOTION** made by **Houten**, the November 2nd meeting of the Select Board adjourned at 9:09 PM.

Respectfully submitted,

Andrew J. Sheehan, Town Administrator

Timothy P. Houten, Select Board Clerk

Documents either distributed to the Board of Selectmen before the meeting in a packet or at the meeting:

- Agenda: November 16, 2021
- Precinct Boundaries legal description

Home > News > Affiliate Updates > Meet the “Trash Queens”: Leading the Way in Litter Clean

Daily Walk

DONATE

VOLUNTEER

LOGIN

MEET THE “TRASH QUEENS”: LEADING THE WAY IN LITTER CLEANUP ON THEIR DAILY WALK



By Abby Turpin, Director of Communications, Keep America Beautiful

(September 29, 2021) – Five to seven days a week, you’ll find four women walking together in Middleton, Massachusetts. Bags and grabbers in hand while on their walk, they

are women making a difference who you'll want to learn more about. They are the self-titled "Trash Queens."

I connected with Susan Piccole through the Keep America Beautiful Facebook page and reached out to tell their story. It's these efforts that are helping beautify America's communities. These are stories that need to be told to inspire others to do similar acts of kindness and importance.

Susan and three friends, Claudia, Judy and Pamela, began walking together almost every day beginning in March 2020 to combat, they say, their boredom during the COVID-19 lockdown. From day one, they began to notice the tremendous amount of trash along the trails and roads. So, they decided they'd come with a trash bag in hand from then on and start picking up the litter. Susan tells me she thinks, in total, they have picked up somewhere between 2000 to 2500 bags of trash in the past year and a half.

"We average four shopping bags a day, and sometimes we get 10 bags," Susan wrote. Word has gotten out about their efforts, and the Department of Public Works in their area is supporting them by supplying yellow bags and picking up the bags they accumulate on Tuesdays, appropriately named "Trash Tuesdays."

They haven't stopped there. They see they're making an impact and are branching out with other ideas to help care for the community. They have begun collecting redeemable cans and are donating the proceeds to the Middleton Stream Team. This local organization works to protect and preserve the rivers and wetlands in Middleton. The money donated by the "Trash Queens" will be awarded to high school seniors who plan to go into environmental studies.

Don't forget the trash grabbers! Susan and friends set up a table at the Middleton Stream Team's Earth Day celebration recently and gave out 48 trash grabbers to families, Boy and Girl Scouts and environmental students.

"It is amazing how excited the grade school children were with their grabbers," wrote Susan. And she wanted to be sure to add, "All grabbers were given with parent approval."

When stories come in to Susan about how their work is inspiring others, she "grabs" on to the opportunity.

"I post on the local community page and, when someone stated their son was unable to go to school so he opted to pick up trash and got three trash bags full, the "Trash Queen" made a quick visit and presented him with his own grabber. I just got notified that today he picked up another bag of trash, grabber in hand!"

Neil Rhein, Founder and Executive Director of Keep Massachusetts Beautiful, was thrilled to hear about the "Trash Queens" and wants to encourage *all* residents of the state to take action in litter cleanup by joining the Massachusetts Litter Cleanup Crew program.

"The fantastic work of the Trash Queens of Middleton is also being done by like-minded individuals and 35 local Keep Massachusetts Beautiful chapters across our Commonwealth," said Rhein. "Our Massachusetts Litter Cleanup Crew program encourages residents to take action to keep their own streets and neighborhoods litter-free. Volunteers can sign up on our website at www.keepmassbeautiful.org/LCC and we will ship them a Litter Cleanup Kit that has all the tools needed to make neighborhood litter cleanups part of their daily or weekly routines."

Keep America Beautiful thanks the "Trash Queens" for all they're doing for the environment. These are the efforts we highlight, hoping to inspire even just one more person to help end littering in our beautiful country.

"I feel we are making a difference," Susan concluded.

Yes, you are, "Trash Queens." Yes, you are.

Posted on September 29, 2021

RELATED NEWS

MIDDLETON STREAM TEAM

Post Office Box 333, Middleton, MA 01949



4.

October 21, 2021

MIDDLETON'S CURTIS BROTHERS' SAWMILL COMMEMORATIVE

Almost a century ago two brothers built a dam to catch water down from county-high Boston and Holt hills in North Andover and Andover. Middleton farmers and sawyers Arthur and Ernest Curtis used the dam to turn their sawmill's shafts, pulleys, belts and saw blades. In the 1930s their water-catching wheel was an old fashioned, wooden one, set in a sluiceway of an earthen dam across Boston Brook. Sometime later they replaced the dam with one of concrete and the wooden wheel with a steel turbine. The latter's whirling blades were pushed by water from two, two-foot diameter penstocks entering a turbine chamber at right angles from the bottom of the mill pond. Up until 1971 a pine mill-building and the large pond attracted young people to dive off the roof, to swim, to fish and to play along its edges. The sawyers shooed them off the mill roof. Kids over the years hung about to watch hired hand Warren Evans bring logs in and lumber out with teams of horses. Bob Currier, Shirley (Paul) Raynard and Leon Rubchinuk were three of those kids. Carl Close as a teenager helped on the Curtis farm and in the mill. He still lives nearby. The mill is reputed to have been the last water powered mill in the Ipswich River watershed of 155 square miles.

In the 1960s Arthur and Ernest stopped sawing logs. Mill operator and mechanic Joseph Reed who had long worked with them continued for a while. Arthur died in 1965 at the age of 76; * Ernest in 1968, age 86. An arsonist burned the mill building in 1971. Mill parts no longer turned; over the years since the 120 foot-long, 12-foot-high dam cracked in places and wasn't repaired. The flash boards in the sluiceway were damaged, especially when water flowed high and fast down Boston Brook. By the turn of the millennium the millpond no longer held much water. In 2011 the state deemed the dam unsafe and gave the town of Danvers, which then had the land and water rights, three choices: rebuild the dam, shore it up halfway, or raze it. After several meetings the latter was decided upon. Those championing the return of spawning fishes in the spring, such as alewives,

blue backed herring, lamprey eels, shad, salmon and sturgeon want fish-blocking dams taken down. In the summer of 2012 earth moving machines tore the concrete structure asunder. A few Middleton Steam Team (MST) members, including John Bacon, MST president until 2013, and friends interested in history who had been following events asked the contractor to set aside the steel parts of the mill for use in some sort of a commemorative. Danvers agreed. Carl Close, fondly remembering the brothers and the mill machinery, drew up a plan for a sculpture to be made of the salvaged steel. He, blacksmith and artist, cleaned and painted black one large basket gear hauled to him by Leon Rubchinuk. That was the start of the sculpture. The Middleton Fire Department with high pressure hose cleaned the rusted turbine. Leon got sand blaster Ricky Tower to take off more rust and then paint. Inspired by these volunteers, Stream Teamer Pike Messenger built an informational kiosk for articles about and photographs of the brothers, their mill, and Carl. He and grandson Django installed it on local red cedar posts just across from where Warren and his teams had brought logs in. Thus, began a commemorative parklet about 50 years after the last log was sawn. This summer the project resumed in earnest under the leadership of Leon Rubchinuk with the help of fellow Stream Teamers, friends, and aspiring Eagle Scout Nils Kovamees.

In August a six-by-six foot, three-foot-deep concrete chamber was poured in a form made by Leon for the turbine. It was a copy of the one demolished when the dam was taken down. The one-ton turbine was hoisted into place within, and the large basket gear Carl had overhauled was mounted on it. Timber braces were built to hold them in place. Next, four granite blocks that Leon donated, were cut from two with wedges and feathers, to be used as a base for timbers upon which the 11-foot drive shaft with belt pulleys and another basket gear were mounted. Soon the pieces were back where they had been. It was tricky business getting the very heavy parts in line and meshing the two heavy gears, one with new wooden teeth made by Carl. The cleaned-up parts were soon in place as in Carl's sketch. The project was ready for the planned roof of local pine rafters and boards, and cedar shingles. John "Red" Caulfield dipped and brushed 15 bundles of new shingles, with linseed oil and spirits, to be lain on boards donated to us several years ago by Paul Richardson and Henry Tragert. Six electric light telephone poles, donated and installed by the Middleton Electric Light Department, had been standing in place for five years awaiting a purpose. They were cut off eight feet above the ground and notched. Roof plate timbers were attached. Next, pine rafters from a mill in Rowley were raised. A half dozen Stream Teamers and

friends then had a “roofing party,” and voila appeared a building. Two weeks later after another barn-raising-of-old type session Red’s shingles were in place. At one point in the process, Peter Goodwin, not allergic to poison ivy, took a break from shingling and pulled off with his bare hands a thick covering of thriving ivy off the tail race’s well-built wall in Boston Brook. Hooray! Shingles were up, poison ivy nearby that had long worried was down! Some of us wondered what the late Arthur and Ernest would have thought of this activity that resulted in a sculpture that couldn’t saw logs, and a good roof without human occupants or livestock below. Leon later attached an owl box under the rafters. One old helper thought of building a small attic room there for himself. A frivolous thought now-a-days, he’d never get an occupancy permit.

While this construction was going on Nils and scouts of Troop 19 cleared and graded the rough land where the mill building had been. They did so with the help of Leon; George Falkowski, who provided six free loads of clean fill; and the Middleton DPW which brought in lots of good loam for a lawn. This work was done during late summer’s drought. We fretted about the fate of the planted lawn grass. We needn’t have. Nils and his dad visited every other morning and irrigated by pumping water from Boston Brook. The grass of this new town parklet is thriving. Nils is now an Eagle Scout.

Today The Middleton Stream Team will turn over this commemorative to the town, which now owns the land. It was built in its entirety by volunteers. The only costs were shingles, concrete, paint and nails. Total expenses were less than \$3000. The balance left of the \$4900 voted at Town Meeting in 2017 will be turned back to the town. Donations were also received from Joan Cudhea whose father Charles Prichard had logs from his land upstream sawn for an addition to their summer house on Prichard Pond, and from Mary and Julia Curtis, nieces of the Curtis brothers. We think that this would be as the late sawyers and farmers would have liked. They helped with town and church projects at no cost.

*Obituary, Salem Evening News January 3, 1966 - Arthur Curtis of Middleton farmer, scholar, craftsman

Middleton Stream Team, Middleton Historical Commission, Middleton Historical Society (December 2020)

POLICY DIRECTIVE

Frank DePaola P.E. (signature on original)

ADMINISTRATOR

State Highway Access Permits for Murals and Artwork

Policy

MassDOT will consider requests from applicants who wish to install murals or other artwork on buildings, bridges and other structures owned by MassDOT, solely for the purpose of aesthetic enhancement to the affected communities/neighborhoods. Murals and other artwork that involve advertising or promotional content will not be allowed under this policy.

To be considered, interested parties are required to prepare and submit a Non-vehicular Access Permit application to the appropriate District Office.

MassDOT may issue permits for murals or other artwork on buildings, bridges and other structures that conform to the conditions described herein.

Authority

The authority for this policy derives from M.G.L. c. 81 and M.G.L. c. 87 and regulations found at 720 CMR 13.00. MassDOT is authorized to issue Non-vehicular Access Permits for projects within a State Highway Layout that do not involve physical modifications.

Applications for murals or artwork that involve advertising content shall be referred to the MassDOT Outdoor Advertising Office and processed in accordance with M.G.L. c. 93D, §1-7 and regulations found at 700 CMR 3.00.

Permit Application Requirements

Applicants proposing to install murals or other artwork on buildings, bridges, or other structures owned by MassDOT shall be required to apply for access via a Non-vehicular Access Permit. In addition to a completed Application for Permission to Access State Highway, the applicant must also include the following documentation:

- A plan showing the structure on which the mural/artwork is proposed to be installed. This plan shall be labeled with sufficient geographic information (street labels, scale,

north arrow, and coordinates) to determine the location of the structure and the affected highway(s), as well as viewpoints documented below.

- Photographs taken from roadway views, indicating the structure to be affected, with mark-ups showing the intended work.
- Concept sketches or renderings of the proposed mural/artwork.
- Evidence of support from municipalities that will be affected by the proposed mural/artwork, including support from the local police department(s). In some cases, additional support from local abutters, regulatory commissions or agencies, and relevant municipal councils or commissions may also be required.
- Additional documentation, such as engineering or material specifications and plans, digitally-modified photographs showing before-and-after conditions, drawings showing existing conditions and/or proposed modifications, other illustrations or information may be required as part of this submission.

The applicant must also demonstrate in writing that the proposed mural/artwork is consistent with the goals outlined in MassDOT's *Project Development and Design Guide*, Chapter 13 (Landscape and Aesthetics).

The District Highway Director may request the applicant to present its proposal to MassDOT and other affected parties as MassDOT deems appropriate in its sole discretion.

Criteria for Approval

The mural/artwork must not cause driver distraction or otherwise unnecessarily engage the attention of drivers. The mural/artwork must not result in conditions that would compromise the flow of traffic or increase roadway information clutter.

The mural/artwork should be best applied directly to the structure and should otherwise not obscure or cover elements that would affect MassDOT's ability to properly inspect the structure in the future. In all cases, MassDOT shall consider its ability to inspect the structure in the future and should not approve any murals/artwork that would compromise this ability.

For the purpose of this policy, the approved application of a mural/artwork to a structure will not be considered to cause a physical modification of the structure. Physical modification is caused by cutting, breaking, demolishing, reconstructing, adding to or otherwise changing the shape and/or structural adequacy of a structure. MassDOT shall not approve applications of murals/artwork that will cause physical modification of any structure, as described above.

In addition to the requirements cited above, MassDOT, in its sole discretion, shall not approve permits for murals/artwork if any of the following apply to the content of the proposed artwork:

1. Demeaning or Disparaging – The mural/artwork contains material that demeans or

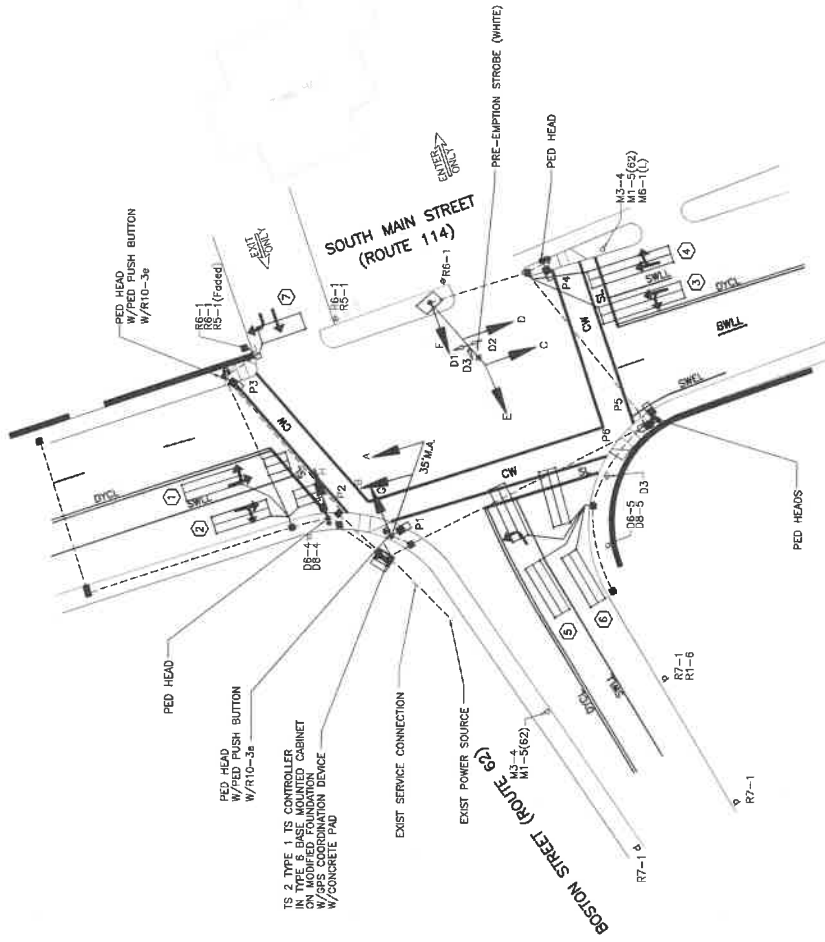
disparages an individual or group of individuals. For purposes of determining whether a mural contains such material, MassDOT will determine whether a reasonably prudent person would believe that the mural/artwork contains material that ridicules or mocks, is abusive or hostile to, or debases the dignity or stature of, an individual or group of individuals.

2. Tobacco and Alcoholic Beverages – The mural/artwork promotes the sale or use of tobacco or tobacco-related products or alcoholic beverages.
3. Violence – The mural/artwork contains an image or description of graphic violence, including but not limited to (1) the depiction of human or animal bodies, body parts or fetuses, in states of mutilation, dismemberment, decomposition or disfigurement, or (2) the depiction of weapons or other implements or devices used in the mural in an act or acts of violence or harm on a person or animal.
4. Unlawful Goods or Services – The mural/artwork promotes or encourages, or appears to promote or encourage, the use or possession of unlawful or illegal goods or services.
5. Unlawful Conduct – The mural/artwork promotes or encourages, or appears to promote or encourage, unlawful or illegal behavior or activities.
6. Obscenity or Nudity – The mural/artwork contains obscene material or images of nudity. For purposes of these guidelines, the terms “obscene” and “nudity” shall have the meanings contained in Massachusetts General Laws c. 272, §31.
7. Prurient Sexual Suggestiveness – The mural/artwork contains material that describes, depicts or represents sexual activities or aspects of the human anatomy in a way that the average adult, applying contemporary community standards, would find appeals to the prurient interest of minors or adults in sex. For purposes of these guidelines, the term “minor” shall have the meaning contained in Massachusetts General Laws c. 272, §31, which is a person under eighteen years of age.
8. Political Campaign Speech – The mural/artwork contains political campaign speech. For purposes of these guidelines, the term “political campaign speech” is speech that (1) refers to a specific ballot question, initiative petition, or referendum, (2) promotes or opposes a political party for local, state, or federal election, or (3) promotes or opposes a candidate or group of candidates. For purposes of these guidelines, the term “candidate” shall include any person actively campaigning for office, any person who has filed their candidacy or declared their intent to run for office, or any person who has been reported in the mainstream media as likely to run for a particular public office.
9. Endorsement – The mural/artwork implies or declares an endorsement by MassDOT or the Commonwealth of any service, product or point of view, without prior written authorization of MassDOT.

Approval

If the applicant's proposal is approved by MassDOT, the following provisions, in addition to those set forth in 720 CMR 13.00, shall be incorporated within the Non-vehicular Access Permit for the mural/artwork:

1. The applicant shall be responsible for installation of the mural/artwork, including any traffic control required by MassDOT for the safety of workers and the traveling public during the installation process.
2. The applicant shall be responsible for future maintenance of the mural/artwork including repair of any damage, wear and tear, or defacement. Additional Non-vehicular Access Permits may be required to perform future maintenance.
3. The applicant shall be responsible for any damage caused to the structure by the mural/artwork.
4. At the discretion of the District Highway Director, the applicant shall post a Surety Bond for an amount not to exceed \$5,000.
5. The applicant shall hold MassDOT harmless for any damage caused to the mural/artwork during structural inspection or other maintenance procedures performed by MassDOT. The applicant may also be responsible for temporary removal of the mural/artwork for purposes of maintenance or inspection.
6. All work shall be subject to regular inspections or ongoing observation by the District Office. Any work determined by MassDOT to be inconsistent with the terms of the permit and policies of MassDOT shall be stopped and the permit revoked as determined in MassDOT's sole discretion.
7. The permit shall recognize an end date for the mural/artwork, at which time MassDOT may remove it due to disrepair, discoloration, fading, or any other reason. Any reapplication of the mural/artwork by the original applicant shall only be done through a new Non-vehicular Access Permit.
8. MassDOT, in its sole discretion, may remove the mural/artwork at any time and for any reason.



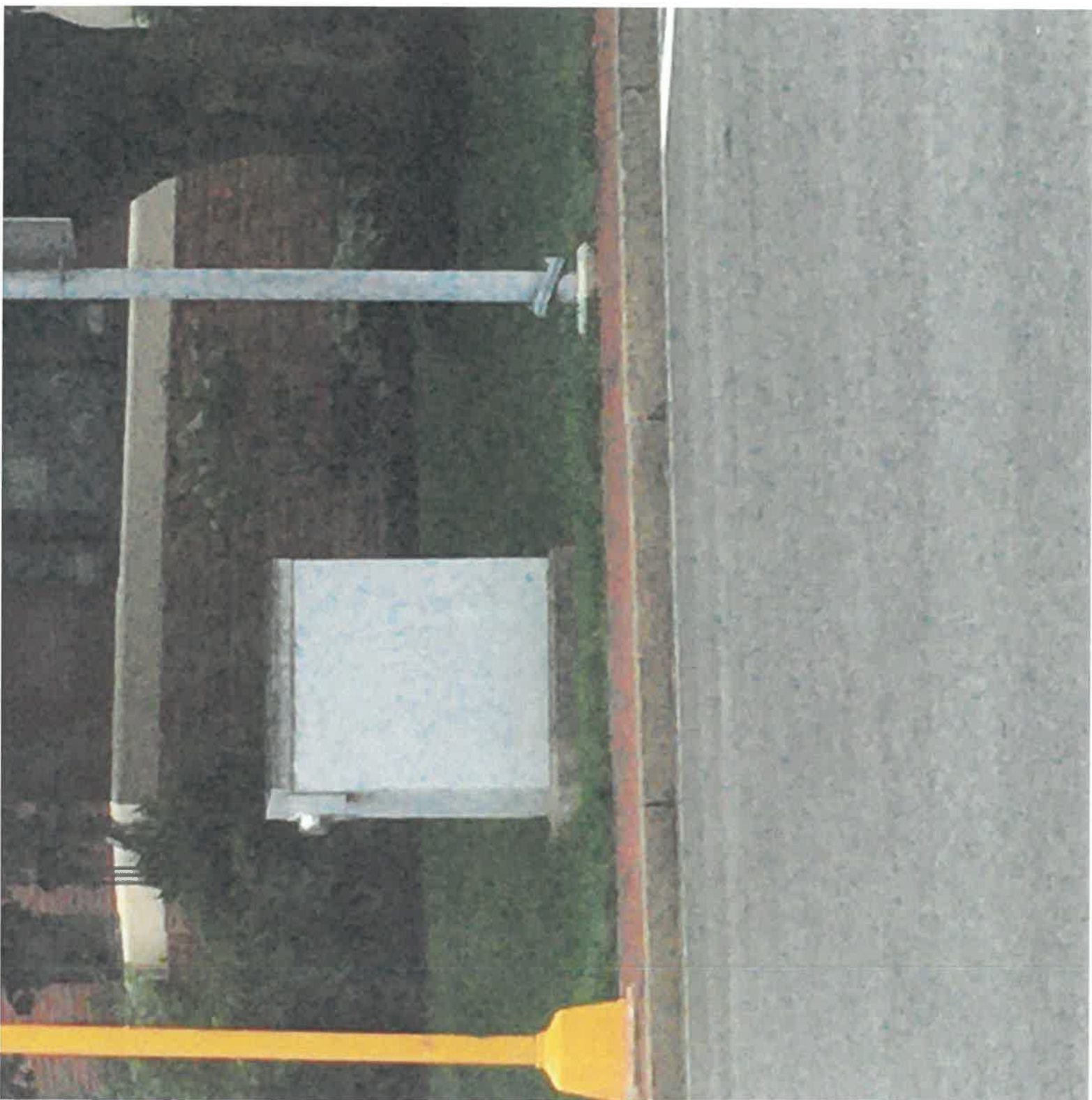
LEGEND

- SIGNAL CONTROLLER
- VEHICULAR SIGNAL
- OPTICALLY PROGRAMMED VEHICULAR SIGNAL
- FIRE PRE-EMPTION RECEIVER
- FIRE PRE-EMPTION STROBE LIGHT
- VIDEO DETECTION CAMERA
- PEDESTRIAN SIGNAL
- PEDESTRIAN PUSH BUTTON
- PULL BOX

APPROVED BY:

