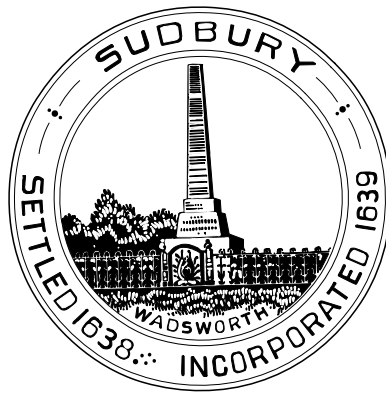


**Town of Sudbury
Massachusetts**



**OFFICIAL WARRANT
2011**

**ANNUAL TOWN MEETING
May 2, 2011 7:30 P.M.**

Lincoln-Sudbury Regional High School Auditorium
390 Lincoln Road, Sudbury, MA

BRING THIS BOOK WITH YOU



TOWN OF SUDBURY 2011 ANNUAL TOWN MEETING WARRANT

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**ACCESS TO LINCOLN-SUDBURY REGIONAL HIGH SCHOOL and
PROVISIONS FOR THE DISABLED**

The Board of Selectmen wishes to accommodate the attendance and participation of persons with disabilities at Town Meeting. As such, we urge those who may require particular accommodations to read the following carefully.

Parking: “HP” parking spaces are provided at two different locations: 1) the main entrance at the upper level (which will require using an elevator to the lower level to check in and to access the auditorium) and 2) the main parking lot to the right (east) of the school. From this location, you may also be dropped off at the entry walkway – a clear path to the entrance doors, leading directly to the check-in tables and the auditorium. Police on duty will provide assistance as needed, or requested.

Auditorium Balcony: The balcony can only be accessed from the Main Level. From the lower level of the building, you may use either the stairs or the elevator to gain entrance to the balcony – the upper level of the auditorium. The Moderator has ruled that if there is adequate seating on the main floor, the balcony **will not** be opened.

Persons with Ambulatory Disabilities: Spaces for persons who use wheelchairs will be available at the front and at the rear of the auditorium. For those who use assistive devices to ambulate, seating will be reserved at the rear of the hall and may be used if desired.

Persons who are Blind or have Vision Impairments: Reserved seating will be available at the front of the auditorium for persons with vision impairments who prefer to be close to the overhead projector. Large print materials will be made available where possible. We encourage those making prepared, formal presentations to have copies of viewgraphs, especially motions, available in large print.

Persons who are Deaf or have Hearing Impairments: A limited number of headphone amplifiers connected to the public address system are available for the use of persons with hearing impairments. Please ask for Mary McCormack when you enter the auditorium to obtain one of these amplifiers. For persons who are deaf and require a sign language interpreter, please contact the Selectmen’s Office no later than March 20, 2009. As there is great demand for qualified interpreters, advance notice will facilitate their availability.

Restrooms: Restrooms are located across the hall from the auditorium.

Refreshments: Coffee and other refreshments are located in the High School corridor near the main entrance on the same level as the auditorium. Refreshments may not be consumed in the auditorium.

If you have any questions regarding these, or any other matters which address accommodations, please contact Mary McCormack (978) 639-3382; or the Massachusetts Relay service of VERIZON: 1-800-439-2370 (V/TDD).

SUMMARY OF BASIC TOWN MEETING PROCEDURES

Only registered voters and Town employees may speak without leave of the Hall.

All votes are by majority unless otherwise announced. Votes will first be taken by a show of hands while sitting. If the Moderator is in doubt, then a standing vote will be taken. If the Moderator is still in doubt, then tellers will count the Hall. If a voter is in disagreement with the Moderator's call of a sitting or standing vote, the voter may challenge the call by immediately standing and saying loudly, "I challenge the vote!" If six additional voters support the challenge, the vote will be counted. If you are in attendance because of a matter of particular interest to you, it is unwise to "bolt" the Hall immediately after the vote is taken. It may be that someone will seek a count of the vote or will seek reconsideration.

The Moderator will not vote - even in the case of where the Moderator's vote would break or create a tie.

The order of speaking is controlled by tradition and Article II, §10 of the Town Bylaws. The proponents of an article make the first motion under the article. A second is then required. The proponents then make a presentation in support of the motion. The Finance Committee is next recognized, followed by the Selectmen and any other boards, which are required to report on the article. After the Town boards have spoken, Town Meeting proceeds to general debate on the matter and a vote.

Until everyone who wishes to be heard has been heard, no person may speak more than twice on a matter except to correct an error or answer a question. The initial presentation by the proponent(s) of an article may not exceed a total of ten minutes in length, and no other speech may exceed five minutes in length unless consent is given by a majority of those present and voting.

Please raise your hand when you wish to be recognized by the Moderator to speak. After being called upon by the Moderator, kindly go to a microphone to speak or wait for one to be passed to you at your seat. We expect to have microphones at each side and in front on the auditorium floor as well as runners with microphones to service voters in the middle of the aisle and, if necessary, the balcony. The basic record of Town Meeting is made on audiotape and your remarks will not be recorded if you do not speak from a microphone. Each and every time you speak, you should begin by giving your name and your address again so the record can be clear.

Budget: By tradition in Sudbury a motion is first made by the Finance Committee proposing a budget that would be limited to the amount which would be required to finance the Finance Committee's budget proposal. This limiting motion will only seek a declaration from the Hall as to the overall limit on the budget. A vote in favor of the motion will not mean that Town Meeting has voted for the particular distribution of the total amount as set forth in the Warrant.

After voting on the limiting motion, Town Meeting will address the budget in the usual way and finally vote on that budget:

1. The Moderator will read the budgets in numerical order by title. If anyone has a motion to amend or a question, just raise your hand. For example, the Moderator will say "200 Public Safety, does anyone have a motion to amend or a question involving 200 Public Safety?"
2. If someone has a motion to amend, it should be in one of two forms.
 - a. For example, "I move to increase 200 Public Safety to the sum of \$X and to reduce 600 Culture and Recreation to the sum of \$Y." The two must balance. **OR**

- b. For example, "I move to reduce 200 Public Safety to the sum of \$X."

A motion simply to increase a line item will not be accepted. This is so because consideration of the budget will have been preceded by the vote limiting the total budget amount.

3. The Hall will debate and vote on any motion to amend.
4. Town Meeting will arrive at the end of this process with a main motion on the budget as it may be amended, and then vote on it.

Motions for Reconsideration: The Town Bylaw on Motions for Reconsideration is somewhat complex. If reconsideration is sought of a matter which has been voted upon during the same night of Town Meeting, a two-thirds vote is required. If reconsideration is sought after the close of the session at which the action was taken, a unanimous vote is required unless by noon of the day after the session a written notice of intent to seek reconsideration signed by 15 voters who attended the session at which the action was taken is filed with the Town Clerk. If that occurs, the Moderator will announce it at the next session and further announce that reconsideration will be the first order of business at the next following session unless the Warrant is completed that night, in which case it will be the last order of business that night. A two-thirds procedural vote to reconsider the matter is then required before the original substantive motion can be discussed and voted. The tradition in Sudbury is not to grant reconsideration except for a misstatement of fact so great that it changed the outcome of the original vote. In the last three decades, reconsideration has been granted less than a handful of times.

All substantive motions, and that includes all main motions and motions to amend a main motion, must be provided to the Town Clerk and the Moderator in writing. Again, this is so there will be an accurate record of the meeting. Except when specifically requested by the Moderator, it is not necessary that the written motion be given to the Moderator, Town Clerk and viewgraph operator before it is actually made, but it should be furnished immediately thereafter.

Adjournment of any session will occur upon completion of the article under discussion at 10:30 P.M. unless there is a two-thirds vote to do otherwise.

CONSENT CALENDAR

To expedite Town Meeting and save valuable time for discussion of key issues, Sudbury has used the "Consent Calendar" to speed passage of articles that appear to raise no controversy. The purpose of the Consent Calendar is to allow the motions under these articles to be acted upon as one unit and to be passed by a unanimous vote without debate. **THE CONSENT CALENDAR WILL BE TAKEN UP AS THE FIRST ORDER OF BUSINESS AT THE COMMENCEMENT OF THE FIRST NIGHT OF TOWN MEETING.**

At the call of the Consent Calendar, the Moderator will call out the numbers of the articles, one by one. If any voter has doubt about passing any motion, or wishes an explanation of any subject on the Consent Calendar, the voter should stand and say the word "hold" in a loud, clear voice when the number is called. The Moderator will then inquire as to whether the request to hold is for a question or for debate. If the purpose of the request was merely to ask a question, an attempt to obtain a satisfactory answer will be made, and if that occurs, the article will remain on the Consent Calendar absent a further request to hold. If the purpose of the request was to hold the article for debate, the article will be removed from the Consent Calendar and restored to its original place in the Warrant, to be brought up, debated and voted on in the usual way. No voter should hesitate to exercise the right to remove matters from the Consent Calendar; it is the view of the voters as to the need for debate that is supreme, not that of the Town Officials who put together the Consent Calendar. However, it is hoped that voters will remove articles

from the Consent Calendar only in cases of genuine concern. In past years, it has occasionally happened that articles were removed from the Consent Calendar and when reached in the normal course, passed unanimously without debate, thus indicating that the initial removal request was, perhaps, not fully considered before being exercised. After calling out each individual article in the Consent Calendar, the Moderator will ask that all articles not removed from the Consent Calendar be passed as a unit by a unanimous vote.

Please review the list of articles and motions proposed for the Consent Calendar that follows. Complete reports are to be found under each article printed in this Warrant. If you have any questions about the articles, motions or procedure, please feel free to call the Town Manager's office at (978) 639-3381 before Town Meeting.

CONSENT CALENDAR ARTICLES AND MOTIONS

ARTICLE 10. CHAPTER 90 HIGHWAY FUNDING: Move in the words of the article.
(See article at page 7.)

ARTICLE 11. REAL ESTATE EXEMPTION: Move in the words of the article.
(See article at page 7.)

ARTICLE 12. TOWN/SCHOOL REVOLVING FUNDS: Move in the words of the article.
(See article at page 8.)

ARTICLE 13. CONSERVATION REVOLVING FUND – TRAIL MAINTENANCE: Move in the words of the article. (See article at page 9.)

ARTICLE 14. CEMETERY REVOLVING FUND – CEMETERY MAINTENANCE: Move in the words of the article. (See article at page 10.)

ARTICLE 15. REGIONAL HOUSING SERVICES REVOLVING FUND: Move in the words of the article. (See article at page 10.)

ARTICLE 25. DISSOLVE PERMANENT LANDSCAPE COMMITTEE: Move in the words of the article. (See article at page 17.)

ARTICLE 34. COMMUNITY PRESERVATION FUND - AMEND ART. 31 OF THE 2008 ATM, SUDBURY HOUSING AUTHORITY UNIT RECONSTRUCTION:
Move in the words of the article. (See article at page 23.)

A MOTION PRIMER

Contrary to popular belief, an article in the Warrant is not “self-starting.” If an article were to be called up, and nobody makes a motion under it, the article would simply be “passed over”, and whatever action had been contemplated thereby would not occur. It is a motion, which puts an article “in play,” and it is the motion, *not the article*, which is actually voted upon. Thus, while speakers may refer to passing, defeating, or otherwise dealing with “the article,” in fact and in law, what the meeting deals with, debates, and votes upon are motions, not articles. The article in the Warrant serves only the purpose of letting the voters know what may come before the meeting and the outside scope of what may be considered. It may be that a speaker will question whether a certain motion is “within the four corners of the article.” Such a challenge requires the Moderator to determine whether the motion should be allowed, as being within a reasonable reading of the article as printed in the Warrant, or be ruled out of order as being beyond the legitimate subject matter of the article.

Many times the first or “main” motion under an article, will be “Move in the words of the article.” By making such a motion, the speaker is adopting the article as his or her motion thereunder. This can only be done where the language of the article is drafted in such a way that it is appropriate for simple adoption as a motion. Whenever the presenter’s motion differs from the wording in the Warrant, the presenter must point out and explain those differences to the Hall.

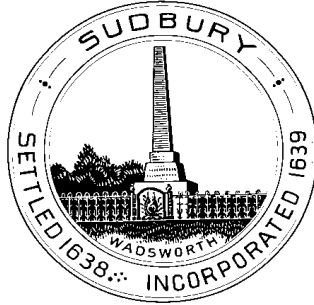
Frequently there will be a motion “to indefinitely postpone” an article. This motion, if adopted, kills the article for all intents and purposes for the Town Meeting. The motion is frequently used when proponents of an article have decided not to proceed with it but want an opportunity to explain to the meeting why they are, in effect, abandoning the article at this time. The motion also may be used by someone who wishes to defeat an article before it can be fully debated on the merits. In such cases it is important to understand that indefinite postponement can have the same effect as defeat which, in turn, can have significance with respect to some items, notably zoning matters, as to when the matter can again be considered by the Town.

You may hear a “Motion for the previous question,” or simply folks shouting “question.” This is a motion to terminate debate and requires a two-thirds vote to pass. The Moderator has discretion as to whether to accept a motion for the question, and it will be refused if the Moderator does not believe there has been a fair opportunity for debate as of the time it is made. However, once made and accepted by the Moderator and seconded, it is voted upon without debate. Upon passage, such a motion terminates the debate then occurring and requires an immediate vote on the substantive or procedural matter on the floor.

For those who may have participated in other parliamentary activities, the frequently heard “Motion to Lay on the Table” used in other forums is almost never used in Sudbury. The tradition here is to use the “Motion to Indefinitely Postpone” to perform the “killing” function of the motion to table, and to use a “Motion to Postpone to a Time Certain” to accomplish a “tabling” or temporary suspension of debate on a matter because of lack of information or other cause.

PART I

**TOWN OF SUDBURY
ANNUAL TOWN MEETING
WARRANT**



Commonwealth of Massachusetts
Middlesex, ss.

To the Constable of the Town of Sudbury:

GREETINGS:

In the name of the Commonwealth of Massachusetts, you are hereby required to notify and warn the inhabitants of the Town of Sudbury, qualified to vote in Town affairs to meet at the Lincoln-Sudbury Regional High School Auditorium in said Town on Monday, May 2, 2011, at 7:30 o'clock in the evening, then and there to act on the following articles:

ARTICLE 1. HEAR REPORTS

To see if the Town will vote to hear, consider and accept the reports of the Town Boards, Commissions, Officers and Committees as printed in the 2010 Town Report or as otherwise presented; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

ARTICLE 2. FY11 BUDGET ADJUSTMENTS

To see if the Town will vote to amend the votes taken under Article 4, FY11 Operating Budget, of the 2010 Annual Town Meeting, by adding to or deleting from line items thereunder, by transfer between or among accounts or by transfer from available funds; or act on anything relative thereto.

Submitted by the Board of Selectmen. (Majority vote required)

BOARD OF SELECTMEN REPORT: This article will allow flexibility to review all accounts within the FY11 Operating Budget to make adjustments at the ATM, if necessary. The Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 3. STABILIZATION FUND

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, to be added to the Stabilization Fund established under Article 12 of the October 7, 1982 Special Town Meeting, pursuant to M.G.L. Chapter 40, Section 5B; or act on anything relative thereto.

Submitted by the Board of Selectmen. (Two-thirds vote required)

BOARD OF SELECTMEN REPORT: Provided that the motion under this article receives a two-thirds vote of approval and an override ballot question passes at a subsequent Town Election, a sum of money will be added to the Town's Stabilization Fund. This fund protects the Town in case of a severe emergency and is beneficial in supporting the Town's AAA bond ratings, which in turn result in lowering borrowing costs. The Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 4. FY12 BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums, or any other sum or sums, for any or all Town expenses and purposes, including debt and interest, and to provide for a Reserve Fund, all for the Fiscal Year July 1, 2011 through June 30, 2012, inclusive, in accordance with the following schedule, which is incorporated herein by reference; and to determine whether or not the appropriation for any of the items shall be raised by borrowing; or act on anything relative thereto.

EXPENDITURES	FY09 Actual	FY10 Actual	FY11 Appropriated	FY12 Non-Override
300: Sudbury Public Schools: Net	26,331,604	27,815,697	28,204,344	28,541,059
300: SPS Employee Benefits*	6,700,568	6,204,274	6,450,128	6,761,451
300: SPS Employee Benefits Reserve**	-	-	-	t/b/d
Sub-total SPS Net	33,032,172	34,019,971	34,654,472	35,302,510
300: LS Operating Assessment: Net	16,334,541	16,805,045	17,577,379	18,079,955
300: LS Debt Assessment	2,394,071	2,298,949	2,237,147	2,193,072
300: LS E&D	-	-	-	-
Sub-total LS Assessments Net	18,728,612	19,103,994	19,814,526	20,273,027
300: Minuteman Regional Assessment	237,788	298,098	228,794	321,590
300: Other Regional School Assessments	43,212	-	-	-
Total: Schools	52,041,784	53,422,063	54,697,792	55,897,127
100: General Government	2,117,424	2,207,011	2,284,281	2,325,635
200: Public Safety***	6,330,016	6,297,069	6,742,557	6,815,453
400: Public Works	3,406,588	3,364,252	3,299,349	3,304,146
500: Human Services	515,673	520,208	538,651	534,239
600: Culture & Recreation	1,080,329	1,112,286	1,149,824	1,166,009
900: Town Employee Benefits	4,153,667	3,964,802	4,209,905	4,490,702
900: Town-wide Operating & Transfer	113,643	106,619	434,505	401,148
1000: SPS/Town Emp Benefits Reserve	-	-	-	t/b/d
Total: Town Departments	17,717,340	17,572,248	18,659,072	19,037,331
700: Town Debt Service	4,347,060	4,269,224	4,180,354	3,883,860
TOTAL: OPERATING BUDGET	74,106,184	75,263,534	77,537,218	78,818,318

(not including Capital or Enterprise Funds)

* to be transferred to 900: Town Employee Benefits

** to be transferred to 1000: SPS/Town Employee Benefits Reserve

*** Ambulance reserve funds to be transferred to 200: Public Safety (direct revenue offset)

t/b/d the use and amount of employee benefits reserve for FY12 still to be determined

Submitted by the Finance Committee.

(Majority vote required)

SEE DETAILED LINE ITEM BUDGET IN THE FINANCE COMMITTEE SECTION, Part II of this Warrant.

Finance Committee reports on each budget section are included therein.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting

FINANCE COMMITTEE POSITION: The Finance Committee recommends approval of the Non-Override Budget and will report at Town Meeting.

ARTICLE 5. FY12 CAPITAL BUDGET

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, for the purchase or acquisition of capital items including but not limited to, capital equipment, construction, engineering, and design, including but not limited to renovation to buildings; and to determine whether this sum shall be raised by borrowing, lease purchase, or otherwise; or act on anything relative thereto.

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
Capital & Capital Articles				
CIPC Items	513,042	523,383	529,054	538,947
Total Capital & Articles	513,042	523,383	529,054	538,947

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
Capital				
Town Buildings	109,500	70,000	116,771	59,607
General Government	12,200	22,622	11,955	0
Public Safety	21,400	25,000	10,000	72,396
Public Works	354,942	325,761	298,328	316,944
Culture & Recreation	15,000	80,000	42,000	0
Sudbury Public Schools	0	0	50,000	90,000
Total: Operating Expenses	513,042	523,383	529,054	538,947

Submitted by the Capital Improvement Planning Committee Two-thirds vote required, if borrowed)

CAPITAL IMPROVEMENT PLANNING COMMITTEE (CIPC) REPORT: Details on each item are shown in the Finance Committee Section on Page FC-38 under Capital Spending. The CIPC recommends approval of this article and will report at Town Meeting.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports the Capital Budget.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of the Capital Budget.

ARTICLE 6. FY12 TRANSFER STATION ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY12 budget of the Transfer Station Enterprise, to be included in the tax levy and offset by the funds of the enterprise; or act on anything relative thereto.

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
TRANSFER STATION ENTERPRISE FUND				
Direct Costs (appropriated)	263,368	256,534	271,437	290,389
Indirect Costs*	30,912	30,953	29,595	33,146
TOTAL: TRANSFER STATION ENTERPRISE	294,280	287,487	301,032	323,536
Transfer Station Receipts	290,000	328,482	250,000	330,000
Retained Earnings Used	26,432	46,795	51,032	0
Total Revenue	316,432	375,277	301,032	330,000
	-	-	-	-

*Appropriated within Benefits Budget

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-41. The Finance Committee will report at Town Meeting.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

ARTICLE 7. FY12 POOL ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY12 budget of the Atkinson Pool Enterprise, to be included in the tax levy and offset by the funds of the enterprise; or act on anything relative thereto.

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
POOL ENTERPRISE FUND				
Direct Costs (appropriated)	438,924	455,118	489,868	517,230
Indirect Costs*	65,530	61,905	55,841	62,542
TOTAL: POOL ENTERPRISE	504,454	517,023	545,709	579,772
Pool Receipts	440,000	464,100	460,000	480,000
Retained Earnings Used	17,842	16,592	29,868	37,230
Total Revenue	457,842	480,692	489,868	517,230
	-	-	-	-

*Appropriated within Benefits Budget

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-41. The Finance Committee will report at Town Meeting.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports the FY12 Pool Enterprise Fund budget as presented by the Finance Committee.

ARTICLE 8. FY12 RECREATION FIELD MAINTENANCE ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY12 budget of the Recreation Field Maintenance Enterprise, to be included in the tax levy and offset by the funds of the enterprise; or act on anything relative thereto.

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
RECREATIONAL FIELD MAINT. ENTERPRISE FUND				
Direct Costs (appropriated)	0	113,606	221,497	309,614
Indirect Costs	0	0	0	0
TOTAL: FIELD ENTERPRISE	0	113,606	221,497	309,614
<hr/>				
Field Receipts	0	170,493	221,497	309,614
Retained Earnings Used	0	0	0	0
Total Revenue	0	170,493	221,497	309,614

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-41. The Finance Committee will report at Town Meeting.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports the FY12 Recreation Field Maintenance Enterprise Fund budget as presented by the Finance Committee.

ARTICLE 9. UNPAID BILLS

To see if the Town will vote to raise and appropriate, or appropriate from available funds, a sum of money for the payment of certain unpaid bills incurred in previous fiscal years or which may be legally unenforceable due to the insufficiency of the appropriation in the years in which such bills were incurred; or act on anything relative thereto.

Submitted by the Town Accountant.

(Four-fifths vote required)

TOWN ACCOUNTANT REPORT: Invoices that are submitted for payment after the accounts are closed at the end of a fiscal year or payables for which there are insufficient funds (and were not submitted for a Reserve Fund Transfer) can only be paid by a vote of the Town Meeting, a Special Act of the Legislature, or a court judgment.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 10. CHAPTER 90 HIGHWAY FUNDING

(Consent Calendar)

To see if the Town will vote to authorize the Town Manager to accept and to enter into a contract for the expenditure of any funds allotted or to be allotted by the Commonwealth for the construction, reconstruction and maintenance projects of Town ways pursuant to Chapter 90 funding; and to authorize the Treasurer to borrow such amounts in anticipation of reimbursement by the Commonwealth; or act on anything relative thereto.

Submitted by the Director of Public Works.

(Majority vote required)

DIRECTOR OF PUBLIC WORKS REPORT: Each year the Legislature allocates funds to cities and towns for the improvement of their infrastructure, to be expended under the Chapter 90 guidelines. The current plans are to continue the implementation of our pavement management program.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 11. REAL ESTATE EXEMPTION

(Consent Calendar)

To see if the Town will vote pursuant to Chapter 73, Section 4, of the Acts of 1986, as amended by Chapter 126 of the Acts of 1988, to allow for an increase of up to 100% of the current exemption amounts under Clauses 17D, 17E, 22, 37A, 41C and 41D, of Chapter 59, Section 5, for fiscal year 2012; or act on anything relative thereto.

Submitted by the Board of Assessors.

(Majority vote required)

BOARD OF ASSESSORS REPORT: At a Special Town Meeting held in November of 1997, voters unanimously approved a local option which provides for an increase in exemptions for the elderly, blind, veterans and others up to 100% of the statutory amounts allowable under Chapter 59, Section 5, Clauses 17D, 17E, 22, 37A, 41C, and 41D of the General Laws. The Town of Sudbury has voted each year to adopt the local option since November 1997. Chapter 73, Section 4, of the Acts of 1986, requires annual acceptance by Town Meeting vote, and is not cumulative. A brief description of each of the affected exemptions is listed below:

CLAUSE 17D(E) - Applicant must be over the age of 70, or a surviving spouse (of any age) with limited personal assets. The personal asset figure varies annually according to the C.O.L.A. index. The personal asset maximum for Fiscal Year 2011 was \$52,706. The FY11 benefit was \$273.56 (subject to annual C.O.L.A. index). Acceptance may result in a potential impact of up to \$547.12 (or twice the current value of the exemption based upon the C.O.L.A.).

CLAUSE 22 - Applicant must be a veteran, (or a qualifying veteran's spouse, or surviving spouse), with a qualifying service-related disability of not less than 10%. The current benefit is a minimum of \$400. Acceptance may result in a possible maximum impact ranging from \$800 to \$2,000 (dependent on disability rating).

CLAUSE 37A - Applicant must be legally blind, as certified by the Massachusetts Commission for the Blind. Current benefit is \$500. Acceptance may result in a potential impact of up to \$1,000.

CLAUSE 41C(D) - Applicant must be over the age of 65 and must have very low income and minimal personal assets in order to qualify. Income and asset amounts vary and are dependent on annual C.O.L.A. index. The current benefit is \$1,000. Acceptance may result in a potential impact of up to \$2,000.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 12. TOWN/SCHOOL REVOLVING FUNDS *(Consent Calendar)*

To see if the Town will vote to authorize for FY12 the use of revolving funds under M.G.L. c.44, s. 53E ½, by the following Departments of the Town in accordance with the description for each fund placed on file with the Town Clerk, said funds to be maintained as separate accounts set forth as follows:

<u>Fund</u>	<u>Department</u>	<u>Maximum Amount</u>
Plumbing & Gas Inspectional Services	Building Inspector	\$ 45,000
Portable Sign Administration & Inspectional Services	Building Inspector	\$ 10,000
Conservation (Wetlands)	Conservation Commission	\$ 35,000
Council on Aging Activities	Council on Aging	\$ 20,000
Council on Aging Van Transportation (MWRTA)	Council on Aging	\$ 70,000
Fire Department Permits	Fire Department	\$ 45,000
Goodnow Library	Goodnow Library	\$ 10,500
Recreation Programs	Park and Recreation Commission	\$ 582,000
Teen Center	Park and Recreation Commission	\$ 20,000
Bus	Sudbury Public Schools	\$ 400,000
Instrumental Music	Sudbury Public Schools	\$ 75,000
Cable Television	Town Manager	\$ 30,000
Rental Property	Town Manager	\$ 40,000
Dog	Treasurer/Collector	\$ 50,000
Treasurer/Collector Passport Fees	Treasurer/Collector	\$ 12,000
Youth Commission	Youth Commission	
	(Park and Recreation)	\$ 50,000
Zoning Board of Appeals	Zoning Board of Appeals	\$ 25,000;

and to confirm that said funds have been established in accordance with M.G.L. c.44 s. 53E ½.

