

Eric M. Conti, Ph.D.  
Superintendent

**RESPONSE SENT THROUGH EMAIL**

May 2, 2024

OpenCommonwealth.org

**Burlington Public Schools Response to Open Commonwealth's Public Records Request dated April 8, 2024**

To Whom It May Concern:

I am in receipt of your Public Records Request dated April 8, 2024 requesting the following:

**Request:**

Please provide the following documents/records in the possession or under the control of your school/district or town/city for the time period **January 1, 2018 through April 5, 2024**:

Any and all contracts, communications, or documents of any kind with the following:

- Accountedge LLC - 3 Meadowlark Farm Lane, Middleton, MA 01949 USA
- Antonietta Mertz (a.k.a. Toni Mertz) - - 28 East Meadow Lane, Middleton, MA 01949 USA
- Kelly DuMont - 3 Meadowlark Farm Lane, Middleton, MA 01949 USA

Any and all payments made to:

- Accountedge LLC - 3 Meadowlark Farm Lane, Middleton, MA 01949 USA
- Antonietta Mertz (a.k.a. Toni Mertz) - - 28 East Meadow Lane, Middleton, MA 01949 USA
- Kelly DuMont - 3 Meadowlark Farm Lane, Middleton, MA 01949 USA

Any and all conflict of interest documents for:

- Accountedge LLC - 3 Meadowlark Farm Lane, Middleton, MA 01949 USA
- Antonietta Mertz (a.k.a. Toni Mertz) - - 28 East Meadow Lane, Middleton, MA 01949 USA
- Kelly DuMont - 3 Meadowlark Farm Lane, Middleton, MA 01949 USA

**Response:**

The district has only conducted business with Toni Mertz. Attached are the payment history, with associated invoices and engagement letters in response to your request:

- Payment history
- Toni Mertz engagement letter – December 15, 2017
- Toni Mertz engagement letter – August 20, 2018
- Toni Mertz Invoices – January 31, 2018, February 28, 2018, March 31, 2018, July 31, 2018, October 15, 2018, January 29, 2019, May 28, 2019, July 31, 2019, September 30, 2019, December 31, 2019, August 28, 2020

Sincerely,



Eric M. Conti, Ph.D.  
Superintendent



INVOICE BROWSE

Clerk	Document	Invoice	Inv Date	PO	Warrant	S	Check #	Amount	Use Tax
dsullivan	285652	1019	01/19/2018		S33-18	P	814258	11,180.00	0.00
dsullivan	287605	1022	02/28/2018		S37-18	P	815637	2,860.00	0.00
dsullivan	290244	1024	03/31/2018		S42-18	P	817043	1,430.00	0.00
dsullivan	299816	1031	07/31/2018	19000006	S10-19	P	822710	1,040.00	0.00
lnichols	305155	1033	10/15/2018	19000006	S19-19	P	823803	5,850.00	0.00
lnichols	312533	1039	01/29/2019	19000006	S33-19	P	830104	2,210.00	0.00
lnichols	321256	1045	05/28/2019	19000006	S50-19	P	835814	845.00	0.00
lnichols	326540	1051	07/31/2019	20000200	S8-20	P	839017	520.00	0.00
ncoscia	330238	1055	09/30/2019	20000200	S16-20	P	841576	6,500.00	0.00
lnichols	338580	1059	12/31/2019	20000200	S31-20	P	846563	325.00	0.00
lnichols	352593	1070	08/29/2020	21000528	S11-21	P	855601	910.00	0.00

Vendor: 134694 MERTZ, TONI has 11 Invoices for: 33,670.00

\*\*\* END OF REPORT - Generated by Coscia, Nichole \*\*\*



Toni Mertz  
28 East Meadow Lane  
Middleton, MA 01949  
Cell# 978-317-2135  
Email: t\_mertz@comcast.net

December 15, 2017

Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

Dear Ms. Coscia,

I sincerely appreciate the opportunity to present this engagement letter to perform consulting services to Burlington Public Schools. The consulting services include, but are not limited to the following:

- Reconcile FY18 budget to actuals
- Help prepare FY19 budget
- Any assignment/project as requested by the School Business Manager

The term of the engagement will begin on December 21, 2017 and will continue until the services are no longer needed.

The fee for this service will be based on actual hours performed at an hourly rate of \$130. Per hour. The hourly rate includes all out of pocket costs.

Invoices for these services will be submitted on a monthly basis throughout the engagement and are payable on presentation. Terms of the payment for services are net 30 days. Services may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If services are terminated for non-payment, the engagement will be deemed to have been completed.