STATE TRAFFIC ENGINEER Date





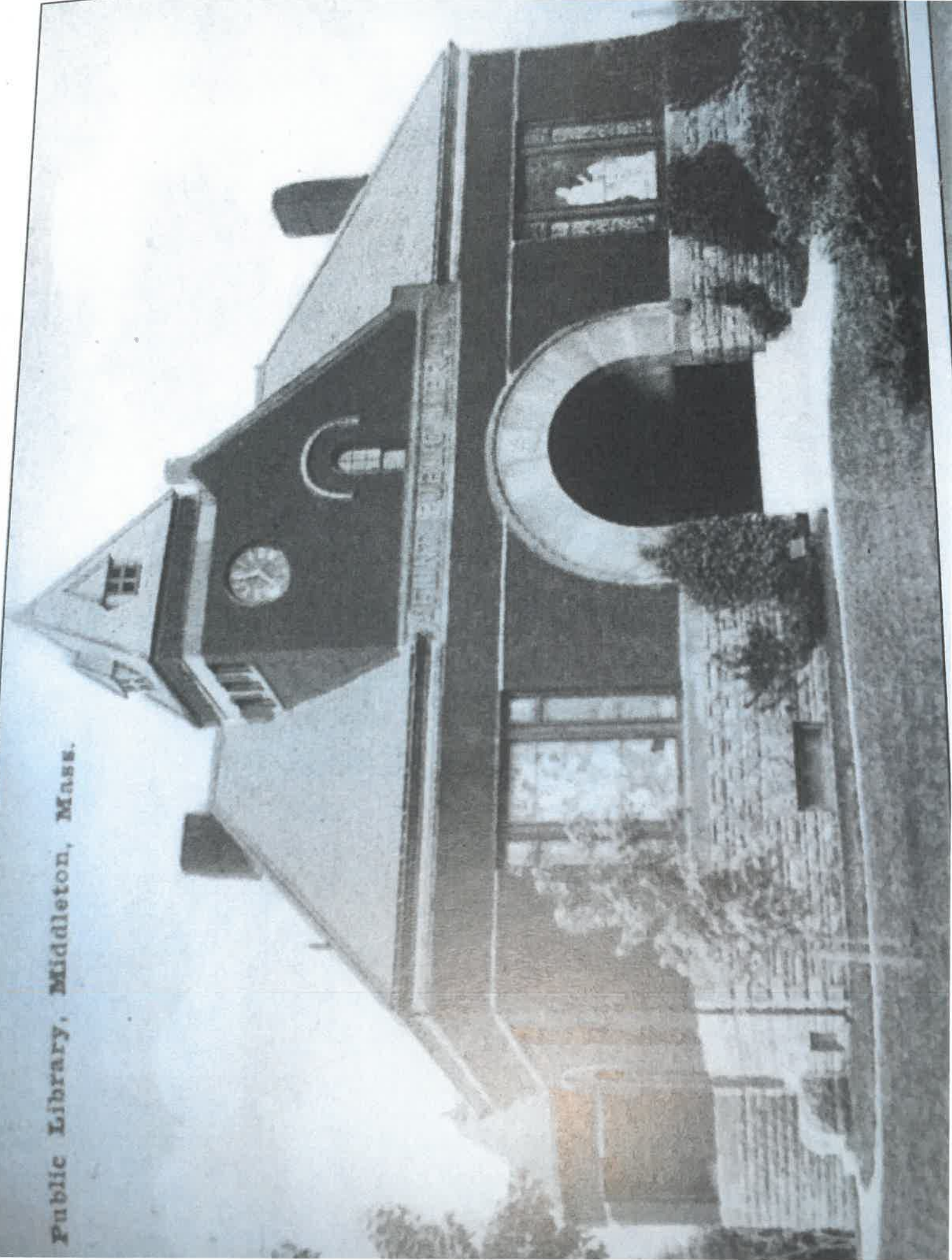


MIDDLETON SQUARE, MIDDLETON, MASS.

1905

MIDDLETON SQUARE TROLLEY, 1905. These passengers are embarking the hourly trolley.

Public Library, Middleton, Mass.





READING

MASSACHUSETTS



6.

**MEMORANDUM OF UNDERSTANDING
FOR THE ESTABLISHMENT AND MAINTENANCE OF
THE ESSEX COUNTY TRI-TOWN SHARED HEALTH INITIATIVE**

This AGREEMENT is made by and between the Massachusetts towns of Topsfield, Middleton, and Boxford (hereinafter "the Participating Municipalities" or "Municipalities") for the purpose of the establishment, operation, and maintenance of the Essex County Tri-Town Shared Health Initiative.

WHEREAS, the Participating Municipalities are to staff, maintain and operate public health departments, which are a proper governmental function and service;

WHEREAS, the Chief Executives of the Municipalities agree that they share many of the same public health challenges and could therefore benefit from collaboration in addressing those challenges;

WHEREAS, each of the Participating Municipalities has determined that it is mutually beneficial to share between them the services and costs associated with the employment of some shared public health staff and other costs to enhance public health capabilities between the municipalities to achieve the goals of the Municipalities; and,

WHEREAS, the Participating Municipalities were awarded funding to support a cross-jurisdictional public health sharing agreement from the Massachusetts Office of Local and Regional Health (hereinafter "OLRH") via RFR 214333, the Public Health Excellence Grant Program for Shared Services;

NOW, THEREFORE, BE IT RESOLVED, that the Participating Municipalities commit to sustain the Shared Health Initiative during the term of this Agreement, and to undertake the following actions to achieve said purpose:

1. The Participating Municipalities hereby establish the Essex County Tri-Town Shared Health Initiative (hereinafter "the Shared Health Initiative") for the purpose of engaging, and equipping shared public health contractors (hereinafter Shared Contractors") to provide direct public health services. Shared Contractors are to serve each of the Participating Municipalities and to fulfill their respective duties, to be found in the job or contractor descriptions in APPENDIX A.
2. The Participating Municipalities agree to develop and adopt an Annual Workplan. The Annual Workplan shall include a list of goals and priorities that the Participating Municipalities aim to accomplish in the upcoming Fiscal Year. The Annual Workplan shall also include intended efforts to be conducted by the Shared Health Initiative contractors, including proposed allotments of time, office or workspace, use of software and hardware, and communication practices. The Annual Workplan for the initial year of this agreement can be found in APPENDIX B.
3. The Participating Municipalities reserve the right to engage other outside consultants or consulting services to fulfil all or part of the goals and priorities outlined in the Annual Workplan. The procurement and contracting process must comply with M.G.L. Chapter 30B and other relevant municipal procurement statutes, thresholds, and laws. Each hired

comprehensive records of services performed, costs incurred, and reimbursements and contributions received; shall perform regular audits of such records; and will render periodic financial statements to all participants.

IN WITNESS THEREOF, the Participating Municipalities hereto have executed this Agreement on this ____ day of ____, 20__, by their duly authorized Chief Executive Officers.

SIGNATURE PAGE:

Barbara G Jessel Chair of Select Board
Name and Title

Bh Jessel
Signature

Boxford
City/Town

Name and Title

Signature

City/Town

Name and Title

Signature

City/Town

RatingsDirect®

Summary:

Middleton, Massachusetts; General Obligation

Primary Credit Analyst:

Timothy W Barrett, Washington D.C. + 1 (202) 942 8711; timothy.barrett@spglobal.com

Secondary Contact:

Victor M Medeiros, Boston + 1 (617) 530 8305; victor.medeiros@spglobal.com

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Summary:

Middleton, Massachusetts; General Obligation

Credit Profile

US\$66.135 mil GO mun purp loan ser 2021 due 12/15/2051

Long Term Rating

AA+/Stable

New

Middleton GO mun purp loan of 2020 bnds

Long Term Rating

AA+/Stable

Affirmed

Rating Action

S&P Global Ratings assigned its 'AA+' long-term rating, with a stable outlook, to the Town of Middleton, Mass.' general obligation (GO) municipal purpose loan of 2021 bonds totaling \$66.1 million and affirmed the 'AA+' rating on the town's existing GO debt.

Middleton's full-faith-and-credit pledge, subject to the limitations of Proposition 2 1/2, secures part of the bonds. We understand that the town has voted to exclude the majority of the series 2021 bonds (roughly \$60 million) from the limits imposed by Proposition 2 1/2, demonstrating management's commitment as well as voters' commitment to funding capital needs. We rate the limited-tax GO debt based on the application of our criteria "Issue Credit Ratings Linked To U.S. Public Finance Obligors' Creditworthiness," published Nov. 20, 2019. Despite commonwealth levy limit laws, we did not make a rating distinction between Middleton's limited-tax bonds and the town's general creditworthiness, because our analysis of Middleton's financial and economic conditions already includes the statutory limitation imposed on its revenue-raising ability.

The bond proceeds will be new money used to fund a variety of capital projects, including a fire and police public safety facility and community center, and a town hall building.

Credit overview

Middleton continues to maintain a strong and stable financial position, despite the recent COVID-19 pandemic, due in part to a high reliance on local property taxes (approximately 77% of general fund revenues), with historically very strong collections, which we expect will continue, and an affluent residential tax base. Further supporting the long-term rating is the town's consistent economic growth. Offsetting these strengths is the substantial increase in debt following the current issuance, as well as the potential for rising pension and other postemployment benefits (OPEB) costs, even though current retirement costs are manageable.

The long-term rating further reflects our assessment of the town's:

- Affluent local economy, which participates in the Boston-Cambridge-Newton metropolitan statistical area (MSA);
- Strong management practices and policies, with a number of formalized policies;
- Strong financial position, with maintenance of very strong reserves and a strong institutional framework score; and

- Weak debt profile following current issuance, which is large relative to budget, albeit with manageable retirement costs.

Environmental, social, and governance

We evaluated Middleton's environmental, social, and governance (ESG) risks relative to the town's economy, financial measures, management, and debt and long-term liability profile. We consider the town's social, governance, and environmental risks in line with those of peers and the sector standard. We understand the town is working on completing a municipal vulnerability plan that should be completed within the next two years, which will help the town identify and plan for various environmental concerns.

Stable Outlook

Downside scenario

We could lower the rating should a trend of weak budgetary performance, driven by long-term liabilities or any other cause, lead to a material decline in the town's available reserves.

Upside scenario

Although we do not expect to raise the rating over the outlook period, we could do so if Middleton mitigates its exposure to high debt, pension, and OPEB liabilities through substantial reserves and budgeting flexibility.

Credit Opinion

Affluent local economy participating in the Boston-Cambridge-Newton MSA

Middleton, with an estimated population of 10,411, is located in northeastern Massachusetts in Essex County within the Boston-Cambridge-Newton MSA, which we consider to be broad and diverse. The town is approximately 23 miles from Boston. Its highway and nearby commuter rail access to employment opportunities in the Boston MSA make it an attractive location for both residents and businesses.

Middleton is primarily residential, and officials report several housing projects under construction, mainly in the form of single and multifamily homes at the high end of the market. We believe the town's convenient location will remain beneficial to future tax base growth, notwithstanding risks to the near-term outlook stemming from the pandemic.

The town's local economic base features employment in trade, transportation and utilities, leisure and hospitality, and business and professional services. Middleton is also home to Essex County Correctional Facility, which is the town's largest employer, with an estimated 1,100 employees. We believe the local economy showed resilience during the pandemic, with the county's unemployment rate reaching a high of 18.1% in April 2020, then steadily improving to its current rate of just 5.7% in September 2021, which is well below national and state levels.

Strong management practices and policies with a number of formalized policies

We view the town's management as strong. Highlights of the town's policies and practices include the use of three years of trend analysis to build its budgets. Results attest to officials' conservative revenue estimates. Budget-to-actual performance is monitored regularly and reported at least quarterly to the governing body. Adjustments to spending are

made if needed to maintain budgetary balance. The town maintains a basic three-year financial projection that it updates annually as part of its budgeting process. It also has a comprehensive five-year capital plan. Middleton has a formal investment policy that mirrors state guidelines, which are conservative. The board receives quarterly reports on holdings and earnings. The town's fund balance policy is to have at least 4%-6% of current-year budgeted general fund operating expenditures in general fund stabilization and 3%-4% in the capital stabilization fund. Additionally, the town aims to have \$350,000-\$500,000 in the special education stabilization fund and at least 3% of the prior-year general fund operating expenditures in free cash. Middleton's debt management policy aims for annual debt service to be 2%-10% of current-year budgeted general fund operating expenditures.

Strong financial position with maintenance of very strong reserves

For analytical consistency, we adjusted for recurring transfers out of the general fund to the capital projects fund and other project funds. Over the past few years, the town has consistently outperformed the adopted budget. For fiscal 2020, management attributes its slight operating surpluses to a focus on conservative budgeting practices, along with numerous ongoing developments aiding in revenue growth. The town receives most of its general fund revenues from property taxes and intergovernmental aid, at 77% and 12%, respectively. The \$359,000 surplus increased the town's available general fund reserves to \$7.3 million, or 18.3% of expenditures, consisting of \$6.3 million in unassigned reserves and \$1.0 million in assigned reserves. Fiscal 2020 available reserves include \$1.5 million in general fund stabilization, which is included in the town's \$6.3 million unassigned fund balance.

For fiscal 2021, Middleton expects positive year-end results. We understand most revenues came in above budget, and that, in total, general fund revenues were \$1.2 million above budget, including a sizeable increase in building permit revenue. Expenses came in slightly under budget as a result of conservative budgeting and some expense savings related to the COVID-19 pandemic. As a result, we understand management expects positive year-end results, with an estimated \$1.6 million surplus to reserves, increasing year-end total reserves to an estimated \$9.4 million and unassigned reserves to \$7.6 million, or nearly 20% of expenses. Additionally, to date, the town has been allocated \$880,000 in Coronavirus Aid Relief and Economic Security (CARES) Act funding and \$3.0 million in American Rescue Plan Act funds, along with \$106,000 in Federal Emergency Management Agency (FEMA) reimbursements.

The town's adopted budget for 2022, totaling \$39.2 million, assumes some minor cost increases relative to the prior year. Management intends to review budget-to-actuals and make intrayear adjustments, such as using the fund balance and decreasing discretionary spending, if necessary. We believe management is taking proactive steps to insulate the town's finances from potential revenue and expenditure variances. However, we incorporated the uncertain environment into our forward-looking view of Middleton's budgetary performance.

Over the long term, we believe pension and OPEB costs could become a budgetary stress, given below-average funding ratios, limited local control, and somewhat aggressive assumptions. As long-term liability expenses increase, management is making budgetary adjustments to absorb them. Management works with health insurance consultants to find ways to lower health care costs for both active and retired employees, and reports the town's cost increases are below state averages. Middleton funds its actuarially determined contribution for pension costs, and is funding an OPEB trust. While we expect costs associated with pensions and OPEB to continue to rise, we expect the town will maintain stable operations despite the challenges.

Weak debt profile following current issuance, which is large relative to budget

Following the current \$66.1 million issuance, the town's debt figures materially increase as total direct debt outstanding increases to about \$78 million, equal to 3.5% of market value, or nearly 2.0x the town's general fund budget. Amortization of debt materially weakened, due in part to the 30-year time frame to repay the series 2021 bonds. Following the current issuance, just 31% of the town's total principal will be repaid within 10 years. However, the town indicates that, following this issuance, it will have caught up with a number of capital projects and that there are no other material capital needs at this time.

Middleton does not maintain any direct-placement debt. It does not have any variable-rate or direct-purchase debt, nor does it have any contingent liquidity risks from financial instruments with payment provisions that change on the occurrence of certain events. We note that the town has a three-year lease to own an ambulance contract, at \$121,000 a year, that matures in 2023. In our view, this lease does not have a material impact on the liquidity profile. We do not view any of the town's investments as risky. While Middleton could experience some variance in its cash on hand due to delayed collections in the current health and economic environment, we do not expect a material deterioration in its liquidity profile.

Pension and other postemployment benefits highlights:

- Despite low funding levels and our expectation of pension cost growth, we do not view retirement liabilities or costs as a credit pressure for Middleton.
- While the pension plan uses an actuarially determined contribution, we believe some of the assumptions are likely to lead to cost escalation and volatility. However, we expect costs to remain manageable.
- The town is prefunding its OPEB liability in a trust, but we believe costs and the total liability are likely to grow.

The town participates in the following retirement plans:

- Essex Regional Retirement System: 55.5% funded, with a \$21.4 million net pension liability; and
- A single-employer, defined-benefit health care plan (OPEB): 7.1% funded, with a \$17.9 million net OPEB liability.

Middleton's combined required pension and actual OPEB contributions totaled 5.5% of total governmental fund expenditures in 2020. Of that amount, 4.2% represented required contributions to pension obligations and 1.2% represented OPEB payments. The town made 100% of its annual required pension contribution in 2020. The pension plan fell short of meeting both our static and minimum funding progress metrics in the most recent year, indicating it is not making progress in addressing current costs or the unfunded liability. We believe some of the plan's assumptions may underestimate the liability and could lead to cost growth and volatility. In particular, the plan's 7.5% discount rate is high, in our opinion, and could lead to contribution volatility. However, we note that the town has set up a pension stabilization fund to prepare for and manage assessment increases, which we view positively.

The town also provides OPEB in the form of health, dental, and life insurance benefits to eligible retirees. It has established an OPEB trust fund to prefund benefits. As of June 30, 2020, the fund had an actuarial value of assets of approximately \$1.4 million, and the town had an OPEB unfunded actuarial accrued liability of \$17.9 million. Costs are funded on a pay-as-you-go basis. Given claims volatility, as well as medical cost and demographic trends, we

anticipate that costs will escalate. If pension and OPEB costs increase substantially and, in our view, pressure the budget, our assessment of Middleton's debt and contingent liability profile could weaken.

Strong institutional framework

The institutional framework score for Massachusetts municipalities is strong.

Middleton--Key Credit Metrics				
	Most recent	Historical information		
		2020	2019	2018
Very strong economy				
Projected per capita EBI % of U.S.	139			
Market value per capita (\$)	215,219			
Population		10,565	10,411	10,214
County unemployment rate(%)	9.8			
Market value (\$000)	2,273,787	2,234,132	2,097,460	
Ten largest taxpayers % of taxable value	6.8			
Strong budgetary performance				
Operating fund result % of expenditures		0.9	2.5	4.9
Total governmental fund result % of expenditures		0.8	2.6	1.1
Very strong budgetary flexibility				
Available reserves % of operating expenditures		18.3	18.3	16.1
Total available reserves (\$000)		7,309	6,959	5,913
Very strong liquidity				
Total government cash % of governmental fund expenditures		28	26	14
Total government cash % of governmental fund debt service		765	725	354
Strong management				
Financial Management Assessment	Good			
Very weak debt & long-term liabilities				
Debt service % of governmental fund expenditures		3.6	3.6	3.8
Net direct debt % of governmental fund revenue	181			
Overall net debt % of market value	3.5			
Direct debt 10-year amortization (%)	31			
Required pension contribution % of governmental fund expenditures	4.2			
OPEB actual contribution % of governmental fund expenditures	1.2			
Strong institutional framework				
EBI--Effective buying income. OPEB--Other postemployment benefits.				
Data points and ratios may reflect analytical adjustments.				

Related Research

- S&P Public Finance Local GO Criteria: How We Adjust Data For Analytic Consistency, Sept. 12, 2013

- Criteria Guidance: Assessing U.S. Public Finance Pension And Other Postemployment Obligations For GO Debt, Local Government GO Ratings, And State Ratings, Oct. 7, 2019
- Through The ESG Lens 2.0: A Deeper Dive Into U.S. Public Finance Credit Factors, April 28, 2020

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Town of Middleton
48 South Main Street
Board of Assessors
Middleton, Massachusetts
01949-2253
978-774-2099
www.townofmiddleton.org

9.

November 30, 2021

Middleton Select Board
Town of Middleton
48 South Main Street
Middleton, MA 01949

Re: FY 2022 Property Tax Classification Hearing and Departmental Report for the Selectmen

Dear Select Board Members:

The Assessors are pleased to submit documentation for the Property Tax Classification Hearing for FY 2022. Please see the attached informational packet. The Selectmen must vote annually on these questions in order to complete the tax rate setting process. I have also included my annual statistical report.

I would now like the opportunity to update the Board of Selectmen on the Assessors department:

FY2022 started in the middle of the COVID – 19 pandemic. Despite the crisis we were able to conduct a larger than usual cyclical data collection program utilizing our new appointee and an independent contractor.

During this quinquennial certification, sales and other market data from calendar 2020 were utilized to determine values. Middleton mirrored other communities in a strong sales market resulting in an overall increase of 7.8 % in the single-family class and an 8.5% increase in the condominium class. Our assessment to sale ratio (ASR) is 96% for single-family properties and 96% for condominiums. All other statistics meet the requirements of the Bureau of Local Assessment.

The average single-family tax bill increase of \$363.44 is based on the projected tax rate of \$13.27.

The average condominium tax bill will increase by \$190.04 using the same rate.

Please see the attached annual statistics for further information.



Town of Middleton
48 South Main Street
Board of Assessors
Middleton, Massachusetts
01949-2253
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www.townofmiddleton.org

In the Tri-Town comparison, Middleton still has a lower average tax bill than the other two towns:

Community	Average Single Family Home 2022	FY22 Tax Rate	Average Tax Bill FY 2022	Average Tax Bill increase
Middleton	\$ 689,094	\$ 13.27	\$ 9,144	\$ 363
Topsfield	\$ 684,560	\$ 16.65	\$ 11,398	\$ 434
Boxford	\$ 738,641	\$ 15.22	\$ 11,242	\$ 304

Middleton maintains a slightly higher average value than Topsfield, but retains a substantially lower average tax bill than the other two towns. Boxford and Topsfield average tax bills are within \$25.


***Please note that the tax rates used are proposed rates and have not been certified by the DOR as of this date.**

This was a lesser year for growth in Middleton. New single-family homes were off slightly and condominiums represented a larger percentage of this year's growth. Commercial/Industrial/Personal growth was 31%. We anticipate a better year for FY2023.

Our department looks forward to utilizing more technology in the future to streamline many internal functions. We also continue to improve the education level of our department through coursework and continuing education seminars.

I would again like to take this opportunity to thank my outstanding staff: Therese Fontaine, Donna Peary (who left for a full-time position in Lynnfield), newcomer Jodi Fish and Board members: Deborah J. Carbone, Toulia Guarino and newly appointed Meredith Stone, all assessors in their respective communities, for their hard work and support during this past year. The Town is truly lucky to have such an experienced board. Thank you to other town departments for their cooperation.