Submitted by the Town Finance Director. (Majority vote required)

FINANCE DIRECTOR REPORT: This article seeks authorization for Fiscal Year 2011 for certain previously established revolving funds pursuant to M.G.L. c.44, s. 53E ½. A descriptive summary of the funds follows:

- Plumbing and Gas Inspectional Services – permit fees collected are used to fund services for plumbing and gas inspections;
- Portable Sign Administration and Inspectional Services – annual registration fees collected pursuant to Section 3259A, Portable Signs, of the Zoning Bylaw are used to fund administration and inspectional services;
- Conservation – application fees collected are used to fund administration of the Sudbury Wetlands Bylaw;

- Council on Aging Activities – fees collected are used to fund Senior Center classes and programs;
- Council on Aging Van Transportation (MWRTA) – payments from the MetroWest Regional Transit Authority (MWRTA) and fare are used to pay salary and benefits of van driver and van operating expenses;
- Fire Department – permit fees collected are used to fund expenses related to the issuance of permits, including salaries and benefits, purchase and maintenance of equipment required;
- Goodnow Library – fees from non-Town agency use of Library meeting rooms are used for maintenance and utility charges for those rooms;
- Recreation Programs – fees collected are used to fund recreation programs and activities;
- Teen Center – fees collected are used for Teen Center programs and activities;
- Bus – user fee collections are used to fund additional or supplemental school transportation;
- Instrumental Music – user fees are used to fund additional or supplemental instrument music lessons after school hours;
- Cable Television – fees and other income collected in connection with cable television are used to fund local access services and the Town institutional network (I-Net);
- Rental Property – receipts received from the rental of Town-owned houses are used to fund expenditures related to the upkeep of these houses;
- Dog – fees, fines, charges, and penalties imposed under the Town Bylaw, Art. V.3, Regulation of Dogs, and those costs required by the Massachusetts General Laws are used for making purchases or paying any expenses related to the regulation of dogs;
- Treasurer/Collector – processing fees for passport applications are used to fund salaries, benefits and expenses therefor;
- Youth Commission – fees collected are used to fund youth programs and activities;
- Zoning Board of Appeals – application fees collected are used to fund consultants and part-time employee salaries.

The maximum amount stated is the same as the FY11 maximum voted for each fund except for Treasurer/Collector Dog Revolving Fund which has been increased from \$40,000 to \$50,000, and Passport Fees which has been increased from \$10,000 to \$12,000, and the following funds operated under the Park and Recreation Commission: Recreation Programs which has been increased from \$572,000 to \$582,000, Teen Center which has been increased from \$15,000 to \$20,000, and Youth which has been increased from \$45,000 to \$50,000. The Zoning Board of Appeals Revolving Fund has been increased from \$10,000 to \$25,000 reflecting an increase in expected filings.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 13. CONSERVATION REVOLVING FUND -
TRAIL MAINTENANCE**

(Consent Calendar)

To see if the Town will vote to establish and authorize for Fiscal Year 2012, the use of a revolving fund by the Conservation Commission for expenditures related to trail maintenance on Town-owned designated conservation lands, to be funded by license fees collected from the licensing of agricultural use of fields on conservation land; said funds to be maintained in a separate account, in accordance with M.G.L. Chapter 44, Section 53E ½; the amount to be expended therefrom shall not exceed \$5,000; or act on anything relative thereto.

Submitted by the Conservation Commission.

(Majority vote required)

CONSERVATION COMMISSION REPORT: This revolving fund is being established for the purpose of receiving agricultural license fees and depositing the proceeds into this revolving fund to be expended by the Conservation Commission for trail maintenance on Town-owned designated conservation lands. This fund will provide a source of money to contribute toward safe and enjoyable public access to the conservation land trails.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 14 . CEMETERY REVOLVING FUND

(Consent Calendar)

To see if the Town will vote to establish and authorize for Fiscal Year 2012, the use of a revolving fund by the Director of Public Works for expenditures related to maintenance of Town cemeteries, to be funded by sale of lots and other fees excepting funds set aside for perpetual care; said funds to be maintained in a separate account, in accordance with M.G.L., Chapter 44, Section 53E ½; the amount to be expended there from shall not exceed \$60,000; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This revolving fund is being established for the purpose of receiving funds from sale of lots and other fees excluding those amounts set aside for perpetual care, said revolving fund to be expended by the Director of Public Works for maintenance of Town cemeteries.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 15 . REGIONAL HOUSING SERVICES REVOLVING FUND

(Consent Calendar)

To see if the Town will vote to establish and authorize for Fiscal Year 2012 the use of a revolving fund by the Regional Housing Services Office for the operation of the Regional Housing Services Office, to be solely funded by membership fees of other towns and other external sources collected by the Office for all costs associated therewith, including salaries, administrative expenses and other staffing costs; said fund to be maintained in a separate account, pursuant to M.G.L. Chapter 44, Section 53E ½ and expended under the direction of the Town Manager; the amount to be expended therefrom shall not exceed the amount of \$150,000; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: The Towns of Bedford, Concord, Lexington, Lincoln, Sudbury, and Weston have signed an Inter-Municipal Agreement to establish a Regional Housing Services Office (RHSO) for the purposes of sharing housing administrative services. The Regional Housing Services Office will be established and located in Sudbury; and Sudbury will deliver the agreed upon services. The establishment of the RHSO is the result of two years effort sponsored by the Metropolitan Area Planning Council (MAPC) and led by the Town Managers of the participating towns. The RHSO will be

funded through membership fees paid by the participating towns and will provide oversight and monitoring services for the Towns. Sudbury is a service provider, and will not pay a membership fee. All expenses for this Regional Housing Services Office will be covered by the membership fees the participating towns contribute, with any additional funds available to the Town to reimburse administrative expenses. All financial activity will take place in the Revolving Fund, as requested through this Town Meeting article. The budget for the first year of service includes \$88,000 income as membership fees from the five towns, with corresponding expenses of \$88,000 (\$70,000 staffing, \$18,000 office expenses). All staff costs are billed to the RHSO at a fully loaded rate to include benefits.

The Regional Housing Services Office is an innovative approach to regionalize efforts with surrounding communities, and allows Sudbury to leverage expenses and expertise while helping municipalities preserve their affordable housing inventory. The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 16. SPECIAL ACT – TRANSPORTATION FEES

To see if the Town will vote to petition the General Court of the Commonwealth of Massachusetts to enact special legislation as follows:

Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same as follows:

Notwithstanding the provisions of sections 7A, 7B, 7C, and 68 of chapter 71 of the General Laws or any other law or regulation to the contrary, the Sudbury Public Schools may charge a fee to all students who choose to use regular school transportation services, provided that such fees shall not exceed the actual cost of transportation services received and provided that such fees shall be reduced by any amount of such expenses reimbursed by the State for the same fiscal year.

Submitted by the School Committee, Sudbury Public Schools.

(Majority vote required)

SUDBURY SCHOOL COMMITTEE REPORT: Massachusetts State laws and regulations require that non-regional school districts furnish transportation to and from school for students in grades kindergarten through six when the distance between the child's residence and the school exceeds two miles. (Regional school districts must provide transportation to children in grades kindergarten through twelve.) These laws have been applied to prohibit school districts from charging regular transportation fees for any mandated transportation. State law further provides that the state will provide reimbursement, subject to appropriation, for approved expenses for regular transportation for students who live more than one and one-half miles from the school. Nonetheless, the State Legislature has not appropriated any funds for non-regional regular transportation since 2003.

The Sudbury Public Schools currently provide the mandated transportation as well as optional transportation for those families who choose to pay a fee of \$350.00 per child per year up to a family maximum of \$635.00. There is no fee for students in grades kindergarten through six who live more than two miles from their school. This fee structure results in an inequitable imposition of fees, with some families paying a significant fee and others paying no fee, even if they live close together on the same street, depending upon the distance to the school.

The purpose of the home rule petition is to allow SPS to charge all families on an equitable basis for similar transportation services. Moreover, SPS spends over \$1 million each year on regular transportation, of which about \$650,000 is spent on mandated transportation that is not reimbursed by the State and cannot be supported through fees. The State is not expected to resume reimbursement for non-regional regular transportation in the near future and, indeed, has reduced education and local aid funding overall in recent years. This home rule petition would allow Sudbury to cover some of the costs previously borne by the State. While fees are not a desirable option for supporting public education, they have become an increasingly important tool in maintaining education services. Sudbury should be able to use this tool in an equitable and prudent manner. The home rule provision would reduce the local district's authority to charge fees for mandated transportation when such expenses are reimbursed by the State.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 17. WITHDRAWN

ARTICLE 18. STREET ACCEPTANCES

To see if the Town will vote to accept the layout, relocation, or alteration of any one or more of the following ways:

Brookside Farm Lane from Landham Road to a dead end, a distance of 500 ft.+/-

Trevor Way from Horse Pond Road to a dead end, a distance of 415 ft.+/-

as laid out by the Board of Selectmen in accordance with the descriptions and plans on file in the Town Clerk's Office; to authorize the acquisition by purchase, by gift or by eminent domain, in fee simple, of the property shown on said plans; and to raise and appropriate from available funds \$300.00, or any other sum therefor and all expenses in connection therewith; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Two-thirds vote required)

BOARD OF SELECTMEN REPORT: This article is the result of the recommendations of the Department of Public Works as to roads which meet legal requirements for acceptance. The Selectmen have voted their intention to approve the layout of these roads and will hold a public hearing for this purpose prior to Town Meeting. If the above streets are voted and accepted by the Town Meeting as public ways, all future maintenance and repair will be done by the Town. The Board will report further at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 19. AMEND BYLAWS, ARTICLE V. 3. REGULATION OF DOGS

To see if the Town will vote to amend Article V, Section 3, of the Town of Sudbury Bylaws at s.3-9, Kennel Registration, Licenses, and Fees, by changing the fee structure for kennel licensing fees to the following: Four (4) dogs - \$60.00; Five (5) to six (6) dogs - \$90.00; Seven (7) to ten (10) dogs - \$150.00; Eleven (11) dogs or more - \$175.00.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: Kennel fees were not updated in 2009 when fees were changed for individual dog licenses so that currently owners of individual dogs are paying more per dog than the kennel owners. The current licensing fees for individual dogs are: \$15/alterd dog and \$20/unaltered dog while the current kennel fees are: Four (4) dogs, \$25.00; Five (5) to ten (10) dogs, \$50.00; and Eleven (11) dogs or more, \$75.00. The proposed Bylaw change also adds another fee level for dogs currently within the 5 to 10 dog category. The waiver of the fee of kennels operated by charitable organizations such as Buddy Dog and Save a Dog remains in force. The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 20 . ROUTE 20 SEWER SYSTEM DESIGN AND PERMITTING

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, for the engineering design and permitting of the proposed Route 20 sewer system; and to determine whether the Town shall raise this appropriation by borrowing or otherwise; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Two-thirds vote required, if borrowed)

BOARD OF SELECTMEN REPORT: Article 20 requests funding approval for the design and permitting of a wastewater treatment facility for a portion of the Route 20 business district. The Board of Selectmen, working with the Route 20 Sewer Technical Advisory Committee, has advanced this project over the last 10 years from feasibility to reality. The 1999 Wastewater Needs Assessment, developed by Weston & Sampson Engineers, clearly demonstrated that the commercial properties along Route 20 are experiencing difficulty in treating and disposing of wastewater due to poor soil conditions and shallow depth to groundwater. The physical inability to properly dispose of wastewater leads to costly repairs and replacement of systems and the inability to attract certain types of businesses, particularly food services. The severity of the problem may eventually require businesses to shut down or move as the naturally occurring soils required for septic treatment are depleted, leaving no options for on-site disposal. Years of testing by the property owners have found limited soil suitability, if any, to expand the existing commercial septic systems.

Advanced wastewater treatment is necessary:

- to protect the adjacent aquifers which provide Sudbury's drinking water;
- to prevent businesses from moving out of Sudbury and the loss of commercial tax revenue; and
- to accommodate business growth and revitalization along the Route 20 corridor.

Previous work has identified the wastewater needs of the corridor's businesses, how to provide advanced wastewater treatment, and where all the treatment processes will be located. The next step is to design the facility and work with state officials to permit it. This phase will take 1-2 years for completion. During this time, as our consultants are completing the engineering and permitting (construction and environmental), the Selectmen will be working on a financing plan, creation of a sewer district, options for long term operation of the facility and implementing land use and zoning controls which will address concerns related to overdevelopment and guarantee that redevelopment along the corridor will maintain

the traditional character of Sudbury while maximizing the real estate development potential that will result from introducing wastewater treatment infrastructure.

This year's article will fund the first major step in the Route 20 sewer project. To date the Town has appropriated a total of \$135,000 for this project. These funds produced a Needs Assessment in 1999, completed a hydrogeological investigation of the Curtis Middle School field site in 2010, and will produce a Project Engineering Report needed to gain State-approved financing of the project. In 2002, local businesses contributed \$35,000 towards this project, which was used to test several properties as potential leaching sites. The Sudbury Foundation awarded the Town \$25,000 in 2002, which was recently used for the needs assessment update and preparation of a DEP work plan. All of these funds have been fully expended or committed towards these tasks.

The project cannot move forward into final design and permitting without the funds requested in this article. In considering this article, residents must be aware that if the Town proceeds with design and permitting, an additional appropriation will be necessary for the construction of the system in approximately 3 years. Based on a conceptual design, that cost is currently estimated to be approximately \$14 million. This would be financed through the State's Revolving Fund (SRF) loan program at 2% interest for up to 30 years, which will save the Town money on bonding costs and administration. The structure of that loan, and how costs will be apportioned between businesses and residents, is unknown at this time, but is anticipated to be a mix of betterment assessments to the improved properties and property taxes town-wide. More information about the construction costs and financing will be available as we near Town Meeting.

What we do know about this project:

- The sewer would provide service to all properties along Route 20 from approximately Massasoit Avenue to Lafayette Drive, and to the commercial properties along Union Avenue and Station Road. Both residential properties and commercial properties in the service area would be accommodated to tie into the sewer system.
- The treatment plant is proposed to be located at 641 Boston Post Road (the Bushey property). Treated effluent would then be pumped to the Curtis Middle School field for leaching.
- There is a clear and pressing need to provide advanced wastewater treatment to the Route 20 businesses. Installing a decentralized wastewater treatment system will address critical environmental issues associated with on-site septic systems and will allow the corridor to remain commercially viable and competitive. It is well documented that the use of septic systems for wastewater treatment in the project area curtails the growth of businesses in Sudbury, and creates a business environment where tenant choices are limited and properties (and revenues) are not maximized.
- According to the Sudbury Health Director, over \$3-4 million has been spent by the businesses along Route 20 in the last 10 years to repair, replace or maintain their septic systems. Over 17 systems have undergone costly repairs in the last 10 years – approximately 20% of all the business properties in the proposed service area. These repairs provide only a stop gap measure to the problem and will require additional repairs and replacements in future years. Many of our most viable businesses and plazas are affected, including Sudbury Farms, Shaw's Plaza, Mill Village, Dunkin' Donuts, McKinnon's Plaza, Lotus Blossom, Post Office Annex, Petsmart, Rossini's Plaza, Bearly Read Books, Next Generation Children's Center, Millbrook Condos, Sudbury Coffee Works, Friendly's, and Frugal Flower.

- Sudbury’s proposed system meets the Department of Environmental Protection guidance for water recharge. Water taken away from the Route 20 area will be discharged back into Sudbury’s aquifers.
- The wastewater flow associated with the current properties in the service area is approximately 170,000 gallons per day, with an estimated build-out (growth) flow of approximately 215,000 gallons per day. Based on recent hydrogeological investigations, it has been determined that the soils beneath the Curtis field have sufficient capacity for this volume as well as additional growth within the Route 20 business district.
- The Town will enact proper zoning controls to ensure overdevelopment does not occur. Land use controls will be discussed at future town meetings and will require 2/3 vote.
- The estimated total cost of the project is \$15 million - \$1 million for design and permitting, and \$14 million for construction of the system. Users of the system will pay entirely for the operation of the sewer system once it is constructed.

We are at a cross roads. After over 40 years of discussion on this issue, the Town is ready to move forward. The costs are high, but the future of Sudbury – our drinking water and our chance to enhance our economic climate - is at stake. Although we understand thoroughly the environmental benefits that sewerage will have on the Town’s drinking water supply wells, the economic benefits are not as well documented, and it will certainly take time to recoup the costs of constructing the system. It is the Selectmen’s goal to gain greater understanding of the economic costs and benefits of wastewater treatment, both short term and long term, and report our findings to the residents at Town Meeting so that informed decisions can be made. But overall, this project is viewed as an investment in our community for a sustainable future. This article is supported by the Board of Health and the Planning Board. The Board of Selectmen supports this article and will report further at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 21 . AMEND ZONING BYLAW ARTICLE IX, SECTION 4300 – WIRELESS SERVICES OVERLAY DISTRICT

To see if the Town will vote to amend Article IX (the Zoning Bylaw), Section 4300 (Wireless Services Overlay District) as follows:

1. Section 4330. Location, by deleting the first sentence reading “The Wireless Services Overly District shall include those parcels of land owned by the Town of Sudbury, which is held in the care, custody, management and control of the Board of Selectmen, Park & Recreation Commission, and parcels of land owned by the Sudbury Water District, as of the effective date of this Bylaw, as listed below:” and substituting the following: “The Wireless Services Overlay District shall consist of the following parcels of land:”
2. Section 4334 to exclude parcels identified as Assessor’s Map No. L08, Parcels 008 and 009, and Assessor’s Map No. M08, Parcel 021, located in the Raymond Road well field/Feeley Park area.
3. Section 4345 to delete the word “or” between the words “cells or panels, and add the words “equipment buildings or cabinets” after the word “panels”, so that section reads as follows:

“Changes in the capacity or operation of a wireless service facility which has previously received a special permit under this Bylaw, limited to an increase or decrease in the number of antennae,

cells, panels, equipment buildings or cabinets, or the number of service providers (co-locators), shall be permitted, subject to Site Plan review under section 6300 of the Zoning Bylaw and authorization from the lessor of the property.”

4. Add a new section 4346, which shall read as follows:

“4346. On all property and buildings owned by the Town of Sudbury, exclusive of school buildings and cemeteries, freestanding monopoles which are no higher than 80 feet, or roof or facade mounted equipment provided it is not higher than 20 feet above the highest point of the roof.”

5. Delete section 4363 in its entirety.

6. Section 4371 to add the words “and adjacent public roadways” at the end of that section so it reads as follows: “A color rendition of the proposed facility with its antenna and/or panels at the proposed location is required. One or more renditions shall also be prepared illustrating the visual effects of the facility from prominent areas and adjacent public roadways.”;

or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Two-thirds vote required)

BOARD OF SELECTMEN REPORT: These amendments are proposed in order to expand the usefulness of the Wireless Services Overlay District, which will have the effect of protecting the Town against undesirable cell tower sites in inappropriate locations. Cellular service providers are still scouring the Town for new sites. As the industry has changed, customers are demanding coverage all over Town, and the need for infrastructure that can carry large amounts of data. The properties contained in the original 1998 overlay district have been almost completely developed, and the cellular companies are looking elsewhere in Sudbury for additional sites to expand their networks. We are again trying to proactively locate new sites that meet the purposes of the bylaw, satisfy the needs of the industry, protect the Town from undesirable installations and provide legally defensible solutions. This amendment allows new towers no greater than 80 feet high on Town property, creating revenue enhancement opportunities for the Town. Only those parcels deemed suitable for such installation will be authorized for lease by the Board of Selectmen. Providing new sites will enhance the Town’s ability to deny applications on properties outside the overlay district. Given the build-out of the original parcels, we will be vulnerable to legal challenges if we do not continue to provide appropriate sites. The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 22. WITHDRAWN

ARTICLE 23. AMEND ZONING BYLAW, ARTICLE IX, USE TABLE – RETAIL USE IN INDUSTRIAL & LIMITED INDUSTRIAL DISTRICTS

To see if the Town will vote to amend Article IX (the Zoning Bylaw), as follows:

Section 2230 (Table of Principal Use Regulations) by permitting use #C.11 (retail stores and services not elsewhere set forth) in Industrial and Limited Industrial Districts; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: This article seeks to expand the types of uses that can be located on parcels of land which are zoned Industrial or Limited Industrial. The locations of these districts are along Union Avenue, Boston Post Road (near Bosse Sports, Richie and Clapper property, BMW, Raytheon, the landfill) and Old County Road (Lewis Welding). These properties all have existing buildings on them and are just as suitable for retail business as they are for industrial uses. Given the economic downturn, vacancy rates are higher than normal for Sudbury. Expanding the types of uses that can locate on these properties will enable the commercial property owners to offer leases to a larger range of businesses during this difficult period, without negative consequences.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 24. WITHDRAWN

ARTICLE 25. DISSOLVE PERMANENT LANDSCAPE COMMITTEE (*Consent Calendar*)

To see if the Town will vote to dissolve the Permanent Landscape Committee established under Article 35 of the 1965 Annual Town Meeting; or act on anything relative thereto.

Submitted by the Board of Selectmen

(Majority vote required)

BOARD OF SELECTMEN REPORT: This Committee was established under a petition article for the purpose of making recommendations for preserving and safeguarding public shade trees within the Town and for suitable planting schemes on Town-owned property including areas around buildings. Currently, the designation of thirty-two Scenic Roads under Article VIII(B) of the Town Bylaws, as well as M.G.L. chapter 87, provides for the safeguarding public shade trees while protecting public safety through procedures requiring action of the Planning Board and the Tree Warden. The Town also recognizes its volunteers and committees who have special knowledge of appropriate plantings for Town-owned buildings and who have been influential in developing those plantings with little or no cost to the Town. It is the intent of the Board of Selectmen to address landscape matters by other means rather than use of a specific committee for that purpose. The Board wishes to thank those who have served over the years on the Permanent Landscape Committee. The Board unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 26. SALE OF LAND – HUDSON ROAD AND PINWOOD AVENUE

To see if the Town will vote to authorize the Selectmen, acting on behalf of the inhabitants of the Town of Sudbury, to execute a deed or deeds conveying in fee simple the following described lands for a sum of no less than \$3,500, and upon such other terms as the Selectmen shall consider proper:

- Land on Hudson Road, shown as Parcel 124 on Town Property Map F04 and containing 0.12 acres according to said Map;
- Land on Pinewood Avenue, shown as Parcel 132 on Town Property Map F04 and containing 0.12 acres according to said Map;

or act on anything relative thereto.

Submitted by the Board of Selectmen

(Two-thirds vote required)

BOARD OF SELECTMEN REPORT: Article 26 authorizes the Selectmen to sell two parcels of land on Hudson Road and Pinewood Avenue to the highest bidder. These parcels were the subject of Town Meeting articles in 2009 for transfer of the lots to the Sudbury Housing Trust. The Trust is no longer interested in purchasing the lots, and there is no other municipal purpose identified for them. If this article passes, an Invitation to Bid will be issued setting forth the minimum bid and other conditions determined appropriate by the Selectmen, including no construction of a principal structure on the parcels. It is the intent of this article to convey the parcels to abutters who will add the land to their lots to increase the overall lot size. The parcels will be deeded with a restriction prohibiting the construction of a house, however small accessory structures associated with an abutting lot can be constructed. The acreage of the land will be taxable. The Board of Selectmen supports this article and will report further at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 27. EXCHANGE OF LAND OFF PETER’S WAY WITH ABUTTER

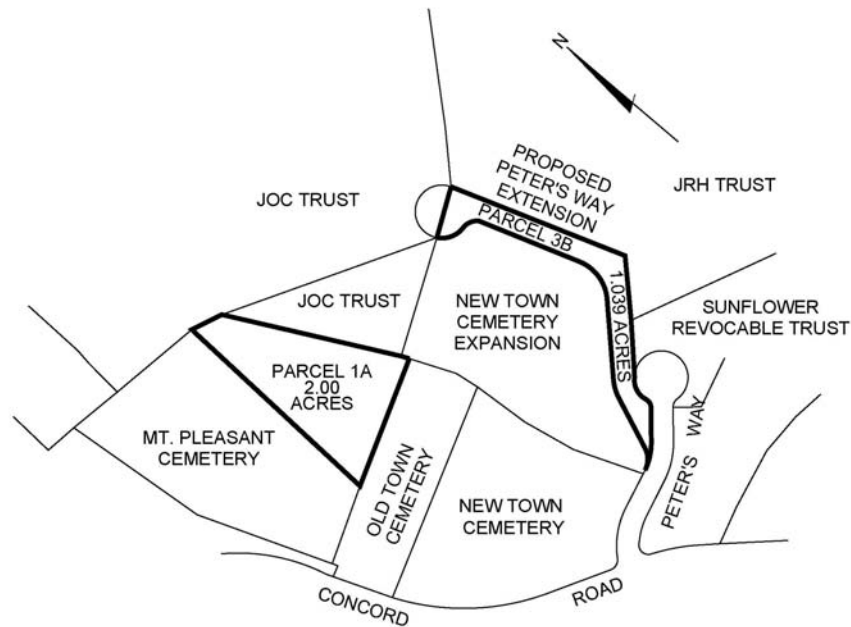
To see if the Town will vote to authorize and direct the Selectmen on behalf of the Town to execute a deed transferring a certain parcel of land owned by the Town, specifically Parcel – 3B consisting of approximately 45,284 s.f. located off Peter’s Way, a private way, as shown on “Plan of Land in Sudbury, Massachusetts”, last revised January 24, 2011, prepared by Sullivan, Connors and Associates, to Laura B. Abrams f/k/a McCarthy, Martha J. Keighley f/k/a Bartlett, and Dorothy M. Bartlett, Trustees of the JOC Trust, in exchange for a deed to the Town of Sudbury of Parcel – 1A on the aforementioned plan consisting of approximately two acres, said land to be used for cemetery purposes; said exchange is subject to subdivision approval of said plan pursuant to M.G.L. c.41 and the Town of Sudbury Planning Board Rules and Regulations governing the subdivision of land.

Submitted by the Board of Selectmen.

(Two-thirds vote required)

BOARD OF SELECTMEN REPORT: This article, if passed, allows the Town to obtain two acres of land needed for expansion of the existing Town cemetery together with a permanent access easement across Peter’s Way, and a landowner to obtain access to a landlocked parcel for the intended development of one house lot. The land transactions will not go forward without approval of the proposed subdivision which will be determined by the Planning Board under its Rules and Regulations for the subdivision of land and any law or bylaw relative thereto. The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.