Burlington Public Schools may elect to terminate the services without cause. If Burlington Public Schools elects to terminate the services, Burlington Public Schools will be obligated to provide compensation for the services provided through the date of termination.

I appreciate the opportunity to be of service to the Burlington Public Schools. If you have any questions, please let me know. If you agree to the terms of the engagement as described in this letter, please sign and return a copy.

Very Truly Yours,

*Toni Mertz*

Toni Mertz

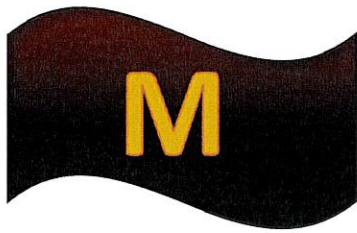
Response:

This letter correctly sets forth the understanding of the Burlington Public Schools. The undersigned has the ability to contractually bind the Burlington Public Schools.

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



Toni Mertz  
28 East Meadow Lane  
Middleton, MA 01949  
Cell# 978-317-2135  
Email: t\_mertz@comcast.net

August 20, 2018

Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

Dear Ms. Coscia,

I sincerely appreciate the opportunity to present this engagement letter to perform consulting services to Burlington Public Schools. I will assist the Burlington Public Schools in completing the end of year report for FY18. The services include, but are not limited to the following:

- Assist Burlington Public Schools in preparing the end of year report for FY18

The fee for this service will be based on actual hours performed at an hourly rate of \$130. per hour. The hourly rate includes all out of pocket costs. The fee for this service will not exceed \$7,500.

Terms of the payment for services are net 30 days. Services may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If services are terminated for non-payment, the engagement will be deemed to have been completed.

Burlington Public Schools may elect to terminate the services without cause. If Burlington Public Schools elects to terminate the services, Burlington Public Schools will be obligated to provide compensation for the services provided through the date of termination.

I appreciate the opportunity to be of service to the Burlington Public Schools. If you have any questions, please let me know. If you agree to the terms of the engagement as described in this letter, please sign and return a copy.

Very Truly Yours,

*Toni Mertz*

Toni Mertz

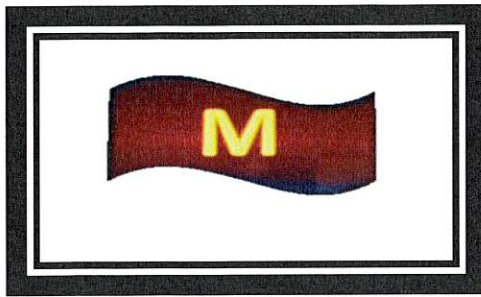
Response:

This letter correctly sets forth the understanding of the Burlington Public Schools. The undersigned has the ability to contractually bind the Burlington Public Schools.

By: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_



# INVOICE

## Toni Mertz

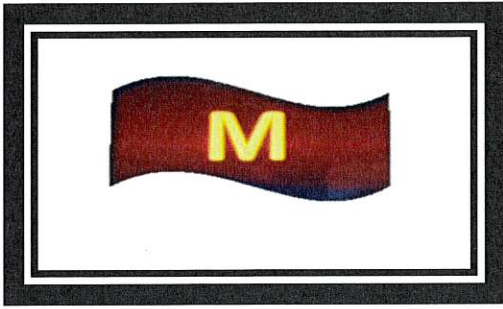
28 East Meadow Lane  
 Middleton, MA 01949  
 978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

**INVOICE NO.** 1019  
**DATE** 1/31/18  
**CUSTOMER ID** Burlington Public Schools

**TO**  
 Ms. Nichole Coscia  
 Business Manager  
 Burlington Public Schools  
 123 Cambridge St  
 Burlington, MA 01803