Respectfully,


Bradford W. Swanson, M.A.A.
Assistant Assessor/Appraiser

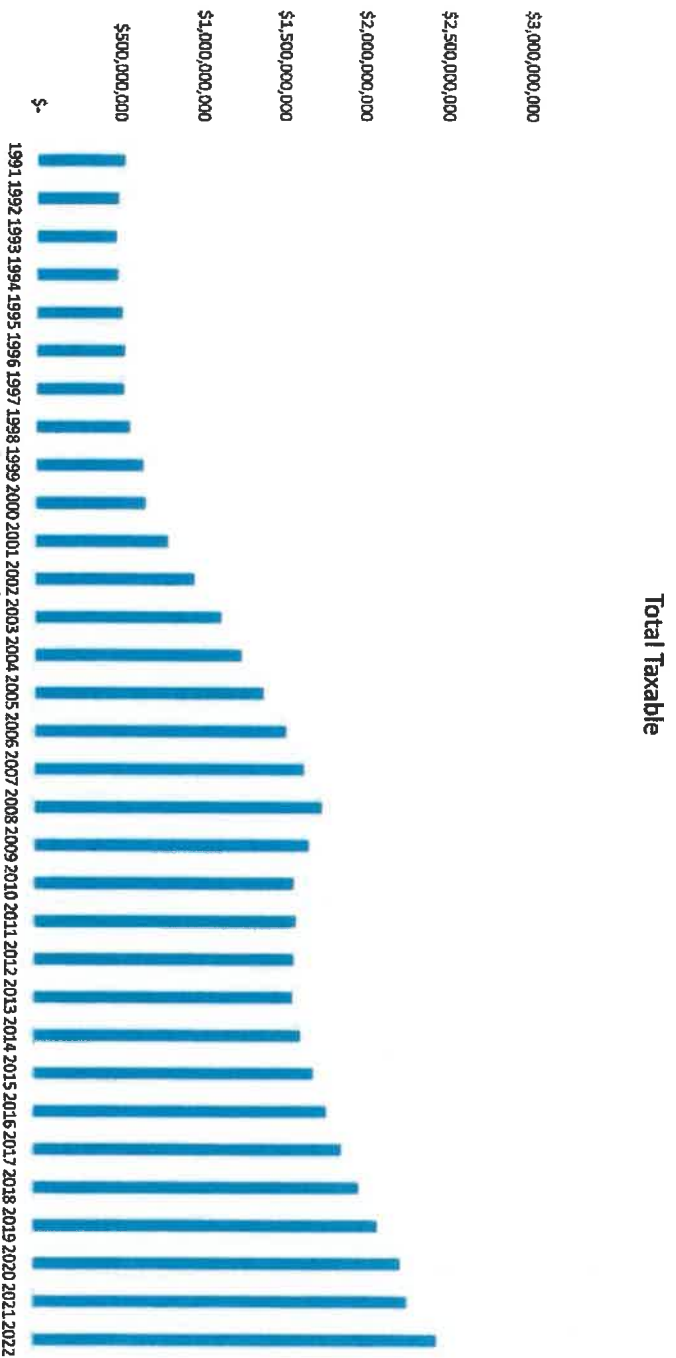
TOWN OF MIDDLETON

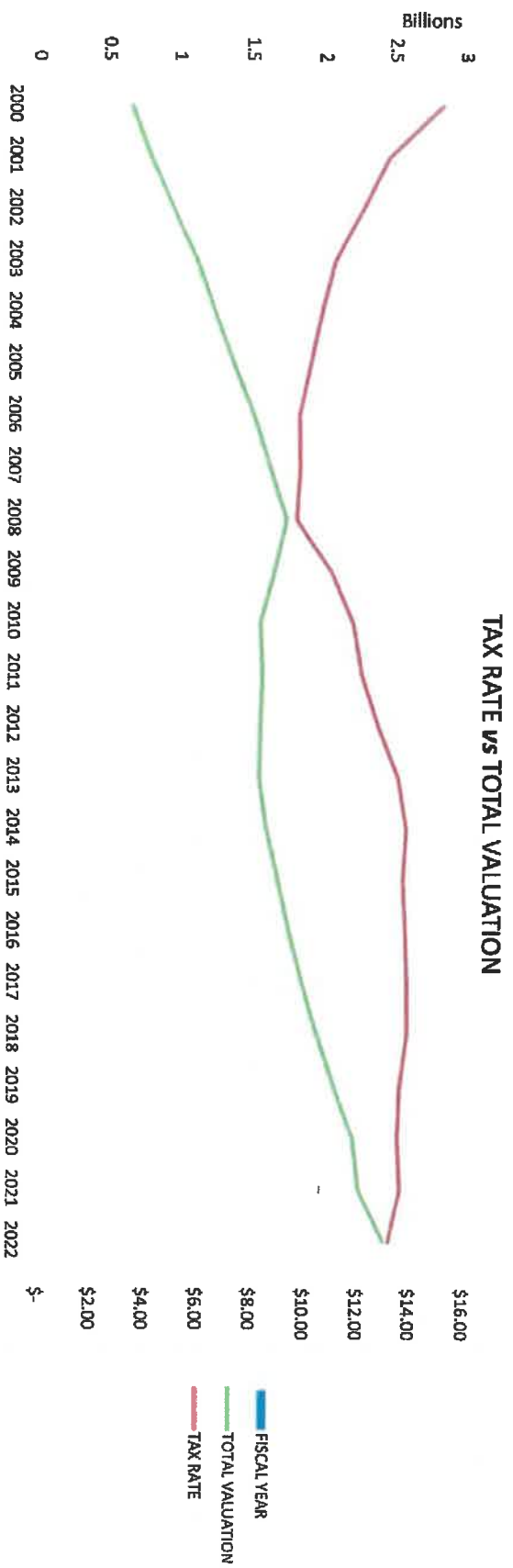
TOTAL VALUES BY CLASS HISTORICALLY

FY	Residential	Commercial	Industrial	Personal Property	Total Taxable	RES % of Total	C I P % of Total	Exempt Valuation	Total Town Valuation
1991	\$ 383,561,059	\$ 105,943,367	\$ 38,610,030	\$ 4,438,994	\$ 532,553,450	72.0	28.0		
1992	\$ 345,340,872	\$ 104,248,112	\$ 34,357,100	\$ 8,264,907	\$ 492,210,991	70.2	29.8		
1993	\$ 339,604,010	\$ 103,748,194	\$ 30,956,440	\$ 8,177,547	\$ 482,486,191	70.4	29.6		
1994	\$ 348,722,071	\$ 105,145,323	\$ 30,352,710	\$ 8,469,065	\$ 492,689,169	70.8	29.2		
1995	\$ 360,619,688	\$ 105,825,635	\$ 30,324,340	\$ 24,100,310	\$ 520,869,973	69.2	30.8		
1996	\$ 399,156,455	\$ 99,892,939	\$ 27,168,390	\$ 10,504,310	\$ 536,722,094	74.4	25.6		
1997	\$ 403,909,749	\$ 93,176,267	\$ 25,664,650	\$ 10,874,090	\$ 533,624,756	75.7	24.3		
1998	\$ 429,637,276	\$ 97,505,941	\$ 27,062,410	\$ 11,377,110	\$ 565,582,737	76.0	24.0		
1999	\$ 493,721,578	\$ 109,778,183	\$ 32,858,480	\$ 11,752,250	\$ 648,110,491	76.2	23.8		
2000	\$ 510,647,683	\$ 107,787,274	\$ 32,118,893	\$ 12,431,485	\$ 662,985,335	77.0	23.0		
2001	\$ 638,533,308	\$ 115,263,085	\$ 33,808,819	\$ 12,727,770	\$ 800,332,982	79.8	20.2	\$ 88,183,800	\$ 888,516,782
2002	\$ 776,039,716	\$ 130,673,551	\$ 38,153,810	\$ 16,510,730	\$ 961,377,807	80.7	19.3	\$ 96,153,800	\$ 1,057,531,607
2003	\$ 928,028,503	\$ 139,563,942	\$ 41,544,570	\$ 16,728,580	\$ 1,125,865,595	82.4	17.6	\$ 115,890,100	\$ 1,241,755,695
2004	\$ 1,048,574,320	\$ 141,225,273	\$ 41,732,670	\$ 19,310,250	\$ 1,250,842,513	83.8	16.2	\$ 120,575,000	\$ 1,371,417,513
2005	\$ 1,158,469,389	\$ 150,731,878	\$ 45,050,570	\$ 32,140,330	\$ 1,386,392,167	83.6	16.4	\$ 131,250,300	\$ 1,517,642,467
2006	\$ 1,302,816,103	\$ 145,008,136	\$ 45,491,130	\$ 32,681,560	\$ 1,525,996,929	85.4	14.6	\$ 135,493,300	\$ 1,661,490,229
2007	\$ 1,395,799,970	\$ 159,954,858	\$ 46,547,070	\$ 34,882,740	\$ 1,637,184,638	85.3	14.7	\$ 153,349,800	\$ 1,790,534,438
2008	\$ 1,466,783,487	\$ 191,497,302	\$ 54,237,400	\$ 37,901,380	\$ 1,750,419,569	83.8	16.2	\$ 139,258,800	\$ 1,889,678,369
2009	\$ 1,372,474,315	\$ 198,205,068	\$ 53,933,700	\$ 44,584,640	\$ 1,669,197,723	82.2	17.8	\$ 142,072,400	\$ 1,811,270,123
2010	\$ 1,268,424,640	\$ 196,849,217	\$ 59,579,100	\$ 50,591,580	\$ 1,575,444,537	80.5	19.5	\$ 128,834,800	\$ 1,704,279,337
2011	\$ 1,293,728,667	\$ 192,903,411	\$ 57,095,800	\$ 46,150,348	\$ 1,589,878,226	81.4	18.6	\$ 117,211,000	\$ 1,707,089,226
2012	\$ 1,296,726,278	\$ 177,190,183	\$ 58,113,600	\$ 46,347,793	\$ 1,578,377,854	82.2	17.8	\$ 151,017,300	\$ 1,729,395,154
2013	\$ 1,298,546,821	\$ 169,439,889	\$ 57,347,800	\$ 44,049,599	\$ 1,569,384,109	82.7	17.3	\$ 151,064,500	\$ 1,720,448,609
2014	\$ 1,339,427,196	\$ 177,093,210	\$ 57,348,600	\$ 46,806,572	\$ 1,620,675,578	82.6	17.4	\$ 162,113,000	\$ 1,782,788,578
2015	\$ 1,415,175,272	\$ 181,829,713	\$ 57,600,100	\$ 47,042,134	\$ 1,701,647,219	83.2	16.8	\$ 170,302,000	\$ 1,871,949,219
2016	\$ 1,483,941,972	\$ 187,537,809	\$ 60,162,200	\$ 47,930,565	\$ 1,779,572,546	83.4	16.6	\$ 174,841,500	\$ 1,954,414,046
2017	\$ 1,559,356,526	\$ 202,226,252	\$ 62,273,200	\$ 47,768,045	\$ 1,871,634,023	83.3	16.7	\$ 223,345,600	\$ 2,094,979,623
2018	\$ 1,644,695,469	\$ 218,433,004	\$ 70,957,400	\$ 46,394,707	\$ 1,980,480,580	83.0	17.0	\$ 227,589,100	\$ 2,208,069,680
2019	\$ 1,741,339,205	\$ 222,709,558	\$ 87,882,600	\$ 45,528,272	\$ 2,097,459,635	83.0	17.0	\$ 228,951,600	\$ 2,326,411,235
2020	\$ 1,822,954,152	\$ 244,832,278	\$ 115,611,800	\$ 50,713,687	\$ 2,224,131,917	81.6	18.4	\$ 229,479,900	\$ 2,463,611,817
2021	\$ 1,857,590,904	\$ 245,046,333	\$ 119,224,900	\$ 51,925,231	\$ 2,273,787,368	81.7	18.3	\$ 230,602,300	\$ 2,504,389,668
2022	\$ 2,005,418,967	\$ 259,982,282	\$ 132,929,800	\$ 54,846,730	\$ 2,453,177,779	81.7	18.3	\$ 238,875,800	\$ 2,692,053,579

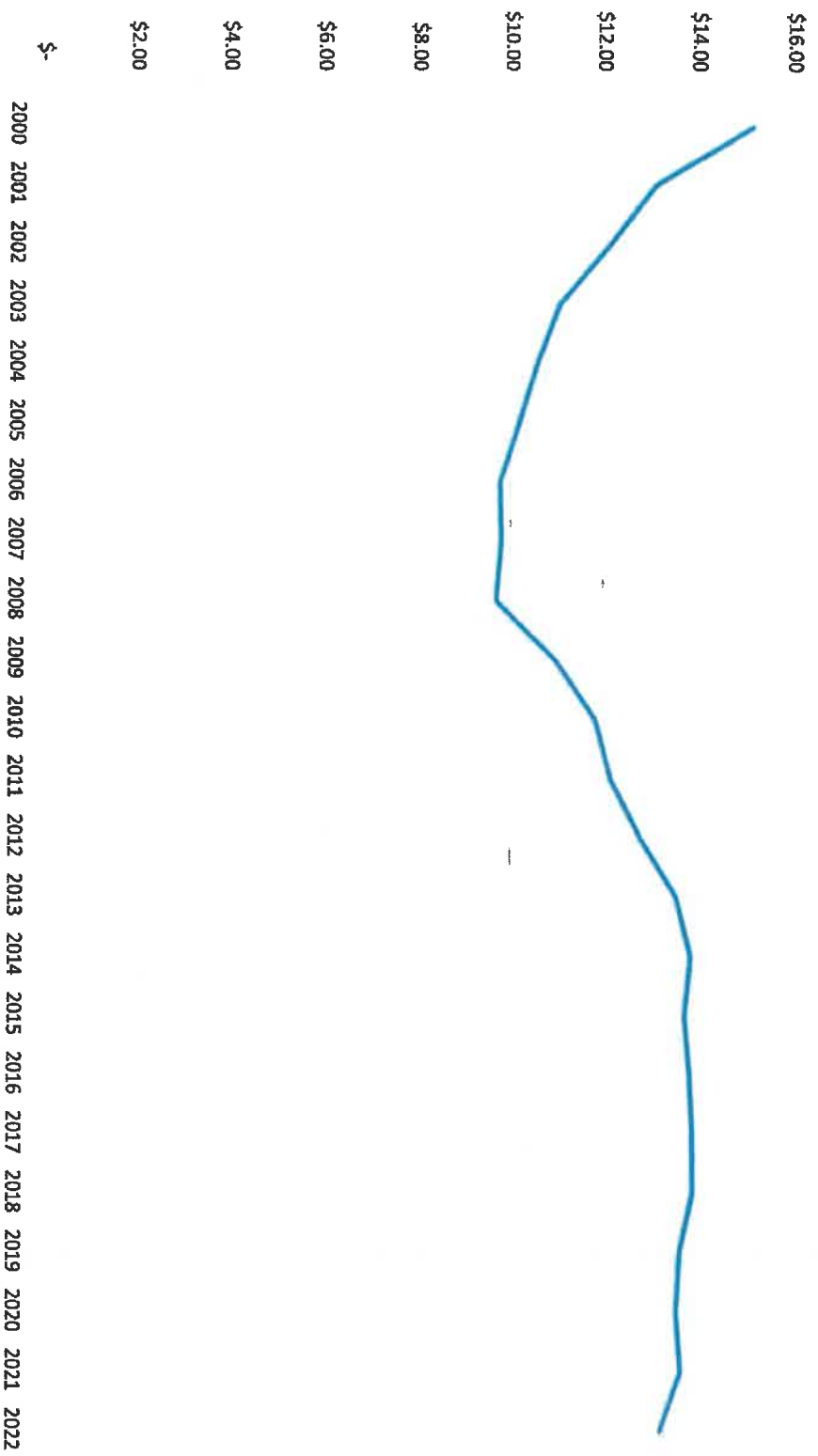
TOWN OF MIDDLETON

TOTAL VALUES BY CLASS HISTORICALLY





Middleton Tax Rates



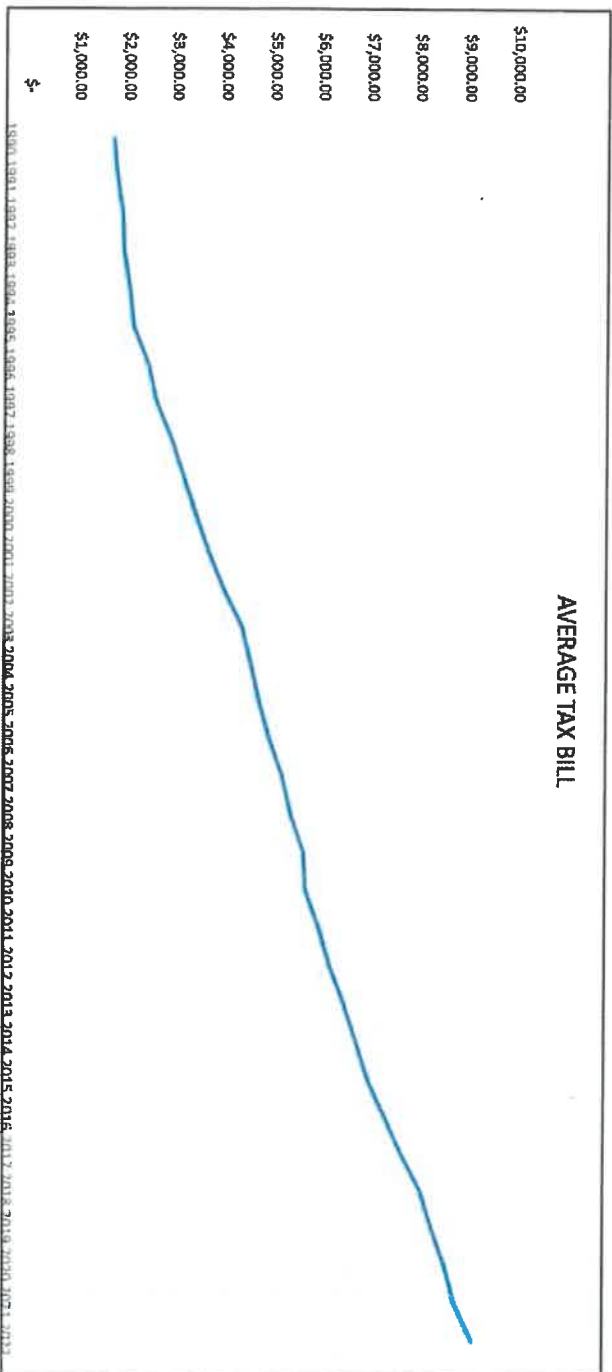
TOWN OF MIDDLETON

AVERAGE SINGLE FAMILY TAX BILL HISTORICALLY

FY	Total Assessed Value	Parcels	Average Value	% change	Tax Rate	Average Tax Bill	% change	Tax dollar change	Tax Rate Change %
1990	\$ 223,188,500	1,218	\$ 183,242	0.49%	\$ 9.18	\$ 1,682.16	7.26%	\$ 113.89	6.74%
1991	\$ 230,427,075	1,238	\$ 186,128	1.58%	\$ 9.42	\$ 1,753.33	4.23%	\$ 71.17	2.61%
1992	\$ 216,243,490	1,256	\$ 172,168	-7.50%	\$ 10.85	\$ 1,868.03	6.54%	\$ 114.70	15.18%
1993	\$ 216,669,960	1,279	\$ 169,406	-1.60%	\$ 11.16	\$ 1,890.57	1.21%	\$ 22.54	2.86%
1994	\$ 230,494,960	1,338	\$ 172,268	1.69%	\$ 11.70	\$ 2,015.54	6.61%	\$ 124.97	4.84%
1995	\$ 246,056,570	1,410	\$ 174,508	1.30%	\$ 12.00	\$ 2,094.10	3.90%	\$ 78.56	2.56%
1996	\$ 275,104,630	1,472	\$ 186,892	7.10%	\$ 12.90	\$ 2,410.90	15.13%	\$ 316.80	7.50%
1997	\$ 281,264,120	1,523	\$ 184,678	-1.18%	\$ 13.98	\$ 2,581.79	7.09%	\$ 170.89	8.37%
1998	\$ 303,952,070	1,592	\$ 190,925	3.38%	\$ 15.18	\$ 2,898.24	12.26%	\$ 316.44	8.58%
1999	\$ 353,609,170	1,625	\$ 217,606	13.97%	\$ 14.48	\$ 3,150.93	8.72%	\$ 252.69	-4.61%
2000	\$ 372,723,195	1,662	\$ 224,262	3.06%	\$ 15.14	\$ 3,395.32	7.76%	\$ 244.39	4.56%
2001	\$ 474,416,800	1,700	\$ 279,069	24.44%	\$ 13.10	\$ 3,655.80	7.67%	\$ 260.48	-13.47%
2002	\$ 565,527,100	1,728	\$ 327,273	17.27%	\$ 12.13	\$ 3,969.82	8.59%	\$ 314.02	-7.40%
2003	\$ 694,426,400	1,768	\$ 392,775	20.01%	\$ 11.06	\$ 4,344.09	9.43%	\$ 374.28	-8.82%
2004	\$ 773,648,300	1,809	\$ 427,666	8.88%	\$ 10.58	\$ 4,524.71	4.16%	\$ 180.62	-4.34%
2005	\$ 849,153,100	1,843	\$ 460,745	7.73%	\$ 10.19	\$ 4,694.99	3.76%	\$ 170.28	-3.69%
2006	\$ 938,938,300	1,870	\$ 502,106	8.98%	\$ 9.77	\$ 4,905.58	4.49%	\$ 210.58	-4.12%
2007	\$ 1,007,340,800	1,908	\$ 527,956	5.15%	\$ 9.81	\$ 5,179.25	5.58%	\$ 273.68	0.41%
2008	\$ 1,062,068,700	1,921	\$ 552,873	4.72%	\$ 9.69	\$ 5,357.34	3.44%	\$ 178.09	-1.22%
2009	\$ 991,316,600	1,934	\$ 512,573	-7.29%	\$ 10.99	\$ 5,633.18	5.15%	\$ 275.84	13.42%
2010	\$ 932,230,800	1,946	\$ 479,050	-6.54%	\$ 11.84	\$ 5,671.95	0.69%	\$ 38.77	7.73%
2011	\$ 952,586,500	1,949	\$ 488,757	2.03%	\$ 12.17	\$ 5,948.17	4.87%	\$ 276.22	2.79%
2012	\$ 944,580,300	1,962	\$ 481,437	-1.50%	\$ 12.81	\$ 6,167.21	3.68%	\$ 219.05	5.26%
2013	\$ 939,391,200	1,973	\$ 476,123	-1.10%	\$ 13.59	\$ 6,470.52	4.92%	\$ 303.30	6.09%
2014	\$ 966,055,500	1,994	\$ 484,481	1.76%	\$ 13.90	\$ 6,734.29	4.08%	\$ 263.77	2.28%
2015	\$ 1,017,513,500	2,011	\$ 505,974	4.44%	\$ 13.78	\$ 6,972.32	3.53%	\$ 238.03	-0.86%
2016	\$ 1,075,006,100	2,040	\$ 526,964	4.15%	\$ 13.89	\$ 7,319.53	4.98%	\$ 347.21	0.80%
2017	\$ 1,132,670,200	2,060	\$ 549,840	4.34%	\$ 13.95	\$ 7,670.27	4.79%	\$ 350.74	0.43%
2018	\$ 1,199,490,000	2,072	\$ 578,904	5.29%	\$ 13.96	\$ 8,081.51	5.36%	\$ 411.24	0.07%
2019	\$ 1,266,097,600	2,082	\$ 608,116	5.05%	\$ 13.69	\$ 8,325.11	3.01%	\$ 243.60	-1.93%
2020	\$ 1,317,940,900	2,091	\$ 630,292	3.65%	\$ 13.62	\$ 8,584.58	3.12%	\$ 259.47	-0.51%
2021	\$ 1,345,285,300	2,102	\$ 640,003	1.54%	\$ 13.72	\$ 8,780.83	2.29%	\$ 196.26	0.73%
2022	\$ 1,449,854,300	2,104	\$ 689,094	7.67%	\$ 13.27	\$ 9,144.28	4.14%	\$ 363.45	-3.28%