**ARTICLE 28. COMMUNITY PRESERVATION FUND –
CARDING MILL POND HARVESTING**

To see if the Town will vote to appropriate an amount not to exceed \$16,000 from the Community Preservation Funds, as recommended by the Community Preservation Committee, for the purpose of habitat restoration of the Carding Mill Pond over a four (4) year period; or act on anything relative thereto. All appropriations will be allocated to the Open Space category and funded from FY12 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the harvest of non-native, invasive aquatic weeds in Carding Mill Pond, a pond largely owned by the Town. As they have in recent years, utilizing their own funds with a contributing appropriation of funds and services from the Town, the Hop Brook Protection Association proposes to perform the annual harvest. The invasive weeds cause birds and waterfowl to relocate, then kill the pond's non-aquatic life, and when it decomposes it produces noxious odors affecting the adjacent Town and Wayside Inn open space lands as well as nearby neighborhoods. If untreated, one of the Town's larger and more scenic ponds will devolve into swampland. The CPC understands that this is a temporary but necessary effort to retain a Town asset and supports this expenditure therefore showing the Town's commitment to ending the pollution of Hop Brook and restoring the sustainability of the Hop Brook waterway system.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 29. COMMUNITY PRESERVATION FUND –
TOWN CLERK HISTORIC DOCUMENT PRESERVATION**

To see if the Town will vote to appropriate an amount not to exceed \$117,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for the purpose of restoring and preserving historic Town records, said work to be performed under the direction of the Town Manager with the involvement of the Sudbury Historical Commission; or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from FY12 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the restoration and preservation of certain historic Town records identified by the Town Clerk as frequently used by the public and at greatest risk for further deterioration. While the documents undergo conservation treatment, they will also be digitized, thus preserving them in perpetuity. Digitization will allow the public greater access to the records and will alleviate the need for constant physical handling of original documents. The CPC feels that preservation of historic documents was a fundamental reason for including the category of Historic Preservation in the Community Preservation Act; and as Sudbury has upheld a long-standing tradition of maintaining its historic records, the CPC supports the use of these funds for this project.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 30. COMMUNITY PRESERVATION FUND – HISTORIC PROJECTS

To see if the Town will vote to appropriate an amount not to exceed \$37,000 from the Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the purpose of completing the following projects as recommended by the Sudbury Historical Commission: restore chimneys at Hosmer House; restore portions of the Wadsworth Cemetery gazebo; install a gravestone at Florence Hosmer's gravesite; remove invasive plant species around the Revolutionary War Cemetery; or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from FY12 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation not to exceed \$37,000 to fund four projects in the historic category. The Sudbury Historical Commission has identified the following as priority projects which have the additional support of the Building Inspector and Department of Public Works. Two of the four projects are for restoration and stabilization, which will prevent further loss of historic fabric and alleviate potential public safety hazards. The restoration projects include the exterior chimneys at the Hosmer House and the Wadsworth Cemetery gazebo. The Hosmer House chimneys are spalling and allowing water infiltration, and the Wadsworth Cemetery gazebo requires restoration of the slate roof. The headstone to mark American artist Florence Hosmer's gravesite in the Wadsworth Cemetery will enhance the Town's efforts to honor and promote an awareness of one of the Town's most significant historic figures. Funds for invasive plant removal around the Town Center and Revolutionary War Cemetery's stone walls will aid in the efforts to protect the stone walls and prevent further deterioration. The CPC believes these projects are necessary to protect and preserve the integrity of Town-owned assets and to promote an awareness of the Town's historic people and places.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 31. COMMUNITY PRESERVATION FUND – TOWN-WIDE WALKWAYS

To see if the Town will vote to appropriate an amount not to exceed \$100,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for the purpose of constructing new walkways within the Town, such design and construction to be guided by the spirit and intent of the Town of Sudbury 2001 Master Plan, the February 2000 Report of the Walkway Committee, the July 2005 Sudbury Board of Selectmen directive regarding public works projects on Scenic Roads, and by recommendation of the Town of Sudbury Planning Board, the Director of Planning and Community Development, and the Director of the Department of Public Works; or act on anything relative thereto. All appropriations will be allocated to the Recreation category and funded from FY12 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the engineering, design and construction of priority *new* walkways within the Town. The walkways funded will be selected by the DPW Director, with the recommendation of the Planning Board, from the list of walkways identified in the February 2000 Report of the Walkway Committee. The CPC firmly believes that the design and construction of walkways should be guided by the spirit of the Town's 2001 Master Plan as it pertains to Town character, and by the July 2005 directive from the Board of Selectmen regarding public works projects on Scenic Roads. The CPC believes that Sudbury's walkways provide a relatively low-maintenance/low-operational cost opportunity for neighborhood recreation. This opportunity, in addition to the safety benefits that walkways confer, contributes greatly to the quality of life in Town, and has been repeatedly identified as desirous by residents not only at Town Meeting, but in other forums and studies as well.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 32. COMMUNITY PRESERVATION FUND –
SUDBURY HOUSING TRUST 10% ALLOCATION**

To see if the Town will vote to appropriate an amount not to exceed \$190,000 of Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the purpose of providing funds to the Sudbury Housing Trust in support of its efforts to provide for the preservation and creation of affordable housing; or act on anything relative thereto. All appropriations will be allocated to the Community Housing category and funded from FY12 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the Sudbury Housing Trust using the ten percent (10%) of FY12 anticipated revenues that the Act

requires be set aside for affordable housing. The Trust was created at the 2006 Annual Town Meeting, provided with start-up funding at the 2007 Annual Town Meeting, and funded with the ten percent (10%) allocation each year since 2008. This appropriation will go toward implementing the Housing Trust's multi-pronged housing strategy. The goal of all these community housing efforts is to make progress toward the State-mandated number of affordable housing units in Town, and to provide an increased diversity among Sudbury's housing options. The CPC understands that as long as progress is not made toward that goal, the Town suffers a lack of control over not only the location, but also the construction parameters of multi-unit housing (40B developments) anywhere in Town.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 33. COMMUNITY PRESERVATION FUND –
FAIRBANK FARM AGRICULTURAL PRESERVATION RESTRICTION**

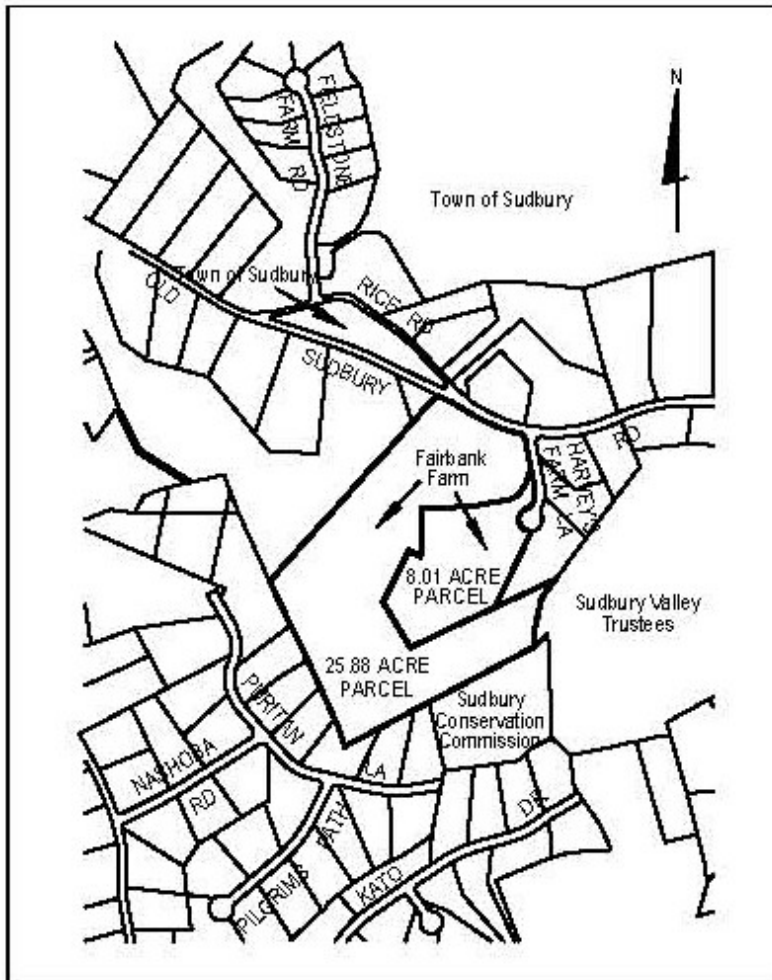
To see if the Town will vote to appropriate an amount of Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the purpose of purchasing an Agricultural Preservation Restriction on approximately 33 acres of land located on Old Sudbury Road; or act on anything relative thereto. All appropriations will be allocated to the Open Space category and funded from unrestricted reserves.

Submitted by the Community Preservation Committee. (Two-thirds vote required, if borrowed)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the purchase of an Agricultural Preservation Restriction on the Fairbank Farm, comprising approximately 33 acres of land on Old Sudbury Road. The end result would be that the land would be owned and farmed, or left undeveloped, in perpetuity. However, that ownership would be governed by an agreement that precludes non-agricultural development, tightly restricts and controls allowed land uses, and affords legal access to the public. The farm abuts land owned by the Sudbury Valley Trustees. The Restriction may also include requirements to preserve the large barn on the property, which is an early 20th century feature that is integral to the property. However, these restrictions have not been finalized at this date. This property is listed as a priority parcel for preservation in the 2009 Open Space and Recreation Plan, and an area of critical concern in the 2006 Heritage Landscape Inventory Report.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.



ARTICLE 34. COMMUNITY PRESERVATION FUND – AMEND ARTICLE 31 OF THE 2008 TOWN MEETING, SUDBURY HOUSING AUTHORITY UNIT RECONSTRUCTION *(Consent Calendar)*

To see if the Town will vote to amend Article 31 of the 2008 Town Meeting by removing the time for completion of the project, as recommended by the Community Preservation Committee; or act on anything relative thereto.

Submitted by the Community Preservation Committee. (Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an indefinite extension of the time limit for Article 31 of the 2008 Town Meeting. Removing the time limit for the Sudbury duplex affordable housing project is necessary in order to allow the SHA greater flexibility with project completion. Obtaining State funding caused a delay; however, those funds are now secured and construction is expected to begin in 2011.

BOARD OF SELECTMEN POSITION: The Board of Selectmen support this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 35. COMMUNITY PRESERVATION FUND –
GENERAL BUDGET AND APPROPRIATIONS**

To see what sum the Town will vote to appropriate from Community Preservation Act funds, as recommended by the Community Preservation Committee, for the FY12 Community Preservation Act budget; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article sets forth the entire FY12 CPA budget, including appropriations and reservations as required in connection with the administration of the CPA funds. The article appropriates funds for FY12 debt service obligations totaling \$1,226,556. These obligations arise from prior Town Meeting approval for the bonding of four projects: 1) purchase of the Dickson property utilizing the Open Space (\$15,731) and Historic Preservation (\$10,487) categories; 2) purchase of land and development rights as well as construction of a sports field on the Cutting property utilizing the Open Space (\$363,741) and Recreation (\$44,957) categories; 3) purchase of the Libby property utilizing the Open Space (\$207,963) category; and 4) purchase of development rights on the Nobscot Boy Scout Reservation phases I and II utilizing the Open Space (\$583,677) category.

The article also appropriates funds for administrative and operational expenses of the CPC in the amount of \$85,000. The administrative fund can be used by the CPC to pay for technical staffing and expertise, consulting services (e.g. land surveys and engineering), property appraisals, legal advertisements, publication fees and other administrative expenses. By statute, the CPC can budget up to five percent (5%) of its annual budget for administrative expenses, or \$95,000 based upon the revenue projection of \$1,900,000 in FY12. Any funds remaining in the administrative account at fiscal yearend revert back to the CPA Fund Balance, as they have for the past seven years, and need to be re-appropriated for administrative use in subsequent years. The CPC believes that having access to administrative funds is critically important, in that it allows it to conduct business on a time-sensitive basis - a vital component of the CPA.

The article may also reserve the requisite statutory minimum of ten percent (10%) of the CPA budget in each of the core CPA categories of Open Space, Community Housing and Historic Preservation. This minimum is mandated by the State CPA statute, and funds not spent in each of these three core categories must be reserved for future expenditure in those same categories. The actual amount reserved each year depends upon whether or not that Town Meeting has appropriated money totaling less than 10%, or not appropriated any money at all, in any of these three core categories. If there is a balance of unspent CPA funds from that fiscal year after such reservations and after Town Meeting has voted the CPA articles, it is budgeted in the unrestricted reserve account for future CPC projects in all three categories. To date, only the Historic category includes Reserves. Both the Community Housing and Open Space categories have expended the requisite 10% minimum allocations.

BOARD OF SELECTMEN POSITION: The Board of Selectmen supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 36. REDUCE CPA SURCHARGE FROM 3% TO 1.5%

To see if town will vote to approve an amendment reducing the amount of surcharge imposed on real property pursuant to Mass General Law Chapter 44B, the Community Preservation Act, from 3% to 1.5%; or act on any relative thereto.

Submitted by Petition.

(Majority vote required)

PETITIONER'S REPORT: This article asks Sudbury voters to support a property tax reduction by reducing Sudbury's participation in the Massachusetts Community Preservation Act (CPA). This article proposes the CPA property tax surcharge (tax on tax) be reduced to 1.5% from the 3.0% currently assessed.

Each year, as a requirement of Sudbury's participating in the Massachusetts CPA; no less than 10% of the fund must be allocated to each of the following areas: (1) affordable housing, (2) acquisition and preservation of open space, and (3) acquisition and preservation of historic buildings and landscapes.

Considering projected investment income on the CPA Trust Fund, the reduction to 1.5% provides sufficient funding for community preservation, including preservation of Sudbury's historic buildings. A reduction of this property tax surcharge would also allow for preservation of open space to continue. With this reduction Sudbury can still protect its historical assets and ensure protection of open space.

Passage of this article at Town Meeting and at the next election would result in a property tax reduction on average of \$150-\$200 per household per year.

The petitioner asks for your vote in support of this article.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 37. SPECIAL ACT – AMEND c. 131 OF THE ACTS OF 1994 TO
REPLACE TOWN MANAGER WITH TOWN ADMINISTRATOR**

To see if the Town will petition the Great and General Court of the Commonwealth of Massachusetts to amend the special act of 1993 modifying Sudbury's form of government from a Selectman – Town Manager to a Selectman - Town Administrator. Upon approval of Town Form of Government said legislation to take effect no later than the first day following the last day of the current town manager contract or earlier should the town manager's service be completed prior to end of the current contract. With passage, no further submissions to a Town Meeting; or act on anything relative thereto, is necessary for implementation.

Submitted by Petition.

(Majority vote required)

PETITIONER'S REPORT: This article asks the voters of Sudbury to support this article which would improve the accountability and transparency of our town governance structure. Under this shift in administration, Sudbury's Board of Selectmen would be more accountable as would be the key employees of Sudbury.

More Specific considerations for why voters should support this directive:

- Sudbury would save \$25-50k per year (plus pension) as the compensation of a Town Administrator is lower than Town Manager;
- By adopting this form of governance, Sudbury would be more aligned with what is commonly referred to as peer communities;
- Despite the higher compensation Sudbury's Town Manager earns, the public services this position manages is far less than peer communities.

Enacting this model at the conclusion of the current Town Manager contract and/or on the day following the termination of the contract, provides Sudbury the time necessary for legislative actions, yet also avoids the severance costs associated with the current contract which are at minimum 1 year salary and 18 months mandatory notice of intent not to renew.

By transitioning to a Town Administrator & Selectmen structure, the Town Administrator will more accountable for their actions, as will their direct reports. This governance form would provide residents the ability to gain a better understanding of operations, limits of authority, and accountability.

The petitioner asks for your support in this article to change key employee leadership in Sudbury from a Town Manager to a Town Administrator.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 38. PURCHASE LAND OFF BRIMSTONE LANE

To see if the Town will vote to raise and appropriate the sum of \$900,000, or any other sum, for the purchase of a 9+/- acre parcel of land on Brimstone Lane being a portion of land shown on Assessors Map L04-0500; and to determine whether the Town shall raise this appropriation by borrowing, use of CPA funds, or otherwise; and to determine whether or not the Board of Selectmen will acquire this property under a taking by eminent domain; or act on anything relative thereto.

Submitted by Petition.

(Two-thirds vote required, if borrowed)

PETITIONER'S REPORT: This parcel contains variable topography, including steep areas sloping to a large wetland. The property is valuable wildlife habitat and a possible habitat for the Eastern Box Turtle. The property is adjacent to the Nobscot Priority Heritage Landscape. It is also adjacent to the Boy Scout Property, and it would provide access to the Boy Scout property from Brimstone lane.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 39. RESOLUTION – STATE OF THE TOWN PUBLIC FORUM

To see if the Town will vote to request the Board of Selectmen establish a policy whereby the Town Manager and Department Heads report, on a bi-annual basis, the progress, current status and path/requirements of Town goals, programs, decision/resolutions in an open, public “State of the Town” forum by approving the following Resolution:

Resolution – “State of the Town” Public Forum

Whereas: The mission of the Town of Sudbury is to ensure the safety and well-being of the community, to protect and enhance the financial health, education excellence, and environmental quality of our Town;

Whereas: The Board of Selectmen relies on the professionalism of Town staff and volunteers, and use of long-term, strategic planning and enhanced communications in Town governance;

Whereas: The Board of Selectmen is dedicated to protecting and enhancing the unique sense of place found in Sudbury and protecting and encouraging tolerance and diversity;

Whereas: The Board of Selectmen, as the chief policy making and governance body of the Town of Sudbury, provides leadership for staff, volunteers, residents and other stakeholders in the Town by advancing goals, programs and decisions/resolutions that are based on the above;

Whereas: There is no formal, public presentation discussing the progress, current status and path/requirements to completion of such goals, programs, decisions/resolutions;

Therefore be it resolved that: The voters of Sudbury request The Board of Selectmen establish a policy whereby the Town Manager and Department Heads report, on a bi-annual basis the progress, current status and path/requirements to completion of such goals, programs, decisions/resolutions in an open, public "State of the Town" forum.

Submitted by Petition.

(Majority vote required)

PETITIONER'S REPORT: It is a best practice for organizations, both commercial and government, to require its' senior managers report, on a regular basis, the status of programs, projects, resolutions, goals and objectives for which they have been assigned responsibility in the accomplishment of said program/project/resolution or the attainment of said goal/objective.

BOARD OF SELECTMEN POSITION: The Board of Selectmen will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

TOWN COUNSEL OPINIONS

It is the opinion of Town Counsel that, if the Bylaw amendments proposed in the following articles in the Warrant for the 2011 Annual Town Meeting are properly moved, seconded and adopted by a majority vote in favor of the motions, the proposed changes will become valid amendments to the Sudbury Bylaws:

Article 19 Amend Bylaws, Art. V.3 – Regulation of Dogs

It is the opinion of Town Counsel that, if the Zoning Bylaw amendments proposed in the following articles in the Warrant for the 2011 Annual Town Meeting are properly moved, seconded and adopted by a two-thirds vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Zoning Bylaw:

Article 21 Amend Zoning Bylaw, Art. IX, Section 4300 – Wireless Services Overlay District

Article 23 Amend Zoning Bylaw, Art. IX, Section 2230 – Table of Principal Use Regulations

And you are required to serve this Warrant by posting an attested copy thereof at the Town Hall at least seven days before the time appointed for such meeting.

Hereof fail not and make due return of the Warrant by your doing thereon to the Town Clerk, at or before the time of meeting aforesaid.

Given under our hands this 29th day of March, 2011.

SELECTMEN OF SUDBURY:

John C. Drobinski

Lawrence W. O'Brien

Robert C. Haarde

PART II

FINANCE COMMITTEE SECTION

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FY12 SECTION OVERVIEW

This represents the second year of the revised Finance Committee (“FinCom”) section of the Town Warrant (the “FC” pages). The objective of the changes implemented a year ago was to provide taxpayers with the same historical trend information regarding operating expenses and metrics that the FinCom uses during the year to evaluate budget proposals.

A summary of the data included is set forth below:

- Operating metrics for each Cost Center for the fiscal years ending June 2009, June 2010, June 2011 and June 2012 (requested) including:
 - Average salaries.
 - Healthcare benefits for active and retired employees.
 - Student populations with details on Sudbury, Lincoln, MetCo, and other out-of-district students.
 - Cost per student for each school system.
 - Headcount by department and/or function for each Cost Center.
- The operating budgets of the two school systems are presented in similar formats to improve their readability.
- Detail on Community Preservation Fund cash flows, with information on sources of revenue, expenditures on Open Space, Community Housing and Historic Preservation, and cash balances.
- Compensation information for all employees, whether managers or not, making over \$100,000 a year in lieu of previously reported compensation information on managers making over \$80,000 a year.

As you review information contained in the FC pages, please keep in mind two important facts. First, this is Sudbury information, and metrics such as average teacher salaries and cost per student are calculated using the FinCom’s methodology. As our figures are calculated differently from those compiled by the Massachusetts Departments of Revenue and Education, the Warrant information is not always comparable to what you might find at the mass.gov web site. You cannot, for instance, compare the FinCom’s “cost per student” to the one available on the Mass DOE web site. To compare Sudbury to other towns, please use the figures on the mass.gov web site. However, to compare Sudbury specific benchmarks the FinCom reviews, please use the information contained in the Warrant.

Second, not all of these statistics are meaningful when used to compare the Sudbury Public Schools and the Lincoln-Sudbury Regional High School. The two school systems are inherently different due to the age and educational needs of their respective student populations. Most of the statistics the FinCom reviews are used solely for the purpose of identifying trends within each system, not for comparison between the school systems.

FINANCE COMMITTEE REPORT

Dear Resident of Sudbury,

This report will assist you in understanding Sudbury's fiscal year 2012 ("FY12") budget – from July 1, 2011 through June 30, 2012 - and the related financial articles that will be presented to you at Town Meeting beginning on May 2nd. We believe, above all, the participation of an informed voter is essential for the success of Sudbury's democratic process and continued fiscal health.

The Finance Committee is responsible for reviewing budgets for the town and schools and making recommendations to the Board of Selectmen and to the taxpayers at Town Meeting. In this role, we have no authority to make spending decisions as that is the responsibility of our various elected bodies. Rather, our role is to examine those budgets on your behalf and make independent and informed recommendations regarding the budget and other financial issues. We do so by gathering data and asking numerous questions prior to forming a recommendation.

This diligence process happens throughout the year as we meet with the Town, the K-8 School System, and the High School in regularly scheduled Finance Committee meetings as well as in smaller liaison meetings between one or two FinCom members and the management teams for each cost center.

This report is the culmination of a six month budget process. In October 2010, the FinCom issued budget guidelines to the leaders of the three principal Sudbury cost centers - Sudbury Town Departments (the "Town"), Sudbury Public Schools ("SPS") and the Lincoln-Sudbury Regional High School ("LSRHS" or the "High School"). In preparation for the budget hearing process in February 2011, we asked each cost center to prepare two budget scenarios for FY12:

- a Non-Override Budget that allows for annual growth of 1.87% for each cost center and was based upon expectations regarding State aid and local receipts as of the date this warrant went to publication; and
- a Level Services (or roll-up) budget that assumes each cost center maintains the same staffing levels in FY12 as funded through their FY11 budgets, with the costs for FY12 based on the current contracts in place for their various collective bargaining units.

What about the "4.5% budget" presented last year?

As a matter of background, in early 2008 the Finance Committee concluded that the recent 6.5% per annum growth in the cost of operating the schools and the town was not sustainable and would likely lead to a series of no override votes that could have significant adverse consequences for the quality of our schools and other town services. After much discussion, in the fall of 2008 and in anticipation of the negotiation and renewal of all of the major Town and School labor contracts in 2009, the FinCom voted to recommend a spending growth limit of 4.5% per annum. This growth limit was meant to be a guideline for budget growth; a maximum, not a minimum. Moreover, this guideline was constructed prior to the onset of the international financial and fiscal crisis experienced in 2009 and 2010.

Unfortunately, like most communities in Massachusetts, Sudbury continues to feel the impact of the recent economic recession while confronting financial challenges caused primarily by decreasing state aid, lower local non-property related taxes and continually escalating employee costs, particularly healthcare and other benefits for both active and retired employees. As a result, while the FinCom recognizes that the current labor agreements were negotiated within the context of a 4.5% fixed growth budget, and in many cases provided a rate of growth well below the 4.5% maximum, those same agreements did not fully address the context of the fiscal crisis at the time and the accompanying uncertainty about future non-property tax revenues. Future budget guidelines beyond FY12 will need to carefully consider the likelihood that non-property tax revenue will most likely remain depressed over the next several years. As a result, sustainable budget growth is likely to continue to be constrained well below the previous 4.5% limit.

Recommended Non-Override Budget

For FY12, we are recommending only a Non-Override Budget of approximately \$80.7 million at this time. The Non-Override Budget represents a tax increase of approximately 2.37% (\$254) on the average assessed home value of \$628,000, and a total increase in taxes of \$1,600,339 including new growth and commercial property taxes.

The Non-Override Budget is in compliance with Proposition 2½ (“Prop 2 ½”), which was approved by Massachusetts voters in 1980 and first implemented in fiscal year 1982 (M.G.L. Ch. 59, sec. 21c). It limits the amount of revenue a city or town may raise, or levy, from local property taxes each year to fund municipal operations without the approval of taxpayers at the ballot box. Prop 2 ½ is not meant to be a “fiscally responsible spending benchmark”. Exceeding this level should not necessarily be construed with negative implications towards a town’s or a schools’ financial management. It is meant to reflect a “check and balance” point at the local level: town officials cannot raise taxes more than allowed under Prop 2 ½ without an affirmative vote of the taxpayers. To spend more money, town officials have to “make their case” to the taxpayers who can apply their own test of reasonableness by their votes at Town Meeting and the polls.

The FY12 Non-Override Budget represents a 1.87% increase in the operating budget for each cost center compared to the FY11 budget. The difference in growth between the property tax increase of 2.37% and the allowable growth in the operating budgets of each cost center is due to continued projected declines in State Aid as well as stagnation in local non-property tax revenues. Sources of revenue and changes from FY11 are set forth below.

- Under Proposition 2 ½, the tax increase is limited to 2 ½% of the overall tax levy; for FY12, this increase is approximately \$1.6 million.
- New growth, the tax on new and upgraded properties, is estimated to generate \$350,000 of new revenue in addition to the allowed increase in the levy, down from an estimated \$450,000 in FY11; this lower number assumes a continued reduction in new home construction and renovation activity related to the recent economic downturn.
- State aid revenue is estimated to decrease by 5% from FY11 levels, resulting in a decrease of approximately \$420,000 (comprised of a 5% reduction in State Aid to Sudbury and LSRHS of approximately \$277,000 and \$143,000, respectively).
- Local receipts, primarily motor vehicle excise taxes and fees charged for certain town services, are expected to remain flat vs. forecast FY11 levels of approximately \$3.7 million.