JOB		PAYMENT TERMS		
Burlington Public Schools		Due on receipt		
DESCRIPTION	Date of Service	QUANTITY	AMOUNT	TOTAL
Meet with Nichole to discuss the project. Started FY18 budget reconciliation	12/21/2017	7.50	\$130.00	\$975.00
FY18 Budget reconciliation	12/28/2017	5.00	\$130.00	\$650.00
FY18 Budget reconciliation	12/29/2017	5.50	\$130.00	\$715.00
Reconcile school staff for Fox Hill, Memorial, and Pine. Identify wrong account codes based on job descriptions	1/4/2018	8.00	\$130.00	\$1,040.00
Reconcile school staff for Wyman. Identify wrong account codes based on job descriptions	1/5/2018	3.00	\$130.00	\$390.00
Reconcile school staff for MS Middle School. Identify wrong account codes based on job descriptions	1/7/2018	3.00	\$130.00	\$390.00
Reconcile school staff for High School and District wide account. Identify wrong account codes based on job description. Meet with Patrick Larkin to discuss school based budgeting	1/11/2018	6.50	\$130.00	\$845.00
Propose journal entries for all elementary schools and MSMS by individual	1/14/2018	7.00	\$130.00	\$910.00
Reconciling individual schools for FY18	1/15/2018	3.00	\$130.00	\$390.00
Reconciling individual schools for FY18	1/17/2018	2.50	\$130.00	\$325.00
Reconciling individual schools for FY18	1/18/2018	9.00	\$130.00	\$1,170.00
Reconciling individual schools for FY18	1/21/2018	8.00	\$130.00	\$1,040.00
Finalize reconciliation and send journal entry to school to book	1/22/2018	4.00	\$130.00	\$520.00
Start FY19 salary Budget	1/25/2018	9.00	\$130.00	\$1,170.00
Continue working on FY19 salary budget and send to Nichole for review and questions	1/28/2018	5.00	\$130.00	\$650.00
			<b>TOTAL DUE</b>	<b>\$11,180.00</b>

***Make all checks payable to Toni Mertz. THANK YOU FOR YOUR BUSINESS!***



# INVOICE

## Toni Mertz

28 East Meadow Lane  
Middleton, MA 01949  
978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

**INVOICE NO.** 1024  
**DATE** 3/31/18  
**CUSTOMER ID** Burlington Public Schools

### TO

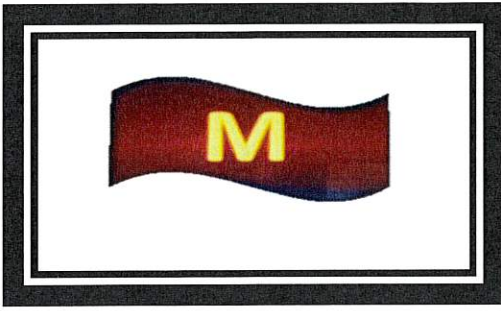
Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

JOB	PAYMENT TERMS
Burlington Public Schools	Due on receipt

DESCRIPTION	Date of Service	QUANTITY	AMOUNT	TOTAL
Work on FY19 budget with Ms. Coscia	3/22/2018	5.00	\$130.00	\$650.00
Work on FY19 budget with Ms. Coscia	3/24/2018	6.00	\$130.00	\$780.00
			<b>TOTAL DUE</b>	<b>\$1,430.00</b>

***Make all checks payable to Toni Mertz. THANK YOU FOR YOUR BUSINESS!***





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## Toni Mertz

28 East Meadow Lane  
Middleton, MA 01949  
978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

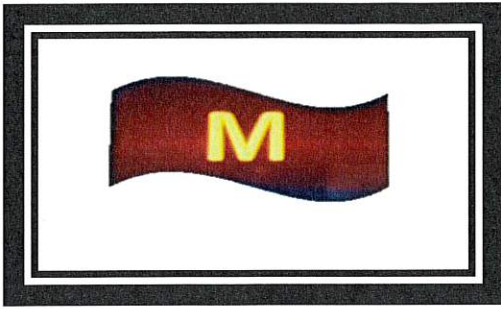
**INVOICE NO.** 1059  
**DATE** 12/31/19  
**CUSTOMER ID** Burlington Public Schools

### TO

Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

JOB		PAYMENT TERMS		
Burlington Public Schools payroll encumbrances		Due on receipt		
DESCRIPTION	Date of Service	QUANTITY	AMOUNT	TOTAL
Payroll encumbrances	12/7/2019	2.50	\$130.00	\$325.00
			<b>TOTAL DUE</b>	<b>\$325.00</b>