TOWN OF MIDDLETON

AVERAGE SINGLE FAMILY TAX BILL HISTORICALLY



TOWN OF MIDDLETON

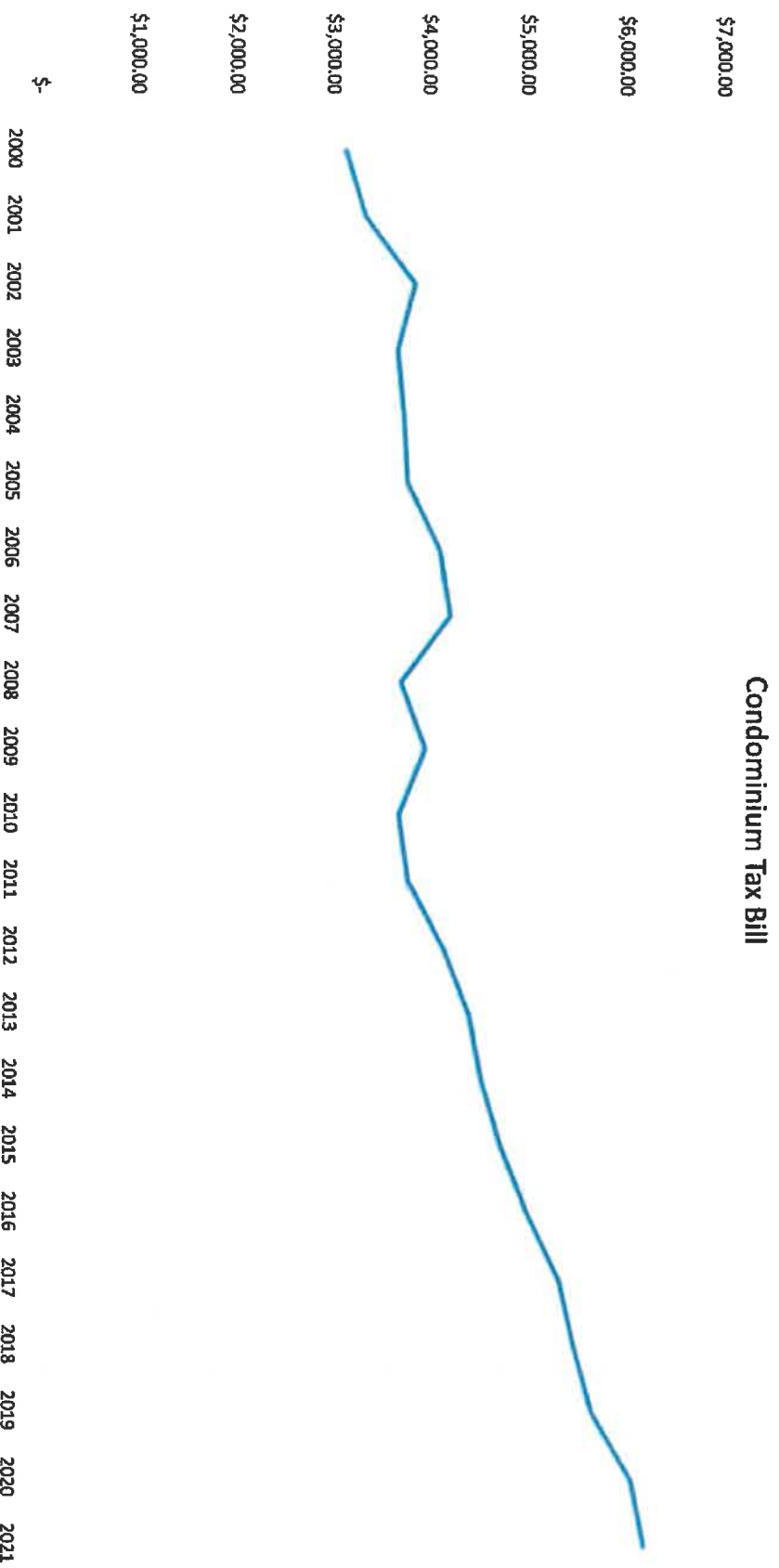
SINGLE FAMILY RANGE OF VALUES HISTORICALLY

Single Family		FY18		FY19		FY20		FY21		FY22	
Range		Number	%	Number	%	Number	%	Number	%	Number	%
\$ -	\$ 99,999	1	0.10%	1	0.05%	1	0.05%	1	0.05%	0	0.00%
\$ 100,000	\$ 199,999	0	0.00%	0	0.00%	0	0.00%	0	0.00%	1	0.05%
\$ 200,000	\$ 299,999	73	3.52%	45	2.16%	38	1.82%	26	1.24%	11	0.52%
\$ 300,000	\$ 399,999	435	20.99%	260	12.49%	235	11.24%	226	10.75%	134	6.37%
\$ 400,000	\$ 499,999	419	20.22%	505	24.26%	497	23.77%	471	22.41%	434	20.65%
\$ 500,000	\$ 599,999	261	12.60%	313	15.03%	355	16.98%	373	17.75%	361	17.17%
\$ 600,000	\$ 699,999	324	15.64%	314	15.08%	252	12.05%	286	13.61%	270	12.84%
\$ 700,000	\$ 799,999	287	13.85%	348	16.71%	308	14.73%	300	14.27%	319	15.18%
\$ 800,000	\$ 899,999	133	6.42%	137	6.58%	188	8.99%	174	8.28%	256	12.18%
\$ 900,000	\$ 999,999	57	2.75%	50	2.40%	83	3.97%	100	4.76%	120	5.71%
\$ 1,000,000	\$ 1,099,999	28	1.35%	35	1.68%	43	2.06%	40	1.90%	63	3.00%
\$ 1,100,000	\$ 1,199,999	20	0.97%	25	1.20%	20	0.96%	30	1.43%	32	1.52%
\$ 1,200,000	\$ 1,299,999	8	0.39%	15	0.72%	13	0.62%	14	0.67%	20	0.95%
\$ 1,300,000	\$ 1,399,999	7	0.34%	11	0.53%	23	1.10%	21	1.00%	18	0.86%
\$ 1,400,000	\$ 1,499,999	6	0.29%	6	0.29%	12	0.57%	11	0.52%	22	1.05%
\$ 1,500,000	\$ 1,599,999	5	0.24%	6	0.29%	11	0.53%	12	0.57%	6	0.29%
\$ 1,600,000	\$ 1,999,999	5	0.24%	8	0.38%	8	0.38%	14	0.67%	30	1.43%
\$ 2,000,000	\$ 2,999,999	3	0.14%	3	0.14%	4	0.19%	3	0.14%	5	0.24%
\$ 3,000,000		0	0.00%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
		2072	100.00%	2082	100.00%	2091	100.00%	2102	100.00%	2102	100.00%

**TOWN OF MIDDLETON
AVERAGE CONDOMINIUM TAX BILL HISTORICALLY**

FY	Total Assessed Value	Parcels	Average Value	Value % change	Tax Rate	Condominium Tax Bill	Tax Dollar Change	% bill change
2000	\$ 80,797,080	390	\$ 207,172		\$ 15.14	\$ 3,136.58		
2001	\$ 99,945,400	391	\$ 255,615	23.38%	\$ 13.10	\$ 3,348.55	\$ 211.97	7%
2002	\$ 129,073,900	405	\$ 318,701	24.68%	\$ 12.13	\$ 3,865.84	\$ 517.29	15%
2003	\$ 135,206,300	405	\$ 333,843	4.75%	\$ 11.06	\$ 3,692.30	\$ (173.54)	-4%
2004	\$ 156,870,800	441	\$ 355,716	6.55%	\$ 10.58	\$ 3,763.48	\$ 71.18	2%
2005	\$ 172,028,400	461	\$ 373,164	4.90%	\$ 10.19	\$ 3,802.54	\$ 39.06	1%
2006	\$ 210,937,200	498	\$ 423,569	13.51%	\$ 9.77	\$ 4,138.27	\$ 335.73	9%
2007	\$ 266,538,400	615	\$ 433,396	2.32%	\$ 9.81	\$ 4,251.61	\$ 113.35	3%
2008	\$ 279,522,300	723	\$ 386,615	-10.79%	\$ 9.69	\$ 3,746.29	\$ (505.32)	-12%
2009	\$ 265,055,044	729	\$ 363,587	-5.96%	\$ 10.99	\$ 3,995.82	\$ 249.53	7%
2010	\$ 232,015,241	737	\$ 314,810	-13.42%	\$ 11.84	\$ 3,727.35	\$ (268.47)	-7%
2011	\$ 238,042,684	757	\$ 314,455	-0.11%	\$ 12.17	\$ 3,826.92	\$ 99.57	3%
2012	\$ 252,582,516	773	\$ 326,756	3.91%	\$ 12.81	\$ 4,185.75	\$ 358.83	9%
2013	\$ 260,502,427	795	\$ 327,676	0.28%	\$ 13.59	\$ 4,453.12	\$ 267.37	6%
2014	\$ 270,968,527	822	\$ 329,645	0.60%	\$ 13.90	\$ 4,582.07	\$ 128.95	3%
2015	\$ 291,257,466	839	\$ 347,148	5.31%	\$ 13.78	\$ 4,783.70	\$ 201.63	4%
2016	\$ 305,591,746	841	\$ 363,367	4.67%	\$ 13.89	\$ 5,047.17	\$ 263.46	6%
2017	\$ 326,600,946	847	\$ 385,597	6.12%	\$ 13.95	\$ 5,379.08	\$ 331.91	7%
2018	\$ 345,396,648	871	\$ 396,552	2.84%	\$ 13.96	\$ 5,535.86	\$ 156.78	3%
2019	\$ 368,109,264	880	\$ 418,306	5.49%	\$ 13.69	\$ 5,726.61	\$ 190.75	3%
2020	\$ 406,662,818	904	\$ 449,848	7.54%	\$ 13.62	\$ 6,126.93	\$ 400.32	7%
2021	\$ 414,927,511	909	\$ 456,466	1.47%	\$ 13.72	\$ 6,262.71	\$ 135.78	2%
2022	\$ 450,282,774	926	\$ 486,266	6.53%	\$ 13.27	\$ 6,452.76	\$ 190.04	3%

**TOWN OF MIDDLETON
AVERAGE CONDOMINIUM TAX BILL HISTORICALLY**



TOWN OF MIDDLETON

CONDOMINIUM RANGE OF VALUES HISTORICALLY

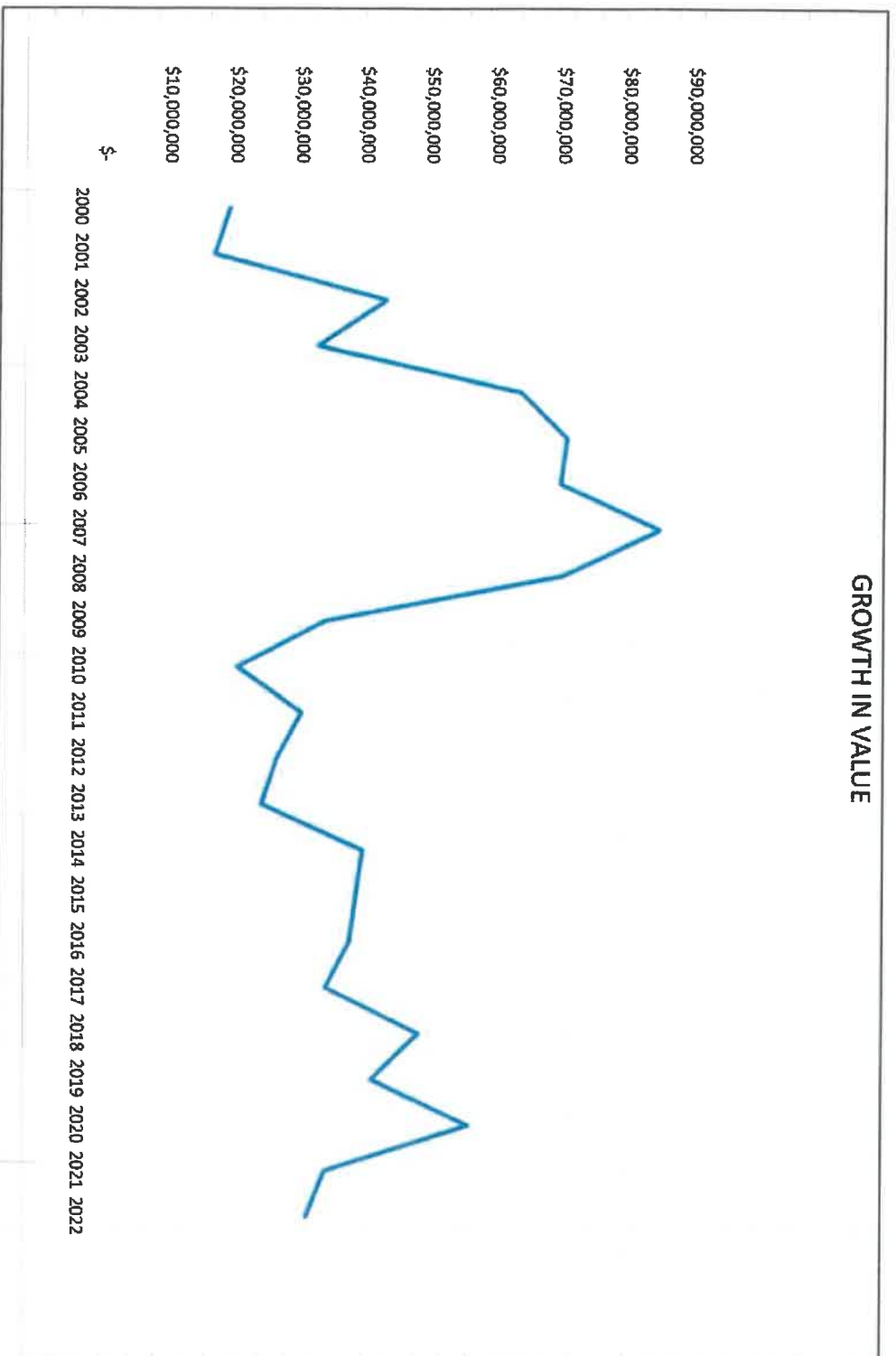
Condominium	FY18		FY19		FY20		FY21		FY22		
Range	Number	%	Number	%	Number	%	Number	%	Number	%	
\$ -	\$ 99,999	2	0.23%	0	0.00%	0	0.00%	0	0.00%	0	0.00%
\$ 100,000	\$ 199,999	10	1.15%	14	1.59%	11	1.22%	11	1.21%	8	0.86%
\$ 200,000	\$ 299,999	258	29.69%	200	22.73%	117	12.94%	105	11.55%	73	7.88%
\$ 300,000	\$ 399,999	207	23.82%	220	25.00%	291	32.19%	299	32.89%	209	22.57%
\$ 400,000	\$ 499,999	205	23.59%	212	24.09%	164	18.14%	167	18.37%	252	27.21%
\$ 500,000	\$ 599,999	112	12.89%	146	16.59%	207	22.90%	197	21.67%	221	23.87%
\$ 600,000	\$ 699,999	45	5.18%	33	3.75%	41	4.54%	57	6.27%	72	7.78%
\$ 700,000	\$ 799,999	26	2.99%	50	5.68%	51	5.64%	49	5.39%	57	6.16%
\$ 800,000	\$ 899,999	4	0.46%	5	0.57%	13	1.44%	15	1.65%	22	2.38%
\$ 900,000	\$ 999,999	0	0.00%	0	0.00%	1	0.11%	1	0.11%	4	0.43%
\$ 1,000,000	\$ 1,300,000	0		0		8	1%	8	1%	8	1%
		869	100.00%	880	100.00%	904	100.00%	909	100.00%	926	100.00%

TOWN OF MIDDLETON ANNUAL GROWTH COMPARISON

FISCAL YEAR	GROWTH IN VALUE	RES %	CIP %	RES. GROWTH DOLLARS	C.I.P. GROWTH DOLLARS	GROWTH IN TAX DOLLARS	% FROM PREV. YR
2000	\$ 19,007,843	88.53%	11.47%	\$ 243,677.71	\$ 31,555.86	\$ 275,234	
2001	\$ 16,712,583	94.75%	5.25%	\$ 239,737.55	\$ 13,290.95	\$ 253,029	-8.1%
2002	\$ 43,080,111	80.54%	19.46%	\$ 454,512.39	\$ 109,837.07	\$ 564,349	123.0%
2003	\$ 32,539,120	88.22%	11.78%	\$ 348,209.85	\$ 46,489.68	\$ 394,700	-30.1%
2004	\$ 63,586,770	84.44%	15.56%	\$ 593,867.81	\$ 109,401.87	\$ 703,270	78.2%
2005	\$ 70,637,983	64.71%	35.29%	\$ 483,595.56	\$ 263,754.30	\$ 747,350	6.3%
2006	\$ 69,663,680	94.50%	5.50%	\$ 670,846.42	\$ 39,026.48	\$ 709,873	-5.0%
2007	\$ 84,770,650	87.97%	12.03%	\$ 728,549.88	\$ 99,659.37	\$ 828,209	16.7%
2008	\$ 70,041,297	63.19%	36.81%	\$ 434,198.45	\$ 252,906.68	\$ 687,105	-17.0%
2009	\$ 33,724,530	54.38%	45.62%	\$ 177,696.62	\$ 149,094.08	\$ 326,791	-52.4%
2010	\$ 20,427,997	55.84%	44.16%	\$ 125,351.91	\$ 99,151.78	\$ 224,504	-31.3%
2011	\$ 30,206,572	80.27%	19.73%	\$ 287,067.04	\$ 70,578.77	\$ 357,646	59.3%
2012	\$ 26,403,375	66.55%	33.45%	\$ 213,834.38	\$ 107,494.69	\$ 321,329	-10.2%
2013	\$ 24,079,969	93.36%	6.64%	\$ 287,989.44	\$ 20,474.97	\$ 308,464	-4.0%
2014	\$ 39,604,506	84.43%	15.57%	\$ 454,401.08	\$ 83,824.15	\$ 538,225	74.5%
2015	\$ 38,652,728	84.53%	15.47%	\$ 454,152.78	\$ 83,120.14	\$ 537,273	-0.2%
2016	\$ 37,722,469	63.09%	36.91%	\$ 327,930.71	\$ 191,884.92	\$ 519,816	-3.2%
2017	\$ 34,000,021	58.84%	41.16%	\$ 277,866.67	\$ 194,393.62	\$ 472,260	-9.1%
2018	\$ 48,215,287	60.22%	39.78%	\$ 405,072.41	\$ 267,530.84	\$ 672,603	42.4%
2019	\$ 41,037,699	61.10%	38.90%	\$ 350,056.87	\$ 222,829.41	\$ 572,886	-14.8%
2020	\$ 55,842,065	49.33%	50.67%	\$ 377,095.16	\$ 387,382.71	\$ 764,478	33.4%
2021	\$ 33,934,943	73.81%	26.19%	\$ 341,149.67	\$ 121,044.25	\$ 462,194	-39.5%
2022	\$ 31,103,749	68.82%	31.18%	\$ 293,667.00	\$ 133,077.00	\$ 426,743	-7.7%
AVERAGE	\$ 42,205,760	75.47%	24.53%	\$ 377,930.78	\$ 122,814.98	\$ 500,746	11%

City	State	Year	Population	Area (sq. mi.)	Density (per sq. mi.)	Water (sq. mi.)	Land (sq. mi.)	Total (sq. mi.)	Water (%)	Land (%)	Total (%)
Albany	NY	1990	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2000	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2010	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2020	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2030	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2040	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2050	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2060	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2070	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2080	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2090	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2100	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2110	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2120	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2130	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2140	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2150	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2160	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2170	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2180	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2190	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2200	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2210	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2220	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2230	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2240	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2250	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2260	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2270	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2280	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2290	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2300	20,000	1.0	20,000	0.1	0.9	1.0	10.0	1.0	10.0
Albany	NY	2310	20,000	1.0	20,000						

TOWN OF MIDDLETON ANNUAL GROWTH COMPARISON



**Town of Middleton
Property Tax Classification Hearing
Presentation and Information
Fiscal Year 2022**



Tuesday November 30, 2021

Prepared by the Board of Assessors

**Deborah J. Carbone M.A.A. – Chair
Toula Guarino M.A.A. - Clerk
Meredith Stone M.A.A.**

**Bradford W. Swanson M.A.A.
Assistant Assessor**

**Therese A. Fontaine M.A.A.
Administrative Assessor**

**Jodi Fish
P/T Assessing Clerk/Data Collector**

1 **Tax rate used is not final. It is a rough estimate for Classification purposes only.*

This information is intended to provide the Board of Selectmen with the necessary information to conduct a Public Hearing on the tax classification options available under the Massachusetts General Laws.

During the Commonwealth mandated Classification Hearing, the Board of Selectmen must vote on the following in order to establish a tax rate:

- 1. Open Space Discount**
- 2. Residential Exemption**
- 3. Small Commercial Exemption**
- 4. Classification (shift of tax rate)**

1. OPEN SPACE DISCOUNT:

Open space is land maintained in an open or natural condition which contributes significantly to the benefit and enjoyment of the public and which is not:

- **subject to a permanent conservation restriction;**
- **held for the production of income;**
- **taxable under the provisions of:**
 - **Chapter 61 (forestry)**
 - **Chapter 61A (agricultural land)**
 - **Chapter 61B (recreation land)**

The Board of Selectmen may discount up to 25% of the Open Space share of taxes.

Of the 351 municipalities in Massachusetts, 19 classify property as Open Space (2 with a discount).

Ashland	Erving	New Ashford	South Hadley
Bedford	Falmouth	Newburyport	Sturbridge
Berlin	Leominster	Norfolk	Whately
Beverly	Mashpee	Paxton	Winthrop
Dennis	Nantucket	Rowley	

The Board of Assessors has determined that Middleton does not have any Open Space land. Most large parcels are in a Chapter program.

2. RESIDENTIAL EXEMPTION:

The Board of Selectmen may adopt an exemption of up to 35% to shift the Residential Class tax burden from lower assessed properties that are the principal residence of a taxpayer to higher assessed properties and properties that are not the principal residence of a taxpayer.

RESIDENTIAL CLASS VALUE	\$	2,005,418,967
PARCELS		3,379
AVERAGE	\$	593,495
EXEMPTION %		20%
EXEMPT VALUE/PARCEL	\$	118,699
PARCELS		3,379
TOTAL EXMPT VALUE	\$	(401,083,793)
NEW RESDTL VALUE	\$	1,604,335,174
RESIDENTIAL TAXES	\$	26,611,910
NEW RESDTL TAX RATE	\$	16.59

EXAMPLES

ASSESSED VALUE	\$	443,495	\$	593,495	\$	743,495
TAX RATE W/O EXEMPTION	\$	13.27	\$	13.27	\$	13.27
TAXES PAID	\$	5,885.18	\$	7,875.68	\$	9,866.18
SAVINGS/COSTS	\$	(497.62)	\$	-	\$	497.63
TAXES PAID	\$	5,387.55	\$	7,875.68	\$	10,363.80
TAX RATE W/O EXEMPTION	\$	16.59	\$	16.59	\$	16.59
NEW ASSESSED VALUE	\$	324,796	\$	474,796	\$	624,796
EXEMPT VALUE/PARCEL	\$	(118,699)	\$	(118,699)	\$	(118,699)
ASSESSED VALUE	\$	443,495	\$	593,495	\$	743,495

The following eleven municipalities allow a residential exemption. Note that these communities are large cities or oceanfront communities with large rental or second homes.

Municipality	Percent Granted	Municipality	Percent Granted
BOSTON	30.00%	SOMERSET	10.00%
BROOKLINE	20.00%	SOMERVILLE	30.00%
CAMBRIDGE	30.00%	TISBURY	20.00%
CHELSEA	20.00%	WALTHAM	20.00%
MARLBOROUGH	13.00%	WATERTOWN	20.00%
NANTUCKET	20.00%		

4 **Tax rate used is not final. It is a rough estimate for Classification purposes only.*

3. SMALL COMMERCIAL EXEMPTION:

The Board of Selectmen may adopt an exemption of up to 10% to shift the Commercial Class tax burden from eligible parcels to ineligible parcels. Eligible parcels must have:

- 1. Be Class Three, Commercial, property.**
- 2. Be occupied solely by businesses with an average annual employment of 10 or under at all locations during the prior calendar year. (Assessors may determine annual employment for a sole proprietorship or partnership. For all other businesses, they must rely solely on the determination of the Director of Labor and Workplace Development.)**
- 3. Have an assessed valuation of \$1,000,000 or less before the application of the exemption.**

The following communities have adopted the exemption:

Avon Bellingham Braintree Somerset Westford

The mechanics of the Small Commercial Exemption are similar to the Residential Exemption.

An annual application process is required confirming payroll information

4. CLASSIFICATION:

An amendment to the Massachusetts Constitution endorsed by the electorate in 1978 resulted in the Classification Act. This Act requires municipalities to classify real property into one of four classes, according to use: residential, open space, commercial and industrial.

Cities and towns that are certified as assessing property at full and fair cash value may elect to shift the tax burden among the major property classes within certain limits established by law. The adoption of different rates does not change the total property tax levy; rather it determines the share of the total levy to be borne by each class.

The share of the levy raised by the commercial and industrial classes and personal property may be increased 50% as long as the residential and open space classes raise at least 65% of what they would have raised without the shift.

Of 351 municipalities in the Commonwealth, 108 (30.7%) shift the tax rate.