- The annual school debt reimbursement represents aid from the State and is the same as FY11 as this amount will not change for the remainder of the payments scheduled through FY21 (unless the outstanding debt is refinanced); this aid must be used to reduce the amount of school debt issued and is excluded from the normal Proposition 2 ½ tax levy limit.

	BUDGET FY11	BUDGET FY12	Increase/ (Decrease)	%
Tax Levy	67,418,506	69,018,845	1,600,339	2.37%
SBAB School Debt Reimbursement	1,702,597	1,702,597	0	0.00%
State Aid ^(a)	5,537,686	5,260,802	(276,884)	-5.00%
Local Receipts	3,652,860	3,657,581	4,721	0.13%
Sub-Total	78,311,649	79,639,825	1,328,176	1.70%
Enterprise Funds	1,012,397	1,156,844	144,447	14.27%
TOTAL REVENUE	79,324,046	80,796,669	1,472,623	1.86%

^(a) Reflects State Aid for Sudbury only; LSRHS State Aid included in "Offsets/Re-apportionments".

Potential Override Budget Scenario

While we are not recommending an Override budget at this point in time, the FinCom has presented certain parameters for an Override budget to the Board of Selectmen for consideration. In summary, this potential scenario results in an Override Budget of approximately \$81.7 million which represents a total tax increase of approximately 3.86% (\$413) on the average assessed home value (inclusive of the amount previously discussed in the Non-Override Budget). The potential Override Budget scenario represents a tax increase over last year of \$2,600,339, including new growth and commercial property taxes, and is comprised of the following three components.

- 1) \$370,000 of additional funding to SPS which consists of approximately \$175,000 to cover the gap from their Level Services budget request as well as an additional \$195,000 to fund several critical needs that went unfunded due to the reductions resulting from three consecutive years of budget growth below 2% per annum. With this additional funding, the overall FY12 SPS operating budget would increase by 2.94% from the current FY11 budget.
- 2) \$130,000 of additional funding for Town services in the form of an \$80,000 increase to the operating budget of the Town departments and an additional \$50,000 increase to the Capital Budget for specific capital items needed by the Town. With this additional FY12 funding, the Town operating budget and the Capital Planning budget would increase by 2.31% and 11.32%, respectively, from FY11 budget levels.
- 3) \$500,000 of additional funding to LSRHS to help offset higher Special Education costs and mitigate some of the headcount reductions currently forecasted. With this additional funding, the overall FY12 LSRHS operating budget would increase by 5.70% from the current FY11 budget

As outlined above, unlike recent fiscal years the FinCom is not recommending the same percentage increase for each cost center as a disproportionate share of the override is targeted for LSRHS. As a result, the FinCom believes their override allocation should be tied to targeted savings that could be realized by restructuring the current health insurance plans offered at

LSRHS. Specifically, by moving all employees to a healthcare plan with an average cost of \$19,422 per annum for family coverage and \$7,296 for individual coverage (as compared to the current average plan cost of \$22,842 per annum for family coverage and \$8,592 for individual coverage), LSRHS could save approximately \$400,000 due to lower health insurance premiums while their employees would collectively save approximately \$173,000 in premium contributions. These projected savings are as compared to the costs projected in their current Level Services budget and would still provide employees with a generous healthcare package. In the longer term, we would like to see premiums for all town employees' plans remain or come down into the range more readily seen in the private sector of \$14,000 to \$18,000 per annum for family coverage and \$5,000 to \$7,000 per annum for individual coverage.

In conjunction with the proposed benefit changes, the FinCom suggests using \$300,000 from the LSRHS's Excess and Deficiency Fund (similar to the Town's Stabilization Fund) to further bridge the funding gap. As demonstrated below, the sum of the proposed changes outlined in this potential Override scenario would address the significant funding gap at LSRHS.

	FY12
LSRHS Non-Override Budget Shortfall	\$ (1,182,000)
 <i>Parameters for Potential Override Scenario</i>	
1) Override Amount to LSRHS	\$ 500,000
2) Savings from Health Insurance Changes	\$ 400,000
3) Allocation from E&D Fund	\$ 300,000
Total Adjustments	\$ 1,200,000
Adjusted Budget Surplus / (Shortfall) = \$ 18,000	

Moreover, the FinCom believes that concessions are warranted, in the form of the aforementioned benefit plan changes, in order to preserve one of the principles of the spending growth limit concept. Specifically, that absent major changes, such as a significant change in student population or new service mandates imposed by the State or Federal government, all cost center budgets should be growing at roughly the same rate. This is logical given that all three are labor-intensive services with 70-80% of their budgets consisting of labor-related costs. Limiting each cost center to the same percentage increase would:

- discourage overly generous labor contracts as the cost center with the larger contract settlement will have less money to spend on new hires (or reducing layoffs), technology, classroom materials, etc.;
- encourage each cost center to find ways to operate more efficiently by moving their budgets away from a “cost plus” approach as savings generated could be applied to better uses within that cost center as long as overall spending stays within the growth limit applied to all; and
- avoid the otherwise unfortunate result that one cost center might receive a bigger piece of the pie, over time, without any change in their relative contribution to town services.

As of the date this warrant was submitted for publication, no changes had been agreed to by the LS School Committee and their collective bargaining units regarding healthcare benefits. That said, the FinCom is hopeful that discussions are ongoing and will proceed in earnest so that we

might have the opportunity to provide a formal recommendation concerning a potential Override Budget at Town Meeting.

Conclusions

Over the past several years, the Town's fiscal situation has been severely constrained by increases in the cost of wages and benefits, costs which have risen much faster than the rate of inflation. Moreover, with one of the highest levels of households with school age children in the State, we have a much higher demand for education services relative to other communities. On a comparative basis, Sudbury has amongst the highest per capita spending on education in the entire State. That said, our spending on schools and services as measured on a per student basis is in line with, or lower than, many of our peers.

However, our cost structure is constrained by the fact that our revenue structure is heavily dependent on property taxes with only 7% of Sudbury's total revenues coming from commercial property taxes and 70% coming from residential taxes. As a result, residents bear the brunt of any tax increases.

In the short-term, it is unlikely that our non-residential tax revenues will see any meaningful increases given the current economic climate and the potential continued decreases in state aid and stagnation of local receipts. For the past three years, these non-residential tax revenues have decreased substantially. As a result, the Finance Committee believes the Town will increasingly be confronted with three alternatives:

- additional overrides needed to fund our ongoing level of services given current organizations and cost structures;
- reductions to staff, and therefore services, within our current organizations and cost structures in order to fit within the constraints of Proposition 2 ½ and avoid overrides; or
- changes to our current organizations and cost structures that enable our Town to deliver substantially (but perhaps not completely) the same level of services at a lower overall cost.

The Finance Committee believes that achieving the latter of these three alternatives is imperative if we are to avoid or limit either of the former alternatives. To that end, we encourage the Selectmen and the School Committees to continue their efforts to reduce our structural costs. Several initiatives have already been implemented - including reductions in the rate of growth of Town and SPS employee health insurance, enhanced cooperation among school administrations, and sharing of staff with neighboring communities to reduce overall costs. However, more is needed.

In addition to these cost initiatives, we support the Selectmen's on-going efforts to sustain and grow our commercial sector by moving forward with efforts to fund the development of a wastewater treatment plant to serve the Route 20 area. Over the long-term, diversifying our tax base and securing revenue opportunities beyond the traditional residential property tax is critical.

We strongly urge you to be informed on the budgets being presented for your consideration. You have several avenues to increase your understanding of how each budget will affect the level of services, schooling and quality of life in Sudbury. Please review the Finance Committee Report

section of the Town Warrant; attend budget forums; watch the Finance Committee budget hearings, which will be rebroadcast on Channels 8 (Comcast) and 31 (Verizon) during March and April; and review the vast array of budget materials available on the town and school websites. Also, do not hesitate to ask questions of your elected officials and committee members.

Whether or not you agree with our findings and recommendations, please make sure that when you cast your vote, it is an informed one.

Lastly, the Finance Committee would like to recognize and extend thanks to the employees of the Town, SPS and LSRHS, and the various committees for their support and contributions during the preparation of the FY12 budget.

Respectfully yours,

Sudbury Finance Committee

Jim Rao, Chair
Joan Carlton
Tammie Dufault
Jamie Gossels
Robert Jacobson

William Kneeland, Jr.
Martha Ragonas
Robert Stein
Chuck Woodard

FY12 MONIED ARTICLES
(Excluding Enterprises & Revolving Accounts)

<u>Article</u>	<u>Subject</u>	<u>Requested</u> ¹ <u>Amount</u>	<u>Finance Committee</u> <u>Recommendation</u>
2	FY11 Budget Adjustments	n/a	Report at Town Meeting
4	FY12 Operating Budget	\$78,818,318	Recommends approval
5	FY12 Capital Budget	\$538,947	Recommends approval
9	Unpaid Bills	n/a	Report at Town Meeting
20	Rt. 20 Sewer System Design and Permitting	n/a	Report at Town Meeting
26	Sale of Land - Hudson Road and Pinewood Ave	n/a	Report at Town Meeting
28	CPF: Carding Mill Harvest	\$16,000	Report at Town Meeting
29	CPF: Historic Document Preservation	\$117,000	Report at Town Meeting
30	CPF: Historic Projects	\$37,000	Report at Town Meeting
31	CPF: Town-wide Walkways	\$100,000	Report at Town Meeting
32	CPF: Sudbury Housing Trust 10% Allocation	\$190,000	Report at Town Meeting
33	CPF: Fairbank Farm Agricultural Preservation	n/a	Report at Town Meeting
35	CPF: General Budget and Appropriations	n/a	Report at Town Meeting
<u>Exhibit Notes:</u>			
1. If article includes override, "Requested Amount" represents override value.			
n/a = exact dollar amount not available at time of Town Warrant printing			

ESTIMATED IMPACT ON FY12 TAX BILL

ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR FISCAL 2012 TAX BILL												
								AVG.				
Fiscal 2011 Values	100,000	200,000	300,000	400,000	500,000	600,000	628,000	700,000	800,000	900,000	1,000,000	
Fiscal 2011 Taxes	1,703	3,406	5,109	6,812	8,515	10,218	10,695	11,921	13,624	15,327	17,030	
Fiscal 2012 Taxes	1,743	3,487	5,230	6,974	8,717	10,460	10,949	12,204	13,947	15,691	17,434	
Fiscal 2012(Base)Taxes	1,633	3,266	4,899	6,532	8,165	9,798	10,255	11,431	13,064	14,697	16,330	
Debt Exemption	110	221	331	442	552	662	693	773	883	994	1,104	
% Tax Bill Increase	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%	2.37%
Article	Resident's	To calculate the dollar impact of any additional expenditures that may be considered by Town Meeting, use this chart below.										
Amount	Share	100,000	200,000	300,000	400,000	500,000	600,000	628,000	700,000	800,000	900,000	1,000,000
\$ 1,000	\$ 909	\$ 0.03	\$ 0.05	\$ 0.08	\$ 0.10	\$ 0.13	\$ 0.15	\$ 0.16	\$ 0.18	\$ 0.20	\$ 0.23	\$ 0.25
25,000	22,731	0.63	1.26	1.89	2.53	3.16	3.79	3.97	4.42	5.05	5.68	6.31
50,000	45,462	1.26	2.53	3.79	5.05	6.31	7.58	7.93	8.84	10.10	11.37	12.63
75,000	68,193	1.89	3.79	5.68	7.58	9.47	11.37	11.90	13.26	15.16	17.05	18.94
100,000	90,924	2.53	5.05	7.58	10.10	12.63	15.16	15.86	17.68	20.21	22.73	25.26
200,000	181,848	5.05	10.10	15.16	20.21	25.26	30.31	31.73	35.36	40.42	45.47	50.52
300,000	272,772	7.58	15.16	22.73	30.31	37.89	45.47	47.59	53.05	60.62	68.20	75.78
400,000	363,696	10.10	20.21	30.31	40.42	50.52	60.62	63.45	70.73	80.83	90.93	101.04
500,000	454,620	12.63	25.26	37.89	50.52	63.15	75.78	79.32	88.41	101.04	113.67	126.30
600,000	545,544	15.16	30.31	45.47	60.62	75.78	90.93	95.18	106.09	121.25	136.40	151.56
700,000	636,468	17.68	35.36	53.05	70.73	88.41	106.09	111.04	123.77	141.45	159.14	176.82
800,000	727,392	20.21	40.42	60.62	80.83	101.04	121.25	126.90	141.45	161.66	181.87	202.08
900,000	818,316	22.73	45.47	68.20	90.93	113.67	136.40	142.77	159.14	181.87	204.60	227.34
1,000,000	909,240	25.26	50.52	75.78	101.04	126.30	151.56	158.63	176.82	202.08	227.34	252.60
2,000,000	1,818,480	50.52	101.04	151.56	202.08	252.60	303.12	317.26	353.64	404.15	454.67	505.19
3,000,000	2,727,720	75.78	151.56	227.34	303.12	378.90	454.67	475.89	530.45	606.23	682.01	757.79
4,000,000	3,636,960	101.04	202.08	303.12	404.15	505.19	606.23	634.52	707.27	808.31	909.35	1,010.39

SUDBURY PUBLIC SCHOOLS SUPERINTENDENT'S REPORT

Dear Resident of Sudbury,

The FY12 non-override budget, projected to be 1.87% greater than FY11 budget, will be the fourth consecutive year with year-over-year budget growth below 2%. Layoffs, elimination of services, significant employee compensation concessions and the infusion of federal stimulus revenues have allowed us to balance our budget during this downturn. Much is made in Massachusetts of the 2.5% tax threshold. With the collaboration of our School Committee, administrators and employee associations, we have restructured our district to a point where a 2.5% increase in our budget next year would allow us to provide the same level of services, class sizes and opportunities as we have in FY11. That however, is not our reality with the non-override budget.

The non-override budget that is presented in this warrant totals \$35,302,511, an increase of \$648,000 over the current year. This budget assumes a 5% cut in state school and municipal aide and other revenue sources remaining flat compared to the current year. This assumption, as well as others, remains somewhat fluid at this point in time. These may change before we open town meeting. Despite holding our FY12 benefit cost increase to 4.8%, as a result of recent negotiated revisions to the health plans and employee contribution rates, and our net salary increase to 2.15%, the non-override budget falls \$371,000 short of allowing us to maintaining our FY11 service level when critical needs are included.

At the time this warrant goes to print, we have not finalized a specific budget balancing plan to close this \$371,000 gap. A budget shortfall of \$371,000 in early March seems quite modest given the previous year gaps ranging between \$600,000 and \$1.3 million. However, in many ways this \$371,000 is more impactful because of the cuts made in the previous three years. We have no latitude to cut supplies and capital, we have nearly maximized the energy savings we can achieve without the investment of additional funds, we have already implemented a number of cost savings measures around transportation, special education and food service, and we've cut support and custodial staff to a minimum. We have laid off over 30 FTE's during this time. In FY08 we employed 412.25 FTE; in FY12, that number is 370 FTE, not counting the full-day kindergarten staff added with the program in 2010.

So while the FY12 deficit is modest compared to prior years, any plan to eliminate the shortfall will include the reduction of teachers and thus, the increase in class size. There will be various budget balancing scenarios considered but any scenario will include between 4 and 7.5 FTE teachers. It is my opinion, that this budget will impede our ability to continue to meet the high expectations this community has for service.

Our enrollment is projected to decline in FY12 by 69 students (2.2%), but this decline is primarily at the kindergarten level. Our projection for grades 1-5 enrollment is at the same level as the current year. Thus any further elementary grades staffing reductions will result in class size increases. We experienced this situation this year and opened the school year with 4th and 5th grade class sizes of 29-30. Fortunately, federal stimulus funding was received at about the time school started and we decided to use these funds to mitigate these class size concerns. No federal stimulus will be available in FY12.

A key budget driver is special education. This federal and state mandated program requires us to provide a level of service that meets the needs of each identified student starting at age 3. While

a mandate, we continue to seek the most efficient means to meet it. We have recently developed programs within our schools that allow us to serve the students in Sudbury with lower costs than serving them in out-of-district placements. We also modified the way we provide required related services to our youngest special needs students resulting in a savings of nearly \$200,000 in the FY11 budget. For FY12, we are able to reduce our budget for students who must be serviced out-of-district. The projected tuitions for these students will be \$425,000 less than this year. Consequently, our total net special education expenses will be 2.8% lower in FY12 than FY11. This expense has been growing at nearly 10% per year in the past several budgets. Because special education accounts for nearly 20% of our operating budget, we are continually seeking every efficiency and every economy possible while maintaining a quality, mandated level of service.

The SPS School Committee and administration understand that the economic conditions we have all faced have stretched us and created sacrifices. The economic signs are improving but improvement in the public sector and municipal funding always lags any turnaround. I hope FY12 is a bridge year to some modest relief in the future. As we have positioned ourselves to provide a program that is responsible and sustainable, we now have to position ourselves to ensure and provide an education for our children that will allow them to compete and succeed with their global classmates and future colleagues. We understand the pressure inherent in the relationship between costs and service and the need to provide a sustainable program in order to avoid budget peaks and valleys, the annual plan for lay-offs and program cuts, and the frequent request to our supportive community to maintain our level of service. However, our reality is that expectations and accountability are increasing. We will not be able to maintain the level of service and performance to meet those expectations and accountability measures if our resources continue to cause a reduction of staff and opportunities. As always, we at SPS accept our fiduciary responsibility to our students, parents, and community and will continue to offer leadership with fidelity and singleness of purpose.

Respectfully yours,

Dr. John A. Brackett

LINCOLN-SUDBURY SUPERINTENDENT'S REPORT

Dear Resident of Sudbury,

For years, Lincoln-Sudbury's strengths have been its depth and breadth of curriculum, an appropriately rigorous academic program that meets students' needs, diverse extracurricular opportunities, and a supportive environment where each student finds a "home." These continue to be your high school's strengths, and each is gradually being undermined by the protracted economic slump.

Enrollment over the past three years has been relatively unchanged, but the staffing supporting our students and programs has seen reductions. Over the past three years the high school has reduced 10.83 FTE teachers and administrators and we have cut 4.89 FTE of support staff, including teaching assistants and clerical help. For the past two fiscal years ARRA grants have stabilized 1.67 FTE teachers and counselors and 1.20 tutors -- these positions too will be eliminated in FY12 as these federal grants come to an end.

As the economic downturn began three years ago, the school increased its Athletic, Activities, and Parking fees to levels that are significantly higher than neighboring communities. In order to continue the breadth of athletic opportunities available to student athletes, the school, after lengthy discussion, increased its athletic fees for FY12. Combined, the athletic fees (\$365/sport), activity fees (\$60/year), and parking fees (\$300/vehicle) are anticipated to contribute \$524,200 towards the FY12 operational expenses of the high school, and each dollar paid shifts some of the financial burden of supporting Lincoln-Sudbury's program to parents, thereby decreasing the school's overall tax burden on residents.

The dilemma that Sudbury and many other communities face each year is that the costs of running and maintaining quality schools and providing Town services outpaces the revenues the Town can generate under Proposition 2½. The largest single driver inflating costs at the high school above 2 ½% is the increase in mandated out-of-district tuitions and the transportation to these placements – these increased by \$652,106 over the FY11 costs.

There are things that are being done to control costs at the high school. Lincoln-Sudbury is being run with one of the leanest school administrations around, with one principal and three housemasters supporting over 1600 students. During FY11, Lincoln-Sudbury began sharing a METCO Director with Sudbury Public Schools. Contracted cleaning and cafeteria food services for the high school have both been outsourced for over 15 years, reducing costs and long-term benefit liabilities. Now to reduce cost and improve service, the high school also outsourced payroll in FY11.

L-S implemented the use of "SchoolSpring", an on-line personnel advertising and application system. This move has saved the District significantly, cutting the personnel advertising budget from over \$10,000 to under \$3,000.

The Guidance/Counseling Department is planning to implement a guidance software program (Naviance) that will further cut postage and mailing expenses by allowing students to file applications on-line and L-S to submit information on-line for those applications. The effect of this conversion will be realized in FY12.

L-S has participated in the E-Rate funding program under the Federal Schools & Libraries "grant" since its inception. This federal program reimburses districts for telecommunications costs and internet service provider costs. L-S processes all of the required paperwork in-house (as opposed to contracting a service, which many districts do) and the funding is provided in two ways: the ISP vendor credits our current year service costs directly; and the federal government reimburses to the District for the telecommunications costs. The savings flow into E&D and ultimately into Reapportionment, reducing the Town's assessment for the cost of running the high school. The annual amount of reimbursement is approximately \$30,000.

This year L-S is working with a telecommunications consultant to reconfigure lines to reduce telephone costs. The report will be submitted to me within a few weeks, and it is anticipated that our annual costs will decrease a minimum of \$6,000 beginning in FY12.

Our staff participated with the Town of Sudbury on its "Green Communities" grant, and B&G submitted a plan for utilization of funds approved through the grant.

L-S' participation in the ISO program to sell energy back to the grid completed its first year. The estimated \$12,000 in revenue came in lower due to the specific points in time that the consumption levels for L-S were set, but we have still generated close to \$8,000 and will continue

to generate revenue under this program. The School Committee established a special revenue revolving account to deposit the funds and use toward facility maintenance needs and the plant infrastructure systems.

To mitigate a looming budgetary shortfall in FY12, the high school will be applying contingency from FY11 to preserve Circuit Breaker funding that can be used to offset some of the out-of-district placement costs. This strategy is to address the one-year lag in the receipt of Circuit Breaker reimbursement, whereby L-S will incur the increase of \$602,000 in placement costs in FY12; but the Circuit Breaker funds associated with eligible placements will not be received until FY13. Being able to carry over funds will partially offset the immediate impact on the budget. The school will also use \$150,000 in Athletic Fee revenues from a revolving account and the increase in Athletic Fees to offset more Athletics program costs, thereby reducing the impact of Athletics on the school's overall operating budget. Finally, the high school will use Federal Education Jobs Funds and IDEA grant money to stabilize positions in FY12 that otherwise would be lost without these grants.

A No Override Budget represents a 1.87% increase in the operating budget, excluding debt service. After three years of "trimming around the edges" when making staff reductions at the high school during these challenging fiscal times, a No Override Budget cuts at the "meat" of our academic program. A No Override Budget in FY12 will result in the reduction of 12.50 FTE from the teaching and counseling faculty and 4.89 FTE from the support staff. A No Override Budget will decrease the breadth of the high school's curricular offerings, will significantly increase class size and teacher load, will further limit scheduling students into courses of their choice and that match their needs, and will decrease our underlying support structures for students. In short, a No Override Budget will diminish the overall quality of a great school.

Over the past four years, our decisions when developing no override budgets have been to preserve professional staff positions: those who serve our core mission of teaching and learning. At this point, the non-override impact upon professional positions is unavoidable. If an override should be successful, the additional resources would be focused on restoring losses to the high school's professional staff.

Respectfully yours,

Scott Carpenter
Superintendent/Principal

TOWN MANAGER'S REPORT

Dear Resident of Sudbury,

This Finance Committee recommended FY12 budget for the municipal government increases 1.87% (approximately \$340,901, net after offsets) over the FY11 budget. However, this budget is \$250,588 short of being a level services budget, and thus there are some reductions in services and capacities in this Non-Override budget, mostly in the ability to provide services through outsourcing (contracts with vendors) and to have adequate quantities of materials and supplies that departments need to continue providing the same services and response times as this year – which is already a decrease over previous years due to the ongoing budget situation. These reductions are an extension of similar actions that were taken in FY09, FY10 and FY11.

Fortunately, we are not anticipating any further layoffs of Town staff with the Non-Override budget but we are not able to restore any of the 10.1 FTE positions that have been eliminated since FY08.

As can be noted in the Finance Committee Report in this warrant, the Finance Committee is discussing an override budget scenario (although they have not recommended one at this point). In the override budget scenario they are considering, they have discussed an additional \$130,000 funding for Town needs - \$80,000 for Town services and \$50,000 for Town Capital needs. The DPW needs to replace a failing 1984 Bombardier sidewalk plow to get walkways open for school children to walk to schools after snow storms. The additional \$50,000 allows for the lease of a sidewalk plow to move forward in FY12, in time for next winter. If the Finance Committee ultimately makes this recommendation and it is approved at both the Annual Town Meeting and a Special Town Election, the Town's budget would increase by 2.31%, net of offsets, over FY11 appropriations. Final decisions as to how the additional \$80,000 would be utilized are still under discussion. The two highest priorities are using all or part toward funding a Combined Facilities Department, to be shared with the Sudbury Public Schools, and restoring funds to the Department of Public Works, where the greatest number of reductions from the level service budget were made.

The Selectmen and Town management team recognize that among our many challenges is the need to continue to run lean and to maintain spending for key Town services lower than nearly all of our peer communities, whether measured as a percent of total budget or on a per capita or a per household basis. This is only half the battle. We also need to insure our costs are sustainable within the ability of Sudbury to generate sufficient revenues to pay for expected and required services. The Town budget is able to be presented without layoffs due to the many efforts the Selectmen and Town staff have made to collaboratively keep costs as low as possible. Together with the employees of the Sudbury Public Schools, Town employees agreed to significant concessions in their health insurance benefits program over a three year period. For FY12, these changes result in the budget for employee health insurance that is an estimated \$2.9 million lower than it would have been without the changes. All employees are on health insurance plans known as "rate savers", meaning they have agreed to plan design changes which make the employees pay more of the costs, thereby reducing the overall premium cost, as well as assumed a higher level of contribution toward the plan's premium cost.

We continue to carefully study staffing alternatives and other efforts to reduce program costs. We have been very successful thus far in achieving savings by working with our neighboring communities on collaborations. We are in the second year of sharing a Recreation Director with Wayland. Due to the expertise and top notch staffing in this area, sharing the Director has worked very well and we continue to offer a high level of service to the public. We are also evaluating if outsourcing work to private vendors is a more cost effective approach in some areas. It should be viewed with skepticism the premise that outsourcing is always more efficient and regionalizing is always better; however, careful evaluation that begins with our current cost and staffing structure must be kept in mind. Most of our employees perform more than one function. For example, Sudbury is the lead community in a grant-funded study to determine if regional public safety dispatch would be, in terms of both cost AND service provision, a worthwhile goal to pursue. At first blush, it would seem to clearly be an easy decision. However, the night Dispatcher in the Sudbury Police Department performs a number of other critical functions besides the dispatch function, such as being the primary point of contact for citizen questions and needs who call or stop by the department, mandated prisoner checks and data entry. What is the cost to the citizen who comes to the Police Station at night in need of help to find the door locked because our Police Officers are on patrol and Dispatching is done from another location in an

adjacent community? How do you put a price tag on not assisting that citizen? If the Town has to develop another method of covering those functions, this might require a similar level of cost as having the Dispatcher in Sudbury. The role of the Sudbury Police Department can't always be captured in statistical data and doesn't exist in many other communities. Sudbury has a culture where citizens of this community are not hesitant to call or come to the Police Station requesting assistance for a multitude of reasons, some being law enforcement related but many being quality of life issues. The Police Department considers it part of their responsibility to assist directly or to facilitate a solution by reaching out to agencies, both inside and outside this community, that are most able to assist. These efforts typically begin with a face to face or phone interaction with the person assigned to the desk. These and other intangible items are important factors that need to be considered before making a decision to outsource or regionalize.