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## Toni Mertz

28 East Meadow Lane  
Middleton, MA 01949  
978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

**INVOICE NO.** 1022  
**DATE** 2/28/18  
**CUSTOMER ID** Burlington Public Schools

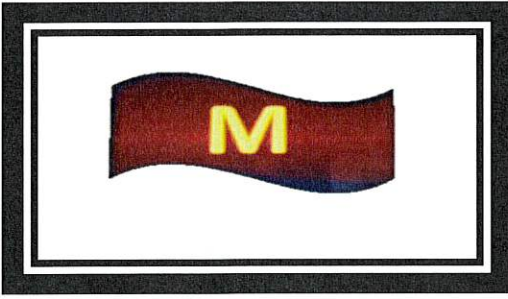
### TO

Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

JOB	PAYMENT TERMS
Burlington Public Schools	Due on receipt

DESCRIPTION	Date of Service	QUANTITY	AMOUNT	TOTAL
Work on FY19 budget with Ms. Coscia	2/5/2018	7.50	\$130.00	\$975.00
Work on FY19 budget with Ms. Coscia	2/12/2018	7.50	\$130.00	\$975.00
Work on FY19 budget with Ms. Coscia	2/14/2018	2.00	\$130.00	\$260.00
Work on FY19 budget with Ms. Coscia	2/25/2018	5.00	\$130.00	\$650.00
			<b>TOTAL DUE</b>	<b>\$2,860.00</b>

***Make all checks payable to Toni Mertz. THANK YOU FOR YOUR BUSINESS!***



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28 East Meadow Lane  
Middleton, MA 01949  
978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

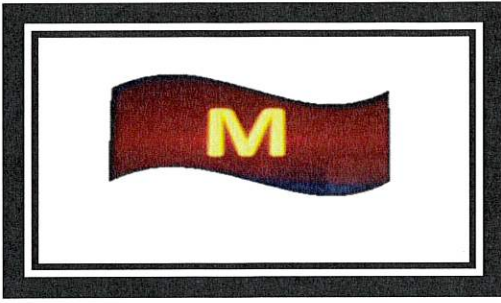
**INVOICE NO.** 1070  
**DATE** 8/29/20  
**CUSTOMER ID** Burlington Public Schools

**TO**  
Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

<b>JOB</b>		<b>PAYMENT TERMS</b>		
Burlington Public Schools grants reconciliation		Due on receipt		
<b>DESCRIPTION</b>	<b>Date of Service</b>	<b>QUANTITY</b>	<b>AMOUNT</b>	<b>TOTAL</b>
FY20 Grants reconciliation	7/30/2020	3.50	\$130.00	\$455.00
FY20 Grants reconciliation	7/31/2020	2.50	\$130.00	\$325.00
Prepare final financials in EdGrants	8/2/2020	1.00	\$130.00	\$130.00
<b>TOTAL DUE</b>				<b>\$910.00</b>

*Make all checks payable to Toni Mertz. THANK YOU FOR YOUR BUSINESS!*





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28 East Meadow Lane  
Middleton, MA 01949  
978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

**INVOICE NO.** 1039  
**DATE** 1/29/19  
**CUSTOMER ID** Burlington Public Schools

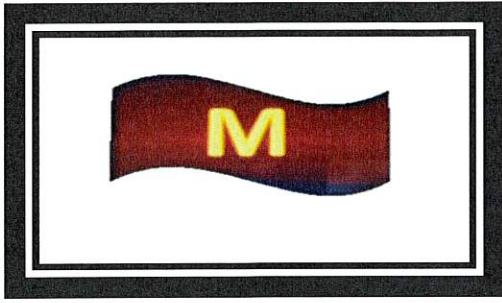
### TO

Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

JOB		PAYMENT TERMS		
Special Projects		Due on receipt		
DESCRIPTION	Date of Service	QUANTITY	AMOUNT	TOTAL
Reconcile Sped grant and do amendment	1/16/2019	3.00	\$130.00	\$390.00
Reconcile FY18 grants and file final financials for FY18	1/23/2019	8.00	\$130.00	\$1,040.00
Reconcile FY18 and FY19 grants, file final financials for FY18	1/26/2019	6.00	\$130.00	\$780.00
			\$130.00	\$0.00
			<b>TOTAL DUE</b>	<b>\$2,210.00</b>

***Make all checks payable to Toni Mertz. THANK YOU FOR YOUR BUSINESS!***





# INVOICE

## Toni Mertz

28 East Meadow Lane  
Middleton, MA 01949  
978-317-2135  
[t\\_mertz@comcast.net](mailto:t_mertz@comcast.net)

**INVOICE NO.** 1051  
**DATE** 7/31/19  
**CUSTOMER ID** Burlington Public Schools

### TO

Ms. Nichole Coscia  
Business Manager  
Burlington Public Schools  
123 Cambridge St  
Burlington, MA 01803

JOB		PAYMENT TERMS		
Special Projects		Due on receipt		
DESCRIPTION	Date of Service	QUANTITY	AMOUNT	TOTAL
Reconcile end of year budget and grants	7/30/2019	4.00	\$130.00	\$520.00
TOTAL DUE				\$520.00

***Make all checks payable to Toni Mertz. THANK YOU FOR YOUR BUSINESS!***