Of the 108, 66 (61.1%) shift over 1.50. In Essex County, the following communities shift their rate:

MUNICIPALITY	SHIFT %	MUNICIPALITY	SHIFT %
Gloucester	1.0298	Beverly	1.7354
North Andover	1.3000	Lawrence	1.7500
Lynnfield	1.3699	Methuen	1.7500
Danvers	1.4071	Peabody	1.7500
Andover	1.5900	Saugus	1.7500
Salem	1.7000	Lynn	1.7500
Swampscott	1.7000		

Please note that most of these communities are larger cities or towns and only four shift under 1.50.

The "Minimum Residential Factor" or MRF established by the Commissioner of Revenue is used to make certain that the shift of the tax burden complies with the Classification Act. If the minimum residential factor would be less than .650000, the community cannot make the maximum shift and must use a CIP factor less than 1.50.

In Middleton, The Select Board may shift the Town's tax burden from the Residential Class to the Commercial, Industrial and Personal Property Classes as long as the shift does not exceed the Minimum Residential Factor (MRF). Middleton's Minimum Residential Factor is 88.83 %.

The following pages contain information on the development of the Minimum Residential Factor (MRF) and on the impact of any shift of the tax rate:

TAX RATE SHIFT IMPLICATIONS

RATE SHIFT	RES RATE	CIP RATE	RESIDENTIAL VALUATION	TAX SAVINGS	COMM/IND/PP VALUE	TAX INCREASE
1.0000	\$ 13.27	\$ 13.27	\$ 262,000	\$ -	\$ 151,400	\$ -
1.1000	\$ 12.97	\$ 14.60	\$ 262,000	\$ (79)	\$ 151,400	\$ 201
1.2000	\$ 12.68	\$ 15.92	\$ 262,000	\$ (155)	\$ 151,400	\$ 401
1.3000	\$ 12.38	\$ 17.25	\$ 262,000	\$ (233)	\$ 151,400	\$ 603
1.4000	\$ 12.08	\$ 18.58	\$ 262,000	\$ (312)	\$ 151,400	\$ 804
1.5000	\$ 11.79	\$ 19.91	\$ 262,000	\$ (388)	\$ 151,400	\$ 1,005

LOWEST RESIDENTIAL VALUE VS LOWEST C & I VALUE

RATE SHIFT	RES RATE	CIP RATE	RESIDENTIAL VALUATION	TAX SAVINGS	COMM/IND/PP VALUE	TAX INCREASE
1.0000	\$ 13.27	\$ 13.27	\$ 689,094	\$ -	\$ 758,913	\$ -
1.1000	\$ 12.97	\$ 14.60	\$ 689,094	\$ (207)	\$ 758,913	\$ 1,009
1.2000	\$ 12.68	\$ 15.92	\$ 689,094	\$ (407)	\$ 758,913	\$ 2,011
1.3000	\$ 12.38	\$ 17.25	\$ 689,094	\$ (613)	\$ 758,913	\$ 3,020
1.4000	\$ 12.08	\$ 18.58	\$ 689,094	\$ (820)	\$ 758,913	\$ 4,030
1.5000	\$ 11.79	\$ 19.91	\$ 689,094	\$ (1,020)	\$ 758,913	\$ 5,039

AVERAGE RESIDENTIAL VALUE VS AVERAGE C.I.P. VALUE

RATE SHIFT	RES RATE	CIP RATE	RESIDENTIAL VALUATION	TAX SAVINGS	COMM/IND/PP VALUE	TAX INCREASE
1.0000	\$ 13.27	\$ 13.27	\$ 2,571,100	\$ -	\$ 26,102,400	\$ -
1.1000	\$ 12.97	\$ 14.60	\$ 2,571,100	\$ (771)	\$ 26,102,400	\$ 34,716
1.2000	\$ 12.68	\$ 15.92	\$ 2,571,100	\$ (1,517)	\$ 26,102,400	\$ 69,171
1.3000	\$ 12.38	\$ 17.25	\$ 2,571,100	\$ (2,288)	\$ 26,102,400	\$ 103,888
1.4000	\$ 12.08	\$ 18.58	\$ 2,571,100	\$ (3,060)	\$ 26,102,400	\$ 138,604
1.5000	\$ 11.79	\$ 19.91	\$ 2,571,100	\$ (3,805)	\$ 26,102,400	\$ 173,320

HIGHEST RESIDENTIAL VALUE VS HIGHEST C/I VALUE

Town of Middleton

Classification Hearing

CLASS	VALUE	PERCENT	RATE 100%	RATE 110%	RATE 125%	RATE 150%	TAXES PAID 100%	TAXES PAID 110%	TAXES PAID 125%	TAXES PAID 150%
1. RESIDENTIAL	\$ 2,005,418,967	81.75%	13.27	12.97	12.53	11.79	\$ 26,611,910	\$ 26,017,734	\$ 25,128,470	\$ 23,641,030
2. OPEN SPACE	\$ -	0.00%	13.27	14.60	16.59	19.91	\$ -	\$ -	\$ -	\$ -
3. COMMERCIAL	\$ 259,982,282	10.60%	13.27	14.60	16.59	19.91	\$ 3,449,965	\$ 3,794,961	\$ 4,312,456	\$ 5,174,947
4. INDUSTRIAL	\$ 132,929,800	5.42%	13.27	14.60	16.59	19.91	\$ 1,763,978	\$ 1,940,376	\$ 2,204,973	\$ 2,645,968
5. PERSONAL	\$ 54,846,730	2.24%	13.27	14.60	16.59	19.91	\$ 727,816	\$ 800,598	\$ 909,770	\$ 1,091,724
	\$ 2,453,177,779	100.00%					\$ 32,553,669	\$ 1,623,604	\$ 32,553,669	\$ 32,553,669

CLASS	PARCELS	AVE VALUE	RATE 100%	RATE 110%	RATE 125%	RATE 150%	AVE TAXES PAID @ 100%	AVE TAXES PAID @ 110%	AVE TAXES PAID @ 125%	AVE TAXES PAID @ 150%
1. RESIDENTIAL	3379	\$ 593,495	13.27	12.97	12.53	11.79	\$ 7,876	\$ 7,700	\$ 7,436	\$ 6,986
2. OPEN SPACE	0	\$ -	13.27	14.60	16.59	19.91	\$ -	\$ -	\$ -	\$ -
3. COMMERCIAL	180	\$ 1,444,346	13.27	14.60	16.59	19.91	\$ 19,166	\$ 21,083	\$ 23,958	\$ 28,750
4. INDUSTRIAL	80	\$ 1,661,623	13.27	14.60	16.59	19.91	\$ 22,050	\$ 24,255	\$ 27,562	\$ 33,075
5. PERSONAL	314	\$ 174,671	13.27	14.60	16.59	19.91	\$ 2,318	\$ 2,550	\$ 2,897	\$ 3,477
AVERAGE SINGLE FAMILY HOUSE TAX SAVINGS @ CLASSIFIED RATE		\$ 689,094	13.27	12.97	12.53	11.79	\$ 9,144	\$ (204)	\$ 8,634	\$ 8,123 (1,021)
TAX COSTS @ CLASSIFIED RATE AVERAGE C&I PROPERTY		\$ 1,511,200	13.27	14.60	16.59	19.91	\$ 20,054	\$ 22,069	\$ 25,067	\$ 30,080 10,027

*Tax Rate is for Classification purposes only. Growth and final values not yet certified by D.O.R.

11/24/2021

Be included in this section b



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

10.

APPLICATION FOR A TRANSFER OF LICENSE

Municipality

1. TRANSACTION INFORMATION

- ☒ Transfer of License
☐ Alteration of Premises
☐ Change of Location
☐ Management/Operating Agreement
- ☐ Pledge of Inventory
☒ Pledge of License
☐ Pledge of Stock
☐ Other
- ☐ Change of Class
☐ Change of Category
☐ Change of License Type
(\$12 ONLY, e.g. "club" to "restaurant")

Please provide a narrative overview of the transaction(s) being applied for. On-premises applicants should also provide a description of the intended theme or concept of the business operation. Attach additional pages, if necessary.

Full service Italian restaurant and eatery

2. LICENSE CLASSIFICATION INFORMATION

ON/OFF-PREMISES

On-Premises-12

TYPE

\$12 Restaurant

CATEGORY

All Alcoholic Beverages

CLASS

Annual

3. BUSINESS ENTITY INFORMATION

The entity that will be issued the license and have operational control of the premises.

Current or Seller's License Number

FEIN

Entity Name

DBA

Manager of Record

Street Address

Phone

Email

Add'l Phone

Website

4. DESCRIPTION OF PREMISES

Please provide a complete description of the premises to be licensed, including the number of floors, number of rooms on each floor, any outdoor areas to be included in the licensed area, and total square footage. If this application alters the current premises, provide the specific changes from the last approved description. You must also submit a floor plan.

Location of space is 119 South Main Street, Middleton Massachusetts, 01949 consisting of 3,300 of restaurant space located at ground level.

Total Sq. Footage

Seating Capacity

Occupancy Number

Number of Entrances

Number of Exits

Number of Floors

APPLICATION FOR A TRANSFER OF LICENSE

5. CURRENT OFFICERS, STOCK OR OWNERSHIP INTEREST

Transferor Entity Name By what means is the license being transferred?

List the individuals and entities of the current ownership. Attach additional pages if necessary utilizing the format below.

Name of Principal	Title/Position	Percentage of Ownership
<input type="text" value="MARK MCDONOUGH"/>	<input type="text" value="PRESIDENT"/>	<input type="text" value="100"/>
<input type="text" value="MARK MCDONOUGH"/>	<input type="text" value="TREASURER"/>	<input type="text"/>
<input type="text" value="MARK MCDONOUGH"/>	<input type="text" value="SECRETARY"/>	<input type="text"/>
<input type="text" value="MARK MCDONOUGH"/>	<input type="text" value="VICE PRESIDENT"/>	<input type="text"/>
<input type="text" value="MARK MCDONOUGH"/>	<input type="text" value="DIRECTOR"/>	<input type="text"/>

6. PROPOSED OFFICERS, STOCK OR OWNERSHIP INTEREST

List all individuals or entities that will have a direct or indirect, beneficial or financial interest in this license (E.g. Stockholders, Officers, Directors, LLC Managers, LLC Members, LLP Partners, Trustees etc.). Attach additional page(s) provided, if necessary, utilizing Addendum A.

- The individuals and titles listed in this section must be identical to those filed with the Massachusetts Secretary of State.
- The individuals identified in this section, as well as the proposed Manager of Record, must complete a CORI Release Form.
- Please note the following statutory requirements for Directors and LLC Managers:
On Premises (E.g. Restaurant/ Club/Hotel) Directors or LLC Managers - At least 50% must be US citizens;
Off Premises (Liquor Store) Directors or LLC Managers - All must be US citizens and a majority must be Massachusetts residents.
- If you are a Multi-Tiered Organization, please attach a flow chart identifying each corporate interest and the individual owners of each entity as well as the Articles of Organization for each corporate entity. Every individual must be identified in Addendum A.

Name of Principal	Residential Address	SSN	DOB
<input type="text" value="MARCO STEFANELLI"/>	<input type="text" value="51 PEABODY STREET MIDDLETON MA 01949"/>	<input type="text"/>	<input type="text" value="06/27/1980"/>
Title and or Position	Percentage of Ownership	Director/ LLC Manager US Citizen	MA Resident
<input type="text" value="PRESIDENT AND MANAGER"/>	<input type="text" value="100"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title and or Position	Percentage of Ownership	Director/ LLC Manager US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title and or Position	Percentage of Ownership	Director/ LLC Manager US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Title and or Position	Percentage of Ownership	Director/ LLC Manager US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

APPLICATION FOR A TRANSFER OF LICENSE

6. PROPOSED OFFICERS, STOCK OR OWNERSHIP INTEREST (Continued...)

Name of Principal	Residential Address	SSN	DOB
MARCO STEFANELLI	51 PEABODY STREET	(06/27/1980
Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen
PRESIDENT	100	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No
		<input checked="" type="radio"/> Yes <input type="radio"/> No	

Name of Principal	Residential Address	SSN	DOB
Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen
		<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
		<input type="radio"/> Yes <input type="radio"/> No	

Name of Principal	Residential Address	SSN	DOB
Title and or Position	Percentage of Ownership	Director/ LLC Manager	US Citizen
		<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
		<input type="radio"/> Yes <input type="radio"/> No	

Additional pages attached? ☐ Yes ☒ No

CRIMINAL HISTORY

Has any individual listed in question 6, and applicable attachments, ever been convicted of a State, Federal or Military Crime? If yes, attach an affidavit providing the details of any and all convictions.

☐ Yes ☒ No

6A. INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Does any individual or entity identified in question 6, and applicable attachments, have any direct or indirect, beneficial or financial interest in any other license to sell alcoholic beverages? Yes ☒ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality
MARCO STEFANELLI	FULL	MARCO STEFANELLI	PEABODY MASS

6B. PREVIOUSLY HELD INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Has any individual or entity identified in question 6, and applicable attachments, ever held a direct or indirect, beneficial or financial interest in a license to sell alcoholic beverages, which is not presently held? Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	

APPLICATION FOR A TRANSFER OF LICENSE

6C. DISCLOSURE OF LICENSE DISCIPLINARY ACTION

Have any of the disclosed licenses listed in question 6A or 6B ever been suspended, revoked or cancelled?

Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Date of Action	Name of License	City	Reason for suspension, revocation or cancellation

7. CORPORATE STRUCTURE

Entity Legal Structure

Corporation

Date of Incorporation

10/28/2021

State of Incorporation

Massachusetts

Is the Corporation publicly traded? ☐ Yes ☒ No

8. OCCUPANCY OF PREMISES

Please complete all fields in this section. Please provide proof of legal occupancy of the premises.

- If the applicant entity owns the premises, a deed is required.
- If leasing or renting the premises, a signed copy of the lease is required.
- If the lease is contingent on the approval of this license, and a signed lease is not available, a copy of the unsigned lease and a letter of intent to lease, signed by the applicant and the landlord, is required.
- If the real estate and business are owned by the same individuals listed in question 6, either individually or through separate business entities, a signed copy of a lease between the two entities is required.

Please indicate by what means the applicant will occupy the premises

Lease

Landlord Name

Warren D Kelly Trust

Landlord Phone

978-423-38423

Landlord Email

wkelly729@comcast.net

Landlord Address

PO BOX 70 MIDDLETON MA

Lease Beginning Date

10/28/1998

Rent per Month

8330.36

Lease Ending Date

09/30/2026

Rent per Year

99971.52

Will the Landlord receive revenue based on percentage of alcohol sales?

☐ Yes ☒ No

9. APPLICATION CONTACT

The application contact is the person who the licensing authorities should contact regarding this application.

Name:

MARCO STEFANELLI

Phone:

617-240-8465

Title:

PRESIDENT AND MANAGER

Email:

1mstefanelli@gmail.com

APPLICATION FOR A TRANSFER OF LICENSE

10. FINANCIAL DISCLOSURE

A. Purchase Price for Real Estate	0
B. Purchase Price for Business Assets	275,000
C. Other* (Please specify)	0
D. Total Cost	275,000

*Other: (i.e. Costs associated with License Transaction including but not limited to: Property price, Business Assets, Renovations costs, Construction costs, Initial Start-up costs, Inventory costs, or specify other costs):"

SOURCE OF CASH CONTRIBUTION

Please provide documentation of available funds. (E.g. Bank or other Financial institution Statements, Bank Letter, etc.)

Name of Contributor	Amount of Contribution
CITIZENS BANK- LINE OF CREDIT FROM M STEFANELLI	120,000.00
NORTHSHORE BANK BANK ACCOUNT	30,000.00
NORTH SHORE CANTINA INC.	125,000
Total	275,000.00

SOURCE OF FINANCING

Please provide signed financing documentation.

Name of Lender	Amount	Type of Financing	Is the lender a licensee pursuant to M.G.L. Ch. 138.
NORTH SHORE CANTINA INC.	125000	PRIVATE MORTGAGE	<input type="radio"/> Yes <input checked="" type="radio"/> No
NORTH SHORE CANTINA INC.			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No
			<input type="radio"/> Yes <input type="radio"/> No

FINANCIAL INFORMATION

Provide a detailed explanation of the form(s) and source(s) of funding for the cost identified above.

SELLER IS FINANCING \$125,000 IN THE FORM OF A PROMISSORY NOTE TO APPLICANT PAYMENTS IN ONE LUMP SUM AT THE END OF 12 MONTHS.

11. PLEDGE INFORMATION

Please provide signed pledge documentation.

Are you seeking approval for a pledge? ☒ Yes ☐ No

Please indicate what you are seeking to pledge (check all that apply) ☒ License ☐ Stock ☐ Inventory

To whom is the pledge being made? NORTH SHORE CANTINA INC.

12. MANAGER APPLICATION

A. MANAGER INFORMATION

The individual that has been appointed to manage and control the licensed business and premises.

Proposed Manager Name Date of Birth SSN

Residential Address

Email Phone

Please indicate how many hours per week you intend to be on the licensed premises

B. CITIZENSHIP/BACKGROUND INFORMATION

Are you a U.S. Citizen?* ☒ Yes ☐ No *Manager must be a U.S. Citizen

If yes, attach one of the following as proof of citizenship US Passport, Voter's Certificate, Birth Certificate or Naturalization Papers.

Have you ever been convicted of a state, federal, or military crime? ☐ Yes ☒ No

If yes, fill out the table below and attach an affidavit providing the details of any and all convictions. Attach additional pages, if necessary, utilizing the format below.

Date	Municipality	Charge	Disposition

C. EMPLOYMENT INFORMATION

Please provide your employment history. Attach additional pages, if necessary, utilizing the format below.

Start Date	End Date	Position	Employer	Supervisor Name
2015	present and	OWNER	MARCO RESTAURANT	

D. PRIOR DISCIPLINARY ACTION

Have you held a beneficial or financial interest in, or been the manager of, a license to sell alcoholic beverages that was subject to disciplinary action? ☐ Yes ☒ No If yes, please fill out the table. Attach additional pages, if necessary,utilizing the format below.

Date of Action	Name of License	State	City	Reason for suspension, revocation or cancellation

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate:

Manager's Signature Date

13. MANAGEMENT AGREEMENT

Are you requesting approval to utilize a management company through a management agreement?

☐ Yes ☒ No

If yes, please fill out section 13.

Please provide a narrative overview of the Management Agreement. Attach additional pages, if necessary.

IMPORTANT NOTE: A management agreement is where a licensee authorizes a third party to control the daily operations of the license premises, while retaining ultimate control over the license, through a written contract. *This does not pertain to a liquor license manager that is employed directly by the entity.*

13A. MANAGEMENT ENTITY

List all proposed individuals or entities that will have a direct or indirect, beneficial or financial interest in the management Entity (E.g. Stockholders, Officers, Directors, LLC Managers, LLP Partners, Trustees etc.).

Entity Name	Address	Phone		
<input type="text"/>	<input type="text"/>	<input type="text"/>		
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Name of Principal	Residential Address	SSN	DOB	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Title and or Position	Percentage of Ownership	Director	US Citizen	MA Resident
<input type="text"/>	<input type="text"/>	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

CRIMINAL HISTORY

Has any individual identified above ever been convicted of a State, Federal or Military Crime?

If yes, attach an affidavit providing the details of any and all convictions.

☐ Yes ☐ No

13B. EXISTING MANAGEMENT AGREEMENTS AND INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Does any individual or entity identified in question 13A, and applicable attachments, have any direct or indirect, beneficial or financial interest in any other license to sell alcoholic beverages; and or have an active management agreement with any other licensees?

Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality

13C. PREVIOUSLY HELD INTEREST IN AN ALCOHOLIC BEVERAGES LICENSE

Has any individual or entity identified in question 13A, and applicable attachments, ever held a direct or indirect, beneficial or financial interest in a license to sell alcoholic beverages, which is not presently held?

Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Name	License Type	License Name	Municipality

13D. PREVIOUSLY HELD MANAGEMENT AGREEMENT

Has any individual or entity identified in question 13A, and applicable attachments, ever held a management agreement with any other Massachusetts licensee?

Yes ☐ No ☒ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Licensee Name	License Type	Municipality	Date(s) of Agreement

13E. DISCLOSURE OF LICENSE DISCIPLINARY ACTION

Have any of the disclosed licenses listed in question section 13B, 13C, 13D ever been suspended, revoked or cancelled?

Yes ☐ No ☐ If yes, list in table below. Attach additional pages, if necessary, utilizing the table format below.

Date of Action	Name of License	City	Reason for suspension, revocation or cancellation

13F. TERMS OF AGREEMENT

a. Does the agreement provide for termination by the licensee?

Yes ☐ No ☐

b. Will the licensee retain control of the business finances?

Yes ☐ No ☐

c. Does the management entity handle the payroll for the business?

Yes ☐ No ☐

d. Management Term Begin Date

e. Management Term End Date

f. How will the management company be compensated by the licensee? (check all that apply)

☐ \$ per month/year (indicate amount)

☐ % of alcohol sales (indicate percentage)

☐ % of overall sales (indicate percentage)

☐ other (please explain)

ABCC Licensee Officer/LLC Manager

Signature:

Title:

Date:

Management Agreement Entity Officer/LLC Manager

Signature:

Title:

Date:

ADDITIONAL INFORMATION

Please utilize this space to provide any additional information that will support your application or to clarify any answers provided above.

APPLICANT'S STATEMENT

I, MARCO STEFANELLI the: ☐ sole proprietor; ☐ partner; ☒ corporate principal; ☐ LLC/LLP manager
Authorized Signatory
of MMS HOSPITALITY INC.
Name of the Entity/Corporation

hereby submit this application (hereinafter the "Application"), to the local licensing authority (the "LLA") and the Alcoholic Beverages Control Commission (the "ABCC" and together with the LLA collectively the "Licensing Authorities") for approval.

I do hereby declare under the pains and penalties of perjury that I have personal knowledge of the information submitted in the Application, and as such affirm that all statements and representations therein are true to the best of my knowledge and belief. I further submit the following to be true and accurate:

- (1) I understand that each representation in this Application is material to the Licensing Authorities' decision on the Application and that the Licensing Authorities will rely on each and every answer in the Application and accompanying documents in reaching its decision;
- (2) I state that the location and description of the proposed licensed premises are in compliance with state and local laws and regulations;
- (3) I understand that while the Application is pending, I must notify the Licensing Authorities of any change in the information submitted therein. I understand that failure to give such notice to the Licensing Authorities may result in disapproval of the Application;
- (4) I understand that upon approval of the Application, I must notify the Licensing Authorities of any change in the ownership as approved by the Licensing Authorities. I understand that failure to give such notice to the Licensing Authorities may result in sanctions including revocation of any license for which this Application is submitted;
- (5) I understand that the licensee will be bound by the statements and representations made in the Application, including, but not limited to the identity of persons with an ownership or financial interest in the license;
- (6) I understand that all statements and representations made become conditions of the license;
- (7) I understand that any physical alterations to or changes to the size of the area used for the sale, delivery, storage, or consumption of alcoholic beverages, must be reported to the Licensing Authorities and may require the prior approval of the Licensing Authorities;
- (8) I understand that the licensee's failure to operate the licensed premises in accordance with the statements and representations made in the Application may result in sanctions, including the revocation of any license for which the Application was submitted; and
- (9) I understand that any false statement or misrepresentation will constitute cause for disapproval of the Application or sanctions including revocation of any license for which this Application is submitted.
- (10) I confirm that the applicant corporation and each individual listed in the ownership section of the application is in good standing with the Massachusetts Department of Revenue and has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Signature:

Marco Stefanello

Date:

11/5/2024

Title:

PRESIDENT

CORPORATE VOTE

The Board of Directors or LLC Managers of

MMS HOSPITALITY INC

Entity Name

duly voted to apply to the Licensing Authority of

MIDDLETON

City/Town

and the

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on

Nov 30, 2021

Date of Meeting

For the following transactions (Check all that apply):

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input checked="" type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input checked="" type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other | | <input type="checkbox"/> Change of DBA |

"VOTED: To authorize

MARCO STEFANELLI

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."