These are important issues that must be carefully addressed and the devil is always in the details, not in the broad initial concept. And bringing a service that has been outsourced in the past into the Town also needs to be considered. Right now, we are working to bring in-house a critical service that has been provided by vendors in the past – Advanced Life Support/Paramedic level of Emergency Medical Response. Sudbury currently offers basic life support Emergency Medical Services through our Fire Department, with ALS services provided through contracts. We are working with the employees of the Fire Department to develop additions to the collective bargaining agreement so that we can begin offering ALS services through our own firefighters. If such an agreement can be reached that is as cost effective as using private vendors, we believe that will be the best outcome for the Town and for the residents who may need these services. These are just examples of issues that we will carefully monitor and come up with the most effective and efficient ways of providing quality services to our citizens.

We continue to work on strategies to grow and diversify our tax base so that we are less vulnerable to economic cycles. The primary goal for several years has been to provide our commercial district with a wastewater treatment plant. As this Warrant goes to print, the Selectmen are considering asking Town Meeting to approve funding for engineering design work and permitting, which will cost an estimated one million dollars. The effort to find a suitable disposal site for wastewater treatment met success this year, with the positive results indicating that the playing field at the Curtis Middle School has the capacity to serve as the leaching fields for a downtown centered sewer system. The Town will also have to address many other issues if this project is brought to reality, including questions of finances, governance, zoning and permitting.

As always, the Board of Selectmen and I, along with our great Town staff, will keep striving to provide the highest levels of service possible to the residents, businesses and guests of the Town. All of Sudbury's residents depend on and benefit from the broad array of Town services that a community requires and their government delivers for their safety, health and quality of life needs, even more so when times are hard. In both the short and the long term, our focus will be on fiscally sustainable strategies that protect the capacity of Sudbury's government to consistently meet these service responsibilities.

Respectfully yours,

Maureen G. Valente

SUMMARY OF FY09-FY12 BUDGET DATA

EXPENDITURES	FY09 Actual	FY10 Actual	FY11 Appropriated	FY12 Non-Override
LS Gross Assessment	16,515,458	16,854,852	17,011,347	17,216,078
LS Offsets/Re-apportionments	(3,255,278)	(3,192,298)	(2,640,344)	(2,642,792)
LS Employee Benefits Assessment	3,074,361	3,142,491	3,206,376	3,506,669
LSRHS NET (Operating Assessment)	16,334,541	16,805,045	17,577,379	18,079,955
SPS Gross Expenses	26,331,604	27,815,697	30,685,207	31,047,394
SPS Offsets	-	-	(2,480,863)	(2,506,335)
SPS Employee Benefits	6,700,568	6,204,274	6,450,128	6,761,451
SPS NET	33,032,172	34,019,971	34,654,472	35,302,510
Minuteman Regional Assessment	237,788	298,098	228,794	321,590
Other Regional School Assessments	43,212	-	-	-
Total: Schools	49,647,713	51,123,114	52,460,645	53,704,055
General Government	2,117,424	2,207,011	2,284,281	2,325,635
Public Safety	6,330,016	6,297,069	6,767,557	6,840,453
Public Works	3,406,588	3,364,252	3,299,349	3,304,146
Human Services	515,673	520,208	538,651	534,239
Culture & Recreation	1,080,329	1,112,286	1,149,824	1,166,009
Unclassified & Transfer Accounts	113,643	106,619	434,505	401,148
Town Employee Benefits	4,153,667	3,964,802	4,224,185	4,536,538
subtotal, town services	17,717,340	17,572,248	18,698,352	19,108,167
Town Operating Offsets	(230,342)	(381,600)	(468,369)	(537,283)
Total: Town Departments	17,486,998	17,190,648	18,229,983	18,570,884
Capital Planning Committee	513,042	523,383	529,054	538,947
Total: Capital Budget	513,042	523,383	529,054	538,947
Subtotal: Operating Budget	67,647,753	68,837,145	71,219,682	72,813,886
Town Debt Service	4,347,060	4,269,224	4,180,354	3,883,860
LSRHS (Debt Assessment)	2,394,071	2,298,949	2,237,147	2,193,072
Total: Debt Budget	6,741,131	6,568,173	6,417,501	6,076,932
Enterprise Fund Expenditures	702,292	825,257	982,802	1,117,234
Total: Other	702,292	825,257	982,802	1,117,234
Other Charges to be raised	983,524	730,246	744,548	734,103
Total: To Be Raised	76,074,700	76,960,820	79,364,533	80,742,155

RECEIPTS				
State Aid (Cherry Sheet)	5,650,528	5,580,961	5,537,686	5,260,802
SBAB School Debt Reimbursement	1,702,597	1,702,597	1,702,597	1,702,597
Local Receipts	4,287,194	3,734,780	3,652,860	3,657,581
Free Cash	294,110	-	-	-
Retirement Trust Fund	25,000	-	-	-
Abatement Surplus	421,000	321,000	-	-
Prior Year Articles/Recoveries	26,320	-	-	-
Enterprise Funds	774,274	1,026,461	1,012,397	1,156,844
Total: State & Local Receipts	13,181,023	12,365,799	11,905,540	11,777,824
Tax Levy	63,263,124	65,529,152	67,418,506	69,018,845
Total: Revenue	76,444,147	77,894,951	79,324,046	80,796,669

UNDER/ (OVER)	369,447	934,131	(40,487)	54,514
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RECOMMENDED FY12 BUDGETS

	FY11	FY12	FY12
ALL LINE ITEMS - ALL FUNDS*	Appropriated	Non-Override	% of Budget
Lincoln-Sudbury Regional High School	17,577,379	18,079,955	22.4%
Sudbury Public Schools	34,654,472	35,302,510	43.7%
Minuteman and other Voc Schools	228,794	321,590	0.4%
Town Departments	18,229,983	18,570,884	23.0%
Debt Service - Town, SPS and LSRHS	6,417,501	6,076,932	7.5%
Transfer Station Enterprise Fund	271,437	290,389	0.4%
Atkinson Pool Enterprise Fund	489,868	517,230	0.6%
Field Maintenance Enterprise Fund	221,497	309,614	0.4%
Capital Items	529,054	538,947	0.7%
Stabilization Fund	-	-	0.0%
State and Local Charges	744,548	734,103	0.9%
Total Budget*	79,364,533	80,742,155	100.0%

* Total budget reporting includes all cost centers and all funds to be appropriated or expended, except for revolving funds.

	FY11	FY12	FY12
OPERATING BUDGET*	Appropriated	Non-Override	% of Total
Lincoln-Sudbury Regional High School	17,577,379	18,079,955	24.8%
Sudbury Public Schools	34,654,472	35,302,510	48.5%
Minuteman and other Voc Schools	228,794	321,590	0.4%
Town Departments	18,229,983	18,570,884	25.5%
Capital Items	529,054	538,947	0.7%
Total Operating Budget*	71,219,682	72,813,886	100.0%

*Operating cost centers only. Excludes debt service and one-time charges. Enterprise funds are also omitted from this table. The cost centers shown above are the ones that are primarily supported by the General Fund.

SUDBURY PUBLIC SCHOOLS BUDGET SUMMARY

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
Salaries & Other Cash Compensation				
Administration	885,574	876,389	893,059	910,503
Elementary Instruction	8,779,376	8,906,003	9,382,476	9,570,505
Middle School Instruction	4,884,122	4,966,011	4,980,436	5,143,683
Curriculum/Instr/Technology	548,011	465,558	529,672	529,363
Special Ed Instruction	4,787,816	4,812,494	4,994,629	5,253,624
Health, Transportation & Food Service	774,409	665,718	643,965	649,534
Plant Maintenance	777,882	780,895	801,251	888,905
All Other	487,972	572,051	614,263	614,263
Non-Override Reduction				
Total Salaries & Other Cash Compensation	21,925,162	22,045,119	22,839,751	23,560,380
Expenses				
Administration	474,554	561,065	394,915	303,762
Elementary Instruction	322,849	350,672	323,778	333,491
Middle School Instruction	181,894	147,667	167,609	172,637
Curriculum/Instr/Technology	219,847	261,160	300,743	309,765
Special Ed Instruction	3,331,820	4,206,325	3,964,845	3,642,494
Health, Transportation & Food Service	718,946	1,060,289	1,060,289	1,092,098
Utilities	945,413	932,320	1,191,882	1,191,882
Plant Maintenance	513,886	670,097	441,395	440,885
Non-Override Reduction				
Total Expenses	6,709,209	8,189,595	7,845,456	7,487,014
Subtotal before Benefits	28,634,371	30,234,714	30,685,207	31,047,394
Healthcare Benefits				
Active Employees	4,632,294	4,109,248	4,199,375	4,285,467
Retired Employees	480,864	487,618	548,757	636,315
Total Healthcare Benefits	5,113,158	4,596,866	4,748,132	4,921,782
Retirement & Other Benefits				
Active Employees	460,073	438,720	530,542	582,625
Retirement Assessment	1,127,337	1,168,688	1,171,454	1,257,044
Total Retirement & Other Benefits	1,587,410	1,607,408	1,701,996	1,839,669
Total Benefits	6,700,568	6,204,274	6,450,128	6,761,451
Total SPS Operating Expenses	35,334,939	36,438,988	37,135,335	37,808,845
SPS Grants, Fees & Other Offsets	(2,302,767)	(2,419,017)	(2,480,863)	(2,506,335)
Net SPS Operating Expenses	33,032,172	34,019,971	34,654,472	35,302,510
Total Compensation (salaries, other cash compensation & benefits)	81.01%	77.53%	78.87%	80.20%
as a percentage of Operating Expenses (before Offsets)				
Students:				
Sudbury (Pre-K - 8)	3,151	3072	3003	2934
Metco	62	65	60	60
Other Out of District Students at SPS	27	28	33	33
Total	3,240	3,165	3,096	3,027
Cost per Student	10,906	11,513	11,995	12,491
(Operating Expenses before Offsets divided by number of Students)				

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
Headcount (FTEs)				
Administrators	16.00	16.00	15.00	16.50
Administrative Support	18.60	15.00	15.70	15.10
Teachers (excl SPED)	191.28	190.33	188.71	178.71
Classroom & Teaching Support (excl SPED)	14.95	22.37	24.40	22.40
SPED Teachers	48.40	52.90	55.30	55.30
SPED Support	54.10	49.30	44.20	44.20
Metco	2.71	3.60	5.40	5.40
Custodial/Grounds/Maintenance	16.00	16.00	15.00	15.60
All Other	27.85	27.81	26.86	26.86
Non-Override Reduction				
Total FTEs	389.89	393.31	390.57	380.07
Part Time Employees receiving benefits	40	35	35	37
Retirees receiving Full Healthcare benefits	50	47	42	44
Retirees receiving Medicare Supplemental benefits	127	141	151	150
Average Class Size				
Haynes	18.8	19.3	21.4	21.6
Loring	21.6	20.9	20.6	22.6
Nixon	22.4	21.1	21.7	23.2
Noyes	19.9	20.9	20.2	20.9
Curtis	23.8	23.2	23.2	23.9
Average Salaries				
Teachers	64,013	64,771	67,017	69,979
Administration	100,836	104,241	104,470	97,357
All Other	34,794	31,792	33,747	34,441
Healthcare benefits per active employee	19,301	13,129	13,247	13,350
Healthcare benefits per retiree	2,671	2,786	2,829	3,247
Other Benefits per active employee	1,180	1,115	1,358	1,533
Pension Assessment Cost/School Participant (Middlesex Only)	5,996	6,216	6,166	6,413

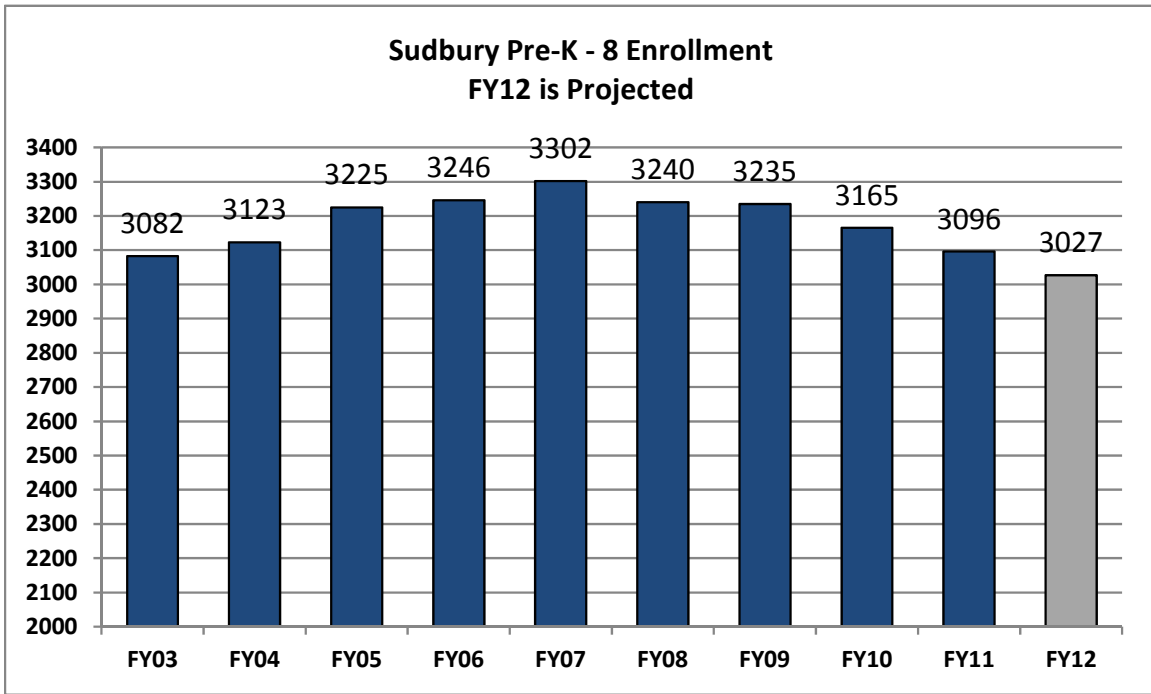
Exhibit Notes:

1) Payments for benefits are those made by SPS and do not include employee or retiree contributions.

2) In FY10, Sudbury Public Schools' contributions for health care were 85% HMO, 70% PPO, & 50% Retirees. In FY11, Sudbury Public Schools' contributions for health care were 82.5% HMO, 67.5% PPO, & 50% Retirees. In FY12, Sudbury Public Schools' contributions for health care will be 80% HMO, 65% PPO, & 50% Retirees. As of July 1, 2009, Sudbury Public Schools' contributions for new hires are 70% HMO and 55% PPO.

Since July 1, 1996, all new non-teacher employees pay 9% plus 2% of salary above \$30,000 in contributions for Middlesex County Retirement. Over the course of an employee's career, a Group 1 (non-public safety) employee hired after this date will pay nearly the entire cost of his/her future retirement benefits. Since July 1, 2001, all new teacher employees pay 11% in contributions to the Massachusetts Teacher Retirement System. Sudbury Public Schools does not contribute to the Massachusetts Teacher Retirement System for active employees and most retired employees. Sudbury Public Schools is in the second to last year of a 20 year repayment plan for an early retirement incentive offered by the Massachusetts Teacher Retirement System 20 years ago. Our yearly repayment for this year and next is \$14,000 each year.

3) Average salaries include other cash payments other than overtime.



	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
SUDBURY PUBLIC SCHOOLS				
Sudbury Public Schools	26,331,604	27,815,697	30,685,207	31,047,394
Offsets (incl. METCO)			(2,480,863)	(2,506,335)
Sudbury Public Schools	26,331,604	27,815,697	28,204,344	28,541,059
Add: Benefits & Insurance	6,700,568	6,204,274	6,450,128	6,761,451
Total: Sudbury Public Schools	33,032,172	34,019,971	34,654,472	35,302,510

The FY12 Non-Override Budget will provide Sudbury Public Schools with an additional \$648,039 in operating revenue over FY11 amounts. This represents an increase of 1.87% over the SPS Fiscal Year 2011 budget, inclusive of pension and insurance costs. Collective bargaining negotiations with the school unions concluded in the summer of 2009 and resulted in a three-year agreement (for FY10, 11 and 12) with a substantial reduction in the rate of growth in overall compensation (salaries and benefits) compared with the prior contract.

The Level Service, or “roll-up” budget, which represents the same staffing levels as FY11 (excluding 4.6 positions funded via Federal Stimulus Funds), would provide Sudbury Public Schools with an additional \$862,231 or 2.49% in operating revenue over FY11 amounts. This budget includes a net increase in salary expenses of \$882,446 or 3.9% and an increase in benefits of \$349,947 or 5.4%, resulting in a total net increase in compensation of 4.2% from FY11 to FY12.

Excluding Special Education costs, all other non-personnel related operating expenses are projected to decrease by approximately 0.9% from FY11 to FY12 in the Non-Override budget and 0.6% in the Level Services budget.

In addition, after several years of increases, Special Education costs are projected to decrease by 8.1%, or \$322,351, in FY12 in both budgets.

Non-Override Budget

The Finance Committee recommends approval of a FY12 Non-Override Budget for the Sudbury Public Schools in the amount of \$35,302,510.

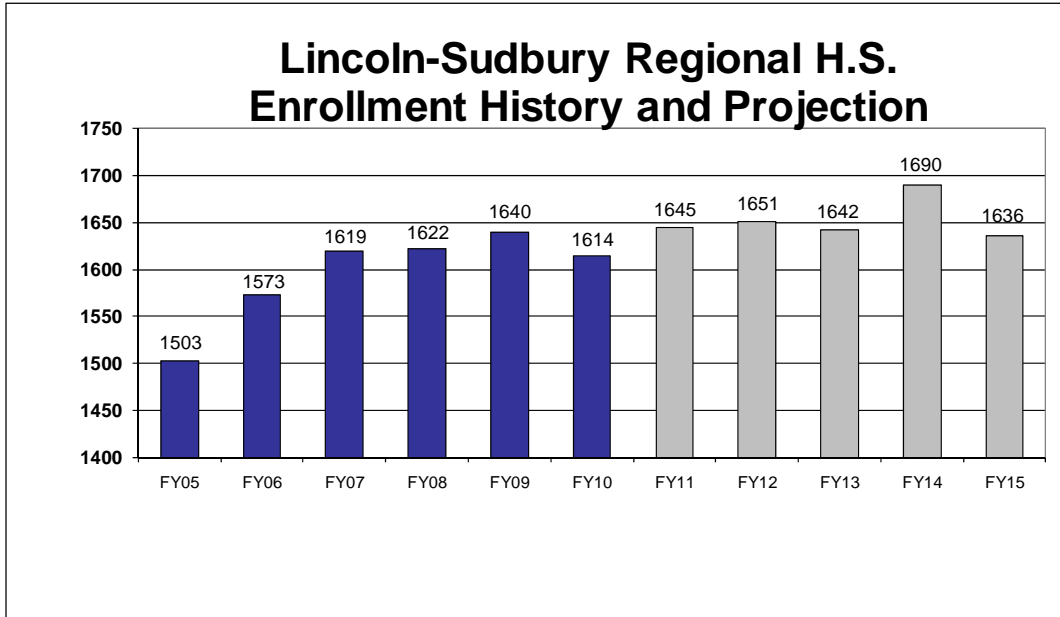
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL BUDGET SUMMARY

	FY09 Actual	FY10 Actual	FY11 Appropriated	FY 12 Non Override
Salaries & Other Cash Compensation				
Administration	1,143,907	1,022,073	1,018,918	1,045,884
Instruction (excl Spec Ed)	10,067,521	9,905,715	10,058,707	9,753,437
Special Ed Instruction	1,277,338	1,317,317	1,332,756	1,332,252
Educational Support	453,190	502,269	517,816	505,424
Educational Support - Special Education	391,313	370,707	378,232	390,324
Clerical/Admin Support	848,586	865,054	859,285	813,624
Grounds/Maintenance	572,846	598,373	624,508	584,361
Coaching	392,510	373,617	381,586	370,300
All Other (Substitutes, Extra Services, Curric Dev)	178,980	168,466	209,544	195,406
Total Salaries & Other Cash Compensation	15,326,190	15,123,589	15,381,352	14,991,012
Expenses				
Instruction (excl Spec Ed)	528,067	476,082	487,589	424,887
Special Education	2,751,128	3,145,307	3,365,341	3,975,447
Educational Support	977,246	966,864	940,688	978,848
Operations excl Utilities	440,741	505,363	429,560	432,170
Utilities	784,161	822,156	779,166	772,664
All Other Expenses & Contingency	140,105	186,673	364,233	164,796
Total Expenses	5,621,447	6,102,445	6,366,577	6,748,812
Subtotal before Benefits	20,947,637	21,226,035	21,747,929	21,739,824
Healthcare Benefits				
Active Employees	1,760,489	1,579,178	1,968,280	2,199,963
Retired Employees	935,587	777,804	826,856	897,227
Total Healthcare Benefits	2,696,076	2,356,982	2,795,136	3,097,190
Retirement & Other Benefits				
Active Employees	383,491	362,036	406,500	592,605
Retired Employees	359,210	379,075	396,133	441,531
Total Retirement & Other Benefits	742,701	741,111	802,633	1,034,136
Total Benefits	3,438,777	3,098,093	3,597,769	4,131,326
Total LSRHS Operating Expenses, including grant funding	24,386,414	24,324,128	25,345,698	25,871,150
LSRHS Grants, Fees & Other Offsets, incl circuit breaker	1,476,632	1,129,306	1,379,691	1,456,979
Net LSRHS Operating Expenses	22,909,782	23,194,822	23,966,007	24,414,171
Total Compensation (salaries, other cash compensation & benefits) as a percentage of Operating Expenses (before Offsets)	76.9%	74.9%	74.9%	73.9%
Students:				
Sudbury	1,321	1,304	1,324	
Lincoln	241	242	220	
Metco	91	91	91	
Other Out of District Students at LS	17	14	13	
Total	1,670	1,651	1,648	<i>1,612</i>
				<i>Projected</i>
Cost per Student (Operating Expenses <u>before</u> Offsets divided by number of Students)	14,603	14,733	15,380	16,049

	FY09 Actual	FY10 Actual	FY11 Appropriated	FY 12 Non Override
Headcount (FTEs)				
Administrators	9.20	8.20	8.00	8.00
Administrative Support	17.87	16.43	15.94	15.48
Teachers (excl SPED)	129.03	123.90	122.28	112.44
Classroom & Teaching Support (excl SPED)	5.10	3.40	4.70	3.25
SPED Teachers	18.30	15.95	15.50	15.50
SPED Support	17.50	13.97	13.82	13.32
Custodial/Grounds/Maintenance (.20 is offset to Building Use)	11.50	11.00	11.00	10.00
All Other	8.10	8.46	8.46	8.43
Total FTEs, including non-operating grant funded positions	216.60	201.31	199.70	186.42
Part Time Employees receiving benefits	30	24	25	23
Retirees receiving Full Healthcare benefits	79	39	46	50
Retirees receiving Medicare Supplemental benefits	30	90	91	87
Average Class Size				
Academic (English, History, Math, Science, Languages)	22.8	25.0	23.58	27.3
Electives are in every subject area and cannot be separated				
Students Participating in Athletics	1,181	1,146	1,229	1,229
				<i>Estimated</i>
Average Salaries				
Teachers	77,003	80,250	82,679	86,648
Administration	124,338	124,643	127,365	130,736
All Other	43,853	50,432	50,768	52,295
Healthcare benefits per active employee	8,128	7,845	9,856	11,801
Healthcare benefits per retiree	8,583	6,029	6,035	6,549
Retirement Assessment per L-S participant	2,490	2,462	2,572	2,760
Reconciliation to Page FC-18				
LS Gross Assessment (equals Subtotal before Benefits above)	20,947,637	21,226,035	21,747,929	21,739,824
LS Employee Benefits (from above)	3,438,777	3,098,093	3,597,769	4,131,326
Offsets & Reapportionment:				
Grants & Offsets (above, incl circuit breaker)	1,476,632	1,129,306	1,379,691	1,456,979
State Aid to LSRHS (does not incl circuit breaker; incl ARRA)	2,857,040	2,498,616	2,752,456	2,609,714
Lincoln Share of the LSRHS Budget	2,936,342	3,094,464	3,260,600	3,218,685
Estimated Receipts	61,000	61,000	50,000	50,000
Reapportionment	909,555	854,422	325,572	455,817
Total Offsets & Reapportionment	8,240,569	7,637,809	7,768,319	7,791,195
LSRHS Net Operating Assessment	16,145,845	16,686,319	17,577,379	18,079,955

Exhibit Notes:

- 1) Payments for benefits are those made by LSRHS and do not include employee or retiree contributions. Retirement assessment from the Middlesex Retirement System pertains to staff other than teachers and administrators.
- 2) LSRHS contributes 70% to active employee health insurance premiums and 75% to most retiree premiums. Adoption of Section 18 and reduction of 5% L-S contribution took effect in FY10.
- 3) Average salaries include other cash payments other than overtime



	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
LINCOLN-SUDBURY REGIONAL HS				
Sudbury Apportionment	84.81%	84.51%	84.36%	84.88%
Benefits Assessment	3,074,361	3,142,491	3,206,376	3,506,669
Oper. Assessment	16,515,458	16,854,852	17,011,347	17,216,078
Oper. Offsets	(3,255,278)	(3,192,298)	(2,640,344)	(2,642,792)
Net Op. Assessment	16,334,541	16,805,045	17,577,379	18,079,955
Debt Assessment	2,394,071	2,298,949	2,237,147	2,193,072
Total LSRHS (Sudbury Portion)	18,728,612	19,103,994	19,814,526	20,273,027

Lincoln-Sudbury Regional High School (“LSRHS”) is a grade 9-12 regional school district established pursuant to Chapter 71 of the Massachusetts General Laws and operates in accordance with Lincoln-Sudbury Regional Agreement. As a regional school district, Lincoln-Sudbury must include within its budget all costs associated with running the District, including health, life, workers’ compensation and property and casualty insurances; FICA; retirement assessments; and debt service. These expenses, which typically fall outside the budgetary responsibility of non-regional schools, represent 17% of the districts total FY12 budget under the finance committee’s recommended Non-Override Budget. Chapter 70 State Aid and Regional Transportation Aid are used to reduce the total budget, along with other district receipts and re-apportioned funds. The Non-Override Budget estimates a 5% reduction in Chapter 70 revenues and assumes level-funding of Regional Transportation Aid. The amount remaining after deducting these revenues and other receipts is then apportioned to Lincoln and Sudbury by a ratio based upon a three-year average enrollment of students from each town. The FY12 budget ratio for Sudbury is 84.88% (up 0.52% from FY11) and for Lincoln is 15.12%.