"VOTED: To appoint

MARCO STEFANELLI

Name of Liquor License Manager

as its manager of record, and hereby grant him or her with full authority and control of the premises described in the license and authority and control of the conduct of all business therein as the licensee itself could in any way have and exercise if it were a natural person residing in the Commonwealth of Massachusetts."

A true copy attest,

Marco Stefanelli
Corporate Officer /LLC Manager Signature

MARCO STEFANELLI
(Print Name)

For Corporations ONLY

A true copy attest,

Marco Stefanelli
Corporation Clerk's Signature

MARCO STEFANELLI
(Print Name)

ADDENDUM A

6. PROPOSED OFFICER, STOCK OR OWNERSHIP INTEREST (Continued...)

List all individuals or entities that will have a direct or indirect, beneficial or financial interest in this license (E.g. Stockholders, Officers, Directors, LLC Managers, LLP Partners, Trustees etc.).

Entity Name

MMS HOSPITALITY INC

Percentage of Ownership in Entity being Licensed
(Write "NA" if this is the entity being licensed)

Name of Principal

MARCO STEFANELLI

Residential Address

51 PEABODY ST MIDDLETON MA 01949

SSN

DOB

06/27/1980

Title and or Position

PRESIDENT

Percentage of Ownership

100

Director/ LLC Manager

☒ Yes ☐ No

US Citizen

☒ Yes ☐ No

MA Resident

☒ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

Name of Principal

Residential Address

SSN

DOB

Title and or Position

Percentage of Ownership

Director/ LLC Manager

☐ Yes ☐ No

US Citizen

☐ Yes ☐ No

MA Resident

☐ Yes ☐ No

CRIMINAL HISTORY

Has any individual identified above ever been convicted of a State, Federal or Military Crime?
If yes, attach an affidavit providing the details of any and all convictions.

☐ Yes ☒ No



THE COMMONWEALTH OF MASSACHUSETTS
EXECUTIVE OFFICE OF LABOR AND WORKFORCE DEVELOPMENT
DEPARTMENT OF UNEMPLOYMENT ASSISTANCE

Charles D. Baker
GOVERNOR

Karyn E. Polito
LT. GOVERNOR



375469550

Rosalin Acosta
SECRETARY

Richard A. Jeffers
DIRECTOR

North Shore Cantina Inc.
185 MAIN STREET
GLOUCESTER, MA 01930

EAN: 22191240
October 25, 2021

Certificate Id:52548

The Department of Unemployment Assistance certifies that as of 10/25/2021 ,North Shore Cantina Inc. is current in all its obligations relating to contributions, payments in lieu of contributions, and the employer medical assistance contribution established in G.L.c.149,§189.

This certificate expires in 30 days from the date of issuance.

Richard A. Jeffers, Director

Department of Unemployment Assistance



CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE



NORTH SHORE CANTINA INC
185 MAIN ST
GLOUCESTER MA 01930-5745

Why did I receive this notice?

The Commissioner of Revenue certifies that, as of the date of this certificate, NORTH SHORE CANTINA INC is in compliance with its tax obligations under Chapter 62C of the Massachusetts General Laws.

This certificate doesn't certify that the taxpayer is compliant in taxes such as unemployment insurance administered by agencies other than the Department of Revenue, or taxes under any other provisions of law.

This is not a waiver of lien issued under Chapter 62C, section 52 of the Massachusetts General Laws.

What if I have questions?

If you have questions, call us at (617) 887-6400 or toll-free in Massachusetts at (800) 392-6089, Monday through Friday, 9:00 a.m. to 4:00 p.m..

Visit us online!

Visit mass.gov/dor to learn more about Massachusetts tax laws and DOR policies and procedures, including your Taxpayer Bill of Rights, and MassTaxConnect for easy access to your account:

- Review or update your account
- Contact us using e-message
- Sign up for e-billing to save paper
- Make payments or set up autopay

Edward W. Coyle, Jr., Chief
Collections Bureau



The Commonwealth of Massachusetts
William Francis Galvin

Minimum Fee: \$250.00

Secretary of the Commonwealth, Corporations Division
 One Ashburton Place, 17th floor
 Boston, MA 02108-1512
 Telephone: (617) 727-9640

Articles of Organization

(General Laws, Chapter 156D, Section 2.02; 950 CMR 113.16)

Identification Number: 001540679

ARTICLE I

The exact name of the corporation is:

MMS HOSPITALITY INC.

ARTICLE II

Unless the articles of organization otherwise provide, all corporations formed pursuant to G.L. C156D have the purpose of engaging in any lawful business. Please specify if you want a more limited purpose:

THE GENERAL CHARACTER OF THE BUSINESS OF THE CORPORATION IS TO MERCHANDISE, SELL, OFFER FOR SALE, AND DISTRIBUTE AT WHOLESALE AND RETAIL FOODS AND FOODS TUFFS OF ALL KINDS AND DESCRIPTIONS AND TO PURCHASE OR OTHERWISE ACQUIRE A ND SELL TRADE, OR DEAL IN GOODS, WARE, AND MERCHANDISE OF EVERY KIND AND NA TURE AND TO CARRY ON SUCH BUSINESS AS WHOLESALERS AND/OR RETAILERS AND TO ACQUIRE ALL SUCH MERCHANDISE, SUPPLIES, MATERIALS, AND OTHER ARTICLES AS SHA LL BE NECESSARY OR INCIDENTAL TO SUCH BUSINESS; TO BORROW MONEY AND TO OTH ERWISE CONTRACT INDEBTEDNESS FOR THE GENERAL PURPOSE OF THE CORPORATION A ND TO ISSUE ITS NOTES OR OTHER SECURITIES THEREFOR AND TO SECURE THE SAME BY MORTGAGES ON PROPERTY. TO PURCHASE, SELL, HOLD, ERECT, REAL OR PERSONALPROP ERTY NECESSARY OR CONVENIENT FOR THE ACCOMPLISHMENT OF THE FOREGOING PUR POSES, EITHER ALONE OR IN ASSOCIATION WITH ANY OTHER CORPORATION, FIRM OR IN DIVIDUAL.

ARTICLE III

State the total number of shares and par value, if any, of each class of stock that the corporation is authorized to issue. All corporations must authorize stock. If only one class or series is authorized, it is not necessary to specify any particular designation.

Class of Stock	Par Value Per Share Enter 0 if no Par	Total Authorized by Articles of Organization or Amendments		Total Issued and Outstanding Num of Shares
		Num of Shares	Total Par Value	
CNP	\$0.00000	1,000	\$0.00	1,000

G.L. C156D eliminates the concept of par value, however a corporation may specify par value in Article III. See G.L. C156D Section 6.21 and the comments thereto.

ARTICLE IV

If more than one class of stock is authorized, state a distinguishing designation for each class. Prior to the issuance of any shares of a class, if shares of another class are outstanding, the Business Entity must provide a description of the preferences, voting powers, qualifications, and special or relative rights or privileges of that class and of each other class of which shares are outstanding and of each series then established within any class.

NONE

ARTICLE V

The restrictions, if any, imposed by the Articles of Organization upon the transfer of shares of stock of any class are:

NONE

ARTICLE VI

Other lawful provisions, and if there are no provisions, this article may be left blank.

NONE

Note: The preceding six (6) articles are considered to be permanent and may be changed only by filing appropriate articles of amendment.

ARTICLE VII

The effective date of organization and time the articles were received for filing if the articles are not rejected within the time prescribed by law. If a *later* effective date is desired, specify such date, which may not be later than the *90th day* after the articles are received for filing.

Later Effective Date: Time:

ARTICLE VIII

The information contained in Article VIII is not a permanent part of the Articles of Organization.

a,b. The street address of the initial registered office of the corporation in the commonwealth and the name of the initial registered agent at the registered office:

Name: MARCO STEFANELLI

No. and Street: 51 PEABODY STREET

City or Town: MIDDLETON State: MA Zip: 01949 Country: USA

c. The names and street addresses of the individuals who will serve as the initial directors, president, treasurer and secretary of the corporation (an address need not be specified if the business address of the officer or director is the same as the principal office location):

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
PRESIDENT	MARCO STEFANELLI	51 PEABODY STREET MIDDLETON, MA 01949 USA
TREASURER	MARCO STEFANELLI	51 PEABODY STREET MIDDLETON, MA 01949 USA
SECRETARY	MARCO STEFANELLI	51 PEABODY STREET MIDDLETON, MA 01949 USA
CEO	MARCO STEFANELLI	51 PEABODY STREET MIDDLETON, MA 01949 USA
VICE PRESIDENT	MARCO STEFANELLI	51 PEABODY STREET

DIRECTOR	MARCO STEFANELLI	MIDDLETON, MA 01949 USA
51 PEABODY STREET MIDDLETON, MA 01949 USA		
d. The fiscal year end (i.e., tax year) of the corporation: December		
e. A brief description of the type of business in which the corporation intends to engage: <u>RESTAURANT</u>		
f. The street address (post office boxes are not acceptable) of the principal office of the corporation: No. and Street: <u>51 PEABODY STREET</u> City or Town: <u>MIDDLETON</u> State: <u>MA</u> Zip: <u>01949</u> Country: <u>USA</u>		
g. Street address where the records of the corporation required to be kept in the Commonwealth are located (post office boxes are not acceptable): No. and Street: <u>51 PEABODY STREET</u> City or Town: <u>MIDDLETON</u> State: <u>MA</u> Zip: <u>01949</u> Country: <u>USA</u> which is <input checked="" type="checkbox"/> its principal office <input type="checkbox"/> an office of its secretary/assistant secretary <input type="checkbox"/> an office of its transfer agent <input type="checkbox"/> its registered office		
Signed this 28 Day of October, 2021 at 4:06:15 PM by the incorporator(s). (If an existing corporation is acting as incorporator, type in the exact name of the business entity, the state or other jurisdiction where it was incorporated, the name of the person signing on behalf of said business entity and the title he/she holds or other authority by which such action is taken.) <u>MARCO STEFANELLI</u>		
© 2001 - 2021 Commonwealth of Massachusetts All Rights Reserved		

THE COMMONWEALTH OF MASSACHUSETTS

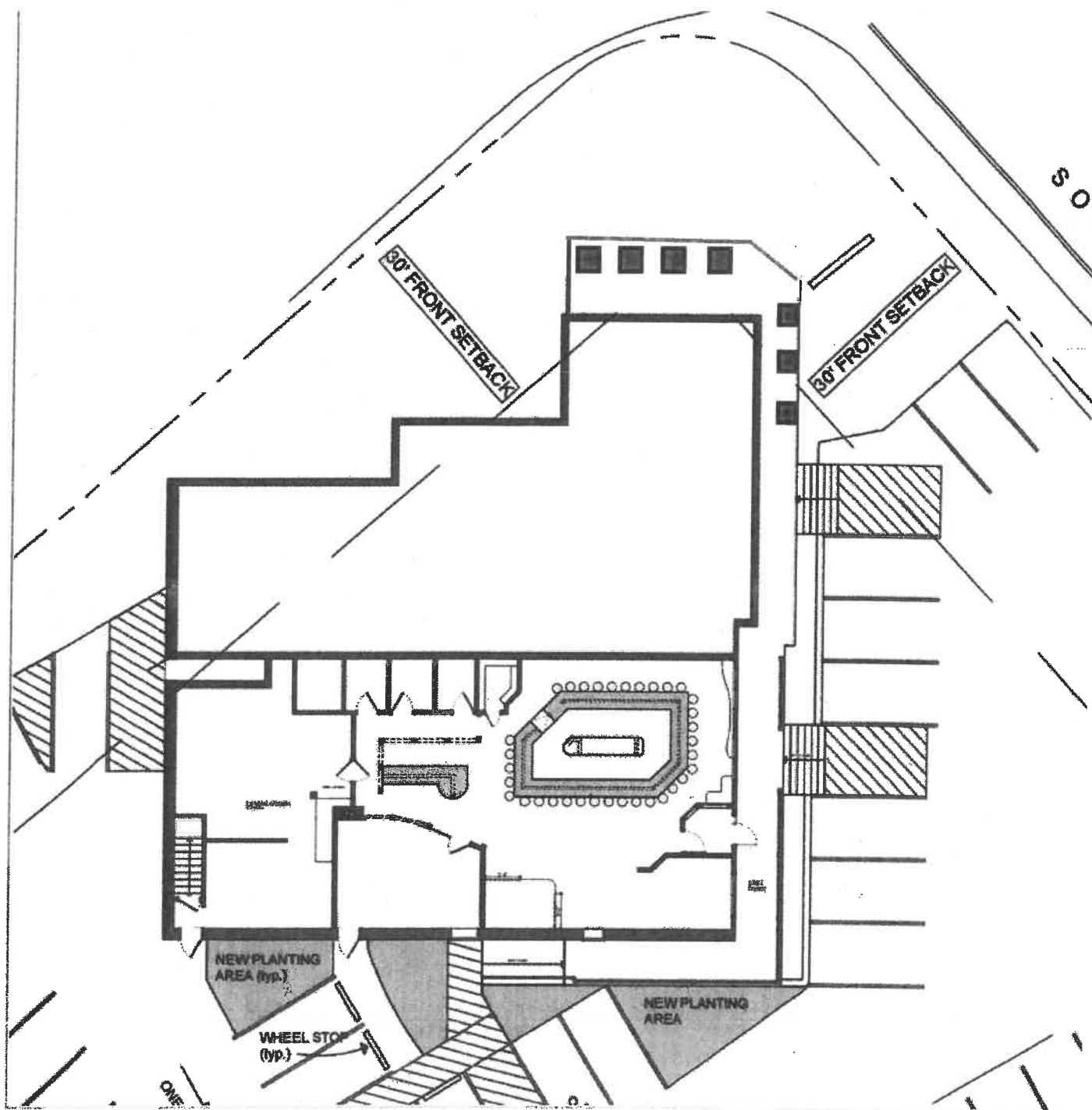
I hereby certify that, upon examination of this document, duly submitted to me, it appears that the provisions of the General Laws relative to corporations have been complied with, and I hereby approve said articles; and the filing fee having been paid, said articles are deemed to have been filed with me on:

October 28, 2021 04:06 PM

A handwritten signature in cursive script, reading "William Francis Galvin". The signature is written in dark ink and is centered on the page.

WILLIAM FRANCIS GALVIN

Secretary of the Commonwealth



LOWEST PRICES

Senior Citizen Price
PAYLESS OIL
All Cities and Towns
No minimum. Senior & Veteran discounts
877-688-7667
Price subject to change

GARAGE SALE



BEVERLY, 221 Cabot St. 8:00 AM to Noon.
Huge Indoor Yard Sale at First Baptist Church
in Beverly. Household items, books, sports,
toys, decorations, tools and more!
Handicapped / stroller accessible.
978-922-3295. Masks required.

MISC ITEMS WANTED

**CASH FOR
RECORD ALBUMS**
33LPS & 45s WANTED. Call George
(617) 633-2682

CASH PAID FOR

COINS, REAL & COSTUME JEWELRY,
POCKET & WRIST WATCHES, ANTIQUES,
COMICS & BOOKS, MUSICAL INSTRUMENTS,
BASEBALL CARDS. DAN (603) 505-0380

MISC MERCHANDISE

**ALL BRANDS SEWING MACHINE
and VACUUM REPAIR.**

FABRIC \$4/yds.
YANKEE CANDLE - BUY ONE - GET ONE FREE
BEVERLY SEW & VAC, 414 Rantoul St
Beverly, MA 978-927-8003

PUBLIC NOTICES

PUBLIC NOTICES

**IN THE SUPERIOR COURT OF
THE VIRGIN ISLANDS
DIVISION OF ST. THOMAS
AND ST. JOHN**

CAPTAIN'S)
COMMAND AT) ST-20 - CV - 138
BLUEBEARD'S) ACTION FOR
BEACH CLUB) DEBT
INTERVAL) FORECLOSURE
OWNERSHIP) OF LIEN AND
CONDOMINIUM) BREACH OF
ASSOCIATION,) CONTRACT
Plaintiff,)
vs.)

DEAN C.)
ROBERTS)
AND)
AMY K. DONA,)
Defendant.)

DEFENDANT: DEAN C. ROBERTS AND AMY K. DONA

Please take notice that an Order for Service by Publication dated March 30, 2021 was entered by the Clerk in the above captioned matter.

You are hereby summoned and required to serve upon Dudley Newman Feuerzeig LLP, plaintiff's attorney, whose address is shown below, an answer to the complaint, which is herewith served upon you, within 21 days after service of this summons upon you, exclusive of the day of service. If you fail to do so, judgment by default will be taken against you for the relief demanded in the complaint.

Witness my hand and Seal of this Court this 10th day of April, 2021.

First Run

CAVALIER KING CHARLES PUPPIES 4 available
Nov. 20. 2 Tri males, 1 Tri female, 1 blenheim
female. Up to date on shots, deworming, health
certificate. Parents on premises. \$2800.
Call or text 508-642-7904 Salisbury MA



ANTIQUE/CLASSICS



GMC JIMMY - RARE 1977
2 WD Straight 6, 3 on the tree stick, 35,000
original miles. Looks and runs great.
Sweet low rider. \$14,000 or best offer.
Call 978-551-4854

PUBLIC NOTICES

PUBLIC NOTICES

**Town of Middleton, MA.
LEGAL NOTICE**

The Middleton Select Board will hold a public hearing at 7:30 PM on November 30, 2021, in the Nathan Media Center, Fuller Meadow School, 143 So. Main St, Middleton on the petition of MMS Hospitality, INC d/b/a Stefanelli, for the: 1) Transfer of the On premise, Restaurant All Alcoholic Liquor License; 2) Change of Manager to Marco Stefanelli and; 3) Change of Common Victualler License and Entertainment License. Licenses are currently held by North Shore Cantina, INC. d/b/a Chanco's, 119 So. Main St., Middleton MA 01949.

Andrew J. Sheehan
Town Administrator

SN - 11/10/21

**COMMONWEALTH OF
MASSACHUSETTS
THE TRIAL COURT
PROBATE AND FAMILY COURT**

Essex Probate and Family Court
36 Federal Street
Salem, MA 01970
(978) 744-1020
Docket No. ES21P3178EA

Estate of:
Oscar Francis Beumel, Jr.
Date of Death:
01/01/2016

**CITATION ON PETITION
FOR FORMAL ADJUDICATION**

To all interested persons:
A Petition for Late and Limited Formal Testacy and/or Appointment has been filed by Gregory Alan Beumel of Washington, DC, requesting that the Court enter a formal Decree and Order and for such other relief, as requested in the Petition. The Petitioner requests that Gregory Alan Beumel of Washington, DC, be appointed as Personal Representative(s) of said estate to serve Without Surety on the bond in an unsupervised administration.

IMPORTANT NOTICE

You have the right to obtain a copy of the Petition from the Petitioner or at the Court. You have a right to object to this proceeding. To do so, you or your attorney must file a written appearance and objection at this Court before 10:00 a.m. on the return day of 11/29/2021.

This is NOT a hearing date, but

PUBLIC NOTICES

PUBLIC NOTICES

**Commonwealth of
Massachusetts
The Trial Court
Probate and Family Court
Docket No. ES21P2141EA
Essex Division
INFORMAL PROBATE
PUBLICATION NOTICE
Estate of:
Brian Charles Pelletier
Also Known As:
Brian C. Pelletier
Date of Death:
12/17/020**

To all persons interested in the above captioned estate, by Petition of Petitioner Andrea M. Pelletier of Lynn MA a Will has been admitted to informal probate. Andrea M. Pelletier of Lynn MA has been informally appointed as the Personal Representative of the estate to serve without surety on the bond.

The estate is being administered under informal procedure by the Personal Representative under the Massachusetts Uniform Probate Code without supervision by the Court. Inventory and accounts are not required to be filed with the Court, but interested parties are entitled to notice regarding the administration from the Personal Representative and can petition the Court in any matter relating to the estate, including distribution of assets and expenses of administration. Interested parties are entitled to petition the Court to institute formal proceedings and to obtain orders terminating or restricting the powers of Personal Representatives appointed under informal procedure. A copy of the Petition and Will, if any, can be obtained from the Petitioner.

SN - 11/10/21

**COMMONWEALTH OF
MASSACHUSETTS
THE TRIAL COURT
PROBATE AND FAMILY COURT**

Essex Probate and Family Court
36 Federal Street
Salem, MA 01970
(978) 744-1020
Docket No. ES21P3223EA

Estate of:
Cecile U. Dionne
Date of Death:
07/27/2021

**CITATION ON PETITION
FOR FORMAL ADJUDICATION**

To all interested persons:
A Petition for Formal Adjudication of Intestacy and Appointment of Personal Representative has been filed by Karen A. Lambert of Oviedo, FL, requesting that the Court enter a formal Decree and Order and for such other relief as requested in the Petition. The Petitioner requests that Karen A. Lambert of Oviedo, FL, be appointed as Personal Representative(s) of said estate to serve Without Surety on the bond in an unsupervised administration.

IMPORTANT NOTICE

You have the right to obtain a copy of the Petition from the Petitioner or at the Court. You have a right to object to this proceeding. To do so, you or your attorney must file a written appearance and objection at this Court before 10:00 a.m. on the return day of 12/07/2021.

This is NOT a hearing date, but a deadline by which you must file a

structure a extension of the pre-existing nonconforming front setback and a vertical extension of pre-existing nonconforming front and side setbacks for a second story addition. The property is located at 74 Bisson Street in the R10 zoning district.

Tuesday, November 23, 2021 at 7pm. See City website for location.
SN- 11/10/21

**COMMONWEALTH OF
MASSACHUSETTS
THE TRIAL COURT
PROBATE AND FAMILY COURT**

Essex Probate and Family Court
36 Federal Street
Salem, MA 01970
(978) 744-1020
Docket No. ES20P0274EA

Estate of:
Concetta M Tordiglione
Also known as:
Concetta Marie Tordiglione
Date of Death:
03/16/2019

**CITATION ON PETITION
FOR ORDER OF COMPLETE
SETTLEMENT**

A Petition for Order of Complete Settlement has been filed by June A Saraceno of Boston, MA, requesting that the court enter a formal Decree of Complete Settlement including the allowance of a final account and other such relief as may be requested in the Petition.

IMPORTANT NOTICE

You have the right to obtain a copy of the Petition from the Petitioner or at the Court. You have a right to object to this proceeding. To do so, you or your attorney must file a written appearance and objection at this Court before 10:00 a.m. on the return day of 12/06/2021.

This is NOT a hearing date, but a deadline by which you must file a written appearance and objection if you object to this proceeding. If you fail to file a timely written appearance and objection followed by an affidavit of objections within thirty (30) days of the return day, action may be taken without further notice to you.

**WITNESS, Jennifer M R Ulwick,
First Justice of this Court.**

Date: October 27, 2021

Pamela Casey O'Brien
Register of Probate

SN - 11/10/21

**COMMONWEALTH OF
MASSACHUSETTS
THE TRIAL COURT
PROBATE AND FAMILY COURT**

Essex Probate and Family Court
36 Federal Street
Salem, MA 01970
(978) 744-1020
Docket No. ES21P2962EA

Estate of:
Holtan Brandi
Date of Death:
08/20/2021

**CITATION ON PETITION FOR
FORMAL ADJUDICATION**

To all interested persons:
A Petition for Formal Probate of Will with Appointment of Personal Representative has been filed by Suzanne Brandi-Reed of Peabody, MA requesting that the Court enter a formal Decree and Order and for such other relief as requested in the Petition.

The Petitioner requests that: Suzanne Brandi-Reed of Peabody, MA be appointed as Personal Representative(s) of said estate to serve Without Surety on the bond in an unsupervised administration.

IMPORTANT NOTICE

You have the right to obtain a copy of the Petition from the Petitioner or at the Court. You have a right to object to this proceeding. To do so, you or your attorney must file a written appearance and objection at this Court before 10:00 a.m. on the return day of 12/07/2021.

This is NOT a hearing date, but a deadline by which you must file a

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MANN & MANN, P.C.
COUNSELLORS AT LAW

JILL ELMSTROM MANN†*
KURT P. MANN†*

†Admitted to practice in Massachusetts
*Admitted to practice in New York

November 19, 2021

Town of Middleton
Board of Selectmen
Attention: Andrew Sheehan
48 South Main Street
Middleton, MA 01949

RE: Change of Manager – Ferncroft Country Club

Dear Mr. Sheehan:

Attached please find the Petition for Change of Manager for the following entities:

1. SD Management Group LLC d/b/a Members Lounge (ABCC License No. 00033-RS-0704;
2. SD Management Group LLC d/b/a 19th Hole Restaurant (ABCC License No. 00013-RS-0704; and
3. SD Management Group LLC d/b/a Halfway House Snack Bar (ABCC License No. 00034-RS-0704).

All these restaurants are located at the Fencroft Country Club, 8-10 Village Road, Middleton, MA. We would respectfully request that you place this on the next regularly scheduled Board of Selectmen's meeting.

Thank you and should you have any questions please do not hesitate to contact me.

Sincerely,
MANN & MANN, P.C.

Jill Elmstrom Mann

Enclosures
cc: Client

S:\FCC - all Files\Liquor Licenses & Amendments\Change of Manager - D Gentile\Ltr to Board.doc

191 South Main Street, Suite 104
Middleton, Massachusetts 01949
Telephone: 978-762-6238
Facsimile: 978-762-6434

Direct Email: jill@mannpc.com
kurt@mannpc.com

**LIQUOR LICENSE
CHANGE OF MANAGER APPLICATION**

**SD MANAGEMENT GROUP LLC
d/b/a
MEMBERS LOUNGE at
FERNCROFT COUNTRY CLUB
SEASONAL LICENSE**

8-10 Village Road, Middleton, MA 01949

**MANN & MANN, P.C.
Counsellors at Law
191 South Main Street, Suite 104
Middleton, MA 01949
Telephone: 978-762-6238
Facsimile: 978-762-6434
Email: jill@mannpc.com**

Exhibit List

For

Change of Manager for SD Management Group LLC d/b/a Members Lounge
At Ferncroft Country Club

1. Retail Application for Change of Manager and Applicant's Statement
2. CORI Request Form for Danielle Arnson Gentile with proof of citizenship for Ms. Gentile: Passport and Driver's License
3. TIPS Certification for Danielle Arnson Gentile
4. Vote of Corporate Board of SD Management Group LLC
5. Monetary Transmittal Form together with Receipt reflecting payment of Application Fee
6. Local Licensing Certification

1



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

AMENDMENT-Change of Manager

☒ **Change of License Manager**

1. BUSINESS ENTITY INFORMATION

Entity Name	Municipality	ABCC License Number
SD Management Group LLC	Middleton	00033-RS-0704

2. APPLICATION CONTACT

The application contact is the person who should be contacted with any questions regarding this application.

Name	Title	Email	Phone
Jill Elmstrom Mann	Attorney	jill@mannpc.com	978-762-6238

3A. MANAGER INFORMATION

The individual that has been appointed to manage and control of the licensed business and premises.

Proposed Manager Name	Danielle Arnson Gentile	Date of Birth	06/02/1992	SSN	
Residential Address	1440 Main Street, Reading, MA 01867				
Email	danielle@ferncroftcc.com	Phone	216-470-3703		
Please indicate how many hours per week you intend to be on the licensed premises		40+	Last-Approved License Manager		
			Ronald E. Rice		

3B. CITIZENSHIP/BACKGROUND INFORMATION

Are you a U.S. Citizen?*

☒ Yes ☐ No *Manager must be U.S. citizen

If yes, attach one of the following as proof of citizenship US Passport, Voter's Certificate, Birth Certificate or Naturalization Papers.
Have you ever been convicted of a state, federal, or military crime?

☐ Yes ☒ No

If yes, fill out the table below and attach an affidavit providing the details of any and all convictions. Attach additional pages, if necessary, utilizing the format below.

Date	Municipality	Charge	Disposition

3C. EMPLOYMENT INFORMATION

Please provide your employment history. Attach additional pages, if necessary, utilizing the format below.

Start Date	End Date	Position	Employer	Supervisor Name
		See Attached Resume		

3D. PRIOR DISCIPLINARY ACTION

Have you held a beneficial or financial interest in, or been the manager of, a license to sell alcoholic beverages that was subject to disciplinary action? ☐ Yes ☒ No If yes, please fill out the table. Attach additional pages, if necessary,utilizing the format below.

Date of Action	Name of License	State	City	Reason for suspension, revocation or cancellation

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate:

Manager's Signature Danielle Arnson Gentile Date 11/19/2021

DANIELLE GENTILE

EDUCATION

2010 - 2014

- University of Arizona
Bachelor of Arts, Communication

2013

- Barcelona, Spain Study Abroad
International Communication Studies

EXPERIENCE

2021 Ferncroft Country Club

Middleton, Massachusetts

Clubhouse Manager

- Responsible for the day-to-day running of all the front of house F&B services and outlets at the Club including events and banquets.
- Liaise between the Club and the members to provide excellent customer service to members and guests, to remedy problems that arise and to report to ownership issues involving customer or business concerns.
- Assist in the F&B quality, menu planning, costing and selling, adherence to budgeted costs, event planning to include weddings, theme nights, calendared events, golf outings, and F&B presentation.
- Implement sales and marketing programs of all F&B at Club.

2018- 2020 Aramark at Fenway Park

Boston, Massachusetts

Luxury Suites Manager

- Meet operating and financial goals and customer needs by communicating daily with suite holders and customers in the Premium level at Fenway Park.
- Ensure day-to-day success in 62 luxury suites with daily revenue of \$100,000 by providing the highest quality of food and service for sporting events, concerts and catering events.
- Collaborate with the culinary team to develop innovative menu options based on customer requests
- Lead a team of 60+ direct reports on a daily basis.

2016-2018 Troon North Golf Club

Scottsdale, Arizona

Catering Sales Manager

- Manage/forecast budgets and annual revenue of \$1M in member, charity and corporate events, weddings, golf tournaments, and more.
- Menu and timeline development, establish and distribute banquet event orders, selling and marketing events.
- Overseeing banquet staff and ensuring return of clients.

APPLICANT'S STATEMENT

I, David Swales the: ☐ sole proprietor; ☐ partner; ☐ corporate principal; ☒ LLC/LLP manager
Authorized Signatory
of SD Management Group LLC
Name of the Entity/Corporation

hereby submit this application (hereinafter the "Application"), to the local licensing authority (the "LLA") and the Alcoholic Beverages Control Commission (the "ABCC" and together with the LLA collectively the "Licensing Authorities") for approval.

I do hereby declare under the pains and penalties of perjury that I have personal knowledge of the information submitted in the Application, and as such affirm that all statements and representations therein are true to the best of my knowledge and belief. I further submit the following to be true and accurate:

- (1) I understand that each representation in this Application is material to the Licensing Authorities' decision on the Application and that the Licensing Authorities will rely on each and every answer in the Application and accompanying documents in reaching its decision;
- (2) I state that the location and description of the proposed licensed premises are in compliance with state and local laws and regulations;
- (3) I understand that while the Application is pending, I must notify the Licensing Authorities of any change in the information submitted therein. I understand that failure to give such notice to the Licensing Authorities may result in disapproval of the Application;
- (4) I understand that upon approval of the Application, I must notify the Licensing Authorities of any change in the ownership as approved by the Licensing Authorities. I understand that failure to give such notice to the Licensing Authorities may result in sanctions including revocation of any license for which this Application is submitted;
- (5) I understand that the licensee will be bound by the statements and representations made in the Application, including, but not limited to the identity of persons with an ownership or financial interest in the license;
- (6) I understand that all statements and representations made become conditions of the license;
- (7) I understand that any physical alterations to or changes to the size of the area used for the sale, delivery, storage, or consumption of alcoholic beverages, must be reported to the Licensing Authorities and may require the prior approval of the Licensing Authorities;
- (8) I understand that the licensee's failure to operate the licensed premises in accordance with the statements and representations made in the Application may result in sanctions, including the revocation of any license for which the Application was submitted; and
- (9) I understand that any false statement or misrepresentation will constitute cause for disapproval of the Application or sanctions including revocation of any license for which this Application is submitted.
- (10) I confirm that the applicant corporation and each individual listed in the ownership section of the application is in good standing with the Massachusetts Department of Revenue and has complied with all laws of the Commonwealth relating to taxes, reporting of employees and contractors, and withholding and remitting of child support.

Signature:

DR SWALES

Date: November 19, 2021

Title:

Manager

2

3

Certificate of Completion

This Certificate of Completion of

eTIPS On Premise 3.1

For coursework completed on November 19, 2021
provided by Health Communications, Inc.

is hereby granted to:

Danielle Gentile

Certification to be sent to:

**Ferncroft Country Club, Middleton
10 Village Rd
Middleton MA, 01949-1213 USA**



HEALTH COMMUNICATIONS INC.

This document is not proof of TIPS certification. It signifies only that you have completed the course. Valid certification documents will be forwarded to you.



4

ENTITY VOTE

The Board of Directors or LLC Managers of

SD Management Group LLC

Entity Name

duly voted to apply to the Licensing Authority of

Middleton

City/Town

and the

Commonwealth of Massachusetts Alcoholic Beverages Control Commission on

November 19, 2021

Date of Meeting

For the following transactions (Check all that apply):

☒ Change of Manager

☐ Other

"VOTED: To authorize

David Swales

Name of Person

to sign the application submitted and to execute on the Entity's behalf, any necessary papers and do all things required to have the application granted."


"VOTED: To appoint

Danielle Gentile

Name of Liquor License Manager

as its manager of record, and hereby grant him or her with full authority and control of the premises described in the license and authority and control of the conduct of all business therein as the licensee itself could in any way have and exercise if it were a natural person residing in the Commonwealth of Massachusetts."

A true copy attest,



Corporate Officer /LLC Manager Signature

DAVID R. SWALES.

(Print Name)

For Corporations ONLY

A true copy attest,

Corporation Clerk's Signature

(Print Name)

5



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

**RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION
MONETARY TRANSMITTAL FORM**

AMENDMENT-Change of Manager

**APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE LOCAL
LICENSING AUTHORITY.**

ECRT CODE: RETA

Please make \$200.00 payment here: ABCC PAYMENT WEBSITE

**PAYMENT MUST DENOTE THE NAME OF THE LICENSEE CORPORATION, LLC, PARTNERSHIP, OR INDIVIDUAL AND INCLUDE THE
PAYMENT RECEIPT**

ABCC LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY)

00033-RS-0704

ENTITY/ LICENSEE NAME SD Management Group LLC

ADDRESS 8-10 Village Road

CITY/TOWN Middleton

STATE MA

ZIP CODE 01949

For the following transactions (Check all that apply):

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input checked="" type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | | <input type="checkbox"/> Other <input type="text"/> | <input type="checkbox"/> Change of DBA |

**THE LOCAL LICENSING AUTHORITY MUST MAIL THIS
TRANSMITTAL FORM ALONG WITH
COMPLETED APPLICATION, AND SUPPORTING DOCUMENTS TO:**

**Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3
Chelsea, MA 02150-2358**

Payment Confirmation

YOUR PAYMENT HAS PROCESSED AND THIS IS YOUR RECEIPT

Your account has been billed for the following transaction. You will receive a receipt via email.



Transaction Processed Successfully.

INVOICE #: c6a40557-f768-4e64-af45-7b651270dbc5

DESCRIPTION	APPLICABLE LICENSE/REGISTRATION FEE	AMOUNT
FILING FEES-RETAIL	00033-RS-0704	\$200.00
		\$200.00

Total Convenience Fee: \$4.70

Date Paid: 11/18/2021 3:20:28 PM EDT

Total Amount Paid: \$204.70

Payment On Behalf Of

License Number or Business Name:
00033-RS-0704

Fee Type:
FILING FEES-RETAIL

Billing Information

First Name:
Jill

Last Name:
Mann

Address:
Mann & Mann PC

City:
Middleton

State:
MA

Zip Code:
01949

Email Address:
pamv@mannpc.com

6



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission

☐ For Reconsideration

LICENSING AUTHORITY CERTIFICATION

Middleton

City /Town

00033-RS-0704

ABCC License Number

TRANSACTION TYPE (Please check all relevant transactions):

The license applicant petitions the Licensing Authorities to approve the following transactions:

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input checked="" type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other <input type="text"/> | <input type="checkbox"/> Change of DBA | |

APPLICANT INFORMATION

Name of Licensee SD Management Group LLC

DBA Members Lounge at Ferncroft Country Club

Street Address 8-10 Village Road

Zip Code 01949

Manager Danielle Arnson Gentile

Granted under
Special Legislation? Yes ☐ No ☒

\$12 Restaurant

Annual

All Alcoholic Beverages

If Yes, Chapter
of the Acts of (year)

Type
(i.e. restaurant, package store)

Class
(Annual or Seasonal)

Category
(i.e. Wines and Malts / All Alcohol)

DESCRIPTION OF PREMISES Complete description of the licensed premises

The Member's Lounge at Ferncroft Country Club is seasonal and serves alcoholic beverages in and around the stands, pool area and areas surrounding the tennis courts and practice putting greens during the months of June and July for charity events.

LOCAL LICENSING AUTHORITY INFORMATION

Application filed with the LLA: Date Time

Advertised Yes ☐ No ☐ Date Published

Publication

Abutters Notified: Yes ☐ No ☐ Date of Notice

Date APPROVED by LLA

Decision of the LLA

Additional remarks or conditions
(E.g. Days and hours)

For Transfers ONLY:

Seller License Number:

Seller Name:

The Local Licensing Authorities By:

Alcoholic Beverages Control Commission
Ralph Sacramone
Executive Director

**LIQUOR LICENSE
CHANGE OF MANAGER APPLICATION**

**SD MANAGEMENT GROUP LLC
d/b/a
19th HOLE RESTAURANT at
FERNCROFT COUNTRY CLUB**

8-10 Village Road, Middleton, MA 01949

**MANN & MANN, P.C.
Counsellors at Law
191 South Main Street, Suite 104
Middleton, MA 01949
Telephone: 978-762-6238
Facsimile: 978-762-6434
Email: jill@mannpc.com**

Exhibit List

For

Change of Manager for SD Management Group LLC d/b/a 19th Hole Restaurant
At Ferncroft Country Club

1. Retail Application for Change of Manager and Applicant's Statement
2. CORI Request Form for Danielle Arnson Gentile with proof of citizenship for Ms. Gentile: Passport and Driver's License
3. TIPS Certification for Danielle Arnson Gentile
4. Vote of Corporate Board of SD Management Group LLC
5. Monetary Transmittal Form together with Receipt reflecting payment of Application Fee
6. Local Licensing Certification



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

**RETAIL ALCOHOLIC BEVERAGES LICENSE APPLICATION
MONETARY TRANSMITTAL FORM**

AMENDMENT-Change of Manager

**APPLICATION SHOULD BE COMPLETED ON-LINE, PRINTED, SIGNED, AND SUBMITTED TO THE LOCAL
LICENSING AUTHORITY.**

ECRT CODE: RETA

Please make \$200.00 payment here: ABCC PAYMENT WEBSITE

**PAYMENT MUST DENOTE THE NAME OF THE LICENSEE CORPORATION, LLC, PARTNERSHIP, OR INDIVIDUAL AND INCLUDE THE
PAYMENT RECEIPT**

ABCC LICENSE NUMBER (IF AN EXISTING LICENSEE, CAN BE OBTAINED FROM THE CITY)

00013-RS-0704

ENTITY/ LICENSEE NAME

SD Management Group LLC

ADDRESS

8-10 Village Road

CITY/TOWN

Middleton

STATE

MA

ZIP CODE

01949

For the following transactions (Check all that apply):

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input checked="" type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other | | <input type="checkbox"/> Change of DBA |

**THE LOCAL LICENSING AUTHORITY MUST MAIL THIS
TRANSMITTAL FORM ALONG WITH
COMPLETED APPLICATION, AND SUPPORTING DOCUMENTS TO:**

**Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3
Chelsea, MA 02150-2358**

Pam Veerman

From: customerservice@nCourt.com
Sent: Thursday, November 18, 2021 3:18 PM
To: Pam Veerman
Subject: Receipt from nCourt

YOUR RECEIPT >>

Please include the payment receipt with your application. Thank you.

Paid To

Name: Massachusetts Alcoholic Beverages Control Commission - Retail
Address 1: 95 Fourth Street, Suite 3
Address 2:
City: Chelsea
State: Massachusetts
Zip: 02150

Payment On Behalf Of

First Name: Jill Last Name: Mann
Address 1: Mann & Mann PC
Address 2: 191 South Main Street, Suite 104
City: Middleton State: MA Zip: 01949

Description	ID	Service Fee	Amount
FILING FEES-RETAIL	00013-RS-0704	\$4.70	\$200.00

Receipt Date: 11/18/2021 3:18:19 PM EDT

Invoice Number: 090849a6-bbdd-4630-979d-1fa14b38dfa1

Total Amount Paid:\$204.70

Billing Information

First Name Jill
Last Name Mann
Email pamv@mannpc.com
Street Mann & Mann PC
City Middleton
State/Territory MA
Zip 01949
Phone Number (978) 762-6238

Credit / Debit Card Information

Card Type Visa
Card Number *****

6



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission

☐ For Reconsideration

LICENSING AUTHORITY CERTIFICATION

Middleton

City /Town

00013-RS-0704

ABCC License Number

TRANSACTION TYPE (Please check all relevant transactions):

The license applicant petitions the Licensing Authorities to approve the following transactions:

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> New License | <input type="checkbox"/> Change of Location | <input type="checkbox"/> Change of Class (i.e. Annual / Seasonal) | <input type="checkbox"/> Change Corporate Structure (i.e. Corp / LLC) |
| <input type="checkbox"/> Transfer of License | <input type="checkbox"/> Alteration of Licensed Premises | <input type="checkbox"/> Change of License Type (i.e. club / restaurant) | <input type="checkbox"/> Pledge of Collateral (i.e. License/Stock) |
| <input checked="" type="checkbox"/> Change of Manager | <input type="checkbox"/> Change Corporate Name | <input type="checkbox"/> Change of Category (i.e. All Alcohol/Wine, Malt) | <input type="checkbox"/> Management/Operating Agreement |
| <input type="checkbox"/> Change of Officers/
Directors/LLC Managers | <input type="checkbox"/> Change of Ownership Interest
(LLC Members/ LLP Partners,
Trustees) | <input type="checkbox"/> Issuance/Transfer of Stock/New Stockholder | <input type="checkbox"/> Change of Hours |
| | <input type="checkbox"/> Other | | <input type="checkbox"/> Change of DBA |

APPLICANT INFORMATION

Name of Licensee	SD Management Group LLC	DBA	19th Hole Restaurant at Ferncroft Country Club
Street Address	8-10 Village Road		Zip Code 01949
Manager	Danielle Arnson Gentile		Granted under Special Legislation? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
\$12 Restaurant	Seasonal	All Alcoholic Beverages	If Yes, Chapter of the Acts of (year)
<small>(i.e. restaurant, package store)</small>	<small>Class (Annual or Seasonal)</small>	<small>Category (i.e. Wines and Malts / All Alcohol)</small>	

DESCRIPTION OF PREMISES Complete description of the licensed premises

The 19th Hole Restaurant and Function Room at the Ferncroft Country Club. The first floor has a 2,500 sf function room and a 2,500 sf dining room, 1,500 sf bar and two outdoor decks with 400 sf and 600 sf. The second floor has a 4,000 sf dining area/function room and a roof deck with 1,600 sf.

LOCAL LICENSING AUTHORITY INFORMATION

Application filed with the LLA:	Date		Time	
Advertised	Yes <input type="checkbox"/> No <input type="checkbox"/>	Date Published		Publication
Abutters Notified:	Yes <input type="checkbox"/> No <input type="checkbox"/>	Date of Notice		
Date APPROVED by LLA		Decision of the LLA		
Additional remarks or conditions (E.g. Days and hours)				
For Transfers ONLY:				
Seller License Number:		Seller Name:		

The Local Licensing Authorities By:

Alcoholic Beverages Control Commission
Ralph Sacramone
Executive Director

**LIQUOR LICENSE
CHANGE OF MANAGER APPLICATION**

**SD MANAGEMENT GROUP LLC
d/b/a
HALFWAY HOUSE SNACK BAR at
FERNCROFT COUNTRY CLUB
SEASONAL LICENSE**

8-10 Village Road, Middleton, MA 01949

**MANN & MANN, P.C.
Counsellors at Law
191 South Main Street, Suite 104
Middleton, MA 01949
Telephone: 978-762-6238
Facsimile: 978-762-6434
Email: jill@mannpc.com**

Exhibit List

For

Change of Manager for SD Management Group LLC d/b/a Halfway House Snack Bar
At Ferncroft Country Club

1. Retail Application for Change of Manager and Applicant's Statement
2. CORI Request Form for Danielle Arnson Gentile with proof of citizenship for Ms. Gentile: Passport and Driver's License
3. TIPS Certification for Danielle Arnson Gentile
4. Vote of Corporate Board of SD Management Group LLC
5. Monetary Transmittal Form together with Receipt reflecting payment of Application Fee
6. Local Licensing Certification

1



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission
95 Fourth Street, Suite 3, Chelsea, MA 02150-2358
www.mass.gov/abcc

AMENDMENT-Change of Manager

☒ **Change of License Manager**

1. BUSINESS ENTITY INFORMATION

Entity Name	Municipality	ABCC License Number
SD Management Group LLC	Middleton	00034-RS-0704

2. APPLICATION CONTACT

The application contact is the person who should be contacted with any questions regarding this application.

Name	Title	Email	Phone
Jill Elmstrom Mann	Attorney	jill@mannpc.com	978-762-6238

3A. MANAGER INFORMATION

The individual that has been appointed to manage and control of the licensed business and premises.

Proposed Manager Name	Danielle Arnson Gentile	Date of Birth	06/02/1992	SSN	
Residential Address	1440 Main Street, Reading, MA 01867				
Email	danielle@ferncroftcc.com	Phone	216-470-3703		
Please indicate how many hours per week you intend to be on the licensed premises	40+	Last-Approved License Manager	Ronald E. Rice		

3B. CITIZENSHIP/BACKGROUND INFORMATION

Are you a U.S. Citizen?*

☒ Yes ☐ No *Manager must be U.S. citizen

If yes, attach one of the following as proof of citizenship US Passport, Voter's Certificate, Birth Certificate or Naturalization Papers.

Have you ever been convicted of a state, federal, or military crime?

☐ Yes ☒ No

If yes, fill out the table below and attach an affidavit providing the details of any and all convictions. Attach additional pages, if necessary, utilizing the format below.

Date	Municipality	Charge	Disposition

3C. EMPLOYMENT INFORMATION

Please provide your employment history. Attach additional pages, if necessary, utilizing the format below.

Start Date	End Date	Position	Employer	Supervisor Name
		See Attached Resume		

3D. PRIOR DISCIPLINARY ACTION

Have you held a beneficial or financial interest in, or been the manager of, a license to sell alcoholic beverages that was subject to disciplinary action? ☐ Yes ☒ No If yes, please fill out the table. Attach additional pages, if necessary,utilizing the format below.

Date of Action	Name of License	State	City	Reason for suspension, revocation or cancellation

I hereby swear under the pains and penalties of perjury that the information I have provided in this application is true and accurate:

Manager's Signature

Danielle Arnson Gentile

Date

11/19/2021



Council on Aging
Old Town Hall
38 Maple Street
Middleton, MA. 01949
978-777-4067
www.townofmiddleton.org

12.

November 2, 2021

Board of Selectmen
48 South Main Street
Middleton, MA. 01949

Re: Middleton Food Bank Donation / Abhishek Ranjan

Please add the following donations to your agenda for acceptance by the Board of Selectmen for the Middleton Food Pantry, and notify me when the check has been accepted so that it can then be deposited.

Thank you,

Jillian Smith

Jillian Smith
COA Director

A donation has been made payable to the Town of Middleton Food Pantry:

Date: 11/01/21

Name: Abhishek Ranjan

Donation: \$500.00

Check Number 3070155

This donor would like to remain anonymous

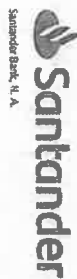
Yes

X No

VERIFY THE AUTHENTICITY OF THIS MULTITONE SECURITY DOCUMENT

CHECK BACKGROUND AREA CHANGES COLOR GRADUALLY FROM TOP TO BOTTOM.