Enrollment at LSRHS has increased 81.3% from FY95 (887 students) to FY11 (1,609 students). Projections indicate flat enrollments in FY12 (1,612 students, or a total increase of 3 students) and only minor enrollment fluctuation until 2014 when an increase of 40 students is projected based on current elementary enrollments.

While the general student population will not be growing, the High School will experience a major increase in its out of district placements for special needs students in FY12. The budget impact of this increase is \$602,000 plus an increase in related transportation costs estimated at \$50,000. Combined, these cost increases exceed the total Non-Override Budget increase for LSRHS by more than \$200,000.

Non-Override Budget

The Finance Committee recommends approval of a FY12 Non-Override net operating budget assessment of \$18,079,955 from Sudbury to LSRHS. This budget would provide LSRHS with a 1.87% increase in the total gross operating budget over FY11 levels. The Finance Committee believes that this funding level would force the High School to make very significant staff reductions, including teaching staff.

MINUTEMAN VOCATIONAL TECHNICAL SCHOOL DISTRICT

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
MINUTEMAN VOCATIONAL				
Operating Assessment	237,788	298,098	228,794	321,590
Total: Minuteman Vocational	237,788	298,098	228,794	321,590

The proposed FY12 operating budget for Minuteman Regional Career and Technical High School shows an increase in the assessment to Sudbury of \$92,796 or 40.6% above the FY11 assessment. The overall FY12 operating budget for Minuteman increased by \$176,794 or 1.08% above the FY11 budget. The higher increase in the assessment to Sudbury was due to changes in the enrollment mix of Sudbury students at Minuteman, growing from 10 student to 16 students from FY11 to FY12, respectively.

The Finance Committee recommends approval of FY12 assessment to the District of \$321,590.

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
OTHER EDUCATIONAL ASSESSMENTS				
Operating Assessment	43,212	0	0	0
Total: Other Regional	43,212	0	0	0

The proposed FY12 operating budget for other educational assessments is zero. The Town does not anticipate having students attend any other high school districts in FY12.

TOWN SERVICES BUDGET SUMMARY

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
General Government	2,117,424	2,207,011	2,284,281	2,325,635
Public Safety	6,330,016	6,297,069	6,767,557	6,840,453
Public Works	3,406,588	3,364,252	3,299,349	3,304,146
Human Services	515,673	520,208	538,651	534,239
Culture & Recreation	1,080,329	1,112,286	1,149,824	1,166,009
Town-Wide Operations & Transfers	113,643	106,619	434,505	401,148
Subtotal before Benefits	13,563,673	13,607,446	14,474,167	14,571,629
Town Employee Benefits	4,153,667	3,964,802	4,224,185	4,536,538
Total Town Operating Expenses	17,717,340	17,572,248	18,698,352	19,108,167
Town Offsets	(230,342)	(381,600)	(468,369)	(537,283)
Net Town Operating Expenses	17,486,998	17,190,648	18,229,983	18,570,884
Town Salaries & Other Cash Compensation	9,725,213	9,846,422	10,427,549	10,502,355
Healthcare Benefits				
Active Employees	2,115,203	1,868,155	1,894,310	2,126,635
Retired Employees	290,988	295,076	334,731	385,081
Total Healthcare Benefits	2,406,192	2,163,231	2,229,041	2,511,716
Retirement Assessment Costs	1,494,376	1,549,191	1,679,670	1,704,598
Other Benefits & Insurances	253,099	252,380	315,474	320,224
Total Employee Benefits & Insurances	4,153,667	3,964,802	4,224,185	4,536,538
Town Expenses	3,102,840	3,089,075	3,537,663	3,550,224
Town Capital	94,300	94,300	94,300	94,300
Town Snow & Ice	641,320	577,649	414,655	424,750
Town Offsets	(230,342)	(381,600)	(468,369)	(537,283)
Net Town Operating Expenses	17,486,998	17,190,648	18,229,983	18,570,884
Town Only Employee Headcount (FTE)	169.06	162.16	161.07	161.07

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
Total Compensation (salaries, other cash payments & benefits) as a percentage of Operating Expenses (before Offsets)	78.3%	78.6%	78.4%	78.7%
Average Salaries:				
Senior Managers	109,654	112,718	118,903	117,027
Department Heads	76,047	77,500	85,081	85,873
All Other Employees	46,541	49,011	52,845	53,293
Part time employees w/ health benefits	16	14	15	16
Active F/T employees w/ health benefits	139	142	140	134
Retirees w/ health benefits	94	89	92	104
Healthcare benefits cost per active employee*	13,646	11,975	12,221	14,178
Healthcare benefits cost per retiree *	3,096	3,315	3,638	3,703
Pension Assessment cost per Town Participants	5,555	5,759	6,198	6,029

* Benefits breakdown active vs. retired is estimate only. Retiree per average cost based on recent average.				
Counts as of 10/1 each year. Cost per employee represents Town's estimated annual contribution.				
Additional Notes:				
1) Payments for benefits are those made by the Town and do not include employee or retiree contributions.				
2) In FY11, the Town contributes for healthcare 82.5% HMO, 67.5% PPO, 50% for retirees. FY12, 80% HMO, 65% PPO, 50% for retirees. Effective 7/1/2009 for all new employees, the Town contributes 70% HMO, 55% PPO.				
3) Since 7/1/1996 all new employees pay 9% plus 2% of salary above \$30,000 in contributions to retirement. Over the course of an employee's career a Group 1 (non-public safety) employee hired after this date will pay nearly all the entire cost of their future retirement benefits. It is estimated that the Town pays between 3-4% for Group 4 (public safety) employee retirement benefits because they may retire 10 years sooner than Group 1, with full benefits. In general, the majority of Town paid retirement costs is to cover unfunded pension liability for employees hired prior to 1996.				
4) Average salaries includes other cash payments other than overtime.				

GENERAL GOVERNMENT

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
GENERAL GOVERNMENT				
Selectmen/Town Manager	287,644	302,816	310,964	313,805
ATM/Personnel	105,295	111,463	129,362	120,157
Law	175,353	189,712	159,793	160,666
Finance Committee	1,313	1,456	2,003	2,055
Accounting	235,393	245,834	263,102	273,557
Assessors	258,185	261,078	278,677	284,447
Treasurer/Collector	270,963	285,780	291,435	301,405
Information Systems	302,080	312,367	322,451	330,171
Town Clerk & Registrars	219,973	231,684	239,473	241,763
Conservation	105,180	107,266	109,912	114,668
Planning & Board of Appeals	156,045	157,555	177,109	182,940
Total General Government	2,117,424	2,207,011	2,284,281	2,325,635
Employee Compensation	1,732,588	1,811,486	1,918,501	1,966,062
All Other Expenses	384,836	395,525	365,780	359,573
Total General Government	2,117,424	2,207,011	2,284,281	2,325,635
General Government Headcount (FTE)	31.80	30.50	30.50	30.50

The General Government portion of the budget represents the Executive, General Administration, Human Resources Management, Legal, Financial, and quasi-judicial functions of the Town.

Non-Override Budget

The FY12 Non-Override Budget is increasing by \$41,354, or 1.8% compared to the FY11 budget. However, it is a reduction of \$23,630 from the Level Services Budget which would be needed to provide the same level of services and capacity as FY11. The reductions are spread across each of the departments in this group, and include less funding for the consultants the Board of Assessors use when they respond to Appellate Tax Board cases, for use of labor counsel to assist with negotiating and arbitrations, and services provided through contracts, training options for Town staff, who require education and certification for many mandated functions. The employees in this cluster will receive a 1% cost of living increase in addition to any step movement they might be due. The employees will be paying 2.5% more towards their health insurance plan than they paid in FY11, completing the overall 10% shift from employer to employee agreed to by Town and SPS employees. Even if the Finance Committee recommends an override budget at the Annual Town Meeting, the budgets in this cluster will remain the same and not receive any additional funding. The General Government departments have small staffs yet are responsible for essential and mandated functions; the reductions from the Level Services budget are felt deeply throughout.

The Finance Committee recommends approval of a FY12 Non-Override General Government Budget of \$2,325,635.

PUBLIC SAFETY

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
PUBLIC SAFETY				
Police	2,626,498	2,505,324	2,756,869	2,784,137
Fire	2,823,482	2,945,144	3,065,135	3,102,892
Building Department	880,036	846,601	945,553	953,423
Total Public Safety	6,330,016	6,297,069	6,767,557	6,840,453
Employee Compensation	5,214,211	5,241,809	5,539,407	5,623,177
All Other Expenses	1,021,505	960,960	1,133,850	1,122,976
Capital	94,300	94,300	94,300	94,300
Total Public Safety	6,330,016	6,297,069	6,767,557	6,840,453
Public Safety Headcount (FTE)	79.25	76.97	76.97	76.97

The Public Safety cluster consists of the Police and Fire Departments and the Building Inspector. It is by far the largest of the Town's budget clusters, comprising 37% of the overall Town operating budget and where 45% of the FTE Town employees work (exclusive of schools).

Non-Override Budget

The FY12 Non-Override Budget for this cluster is increasing by \$72,896 or 1.08% over the FY11 budgets. However, it is a reduction of \$40,152 from the Level Services Budget which would be needed to provide the same level of services and capacity as FY11. The reductions are taken from the Police Department, in the area of overtime, and maintenance of equipment, as well as replacement of one police cruiser. The Fire and Building Inspection department employees in this cluster will receive a 1% cost of living increase in addition to a step movement they might be due; the Police Officers agreed to a 0% cost of living for FY12. All employees will be paying 2.5% more towards their health insurance plan than they paid in FY11, completing the overall 10% shift from employer to employee agreed to by Town and SPS employees. Even if the Finance Committee recommends an override budget at the Annual Town Meeting, the budgets in this cluster will remain the same and not receive any additional funding if there is a successful override.

The Finance Committee recommends approval of a FY12 Non-Override Public Safety budget of \$6,840,453.

Override Budget

At the time the warrant was printed, the Finance Committee takes no position on the Override Budget.

If the Finance Committee recommends an Override Budget at the Annual Town Meeting, the Building Inspector Department in this cluster might receive part of the \$80,000 additional funds allocated by the Finance Committee for Town services. A priority for the Town for FY12 is funding the Town's portion of a combined Facilities Director position, shared with the Sudbury Public Schools. If plans for creating this position go forward, the position could initially be added to this budget for FY12, and then in future years a separate budget cluster would be created for the new Combined Facilities Management Department. If approved, part of the \$80,000 could also be allocated to fund the salary, benefits and office expenses for this new position.

PUBLIC WORKS

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
PUBLIC WORKS				
Engineering	385,821	316,116	396,661	410,986
Streets & Roads	2,396,024	2,434,193	2,326,247	2,382,393
Trees and Cemetery	337,111	335,913	337,674	337,985
Parks and Grounds	287,632	278,030	238,767	172,782
Total Public Works	3,406,588	3,364,252	3,299,349	3,304,146
Employee Compensation	1,671,027	1,677,233	1,755,917	1,750,564
All Other Expenses	1,094,241	1,109,370	1,128,777	1,128,832
Snow & Ice	641,320	577,649	414,655	424,750
Total Public Works	3,406,588	3,364,252	3,299,349	3,304,146
Public Works Headcount (FTE)	32.70	31.86	31.28	31.28

The Public Works cluster includes the Engineering, Streets and Roads, Trees and Cemeteries, Parks and Grounds Divisions, and Transfer Station Enterprise Fund. The Transfer Station Enterprise Fund is voted separately at Town Meeting.

Non-Override Budget

The FY12 Non-Override Budget for this cluster is increasing by \$4,797 or .15% over the FY11 budgets. However, it is a reduction of \$81,579 from the Level Services Budget which would be needed to provide the same level of services and capacity as FY11. The reductions are primarily taken from the streets and roads accounts, in the area of road work and vehicle maintenance. The cost of materials and contracts continues to rise over time in this area; and without a proportionate increase in funding, this division can't provide all the work it requires to maintain the roads, walkways, guardrails, drainage structures, etc. to even the reduced level provided for in the FY11 budget. Unfortunately, the tree contractor line item budget is once again reduced, meaning fewer diseased trees in the Town's right of ways will be removed on a timely basis. The employees in this cluster will receive a 1% cost of living increase in addition to a step movement they might be due. All employees will be paying 2.5% more towards their health insurance plan than they paid in FY11, completing the overall 10% shift from employer to employee agreed to by Town and SPS employees.

The Finance Committee recommends approval of a FY12 Non-Override Public Works Budget of \$3,304,146.

Override Budget

At the time the warrant was printed, the Finance Committee takes no position on the Override Budget.

If the Finance Committee recommends an Override Budget at the Annual Town Meeting, the roadwork and tree contractor budgets in this cluster might receive part of the \$80,000 additional funds for Town services allocated by the Finance Committee for Town services. The other priority for the Town for FY12 is funding the Town's portion of a combined Facilities Director position, shared with the Sudbury Public Schools.

HUMAN SERVICES

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
HUMAN SERVICES				
Board of Health	365,236	370,083	374,534	377,636
Council on Aging	135,241	134,301	146,702	139,187
Veterans Affairs	15,196	15,825	17,415	17,415
Total Human Services	515,673	520,208	538,651	534,239
Employee Compensation	353,965	361,213	380,684	363,597
All Other Expenses	161,708	158,995	157,967	170,642
Total Human Services	515,673	520,208	538,651	534,239
Human Services Headcount (FTE)	7.20	6.20	6.20	6.20

The Human Services cluster includes the Board of Health, Council on Aging, and Veterans' Affairs Offices. Starting in FY10, the Youth Commission function has been moved to the Culture & Recreation Division and staffing was reduced to one half of the duties of a full time employee. Due to prior year budget cuts, the Family Services Department, through which a community outreach worker provided social services to older residents, has been eliminated and the Board of Health budget continues to have limited funds to contract for assistance in this area.

Non-Override Budget

The FY12 Non-Override Budget for this cluster is decreasing by \$4,412 or -.82% over the FY11 budgets. The reduction reflects the difference between the top step held by the retired Council on Aging Director and the lower step held by the new Council on Aging Director. The employees in this cluster will receive a 1% cost of living increase in addition to any step movement they might be due. All employees will be paying 2.5% more towards their health insurance plan than they paid in FY11, completing the overall 10% shift from employer to employee agreed to by Town and SPS employees. Even if the Finance Committee recommends an override budget at the Annual Town Meeting, the budgets in this cluster will remain the same and not receive any additional funding if there is a successful override.

The Finance Committee recommends approval of a FY12 Non-Override Human Services Budget of \$534,239.

CULTURE & RECREATION

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
CULTURE & RECREATION				
Goodnow Library	953,787	971,918	1,003,633	1,015,308
Recreation	118,468	132,729	138,190	142,641
Historical Commission	5,356	5,386	5,309	5,309
Historic Districts Commission	2,718	2,253	2,692	2,751
Total Culture & Recreation	1,080,329	1,112,286	1,149,824	1,166,009
Employee Compensation	753,422	754,680	781,055	788,891
All Other Expenses	326,907	357,606	368,769	377,118
Total Culture & Recreation	1,080,329	1,112,286	1,149,824	1,166,009
Culture & Recreation Headcount (FTE)	18.11	16.63	16.12	16.12

The Culture & Recreation cluster includes the Goodnow Library, Recreation Department, Historical Commission, and the Historic Districts Commission. Starting in FY10, the Youth Commission function has been moved to within the Recreation Department and the staffing was reduced to one half of a full-time position. And starting in FY10, the Town began sharing a Recreation Director with the Town of Wayland. The Atkinson Pool Enterprise Fund will be voted separately at Town Meeting.

Non-Override Budget

The FY12 Non-Override Budget for this cluster is increasing by \$16,185 or 1.41% over the FY11 budgets. Most of these increased funds are for the Goodnow Library, for salary increases for employees and for additional materials and maintenance costs. The employees in this cluster will receive a 1% cost of living increase in addition to a step movement they might be due. All employees will be paying 2.5% more towards their health insurance plan than they paid in FY11 completing the overall 10% shift from employer to employee agreed to by Town and SPS employees. Even if the Finance Committee recommends an Override Budget at the Annual Town Meeting, the budgets in this cluster will remain the same and not receive any additional funding if there is a successful override.

The Finance Committee recommends approval of a FY12 Non-Override Culture & Recreation budget of \$1,166,009.

TOWN-WIDE OPERATING AND TRANSFER ACCOUNTS

	FY09	FY10	FY11	FY12
	Actual	Budget	Appropriated	Non-Override
Unclassified & Transfers				
Town-Wide Operating Expenses	113,643	106,619	142,100	142,100
Town Reserve Account	0	0	240,420	248,983
Salary Contingency Account	0	0	51,985	10,065
Total Unclassified & Transfers	113,643	106,619	434,505	401,148

The Unclassified and Transfer Accounts budget line item is made up of two categories – Town Wide Operating Expenses and Transfer Accounts.

Unclassified

This budget includes expenses that do not fit precisely into other cost centers and are shared by many departments or support Town-wide functions and responsibilities. Expenses include copiers, postage, telephone, Town Report, Town Meeting, the Memorial Day celebration and the July 4th parade. The FY12 budget for this area is level funded to the FY11 amount.

Transfer Accounts

Transfer accounts are for Town operating department needs only and are counted as part of the Town’s share of the overall budget. Since the Town Manager does not have the same authority as the School Committees to move funds around to meet emergencies or unforeseen needs arising during the year, the Reserve Fund is used as a source of funds to meet those instances where supplemental funding is needed. Money cannot be spent from the Reserve Fund without approval of the Finance Committee. The Reserve Fund is set to increase \$8,563 or 3.56% compared to FY11. As other budgets get reduced, there are more areas where an unexpected and potentially large cost can arise and the Reserve Fund allows the most flexibility for meeting those issues, particularly in the area of snow and ice removal costs.

The salary adjustment account is reduced to \$10,065, as all union contracts with Town employees are settled. However, there is still the possibility for arbitration awards or other similar situations which could require funding during the year; and this line item allows flexibility for that possibility. This account also needs Finance Committee approval for any transfers from this account.

The Finance Committee recommends approval of the FY12 Non-Override Budget for Unclassified and Transfer Accounts of \$401,148.

BENEFITS AND INSURANCE

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
BENEFITS & INSURANCE				
Workers' Compensation	27,009	25,090	30,690	41,055
Unemployment Compensation	52,610	41,730	46,738	86,189
Medicare Tax	413,942	421,241	487,166	487,166
Life Insurance	3,700	3,620	5,600	4,343
Employee Medical Premiums	6,747,497	5,977,403	6,093,685	6,412,102
Retiree Medical Premiums/ OPEB	771,852	782,694	883,488	1,021,396
Retirement Assessment	2,621,713	2,717,879	2,851,124	2,961,642
Property/Liab. Insurance	215,912	199,420	275,822	284,096
Benefits Offsets	-	-	(14,280)	(45,836)
Total: Employee Benefits	10,854,235	10,169,076	10,660,033	11,252,153

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
BENEFITS & INSURANCE				
Town	4,153,667	3,964,802	4,209,905	4,490,702
Schools	6,700,568	6,204,274	6,450,128	6,761,451
	10,854,235	10,169,076	10,660,033	11,252,153

Non-Override Budget

This budget is for the benefits and insurance needs of Sudbury Public Schools (SPS) and Town departments only. The largest item in this area is for the health insurance premiums for SPS and Town employees and retirees.

For the first time, this budget presentation shows a breakout of the costs for the Town's share of the medical premiums for SPS and Town retirees. Retirees pay 50% of the costs of their medical plans, and the Town has accepted Section 18, which means that all retirees who are Medicare eligible will be covered by Medicare when they reach age 65, which minimizes the cost of retiree health insurance.

The Town and SPS employees made concessions in the design and contribution rates for their health insurance plans, and beginning in FY10, the split between employer and employee changed over the three years. For active employees in FY12, the Town will pay 80% of the premium rate for all HMO plans offered by the Town and employees will pay 20%, (80%/20% split) unless the employee was hired on or after July 1, 2009, in which case the premium split is 70%/30% for HMO plans. The Town also is required by state law to offer a PPO plan, and the contribution rate for existing employees has changed from 75%/25% in FY10 to 65%/35% for FY12. For employees hired on or after July 1, 2009, the premium split for the PPO plans has changed to 55%/45%. It is estimated these changes have resulted in the budget for the active and

retired employees being \$2.9 million lower in FY12 than if the former plans and contribution rates had remained the same.

All Town and SPS employees are now on rate saver versions of health insurance plans, and the older plans have been discontinued. Since the cut-over date for new hires on July 1, 2009, 10.5% employees are now paying an additional 10% higher premium split than those hired before that date on all plans.

Unemployment insurance is projected to increase by \$39,451, to \$86,189. The increase is mostly a result of costs paid out by SPS and the Town over the past several years.

The Finance Committee recommends approval of a FY12 Non-Override Budget for \$11,252,153, which includes a 5.84% increase over FY11.

DEBT SERVICE

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
DEBT SERVICE				
Short-term Loan Interest	-	7,620	-	-
Long Term Bond Int.	1,277,060	1,151,604	1,025,354	893,860
Long Term Bond Principal	3,070,000	3,110,000	3,155,000	2,990,000
LSRHS Debt Service, Sudbury Portion	2,394,071	2,298,949	2,237,147	2,193,072
Total: Debt Service	6,741,131	6,568,173	6,417,501	6,076,932
NON-EXEMPT DEBT/ADJUSTMENTS				
Non-Exempt Debt Service	-	(7,620)	-	-
Premium on Bonds	(8,408)	(7,007)	(5,605)	(3,737)
SBAB Debt Reimbursement	(1,702,596)	(1,702,596)	(1,702,596)	(1,702,596)
Sub-Total: Non-exempt debt adjustments	(1,711,004)	(1,717,223)	(1,708,201)	(1,706,333)
Total Exempt Debt to be raised	5,030,127	4,850,950	4,709,300	4,370,599

The Debt Service budget provides for the repayment of principal and interest on the long-term debt of both the Town and the Lincoln Sudbury Regional School District (“LSRSD”). The Town issues debt pursuant to votes of Town Meeting to begin construction projects or purchase expensive equipment or real property. The maximum amount of debt is authorized by Town Meeting, and then the Town Treasurer issues the debt after working with the Town Manager and the Town’s Financial Advisor pending the approval of the Board of Selectmen. The treasurer of LSRSD issues its debt after working with the LSRSD School Committee, the School District’s Financial Advisor and pursuant to votes of Town Meetings of both Lincoln and Sudbury.

The budget request for FY12 is for an appropriation of \$3,883,860, which is the total amount of GROSS debt service payments required for all Town of Sudbury debt. A State grant, estimated at \$1,702,596, will be used to pay part of the debt service associated with school construction projects. Town debt service payments fall into the following major bond issue categories: Town Buildings and projects, Land Acquisitions, and Sudbury Public Schools projects. The appropriation for LSRSD debt service payment for FY12, \$2,193,072, is not requested in this budget, as such, but rather is requested within the LSRSD assessment.

The Finance Committee recommends approval of a FY12 Non-Override Town of Sudbury Debt Service Budget of \$3,883,860.

CAPITAL SPENDING

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
Capital & Capital Articles				
CIPC Items	513,042	523,383	529,054	538,947
Total Capital & Articles	513,042	523,383	529,054	538,947

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
Capital				
Town Buildings	109,500	70,000	116,771	59,607
General Government	12,200	22,622	11,955	0
Public Safety	21,400	25,000	10,000	72,396
Public Works	354,942	325,761	298,328	316,944
Culture & Recreation	15,000	80,000	42,000	0
Sudbury Public Schools	0	0	50,000	90,000
Total: Operating Expenses	513,042	523,383	529,054	538,947

Non-Override Budget

The Finance Committee recommends approval of a FY12 Non-Override Capital Budget of \$538,947.

CAPITAL IMPROVEMENT PLANNING COMMITTEE REPORT

A capital expenditure is defined as major, non-recurring costs involving land acquisition, construction or major rehabilitation of a facility, or purchase of equipment costing \$10,000 or more with a useful life of five years or more.

The Capital Improvement Planning Committee (“Committee”) reviewed each department’s five year capital plan in order to prioritize requests and make recommendations for expenditures in FY12.

The Committee held two hearings on January 5 and 6, 2011. Following its review, the Committee voted to recommend that the following capital items be funded through FY12 Operating Budgets subject to available funding:

<u>Projects Non-Override</u>	<u>FY12</u>	<u>Notes</u>
Ongoing Project Leases:		
Unit #35 Kubota Tractor/Boom Flail Mower	15,664	Started FY11
Unit #54 Elgin Pelican Sweeper	33,236	Started FY11
Unit #8: 2009 John Deere loader	27,315	Started FY10
Unit #14 2009 Chevy pick-up	6,735	Started FY10
Unit #20 2009 6-Wheel Dump Truck	26,500	Started FY10
P&G Landscape Tractor w/Bucket	4,560	Started FY10
Unit #22 2009 John Deer Backhoe	25,183	Started FY09
Unit #27 2007 Mack 10-Wheel	27,390	Started FY09
Unit #33 2009 Tractor	25,230	Started FY09
Unit #5 2008 10-wheel dump truck	23,977	Last installment
Unit #24 2008 6-wheel dump truck	28,053	Last installment
Unit #23 6-wheel dump chip	18,535	Last installment
 Ongoing leases	 261,454	
 P&G:		
1 ton 4x4 truck with plow	8,700	
 DPW:		
10 wheel dump truck	36,290	
1 ton pickup truck	10,500	
 Town Buildings:		
Various building improvements with up to \$12,000 earmarked for regrading the library driveway	59,607	
 Pickup Truck	 22,396	
 School Buildings:		
Nixon Addressable fire alarm	90,000	
 Public Safety:		
Car 3 replacement	40,000	
Fire Station occupational safety items	10,000	
 Total FY12 Projects	 538,947	

Non-Override Budget

The Capital Improvement Planning Committee recommends approval of a FY12 Non-Override Capital Budget of \$538,947.