USE SENSITIVE AREA UNDER MICROFILM



Santander Bank, N.A.

OFFICIAL CHECK

3070155

60286
2513

Memo:

*****500.00

11/01/2021

Branch: 0679

Void If Amount Over: *****500.00

PAY TO THE *** MIDDLETON FOOD PANTRY ***
ORDER OF

Drawer: Santander Bank, N.A.

Harold

AUTHORIZED SIGNATURE

AMP

DRAWEE: SANTANDER BANK, N.A. ISSUED BY: SANTANDER BANK, N.A.

⑈ 3070155⑈ ⑆231372691⑆

7675763718⑈



Santander Bank, N.A.

000003070155

MEMO: T-DAY DINNERS (2021) ORLAR

11/01/2021

*****500.00

Account Holder:

Account Number:

Branch Number: 0679

Harold
Ranjan
Engineering Inc
Box 1212 MA



Council on Aging
Old Town Hall
38 Maple Street
Middleton, MA. 01949
978-777-4067
www.townofmiddleton.org

November 9, 2021

Board of Selectmen
48 South Main Street
Middleton, MA. 01949

Re: Middleton Food Bank Donation / PTC Cust Ira FBO David Conley

Please add the following donations to your agenda for acceptance by the Board of Selectmen for the Middleton Food Pantry, and notify me when the check has been accepted so that it can then be deposited.

Thank you,

Jillian Smith

Jillian Smith
COA Director

A donation has been made payable to the Town of Middleton Food Pantry:

Date: 11/01/21

Name: PTC Cust IRA FBO David Conley

Donation: \$500.00

Check Number 1021

This donor would like to remain anonymous

Yes

X No

PTC CUST IRA FBO
DAVID P CONLEY

1021

80-1885/1012
SL225

11/1/21

Date


Pay to the
Order of

Middleton Food Pantry \$ -500.-
- Five Hundred -

Dollars



Security
Features
Details on
Back

 LPL Financial
PREMIER CHECKWRITING
DRAFT PAYABLE THROUGH
UMB BANK, NA
WARSAW, MO

For

Fuller Ponce

David P Conley

CALENDAR
FY2023 OPERATING AND CAPITAL BUDGETS
MAY 10, 2022 ANNUAL TOWN MEETING
MAY 17, 2022 ANNUAL TOWN ELECTION

13.

2021

Thursday, December 9 FY23 budget instructions distributed to departments

2022

Monday, January 3 Nomination papers for elected Town offices available

Wednesday, January 5 Operating budget requests due to TA's Office

January 10-18 Operating budget meetings with TA, ATA, FD

Tuesday, January 11 Select Board votes to open the ATM warrant

Monday, January 17 Martin Luther King, Jr. holiday

Fri.-Sat., Jan. 21-22 MMA Annual Meeting

Monday, January 31 Operating budget book/link to SB, FinCom

Saturday, February 5
8:30AM-4:00PM Operating budget summit

Monday, February 7 Capital budget requests due to TA's Office

February 7-15 Capital budget meetings with TA, ATA, FD

Tuesday, February 8 Petition articles and zoning amendments due at Town Administrator's Office by 5:00PM

Thursday, February 10 Deadline to submit legal notice to *Salem News* for March 9 Planning Board public hearing on zoning amendments

Tuesday, February 15 Non-petition warrant articles due to Town Administrator's Office by 5:00PM

Thursday, February 17 1st legal ad in *Salem News* for Planning Board public hearing on zoning amendments

Monday, February 21 Presidents' Day holiday; start of school vacation week

Tuesday, February 22 Select Board votes to close ATM warrant

Thursday, Feb. 24 2nd legal ad in *Salem News* for Planning Board public hearing on zoning Amendments

Tuesday, March 1 Capital budget books/files to BOS, FinCom

Friday, March 4	Deadline to submit legal ad to <i>Salem News</i> for 3/31/21 budget hearing
Saturday, March 5 8:30AM-2:00PM	Capital budget summit
Wednesday, March 9	Planning Board Hearing on Zoning Amendments
Friday, March 18	Legal ad in <i>Salem News</i> for 3/31/22 budget hearing
Tuesday, March 29 Until 5PM	Last day for candidates to submit nomination papers for Annual Town Election
Thursday, March 31	Budget Hearing and Warrant Reading: SB, FinCom, Moderator: Flint Public Library
Thursday, April 7	Deadline to submit recommendations, exhibits, maps to TA's Office for inclusion in warrant book
Thursday, April 7	Joint meeting of Select Board & Finance Committee re outstanding budget issues, if needed
Tuesday, April 12	Target date for Constable to post warrant
Tuesday, April 12	Deadline to provide written notice for ballot question to Town Clerk, if any (35 days before Annual Election)
Thursday, April 14	Last day for candidates to object or withdraw their candidacy for elected office
Thursday, April 14	Warrant book to printer
Monday, April 18	Patriots Day holiday; start of school vacation week
Wednesday, April 20 Until 8:00PM	Last day to register to vote for the Annual Town Meeting and Annual Town Election
Friday, April 22	Warrant book to USPS for mailing to households
Tuesday, April 26	Motions meeting with TA, ATA, FD, Moderator, Town Clerk, Town Counsel
Thursday, May 5 6:30PM	Pre-Town Meeting: Flint Public Library
Tuesday, May 10	Annual Town Meeting: Howe Manning School
Tuesday, May 17	Annual Town Election: Fuller Meadow School

Regular Board of Selectmen meetings:

January 11 & 25
February 8 & 22
March 8 & 22

April 5 & 19
May 3, 17, & 31
June 14 & 28



OFFICE OF THE TOWN ADMINISTRATOR

Town of Middleton
Memorial Hall
48 South Main Street
Middleton, MA 01949-2253
978-777-3617
www.middletonma.gov

14.

2022 HOLIDAY SCHEDULE

<u>Holiday</u>	<u>Date Observed</u>
New Year's Day, January 1	Friday, 12/31/21
Martin Luther King, Jr. Day, 3 rd Monday in January	Monday, 1/17/22
Washington's Birthday/Presidents' Day, 3 rd Monday in February	Monday, 2/21/22
Patriots' Day, 3 rd Monday in April	Monday, 4/18/22
Memorial Day, Last Monday in May	Monday, 5/30/22
Juneteenth Independence Day, June 19th	Monday, 6/20/22
Independence Day, July 4th	Monday, 7/4/22
Labor Day, 1 st Monday in September	Monday, 9/5/22
Columbus Day/Indigenous Peoples Day, 2 nd Monday in October	Monday, 10/10/22
Veterans' Day, November 11th	Friday, 11/11/22
Thanksgiving, 4 th Thursday in November	Thursday, 11/24/22
Christmas, December 25th	Monday, 12/26/22

Correspondence and informational materials

**50 FERNCROFT (BOSTON)
ESONG, LLC**

C/O US OCG Inc.
350 S. Grand Ave. Suite 3310
Los Angeles, CA 90071

November 2, 2021

Board of Selectmen
Town of Middleton
48 S. Main St.
Middleton, MA 01949

Re: Doubletree Boston N. Shore
51 Village Rd.
Danvers, MA 01923


Dear Board of Selectmen:

In accordance with the terms of that certain letter dated September 8, 2020 from 50 Ferncroft (Boston) Esong, LLC ("Hotel Owner") to the Board of Selectmen of the Town of Middleton ("Letter"), Hotel Owner is hereby providing written notice of the following changes in connection with the operation of the liquor license at the Doubletree Boston North Shore Hotel (the "Hotel"):

1. The Hotel's general manager, Andrew Dunn, has resigned from his position and his last day of employment was, Friday, October 29, 2021. Replacement candidates are currently being interviewed.
2. Hotel Owner has submitted a termination notice to Merritt Boston North Operator, LLC (the "Licensee") and is in the process of engaging a new hotel management company to manage the Hotel. An Application For A Transfer of License will be filed once the new hotel management company has been identified. This change in management could occur quickly, and we will keep you apprised of the situation.

Very truly yours,

50 FERNCROFT (BOSTON) ESONG, LLC


Name: Tai Hong Tan
Title: Manager

Priorities for ARPA Expenditures

THE METROPOLITAN AREA PLANNING COUNCIL
OCTOBER 2021



Questions? Contact MAPC Government Affairs Director Lizzi Weyant at eweyant@mapc.org.

Investment Principles

As the Legislature considers how best to spend the state's portion of the Coronavirus State and Local Fiscal Recovery Funds that were passed in the American Rescue Plan Act, we urge you to use the following principles to guide your investment decisions:

ARPA funds should be used to address structural inequity in every corner of the Commonwealth.

We must use this moment to confront and dismantle the root causes that led to widely disparate impacts of the pandemic. The Treasury guidance urges investment in “disproportionately impacted communities,” defining these communities as those that were hardest hit by COVID, or where COVID exacerbated existing inequities. We must use these critical funds to redress those inequities and lift up people and places that have not yet gained access to available resources. We encourage state and local officials to partner with local governments and trusted community organizations to ensure that residents are aware of programs and able to readily access assistance.

Align ARPA investments with our existing climate, housing, transportation, and economic development goals.

Massachusetts agencies and communities already have plans and initiatives in place that intertwine the various interests and needs of these sectors. The money should be put to work to meet multiple goals wherever possible. These recovery dollars should be used to advance goals that our Commonwealth has already adopted, specifically around climate and housing production. We believe that it is particularly critical to center climate mitigation and resiliency across all ARPA investments, taking a cross-sector approach that mirrors that of the Commonwealth.

Use funds to both strengthen existing programs and pilot innovative ideas.

State dollars should be used to strengthen our existing programs and reach more people, faster. We have many excellent grant programs already underway in the Commonwealth, many of which are chronically underfunded, and these funds should be used to help expand and support those programs. At the same time, the funds give us an opportunity to pilot new creative ideas. Funds to bolster existing, proven programs should be appropriated as soon as possible because it often takes months or years to generate new projects and put the money to work. Creative new pilot programs can be developed over the next several months.

COVID-related costs should be assumed by the state's funds.

Cities and towns across the Commonwealth are working hard to put ARPA funding to good use. We must be careful not to entrench existing inequities by forcing communities hardest hit by COVID to invest their local ARPA dollars in COVID-related mitigation measures. Instead, these costs, which could include air quality measures in schools, ongoing PPE procurement, testing and vaccination sites, addressing food insecurity, and maintaining ongoing quarantine facilities, should be borne by the state.

Recovery spending should be thoughtful and expeditious.

We encourage the Legislature to spend the dollars in a timely fashion that reflects the urgency of the public health and economic crisis in our midst. Even after funds are appropriated, it typically takes months to years to design programs and projects, to raise private capital, and to implement projects. Appropriations must begin soon – by Thanksgiving for existing programs and by March 2022 for new pilots.

What follows are some specific examples of ways that we could invest ARPA dollars, using the framework set out in the Treasury guidance, [MAPC's priorities for an equitable and resilient recovery](#), and addressing the proposals included in H.3922, An Act relative to immediate COVID recovery needs, filed by Governor Baker.

Public Health

The pandemic highlighted the tremendous role that cities and towns play in our public health, and how under-resourced our public health infrastructure has been. Existing health disparities rooted in the built environment influenced comorbidities seen in individuals at higher risk of contracting COVID-19. As the climate crisis worsens, so too will disparities in public health outcomes.

Local public health officials were a critical trusted resource for communities during the height of the pandemic, providing essential work to communicate the latest information about the virus and expand access to testing and vaccination services. Even as we return to a new normal, a strong, well-resourced network of local public health officials will ensure the Commonwealth is prepared to take on future public health emergencies as they emerge. We stand with our partners at the Massachusetts Public Health Association in calling for investments that will strengthen our local public health infrastructure, enable more comprehensive public health data reporting, and address disparities in public health outcomes evidenced during this time.

Investments in local boards of health and technical assistance.

Such investments include direct funding to local boards of health, as well as technical assistance to address public health disparities.

Build capacity of regional Health and Medical Coordinating Coalitions.

These coalitions, funded by DPH's Office of Preparedness and Emergency Management, could play an enhanced role in supporting cross-disciplinary emergency preparedness between health care institutions and local public health departments, supporting continued efforts to respond to the COVID pandemic as well as prepare for future health emergencies.

Incentivize regional and shared public health projects.

For smaller communities, the opportunities to work with neighboring cities and towns helps make most efficient use of limited resources while providing access to needed public health services.

Funding for public health workforce development and training.

This includes providing training support for members of local boards of health, as well as resources for credentialing programs so that local staff can meet the appropriate training standards.

Expand access to mental health programs.

A portion of ARPA funds should be used to make investments in behavioral and mental health programs, particularly those that serve communities that have been disproportionately impacted by the pandemic. This includes additional resources to organizations that provide support to individuals with substance use disorder, a crisis which has worsened over the course of the pandemic. It should also include a focused effort to enhance mental health services to young people, who have been severely impacted by the pandemic and the year of remote learning.

Address the upstream causes of substance use disorder.

Cities and towns have created systems and built cross-sectoral networks to provide support to residents suffering from substance use disorder. These community-based responses have filled gaps to help those in need gain access to treatment, health care, and wrap-around services such as housing and employment, and they are vital to harm reduction and recovery. The Legislature should invest more funding in these municipally-led efforts in order to address the higher rates of opioid and substance abuse seen during the pandemic.

Climate Smart Housing

Housing remains a tremendous challenge in the Commonwealth. The Administration has established a goal of producing 135,000 new units of housing by 2025, but production has been slow to keep up with demand. While efforts like Housing Choices and new provisions to enable more multifamily housing near transit will help, the Commonwealth should pursue additional measures with federal funds to accelerate these efforts, especially around affordable housing. Our approach to accelerating housing production should also serve our climate and public health goals, and funding should be directed to build these units to high energy efficiency and air quality standards. These practices are important for existing units as well, with investments needed in deep energy retrofits and weatherization, particularly for low-income housing. Increasing investments in these programs will have the added benefit of creating new jobs as part of a broader decarbonization workforce needed.

ARPA funding should also be used to confront the housing affordability crisis, which was exacerbated by the pandemic. While more people have returned to work as the economy reopened and the immediacy of the public health crises has lessened, the termination of federal unemployment benefits means many residents remain in a financially precarious situation. Amidst this uncertainty and as federal eviction protections remain in legal limbo, addressing housing stability is critical. Addressing housing insecurity can also help confront the mental burden that comes with housing instability, improving public health outcomes and reduce health care costs for residents.

Governor Baker is proposing a \$1 billion investment in housing, to support housing production, increased homeownership opportunities, rental housing production, and supportive housing for seniors and veterans. MAPC supports this overall funding amount, and encourages the Legislature to think about additional investments:

Homeownership.

Funds should be invested in homebuyer education, assistance for first-generation homebuyers, and foreclosure prevention; with a particular focus on communities of color. The Commonwealth Builder program is an important initiative, but funds should not be limited to Gateway Cities and the City of Boston. If we expand this program with ARPA dollars, we should also be able to create new homes in some of the “higher opportunity” communities of the Commonwealth, many of which have been largely closed to lower-income residents and people of color for multiple generations.

Affordable rental housing production and preservation.

ARPA funds should be used to create additional subsidies to produce more quality affordable housing, especially near transit and in climate resilient locations. Existing state programs are over-subscribed, and many projects are forced to cobble together resources from as many as a dozen sources just to put shovels in the ground. Focusing additional ARPA resources on rental production could increase housing stability for thousands of households. Additionally, while the Commonwealth has received significant resources to support rental assistance, dollars are going unspent while residents remain in need. The Legislature should consider whether there is opportunity to use ARPA dollars to address barriers to accessing these programs, including expanding translation of program materials, investing in relationships with additional social service organizations to raise awareness of available funds, or hiring more staff.

Public housing.

We have a \$3 billion backlog of deferred work in public housing and these funds create an opportunity to make a down payment on that work. Furthermore, major projects to upgrade public housing developments and create new mixed-income housing units will help expand housing opportunities for some of the Commonwealth's residents most in need of affordable housing and create more stable communities. The Governor's recommendations did not include additional resources for public housing, and we feel this is an area that deserves serious attention from the Legislature.

Utility bill assistance.

There is an ongoing need to help low-income residents with utility bills. A portion of ARPA funds should be allocated to disproportionately impacted renters and homeowners over the next five years.

Weatherization.

ARPA funding should be invested in the existing LEAN and MassSave programs to improve weatherization for low- and moderate-income renters. Funds should be invested into MassCEC's EmPower program to weatherize all homes in low- and moderate-income environmental justice communities.

Deep energy retrofits.

ARPA funds can expand resources available to retrofit public housing and multifamily properties, creating opportunities to undertake retrofitting during sale and refinancing transactions.

Update building code and energy efficiency standards and provide financial support to low-income renters and homeowners to build to these standards.

Additional ARPA funds should be used to help residents of color and low- and moderate-income communities build to better standards, utilizing clean energy heating and cooling systems and addressing upfront operational costs.

Economic & Workforce Development

The impact of the pandemic was not uniform across the business community. Small businesses were hit particularly hard by the pandemic, confronting slowing foot traffic and the challenges of building an online and sometimes outdoor storefront. The Commonwealth should prioritize investments in small businesses that create good well-paying jobs with benefits, revitalize Main Streets, and make our local economies more resilient, particularly in communities hit hardest by the pandemic and among businesses owned by and/or serving people of color.

The COVID-19 pandemic has also demonstrated the critical need to invest in and expand our workforce development infrastructure. We should some of our foundational workforce development infrastructure, including community colleges and the MassHire workforce boards, and we should prioritize investments that will help build a clean energy and decarbonization workforce. Demand in these sectors is poised to grow over time, and there is an urgent need for more trained professionals to make the technological and infrastructure improvements needed for a net zero future.

MAPC feels strongly that our economic development and workforce investments must help to support wealth creation for residents, and especially for residents of color. We urge the Legislature to follow the recommendations of leading childcare and early education advocates and take this opportunity to expand early childhood education opportunities across the Commonwealth. We encourage the Legislature to prioritize investments in the following areas:

Small business support for businesses with <50 employees.

Funding should be used to provide additional grants and low-interest loans through the Mass Growth Capital Corporation (MGCC) and through Community Development Financial Institutions (CDFIs), which are well poised to make investments in low-income communities and disproportionately impacted communities. The MGCC should also be given funds to provide additional technical assistance support.

Downtown revitalization efforts:

- **Provide implementation funding for the Local Rapid Recovery plans.** We should build on the progress made in the creation of Rapid Recovery Plans across the Commonwealth, and provide funding to implement those plans.
- **Update the Municipal Vacant Storefront program** to accelerate the development of newly vacant spaces and incentivize applications from minority-and women-owned business developers.
- **Provide grant opportunities to local business associations and Main Streets organizations.** Continue supporting the Mass Downtown Initiative and expand their technical assistance program.
- **Continue to support the Shared Streets initiative.**

Stipends for individuals attending credentialing and community college programs.

Use stipends to incentivize return to the labor force for individuals who have experienced extended unemployment, with priority given to individuals receiving training for priority industries and occupations identified in the workforce blueprint plans. Stipends can be used for time to participate in programs, transportation, or childcare needs.

Increase support for community colleges.

Community colleges provide an increasingly important role in building the workforce of the Commonwealth. We should use some of these funds to invest in our community and state colleges in order to provide increased staff capacity and programming, especially around credentialing programs for key industries.

Invest in MassCEC and Mass Save

Invest in MassCEC and Mass Save workforce development efforts in order to expand our green workforce opportunities. Our success at addressing environmental and climate challenges depends on a workforce ready to take on new technologies.

Staff capacity at MassHire Workforce Boards and Career Centers.

In order to advance our work readiness and skills programs, staff capacity is a critical need.

Infrastructure Investments

It is no secret that we have infrastructure needs in every corner of the Commonwealth. The MBTA's state of good repair backlog is estimated to be around \$10 billion, and this does not include the investments needed to ensure the system will be resilient to the threats of climate change in the future. Integrating climate resiliency improvements into transportation projects could serve as a down payment for additional investments made with federal infrastructure dollars or other relief money.

Addressing emissions from our transportation system also means growing the share of people who regularly walk and bike. The Shared Streets and Spaces program was a tremendous success, with cities and towns across the Commonwealth repurposing space traditionally dedicated for cars into vibrant walkable and bikeable districts. The surge in walking and biking during the pandemic must be met with complementary investments in on and off-street infrastructure to continue growth of these modes. For these reasons, we would strongly urge the legislature to invest additional funding in the Complete Streets and Shared Streets initiatives.

The pandemic has also highlighted stark disparities in access to broadband and digital literacy. Between work, school, and accessing needed services, access to the internet is going to remain a key feature of our lives for the foreseeable future. ARPA investments should address these disparities, so the hardest hit communities are not left behind.

These are some of the ways we hope that the Legislature will prioritize ARPA funds for infrastructure improvements:

Green infrastructure and nature-based solutions.

The Commonwealth should make it easier for cities and towns to invest in tree-planting and conservation, rain gardens, bioswales, climate-smart parks, green and blue roofs, pervious pavements, wetland restoration and living shorelines, especially in disproportionately impacted communities. This includes integrating climate resiliency measures into transportation projects.

Invest in Complete Streets and expand the Shared Streets and Spaces program.

Cities and towns across the Commonwealth quickly repurposed streets for more active, vibrant uses, and they were by and large met with great enthusiasm from residents and business owners alike. Allocating recovery funds to invest in our existing Complete Streets program and expand the Shared Streets program will enable more communities to build out safe walking and biking infrastructure and capitalize on the momentum to grow active transportation mode share.

Establish a low-income MBTA fare program.

Alleviating the transportation cost burden for low-income transit riders is an important step toward addressing some of the deeply ingrained inequities in our transportation system. Low-income individuals are less likely to own a personal vehicle and more likely to spend a larger portion of their income on transit. Enabling better access to transit through a low-income fare program would make investments in transit-oriented affordable housing, workforce development, and other areas under consideration for ARPA expenditure even more impactful.

Create a Climate Resiliency Infrastructure Bank.

Using recovery funds as an initial capitalization, the bank could provide funding for projects designed to help the Commonwealth withstand and reduce the impacts of climate change. These investments are particularly important in communities that were hardest hit by COVID, as they are often the same communities that are likely to be most impacted by the effects of climate change.

Water and Sewer infrastructure upgrades.

Water infrastructure is at the center of economic opportunity and recovery. It is essential for the siting of homes and businesses, impacts our climate resilience, and is a critical contributor to public health. Recovery funds should be used to help municipalities and the state to address critical water and wastewater needs. These needs were estimated at \$40 billion by a bipartisan report in 2012 even before the understanding of the need to mitigate contaminants such as PFAS and lead. A meaningful down payment on decades-delayed efforts to address Combined Sewer Overflows (CSOs) would be a powerful use for ARPA dollars.

Advance municipal preparedness.

Over 90 percent of the Commonwealth's municipalities are enrolled in the Municipal Vulnerability Preparedness (MVP) Program. The state continues to receive applications in excess of total funds available indicating a list of shovel worthy and ready projects where ARPA investments would help meet extensive identified needs.

Strengthen digital infrastructure.

Funds should be used to expand market competition among providers of high-speed broadband service to enable access to at least 100/100 speeds. Priority should be given to projects that open fiber conduit and access. We should prioritize investments that bring fiber to public housing properties, schools, community centers, and other areas that are not currently adequately served.

- **Data standardization.** Improved and enhanced digital infrastructure should also bring with it a level of data standardization, which would facilitate data sharing, reporting and collaboration among municipalities, government agencies and other entities. For example, such infrastructure would allow for public health and emergency management personnel to more readily share data and facilitate a more targeted response to the opioid epidemic.

Growing digital literacy.

Investments that help to foster public/private partnerships to support digital literacy and digital access, especially for students, unemployed youth, and underserved individuals.

Increasing digital access.

Funds should be used help cities and towns create digital access and equity plans or capital improvement plans for broadband infrastructure.