Status of the Capital Projects Funded for FY10

Starting this year, the Committee will report on the status of the projects approved in the previous fiscal year (concluded as of this budget cycle). Status of the projects funded for FY10 (July 1, 2009 through June 30, 2010):

DPW Equipment:

- Ongoing lease payments
Approved \$2,546,761; Spent \$247,573
- New lease payments
Approved \$71,775; Spent \$60,556
The following units were leased for 5 years:
Unit #14 Chevy One-Ton Truck
Unit #20 Six Wheel Dump Truck
Unit #8 Loader 3.5 yard

Park & Rec:

- New lease payments
Approved \$7,225; Spent \$9,120
The following unit was leased for 5 years:
Utility tractor

Town General:

- Library RFID self check-out
Approved \$80,000; Spent \$80,000
Project completed on budget.
- MUNIS Tax Software:
Approved \$12,000; Spent \$12,200
Lease will end in FY11.
- Ricoh MP6000 B&W copier:
Approved \$10,622; Spent \$10,622
Project completed on budget.

Town Buildings:

- Various building improvements
Approved \$25,000; Spent \$0
Funds were used to complete Senior Center Roof and Skylights project (FY11) that came in over budget.
- Town Hall Handicap Entrance
Approved \$12,000; Spent \$14,175
Project completed. Cost overrun due to Historic District Commission requirement for black iron railings.

Public Safety:

- Fire station HQ paint/trim
Approved \$33,000; Spent \$17,225
Project completed. Multiple vendors submitted bids under budgeted amount. Low bid was accepted.
- Station 2 traffic light
Approved \$25,000; Spent \$0
Project not started. Project on hold as low bid exceeded budgeted amount by \$34,000.

ENTERPRISE FUNDS

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
ENTERPRISE FUND EXPENDITURES				
Transfer Station	263,368	256,534	271,437	290,389
Pool	438,924	455,118	489,868	517,230
Recreation Field Maintenance	0	113,606	221,497	309,614
Total Enterprises (Direct)	702,292	825,257	982,802	1,117,234

	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Non-Override
ENTERPRISE FUND REVENUES				
Transfer Station	316,432	375,277	301,032	330,000
Pool	457,842	480,692	489,868	517,230
Recreation Field Maintenance	0	170,493	221,497	309,614
Total Enterprises Revenues	774,274	1,026,461	1,012,397	1,156,844

The Transfer Station Enterprise Fund operates the Transfer Station, providing recycling, landfill monitoring, and the hauling and disposal of waste. As an enterprise fund, the Transfer Station Enterprise Fund covers all of its direct and indirect costs and is not supported by the general tax levy or any other general revenue source. The Transfer Station is self-sustaining and has a stable group of users.

The Finance Committee recommends approval of a FY12 Non-Override Budget of \$290,389 for the Transfer Station Enterprise Fund.

The Atkinson Pool Enterprise Fund pays for the direct costs of the operation of the Atkinson Pool. Enterprise funds are meant to be self-supporting, meaning they should be able to generate sufficient revenue to pay for all direct and indirect costs, as well as set aside funds for future maintenance and repairs to the facility, but does not pay for the cost of health insurance and pensions. However, the Pool does continue to support all of its direct operating costs.

The Finance Committee recommends approval of a FY12 Non-Override Budget of \$517,230 for the Atkinson Pool Enterprise.

The Recreation Field Maintenance Enterprise Fund pays for the direct costs associated with the maintenance and upkeep of the Town's many recreational playing fields. As an enterprise fund, the Recreational Field Maintenance covers all of its direct and indirect costs and is not supported by the general tax levy. Furthermore, costs previously borne by the tax levy to support recreational fields will be assumed by the Enterprise as new revenue streams are developed.

The Finance Committee recommends approval of a FY12 Non-Override Budget of \$309,614 for the Recreational Field Maintenance Enterprise Fund.

COMMUNITY PRESERVATION FUND

<u>Sudbury Community Preservation Fund Balance Statement</u>			
	FY10 ⁶	FY11	FY12
CPA Funds - 2044 & 3400	Actual	Appropriated	Budget
Beginning Fund Balances	\$ 8,509,267	\$ 8,922,552	\$ 9,273,957
Revenues:			
CPA Surcharge & Fees	1,457,336	1,400,000	1,480,000
Intergovernmental	539,676	431,234	430,000
Investment Income	185,471	200,000	185,479
Total Revenues	2,182,483	2,031,234	2,095,479
Expenditures ⁷			
Debt Service ¹	1,119,954	1,052,034	1,226,556
Admin	69,263	80,000	85,000
Open Space	7,103	-	766,000
Community Housing ²	-	-	-
Historic Preservation	257,755	167,795	154,000
Recreation	107,124	200,000	100,000
Total Expenditures	1,561,198	1,499,829	2,331,556
Excess/(Deficiency)	621,285	531,405	(236,077)
Transfers In/(Out) ³	(208,000)	(180,000)	(190,000)
Ending CPA Operating Fund Balance	\$ 8,922,552	\$ 9,273,957	\$ 8,847,880
	(0)		
	FY10 ⁶	FY11	FY11
Fund Balance Breakdown	Actual	Appropriated	Budget
Reserved ^{5, 6}	\$ 2,029,350	\$ 2,029,350	\$ 2,029,350
Unreserved	\$ 6,893,202	\$ 7,244,607	\$ 6,818,530
	\$ 8,922,552	\$ 9,273,957	\$ 8,847,880
Year-end Cash & Investments ^{4,6}	\$9,344,758		
Exhibit Notes			
1 Debt Service allocation:	FY10	FY11	FY12
Open Space	94.8%	94.5%	95.5%
Recreation	4.2%	4.4%	3.7%
Historic Preservation	0.6%	1.0%	0.8%
2 Community Housing represents funds to non-town entities for Community Housing projects.			
3 Transfers In/(Out) represents appropriations made between Town funds. For CPA this line item represents funds appropriated (and given to) Sudbury Housing Trust for Comm. Housing Projects.			
4 The difference between fund balance and year-end cash balance arises from encumbrances and accruals recorded against the fund but not yet paid out from the cash accounts.			
5 Reserved Fund Balance represents that part of the CPA program reserved for a particular purpose. This may include encumbrances, accruals, current liabilities and mandated reserve allocations.			
6 FY10 annual final as of warrant printing.			
7 Expenditures may not exceed appropriations. However, appropriations for projects may be expended over 1 or more years. CPA project expenditures are tracked in fund 3400.			

LONG-TERM DEBT INFORMATION

TOWN DEBT SCHEDULE BY ISSUANCE DATE

	Issuance Date				Total	Annual Debt Service	Remaining Principal
	12/1/2000	10/1/2001	4/1/2003	2/15/2005			
FY11 Principal	1,265,000	710,000	525,000	655,000	3,155,000		
FY11 Interest	63,250	258,560	63,000	640,544	1,025,354	4,180,354	22,745,000
FY12 Principal		585,000	525,000	1,880,000	2,990,000		
FY12 Interest		232,360	42,000	619,500	893,860	3,883,860	19,755,000
FY13 Principal		500,000	525,000	1,850,000	2,875,000		
FY13 Interest		208,375	21,000	555,131	784,506	3,659,506	16,880,000
FY14 Principal		500,000		1,830,000	2,330,000		
FY14 Interest		187,125		491,044	678,169	3,008,169	14,550,000
FY15 Principal		500,000		1,810,000	2,310,000		
FY15 Interest		165,250		424,800	590,050	2,900,050	12,240,000
FY16 Principal		500,000		1,695,000	2,195,000		
FY16 Interest		142,750		356,925	499,675	2,694,675	10,045,000
FY17 Principal		500,000		1,615,000	2,115,000		
FY17 Interest		119,750		292,900	412,650	2,527,650	7,930,000
FY18 Principal		500,000		1,605,000	2,105,000		
FY18 Interest		96,625		228,400	325,025	2,430,025	5,825,000
FY19 Principal		500,000		1,365,000	1,865,000		
FY19 Interest		72,875		168,800	241,675	2,106,675	3,960,000
FY20 Principal		500,000		1,445,000	1,945,000		
FY20 Interest		48,875		118,400	167,275	2,112,275	2,015,000
FY21 Principal		500,000		1,515,000	2,015,000		
FY21 Interest		24,500		30,300	54,800	2,069,800	0
All Principal	1,265,000	5,795,000	1,575,000	17,265,000	25,900,000		
All Interest	63,250	1,557,045	126,000	3,926,744	5,673,039		
TOTAL	1,328,250	7,352,045	1,701,000	21,191,744	31,573,039		

AUTHORIZED, BUT UNISSUED DEBT

Date Authorized	Permanent Debt Issued Purpose	Total Authorized	Amount Issued	Unissued 12/31/2010	Date Issued	Maturity Date	Article Number
4/8/2008	Nobscot I Conserv. (CPA)	5,545,000	5,045,000	500,000	6/15/2009	6/30/2029	ATM08-33
1/18/2011	Noyes Green Repairs	2,640,000	-	2,640,000			STM11-01
Totals		8,185,000	5,045,000	3,140,000			

Nobscot I debt was authorized to include amount of purchase subsequently covered by State grant. The \$500,000 unissued debt will be rescinded at a future Town Meeting. The Noyes Green Repairs permanent debt will be issued in FY12. Authorization in excess of the Town's final project expenditures (net of MSBA debt reimbursement) may be rescinded in the future.

FY12 LONG-TERM DEBT SERVICE DETAIL

DEBT SERVICE DETAIL	Date	Budget FY12
Loring Elementary	10/1/2001	817,360
DPW	4/1/2003	459,000
K-8 Schools Remainder	4/1/2003	108,000
Curtis Refunding 2000 Issue	2/15/2005	1,412,184
Haynes Refunding 2000 Issue	2/15/2005	496,173
Weisblatt Land Refunding 1999 Issue	6/15/2005	342,863
Meachen Land Refunding 1999 Issue	6/15/2005	248,280
Town Projects Sub-total		3,883,860
L-S assessment, Sudbury share		2,193,072
Total Debt Service (gross)		6,076,932
Debt Service by Category		
Schools K-8		2,833,716
Town		459,000
Land Acquisition		591,144
L-S assessment, Sudbury share		2,193,072
		6,076,932
Adjustments to debt		
Premium on Bonds		(3,737)
SBAB Debt Reimbursement		(1,702,596)
Total Adjustments		(1,706,333)
Total exempt debt to be raised by taxation		4,370,599

L-S DEBT SCHEDULE BY ISSUANCE DATE

	Issuance Date			Total	Annual Debt Service	Remaining Principal
	FY05	FY07	FY09			
FY11 Principal	1,400,000	550,000	200,000	2,150,000		
FY11 Interest	167,267	336,050	23,750	527,067	2,677,067	12,850,000
FY12 Principal	1,400,000	550,000	200,000	2,150,000		
FY12 Interest	127,844	316,800	14,250	458,894	2,608,894	10,700,000
FY13 Principal	1,400,000	550,000	200,000	2,150,000		
FY13 Interest	87,294	297,550	4,750	389,594	2,539,594	8,550,000
FY14 Principal	1,400,000	550,000		1,950,000		
FY14 Interest	45,055	277,613		322,668	2,272,668	6,600,000
FY15 Principal		550,000		550,000		
FY15 Interest		254,925		254,925	804,925	6,050,000
FY16 Principal		550,000		550,000		
FY16 Interest		231,550		231,550	781,550	5,500,000
FY17 Principal		550,000		550,000		
FY17 Interest		210,238		210,238	760,238	4,950,000
FY18 Principal		550,000		550,000		
FY18 Interest		188,925		188,925	738,925	4,400,000
FY19 Principal		550,000		550,000		
FY19 Interest		166,925		166,925	716,925	3,850,000
FY20 Principal		550,000		550,000		
FY20 Interest		144,925		144,925	694,925	3,300,000
FY21 Principal		550,000		550,000		
FY21 Interest		122,925		122,925	672,925	2,750,000
FY22 Principal		550,000		550,000		
FY22 Interest		100,925		100,925	650,925	2,200,000
FY23 Principal		550,000		550,000		
FY23 Interest		78,925		78,925	628,925	1,650,000
FY24 Principal		550,000		550,000		
FY24 Interest		56,650		56,650	606,650	1,100,000
FY25 Principal		550,000		550,000		
FY25 Interest		34,031		34,031	584,031	550,000
FY26 Principal		550,000		550,000		
FY26 Interest		11,344		11,344	561,344	0
All Principal	5,600,000	8,800,000	600,000	15,000,000		
All Interest	427,460	2,830,300	42,750	3,300,510		
TOTAL	6,027,460	11,630,300	642,750	18,300,510		

The Town of Sudbury is responsible for a portion of the District's annual debt service. For further details, see LSRHS and Debt Service narratives.

CPF DEBT SCHEDULE BY ISSUANCE DATE

	Issuance Date					Total	Annual Debt Service	Remaining Principal
	6/15/2004	6/15/2004	6/15/2005	6/15/2009	12/15/2010			
FY11 Principal	277,216	17,784	135,000	255,000		685,000		
FY11 Interest	141,877	9,102	77,688	138,369		367,035	1,052,035	9,620,000
FY12 Principal	277,216	17,784	135,000	255,000	125,000	810,000		
FY12 Interest	131,482	8,435	72,963	131,994	71,683	416,556	1,226,556	10,840,000
FY13 Principal	277,216	17,784	135,000	255,000	105,000	790,000		
FY13 Interest	120,393	7,723	68,238	126,894	58,250	381,498	1,171,498	10,050,000
FY14 Principal	277,216	17,784	135,000	255,000	100,000	785,000		
FY14 Interest	109,304	7,012	63,175	121,794	55,700	356,985	1,141,985	9,265,000
FY15 Principal	220,833	14,167	135,000	255,000	100,000	725,000		
FY15 Interest	98,216	6,301	58,113	116,375	52,700	331,704	1,056,704	8,540,000
FY16 Principal	220,833	14,167	135,000	255,000	100,000	725,000		
FY16 Interest	89,382	5,734	53,050	110,478	50,200	308,844	1,033,844	7,815,000
FY17 Principal	220,833	14,167	135,000	255,000	100,000	725,000		
FY17 Interest	80,218	5,146	47,650	104,263	48,200	285,476	1,010,476	7,090,000
FY18 Principal	220,833	14,167	130,000	255,000	100,000	720,000		
FY18 Interest	70,832	4,544	42,250	97,569	46,075	261,270	981,270	6,370,000
FY19 Principal	220,833	14,167	130,000	250,000	100,000	715,000		
FY19 Interest	61,171	3,924	37,050	90,313	43,700	236,158	951,158	5,655,000
FY20 Principal	220,833	14,167	130,000	250,000	100,000	715,000		
FY20 Interest	51,233	3,287	31,850	82,813	41,075	210,258	925,258	4,940,000
FY21 Principal	220,833	14,167	130,000	250,000	100,000	715,000		
FY21 Interest	41,296	2,649	26,650	75,313	38,200	184,108	899,108	4,225,000
FY22 Principal	220,833	14,167	130,000	250,000	100,000	715,000		
FY22 Interest	31,138	1,998	21,450	67,500	35,200	157,285	872,285	3,510,000
FY23 Principal	220,833	14,167	130,000	250,000	100,000	715,000		
FY23 Interest	20,869	1,339	16,250	59,375	32,100	129,933	844,933	2,795,000
FY24 Principal	220,833	14,167	130,000	250,000	100,000	715,000		
FY24 Interest	10,490	673	10,888	51,094	28,750	101,894	816,894	2,080,000
FY25 Principal			130,000	250,000	100,000	480,000		
FY25 Interest			5,525	42,500	25,250	73,275	553,275	1,600,000
FY26 Principal				250,000	100,000	350,000		
FY26 Interest				33,594	21,625	55,219	405,219	1,250,000
FY27 Principal				250,000	100,000	350,000		
FY27 Interest				24,375	17,875	42,250	392,250	900,000
FY28 Principal				250,000	100,000	350,000		
FY28 Interest				14,844	14,000	28,844	378,844	550,000
FY29 Principal				250,000	100,000	350,000		
FY29 Interest				5,000	10,000	15,000	365,000	200,000
FY30 Principal					100,000	100,000		
FY30 Interest					6,000	6,000	106,000	100,000
FY31 Principal					100,000	100,000		
FY31 Interest					2,000	2,000	102,000	0
All Principal	3,317,199	212,801	1,985,000	4,790,000	2,030,000	12,335,000		
All Interest	1,057,900	67,865	632,788	1,494,453	698,583	3,951,589		
TOTAL	4,375,098	280,667	2,617,788	6,284,453	2,728,583	16,286,589		

CPF (Community Preservation Fund): A special revenue fund used to account for the 3% on local real estate tax surcharge on non-exempt property (and matching state trust fund distribution) that can be used for open space, historic resource and affordable housing purposes. Occasionally, the Town will borrow long-term funds for CPF purposes. This schedule shows all debts outstanding relating to CPF. CPF debt service is budgeted and paid for separately from all other Town activities.

APPENDICES

APPENDIX I. BUDGET TERMS AND DEFINITIONS

Abatements and Exemptions (previously called Overlay): An amount set by the Assessors to create a fund to cover abatements of (and exemptions from) real and personal tax assessments for the current year, and raised on the tax levy. An abatement is a reduction provided by the Assessors in the assessed tax because of bona fide specific conditions or situations not considered when the tax was levied. An exemption is provided for a variety of purposes, which include, but are not limited to: buildings/property used for religious, government, charity, or pollution control. In addition, exemptions may also be provided to the elderly, handicapped, and veterans under certain conditions.

Abatement Surplus: Accumulation of the surplus amounts of Abatements and Exemptions set aside by the Assessors each year to cover abatements of (and exemptions from) real estate and personal property tax assessments. The accumulated amount for previous years no longer committed for abatements may be used by vote of the Town Meeting.

Benefits and Insurance: This account in the shared expenses section of the budget is comprised primarily of benefits such as health insurance and retirement for both school and general government employees.

Capital Exclusion: A temporary increase in the tax levy to fund a capital project or make a capital acquisition.

Cherry Sheet: An annual statement received from the Department of Revenue detailing estimated receipts for the next fiscal year from the various state aid accounts as well as estimated state and county government charges payable to the state. The name “Cherry Sheet” derives from the color of the paper used.

Debt Exclusion: An override to Proposition 2 ½ for the purpose of raising funds for debt service costs; remains for the life of the debt only.

Enterprise Fund: A separate fund, set up to provide a specific Town service, whereby all direct and indirect/overhead costs of providing the service are funded in total from user charges. An appropriation for an enterprise fund is funded in total from enterprise fund revenue unless otherwise noted. Enterprise fund revenue used to fund services provided by other Town departments will be shown in the warrant after the appropriation total for the department. An enterprise fund is required to fully disclose all costs and all revenue sources needed to provide a service.

Free Cash: Free cash is the available, undesignated fund balance of the general fund and is generated when actual revenue collections are in excess of estimates, when expenditures are less than appropriated, or both. A free cash balance is certified as of July 1 each year by the Department of Revenue and, once certified, any or all of the certified amount may be used to defray Town expenses by a vote of the Town Meeting.

APPENDIX I. BUDGET TERMS AND DEFINITIONS CONT'D

Funding Sources for Expenditures: Authorizations for the Town to expend monies are made in the form of a motion at Town Meeting. The wording of the motions will specify the funding source; that is, the place from where money is going to come or will be raised. When a motion reads, "to appropriate a sum of money" without a source being identified, that amount will be included in the tax calculation, whereby the total of all sums to be appropriated will be reduced by an estimate of local and state revenue. The balance needed will be provided by property taxes. When items in the warrant are offset or raised from available funds, those items will also appear as offsets in the determination of the tax rate.

Levy Limit: The maximum amount a community can levy in any given year.

Local Receipts: This is the third largest source of revenue for the Town after property taxes and Cherry Sheet receipts. While it is comprised of a number of different items, the largest source is the auto excise tax.

New Growth: Proposition 2 ½ allows a community to increase its levy limit annually by an amount based upon the valuation of certain new construction and other growth in the tax base that is not the result of property revaluation. New growth becomes part of the levy limit and thus increases at the rate of 2.5% each year as the levy limit increases.

Override: An override is passed by a majority vote at Town Meeting and at the ballot. There are three types of overrides: An Operating Override, which permanently increases the levy limit; a Debt Exclusion, which increases the levy limit only for the life of the debt; and a Capital Project Override, which increases the levy only for the year in which the project is undertaken.

Proposition 2½: A Massachusetts General Law enacted in 1980 to limit property taxes.

Revolving Fund: Funds that may be used without appropriation and that are established for special uses. Recreation fees, for example, may be paid into a revolving fund. Revolving funds are established by State law or Town bylaw.

Reserve Fund: An amount appropriated by the Annual Town Meeting for emergency or unforeseen purposes. The Finance Committee, by state law, is the sole custodian of the Reserve Fund and approves transfers from the Fund into the operating budgets throughout the year if: (1) the need for funds is of an emergency and/or unforeseen nature, and (2) if, in the judgment of the Finance Committee, the Town Meeting would approve such an expenditure if such a meeting was held. The Reserve Fund is, therefore, a mechanism for avoiding the necessity of frequent Special Town Meetings.

Stabilization Fund: Similar to a "savings account", this account has been used to fund large capital projects such as fire trucks and school roofs. A recent amendment to State law allows the Stabilization Fund to be used for the operating budget, as well as capital purchases; however, the Finance Committee would generally be reluctant to recommend doing so. Placing money into this fund requires a majority vote of Town Meeting while withdrawing from the Stabilization Fund requires a 2/3 vote of Town Meeting.

APPENDIX I. BUDGET TERMS AND DEFINITIONS CONT'D

Tax Levy: The property tax levy is the revenue a community can raise through real and personal property taxes. In Massachusetts, municipal revenues to support local spending for schools, public safety, general government and other public services are raised through the property tax levy, State aid, local receipts and other sources. The property tax levy is the largest source of revenue for most cities and towns.

Town-wide Operating Expenses: This account in the general government section of the budget is comprised primarily of operating expenses such as postage, telephone and property liability insurance, that support town-wide operations and are not assigned to any one department or cost center.

**APPENDIX II. EMPLOYEE HEADCOUNT
(Full Time Equivalents)**

		FY09	FY10	FY11	FY12
Cost Center		Actual	Actual	Current	Budget
LSRHS*		220.01	211.54	213.18	194.29
Sudbury K-8 Schools *		389.89	393.31	390.57	380.07
Public Safety		79.25	76.97	76.97	76.97
Public Works		32.70	31.86	31.28	31.28
General Government		31.80	30.50	30.50	30.50
Human Services		7.20	6.20	6.20	6.20
Culture & Recreation		18.11	16.63	16.12	16.12
Town Operating Sub-total		169.06	162.16	161.07	161.07
Town Enterprises		9.60	9.60	10.18	10.18
TOTAL		788.56	776.61	775.00	745.61

*Includes positions covered in full or in part by grants. LSRHS figures represent full FTE's; they are not prorated by the regional assessment.

APPENDIX III. FY10 ACTUAL EMPLOYEE COMPENSATION OVER \$100K^{1,2}

<u>Lincoln Sudbury Regional High School</u>			
Position	Salary	Other Compensation	Overtime
Superintendent/Principal	146,250	-	-
Director of Students Services	119,506	-	-
Coord. of Curric & Instr	119,506	-	-
Housemaster	119,506	-	-
Housemaster	119,506	-	-
Housemaster	119,506	-	-
Athletics/Activities Director	119,506	-	-
Director of Finance & Operations	131,196	-	-
Counselor	101,920	-	-
Department Coordinator	93,127	8,500	-
Department Coordinator	95,920	9,500	-
Department Coordinator	95,920	7,000	-
Department Coordinator	93,127	9,000	-
Department Coordinator *	93,127	57,563	-
Department Coordinator	90,413	10,000	-
Department Coordinator	95,920	8,500	-
Teacher *	95,920	53,960	-
Teacher	95,920	4,500	-
Teacher	95,920	5,500	-
Teacher	95,920	4,700	-
Teacher	95,920	15,947	-
Teacher	95,920	5,000	-
Teacher	95,920	4,500	-
Teacher	95,920	7,300	-
* Other compensation includes Early retirement incentive no longer available. FY10 was last year it was paid.			
<u>Sudbury Public Schools</u>			
Position	Salary	Other Compensation	Overtime
Superintendent	157,343	21,000	-
Assistant Superintendent	118,497	1,000	-
Director of Business & Finance	109,000	1,000	-
Principal, Curtis	101,000	4,852	-
Principal, Loring	100,025	-	-
Principal, Nixon	104,555	-	-
Principal, Noyes	108,541	500	-
Special Education Administrator	107,849	-	-

APPENDIX III (Continued)

<u>Town</u>			
<u>Position</u>	<u>Salary</u>	<u>Other Compensation*</u>	<u>Overtime</u>
Town Manager	147,077	17,978	-
DPW Director/Town Engineer	106,333	9,936	
Assist. Town Manager (retired 6/2010)	97,561	18,075	-
Fire Chief (retired 12/2010)	104,311	30,840	-
Assist. Fire Chief (retired 9/2010)	89,361	14,592	-
Director of Planning & Community Devel.	97,552	3,632	-
Police Lieutenant	85,991	32,743	13,583
Police Chief	96,596	24,620	
Fightfighter/Emt	65,736	14,740	29,505
Fire Captain/Emt	65,736	18,942	37,146
Fire Captain/Emt	65,736	12,291	36,565
Fire Captain/Emt	65,736	11,609	23,576
Police Sargeant (retired 5/2010)	52,238	41,750	15,003
Police Sargeant	59,967	23,942	22,552
Fighfighter/Emt	50,361	5,737	55,411
*excludes non-town paid details which are reimbursed by outside sources.			

¹Salaries are base pay.

²Other compensation paid to employees. This amount may include annuities, deferred compensation match, career incentive, merit pay, stipends, regular or retirement sick-buyback, or any other compensation paid by the Town or Schools, other than base salary or overtime.

APPENDIX IV. COLLECTIVE BARGAINING

BARGAINING UNIT AND CONTRACT TERMS

LINCOLN-SUDBURY REGIONAL HIGH SCHOOL

Three year contract covering school years 2009/10, 2010/11, 2011/12. Effective dates and percentage increases are: 9/1/2009 – Teachers, 0.75% for salary Schedule A, additional 0.75% for the top step in all classifications; 9/1/2010 – 1.75% for salary Schedule A, additional 1.0% for the top step in all classifications; 9/1/2011 – 2.0% for salary Schedule A, additional 1.0% for the top step in all classifications.

SUDBURY PUBLIC SCHOOLS, K-8

Three year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are: 7/1/2009 – Teachers, 3.0% to the salary schedule; 7/1/2010 – 0% to salary schedule, and 2.5% on a new top step in all classifications; 7/1/2011 – 1.0% to salary schedule and 1.0% to the top step.

TOWN

FIRE

Three year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are: 11/1/2009 – 3.00%; 7/1/2010 – 0% to salary schedule, 2.0% on a new top step; 7/1/2011 – 1.0% to salary schedule, additional 1.92% to top step, Min step deleted and all remaining steps renumbered.

POLICE

Three year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are: 11/1/2009 – 3.00%; 7/1/2010 – 0% to salary schedule, 2.5% on a new top step; 7/1/2011 – 0%.

PUBLIC WORKS

Three year contract covering fiscal years 2011, 2012, 2013. Effective dates and percentage increases are: 7/1/2010 – 3.00%; 7/1/2011 – 0% to salary schedule, 2.0% on new top step; 7/1/2012 – 1.0% to salary schedule, additional 1.92% to top step, Start step deleted and all remaining steps renumbered.

ENGINEERING

Three year contract covering fiscal years 2011, 2012, 2013. Effective dates and percentage increases are: 7/1/2010 – 3.00%; 7/1/2011 – 0% to salary schedule, 2.0% on new top step; 7/1/2012 – 1.0% to salary schedule, additional 1.92% to top step, Min step deleted and all remaining steps renumbered.

SUPERVISORY

Three year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are: 11/1/2009 – 3.00%; 7/1/2010 – 0% to salary schedule, 2.0% on a new top step; 7/1/2011 – 1.00% to salary schedule, 1.92% to the top step; Min step deleted and all remaining steps renumbered.

CIVILIAN DISPATCHERS

Three year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are: 7/1/2009 – 0%, 7/1/2010 – 3.00%; 7/1/2011 – 1.0% to salary schedule, new top step 3.92% above step 7.

NOTE: Percentage increases are for cost of living only and do not include changes for step, longevity or merit increases.

APPENDIX V. SALARY SCHEDULES & CLASSIFICATION PLANS

SUDBURY PUBLIC SCHOOLS							
TEACHER SALARY SCHEDULE							
FY12: 7/1/11 - 6/30/12							
Bachelors		Masters		Masters +30		Masters +60	
Step	Salary	Step	Salary	Step	Salary	Step	Salary
1	42,573	1	45,560	1	48,179	1	50,478
2	44,344	2	47,455	2	50,183	2	52,578
3	46,188	3	49,430	3	52,271	3	54,765
4	48,110	4	51,486	4	54,445	4	57,043
5	50,111	5	53,628	5	56,710	5	59,416
6	52,196	6	55,859	6	59,069	6	61,888
7	54,367	7	58,182	7	61,527	7	64,462
8	56,629	8	60,603	8	64,086	8	67,144
9	58,985	9	63,124	9	66,752	9	69,937
10	61,438	10	65,749	10	69,529	10	72,846
11	63,994	11	68,485	11	72,421	11	75,877
12	66,656	12	71,334	12	75,434	12	79,033
13	69,430	13	74,301	13	78,573	13	82,321
14	72,317	14	77,392	14	81,841	14	85,746
15	74,867	15	81,262	15	85,933	15	90,033
16		16	84,126	16	88,962	16	93,207

SUDBURY PUBLIC SCHOOLS							
SUPPORT STAFF SALARY SCHEDULE							
FY12: 7/1/11 - 6/30/12							
Level	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7
1	10.62	10.99	11.49	11.90	12.39	12.85	14.24
2	10.92	11.38	11.84	12.35	13.36	15.40	16.83
3	13.74	14.27	14.82	15.40	16.02	16.65	18.45
4	14.82	15.40	16.02	16.65	17.30	17.97	19.91
5	16.02	16.65	17.30	17.97	18.68	19.41	21.50
6	17.30	17.97	18.68	19.41	20.17	20.95	23.22
7	18.68	19.41	20.17	20.95	21.80	22.64	25.08
8	20.17	20.95	21.78	22.64	23.54	24.45	27.08
9	21.78	22.66	23.54	24.45	25.40	26.42	29.25

JOB CLASSIFICATION FOR SUPPORT STAFF							
Level 1	n/a						
Level 2	Cafeteria Helper						
Level 3	Cafeteria Cook						
Level 4	Lunchroom Supervisor						
Level 5	Cafeteria/Manager, Early Childhood Asst (Clerical), Secretarial Asst						
Level 6	Business Office Assistant, School Secretary/Student Services Secretary						
Level 7	Library/Media Paraprofessional, Teacher Assistant						
Level 8	School Administrative Secretary, Assistant Librarian						
Level 9	Administrative Secretary, Tutor, ABA Tutor, METCO Tutor						

SUDBURY PUBLIC SCHOOLS		
NURSES' SALARY SCHEDULE FY12		
	Step	Salary
	1	44,414
	2	47,078
	3	49,903
	4	52,897
	5	54,762

CUSTODIAN SALARY SCHEDULE FY12				
	Step	Custodian	MA-1	MA-2
	1	16.61	20.31	25.70
	2	17.27	21.04	26.67
	3	17.95	21.81	27.65
	4	18.61	22.64	28.69
	5	19.29	23.48	29.77
	6	20.07	24.34	30.87
	7	21.28	26.14	33.18
	8	22.10		
	9	22.91		
	10	23.12		
	11	24.32		
	MA-1 is Maintenance Assistant 1			
	MA-2 is Maintenance Assistant 2			

APPENDIX V.

LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT

FY12 TEACHERS' SALARY SCHEDULE						
Step	B	M	M+15	M+30	M+45	M+60
1	43,360	46,830	48,235	49,681	51,172	52,707
2	45,095	48,703	50,165	51,669	53,219	54,815
3	46,899	50,650	52,171	53,735	55,347	57,008
4	48,774	52,677	54,257	55,885	57,561	59,289
5	50,726	54,784	56,427	58,121	59,864	61,660
6	52,755	56,975	58,685	60,445	62,259	64,126
7	54,866	59,254	61,033	62,864	64,749	66,692
8	57,060	61,624	63,474	65,377	67,338	69,359
9	59,342	64,090	66,012	67,992	70,032	72,133
10	61,716	66,653	68,653	70,713	72,834	75,019
11	64,185	69,319	71,399	73,541	75,747	78,020
12	66,752	72,093	74,255	76,483	78,777	81,140
13	69,422	74,976	77,225	79,542	81,928	84,386
14	72,199	77,975	80,314	82,723	85,206	87,761
15	75,087	81,094	83,527	86,033	88,614	91,273
16	78,681	84,338	86,868	89,473	92,158	94,922
17	78,681	88,375	89,258	94,758	97,601	100,528
17+1%	79,452	89,241	90,133	95,687	98,558	101,514

NURSES' SCHEDULE		
Step	B	M + Cert.
1	38,196	39,342
2	39,724	40,915
3	41,312	42,552
4	42,965	44,254
5	44,684	46,024
6	46,471	47,865
7	48,330	49,780
8	51,636	53,185

APPENDIX V.

**LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT-SUPPORT STAFF
COMPENSATION CLASSIFICATION PLAN**

FY12 SUPPORT STAFF SCHEDULES								
Category A	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale 1	10.95	11.35	11.75	12.24	12.69	13.20		
Scale 2	12.28	12.76	13.33	13.81	14.31	14.89		
Scale 3	13.72	14.16	14.73	15.30	15.81	16.44		
Scale 4	15.03	15.60	16.27	16.81	17.43	18.13		
Scale 5	16.42	17.06	17.71	18.38	19.03	19.79		
Scale 6	17.75	18.50	19.19	19.88	20.58	21.40		
Scale 7	19.17	19.88	20.66	21.43	22.20	23.09		
Scale 8	20.46	21.34	22.12	22.96	23.79	24.74		
Scale 9	21.90	22.73	23.58	24.47	25.38	26.39		
Scale 10	23.20	24.12	25.10	26.04	26.95	28.02	29.14	30.31
Category B	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale 1	20.66	21.44	22.35	23.20	24.15	25.10	26.11	27.15
Scale 2	22.49	23.36	24.30	25.24	26.29	27.34	28.47	29.61
Scale 3	24.32	25.26	26.25	27.34	28.43	29.57	30.74	31.97
Tech	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale	53,034	55,155	57,361	59,657	62,043	64,524	67,107	69,791
Trainer	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale	37,588	39,139	40,770	42,483	44,357	46,150	47,998	49,918
Trainer Cont'd	Step 9	Step 10	Step 11	Step 12	Step 13	Step 14	Step 15	Step 16
Scale	51,915	53,990	56,148	58,396	60,733	63,162	65,687	68,314

**APPENDIX V.
FY12 TOWN NON-UNION EMPLOYEES***

Position	Grade	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
		Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly
	17								
Director of Public Works	16	85,887	89,251	92,746	96,376	100,151	104,072	108,147	112,427
Finance Director		47.01	48.85	50.76	52.75	54.82	56.96	59.19	61.54
Fire Chief									
Police Chief									
Assist. Town Mgr./Human Res. Dir.	15	78,806	81,888	85,097	88,428	91,890	95,487	99,226	103,154
Dir. of Planning & Community Dev.		43.13	44.82	46.58	48.40	50.30	52.26	54.31	56.46
Town Accountant	14	72,307	75,138	78,078	81,135	84,310	87,612	91,042	94,646
		39.58	41.13	42.74	44.41	46.15	47.95	49.83	51.80
Mgmt. Analyst, D.P.W.	12	60,876	63,258	65,734	68,306	70,980	73,758	76,646	79,680
		33.32	34.62	35.98	37.39	38.85	40.37	41.95	43.61
Community Housing Specialist	11	55,858	58,043	60,315	62,674	65,129	67,677	70,324	73,108
Community Social Worker		30.57	31.77	33.01	34.30	35.65	37.04	38.49	40.02
Aquatic Facility Director	10	51,254	53,259	55,343	57,508	59,758	62,097	64,528	67,082
Assistant Building Inspector		28.05	29.15	30.29	31.48	32.71	33.99	35.32	36.72
Exec. Ass't to Town Mgr. (40 hrs/wk)									
Adult Services/Reference Librarian	9	47,031	48,870	50,782	52,769	54,833	56,978	59,207	61,551
Assistant Library Director		25.74	26.75	27.80	28.88	30.01	31.19	32.41	33.69
Assistant Town Accountant									
Assistant Assessor	8	43,154	44,844	46,597	48,420	50,312	52,282	54,328	56,478
Assistant Planner		23.62	24.55	25.50	26.50	27.54	28.62	29.74	30.91
Assistant Recreation Director									
Assistant Treasurer/Collector									
Children's Librarian									
Head of Circulation, Library									
Head of Technical Services, Library									
Selectmen's Office Mgr. (40 hrs/wk)									
Tech. Support Specialist (40 hrs/wk)									
Aquatic Supervisor	7	39,595	41,144	42,753	44,428	46,166	47,974	49,851	51,824
Assistant Children's Librarian		21.67	22.52	23.40	24.32	25.27	26.26	27.29	28.37
Assistant Town Clerk									
Benefits Coordinator/Hum. Res. Ass't									
Office Supervisor									
Teen Center Director									
Accounting Assistant/Payroll	6	36,669	38,105	39,595	41,144	42,753	44,428	46,166	47,994
Admin. Assistant, Park & Rec.		20.07	20.86	21.67	22.52	23.40	24.32	25.27	26.27
Board of Health/Conservation Ass't									
COA Info. & Referral Specialist									
Data Collector									
Financial Analyst									
Library Office Coordinator									
Program Coordinator, Park & Recr.									
Reference Librarian									
Secretary/Legal Secretary									
Young Adult/Reference Librarian									
Youth Coordinator									
Acct. Administrative Ass't-DPW	5	33,960	35,289	36,669	38,105	39,595	41,144	42,753	44,446
Accounting Ass't/Accounts Payable		18.59	19.32	20.07	20.86	21.67	22.52	23.40	24.33
Board of Health Coordinator									
Census Administrator									
Department Assistant									
Vital Records Administrator									
Accounting Clerk	4	31,452	32,685	33,960	35,289	36,669	38,105	39,595	41,162
Assessing Analyst		17.22	17.89	18.59	19.32	20.07	20.86	21.67	22.53
Bldg. Maint. Custodian (40 hrs/wk)									
Library Technician									
Van Driver, Senior Center									
Library Clerk	3	29,132	30,271	31,452	32,685	33,960	35,289	36,669	38,121
Recording Secretary		15.95	16.57	17.22	17.89	18.59	19.32	20.07	20.87
Clerk I	2	26,983	28,039	29,132	30,271	31,452	32,685	33,960	35,305
		14.77	15.35	15.95	16.57	17.22	17.89	18.59	19.32
Head Lifeguard	1	24,994	25,969	26,983	28,039	29,132	30,271	31,452	32,698
		13.68	14.21	14.77	15.35	15.95	16.57	17.22	17.90

*All positions listed above are 35 hours per week unless otherwise noted. Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 35 hours per week.

APPENDIX V.

FY12 TOWN NON-UNION INDIVIDUALLY RATED EMPLOYEES

<u>LIBRARY</u>				<u>Minimum</u>	<u>Step 1</u>	<u>Step 2</u>	
Library Page				8.63	9.00	9.32	
<u>HIGHWAY/PARK AND RECREATION</u>							
Temporary Laborer					9.50 - 11.50		
Temporary Snow Removal Equipment Operator					16.05-17.28		
<u>DEPARTMENTAL TEMPORARY OR SEASONAL HELP</u>							
Temporary or Seasonal Help					9.50 - 11.50		
Temporary Special Project Help					13.66 - 17.21		
<u>TECHNOLOGY DEPT. TEMPORARY OR SEASONAL HELP</u>				<u>Level I</u>	<u>Level II</u>	<u>Level III</u>	
				9.50 - 11.50	14.61-18.25	18.40-22.99	
<u>PARK AND RECREATION</u>							
<u>Part-time or seasonal hourly rated salary range (Salary paid from program fees)</u>							
<u>Position</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>			
Preschool Director	22.52	23.52	24.52	25.52			
Preschool Instructor	11.00	11.50	12.00				
Recreation Staff	8.00 - 15.00						
Teen Center Staff	8.00 - 19.00						
<u>Seasonal Camp Staff</u>							
<u>Position</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
Camp Director	19.00	20.00	21.00	22.00	23.00	24.00	25.00
CIT Director	13.00	14.00	15.00	16.00			
Program Specialist	10.00	10.50	11.00	12.00			
Head Counselor	9.50	10.00	10.50	11.50			
Counselor	8.50	9.00	9.50	10.50			
Preschool Camp Director	17.00	18.00	19.00	20.00			
Preschool Counselor	8.00	8.50	9.00	10.00			
Camp Nurse	22.50	23.50	24.50	25.50			
Office Assistant	9.00	9.50	10.00	11.00			
Inclusion Aide	12.00	12.50	13.00	14.00			
Adventure Camp Counselor	10.50	11.00	11.50	12.00			
<u>ATKINSON POOL</u>							
Lifeguard	8.75 - 10.75						
Lifeguard in Training	8.00						
Water Safety Instructor	9.25 - 20.00						
Swim Aide in Training	8.00						
Supervisor (Shift-PT)	10.25 - 11.75						
Pool Receptionist	8.00 - 10.50						
<u>ATKINSON POOL (Specialty Instruction)</u>							
Diving (Certified)	20.00	22.00	24.00	26.00	Non-certified: 10.00*		
Water Exercise (Certified)	17.00	19.00	21.00	23.00	25.00	27.00	
* Non-certified instructors are required to become certified within one year.							
<u>MISCELLANEOUS SINGLE RATED</u>							
Election Warden and Election Cle	8.40						
Deputy Election Warden/Clerk	8.40						
Election Officer & Teller	8.00						

APPENDIX V.

FY12 TOWN UNION EMPLOYEES

POLICE DEPARTMENT						
	<u>MIN</u>	<u>Step 1</u>	<u>Step 2</u>	<u>Step 3</u>	<u>Step 4</u>	<u>MAX</u>
Patrolman						
Annual	46,660	47,737	48,859	49,956	50,949	52,223
Hourly	23.22	23.75	24.31	24.86	25.35	25.99
Sargeant						
Annual	55,985	57,280	58,618	59,939	61,132	62,660
Hourly	27.86	28.50	29.17	29.82	30.42	31.18
Single Rated:						
Crime Prevention Officer	\$925/Year		Parking Clerk	\$925/Year		
Photo/Fingerprint Officer	\$925/Year		Mechanic	\$925/Year		
Juvenile Officer	\$925/Year		Firearms Officer	\$925/Year		
Safety Officer	\$925/Year		DARE Officer	\$925/Year		
Motorcycle Officer (half-time)	\$462.50/Yr		Fleet Maint. Officer	\$925/Year		
Detective	\$1,900/Yr		Traffic Officer	\$925/Year		
Training Officer	\$925/Year					

Notes:

Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 38.5 hours per week.
Overtime pay is calculated by multiplying 1.5 times these hourly rates.

POLICE DISPATCHERS								
	<u>Step 1</u>	<u>Step 2</u>	<u>Step 3</u>	<u>Step 4</u>	<u>Step 5</u>	<u>Step 6</u>	<u>Step 7</u>	<u>Step 8</u>
Annual	36,565	38,001	39,491	41,040	42,649	44,324	46,062	47,868
Hourly	18.76	19.50	20.27	21.06	21.89	22.75	23.64	24.57
Note: Hourly rates are obtained by dividing the annual rates by 52.2 and 37.33 Hrs/Wk.								

APPENDIX V.

FY12 TOWN UNION EMPLOYEES

	<u>START</u>	<u>STEP 1</u>	<u>STEP 2</u>	<u>STEP 3</u>	<u>STEP 4</u>	<u>STEP 5</u>	<u>STEP 6</u>	<u>STEP 7</u>
Foreman, Landfill	47,724	49,156	50,633	52,149	53,713	55,327	57,263	58,408
Foreman, Highway	47,724	49,156	50,633	52,149	53,713	55,327	57,263	58,408
Foreman, Tree & Cemetery	47,724	49,156	50,633	52,149	53,713	55,327	57,263	58,408
Foreman, Park & Grounds	47,724	49,156	50,633	52,149	53,713	55,327	57,263	58,408
Master Mechanic	22.10	22.85	23.53	24.15	24.76	25.40	26.28	26.81
Assistant Mechanic	21.11	21.85	22.55	23.18	23.76	24.42	25.28	25.79
Heavy Equipment Operator	19.83	20.40	20.87	21.55	22.24	22.95	23.74	24.21
Tree Surgeon	19.83	20.40	20.87	21.55	22.24	22.95	23.74	24.21
Truck or Light Equip. Operator	18.65	19.12	19.66	20.03	20.44	20.86	21.57	22.00
Tree Climber	18.65	19.12	19.66	20.03	20.44	20.86	21.57	22.00
Heavy Laborer	17.57	18.07	18.46	18.96	19.46	19.97	20.68	21.09
Light Laborer	16.05	16.48	16.83	17.28	17.71	18.17	18.81	19.19
Landfill Monitor	15.00							
Notes: Crew Leaders receive an annual stipend of \$4,095.								
Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 40 hours per week.								
Overtime pay is calculated by multiplying 1.5 times these hourly rates.								

ENGINEERING DEPARTMENT								
	<u>STEP 1</u>	<u>STEP 2</u>	<u>STEP 3</u>	<u>STEP 4</u>	<u>STEP 5</u>	<u>STEP 6</u>	<u>STEP 7</u>	<u>STEP 8</u>
E1 Engineering Aide I	32,869	33,857	34,877	35,926	37,003	38,116	39,259	40,044
E2 Engineering Aide II	37,800	38,936	40,101	41,311	42,546	43,824	45,140	46,043
E3 Engineering Aide III	43,471	44,777	46,117	47,502	48,927	50,394	51,906	52,944
E4 Jr. Civil Engineer	49,992	51,490	53,033	54,626	56,265	57,951	59,690	60,884
E5 Civil Engineer	56,243	57,926	59,672	61,461	63,303	65,199	67,156	68,499
E6 Sr. Civil Engineer	59,642	61,431	63,275	65,174	67,130	69,138	71,212	72,636
E7 Assistant Town Engineer	70,151	72,253	74,420	76,651	78,954	81,322	83,762	85,437
Notes: Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 40 hours per week.								
Overtime pay is calculated by multiplying 1.5 times these hourly rates.								

APPENDIX V.

FY12 UNION EMPLOYEES

FIRE DEPARTMENT	MIN	Step 1	Step 2	Step 3	MAX
Firefighter					
Annual	46,520	47,596	48,648	49,793	51,764
Hourly	21.22	21.71	22.19	22.71	23.61
Firefighter/EMT					
Annual	48,695	49,772	50,826	51,971	54,028
Hourly	22.21	22.70	23.18	23.71	24.64
Lieutenant					
Annual	53,148	54,378	55,580	56,889	59,142
Hourly	24.24	24.80	25.35	25.95	26.98
Lieutenant/EMT					
Annual	55,634	56,865	58,069	59,376	61,726
Hourly	25.38	25.94	26.49	27.08	28.15
Fire Captain					
Annual	60,721	62,128	63,500	64,996	67,568
Hourly	27.70	28.34	28.96	29.65	30.82
Fire Captain/EMT					
Annual	63,562	64,968	66,343	67,837	70,522
Hourly	28.99	29.63	30.26	30.94	32.17
Single Rated:					
Fire Prevention Officer		\$800 /year			
Fire Alarm Superintendent		\$800 /year			
Master Mechanic		\$800 /year			
Technology Coordinator		\$800 /year			
Fire Department Training Officer		\$800 /year			
Emergency Medical Tech. Coord.		\$800 /year			
Fire Alarm Foreman		\$800 /year			

FIRE DISPATCHERS	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Annual	33,856	35,185	36,565	38,001	39,491	41,040	42,649	44,321
Hourly	18.53	19.26	20.01	20.80	21.62	22.46	23.34	24.26
Note: Hourly rates are obtained by dividing the annual rates by 52.2 and 35 Hrs/Wk.								

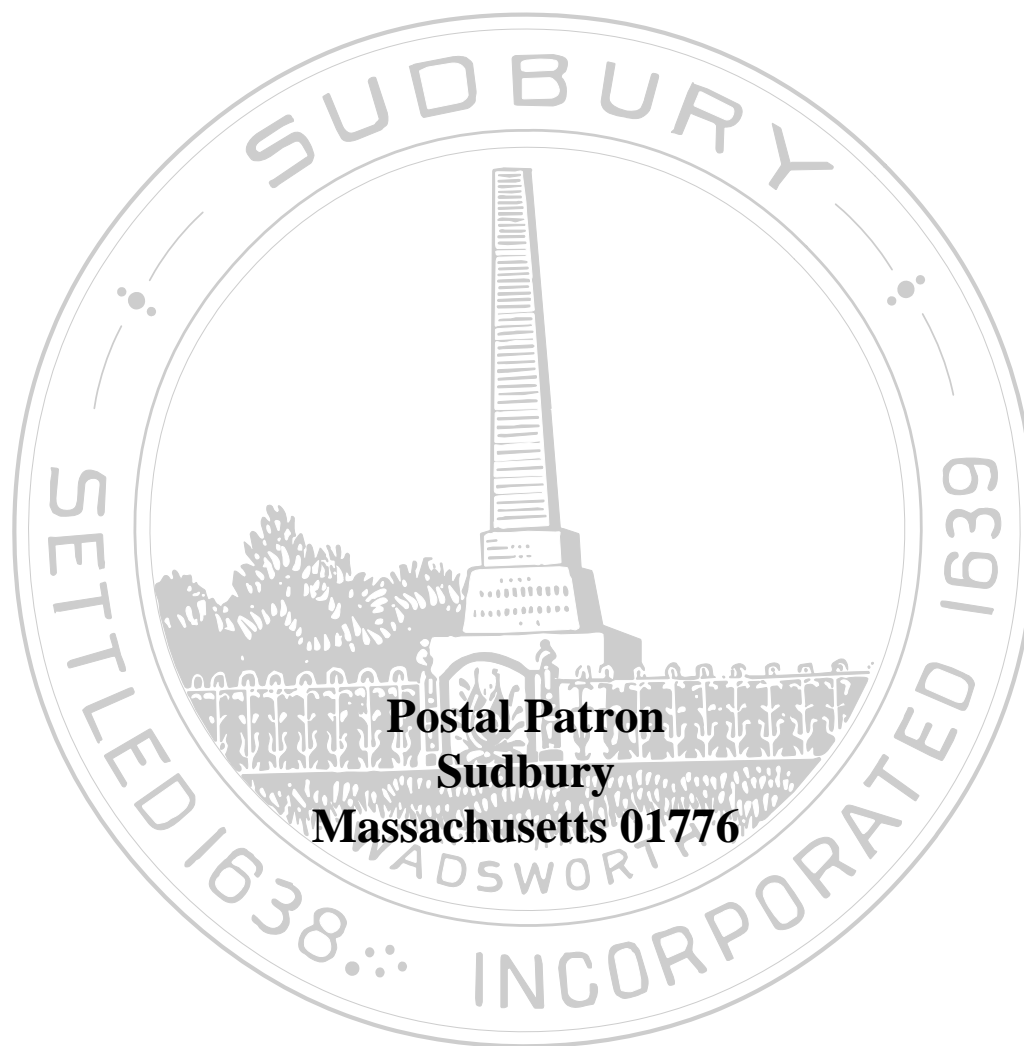
APPENDIX V.

FY12 UNION EMPLOYEES CONT'D*

SUPERVISORY UNION							
Level/Position*	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7
SA-1	53,900	56,012	58,209	60,490	62,862	65,327	67,712
Supv. Of Buildings ¹							
SA-2	58,755	61,060	63,454	65,942	68,524	71,212	74,031
Town Clerk ²							
Conservation Coord.							
SA-3	64,041	66,552	69,160	71,872	74,690	77,617	80,690
Hwy. Operations Dir.							
C.O.A. Director							
SA-4	69,804	72,541	75,383	78,339	81,408	84,600	87,949
Health Director	72,387	74,561	76,800	79,102	81,477	84,671	88,022
Building Inspector							
Director of Assessing	72,969	75,158	77,412	79,735	82,127	85,346	88,724
Treasurer/Collector							
Pk. And Rec. Director							
Town Planner							
Technology Admin.	72,969	75,158	77,412	79,735	82,127	85,346	88,724
SA-5	76,088	79,070	82,169	85,392	88,740	92,217	95,867
Police Lieutenant							
Assistant Fire Chief							
Library Director							
SA-6	82,937	86,185	89,564	93,077	96,725	100,517	104,496
Town Engineer							
SA-7	90,420	93,964	97,650	101,477	105,455	109,588	113,926
* Note all positions in each level have same step compensation unless otherwise indicated.							
1 This position also receives an annual stipend \$13,050 as Wiring Inspector							
2 This position also receives an annual stipend of \$782 as Registrar of Voters							

**Board of Selectmen
Sudbury, MA 01776**

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