

**Budget Review Task Force
Revenue Sub-Committee
Monday June 9, 2008
Flynn Building – Second Floor - 7:30 PM**

AGENDA

- 7:30 PM Item 1: Approve 6/2 minutes if available
Break up into sub-groups for research/discussion
- 7:30-8PM Item 2: Commercial Development/Sewers
(Bob Haarde, Dan Difelice, Radha Gargeya)
Energy (Paul Gannon, Jeff Beeler, Sam Merra)
- 8-8:30PM Item 3: Fundraising (Paul Gannon, Marty Ragonese, Radha
Gargeya)
Water District/W-S Septage (Sam Merra, Jamie
Gossels, Dan Difelice, Larry O'Brien)
- 8:30-9PM Item 4: Legislative (Jeff Beeler, Marty Ragonese, Larry
O'Brien, Radha Gargega)_
- 9:00PM Item 5: Adjourn

Revenue Subgroup Mtg Schedule (Flynn Bldg, 2nd Floor):

6/9, 6/23, 6/30

7/7, 7/21

8/4, 8/11, 8/18, 8/25

**Budget Review Task Force
Expense Sub-Committee
Monday June 9, 2008
Flynn Building – Second Floor - 7:30 PM**

AGENDA

7:30 PM	Item 1:	Approve 6/2 minutes if available
7:30-8:15	Item 2:	Ranking / Identification of Expense Categories of top 5 – 7
8:15-8:30	Item 3:	Assignment of teams to evaluate key areas of opportunity
8:30-9PM	Item 4:	Team Discussions on Next Steps
9:00PM	Item 5:	Adjourn

Expense Subgroup Mtg Schedule (Flynn Bldg, 2nd Floor) have been communicated via MS Outlook, please advise Tammie if you have not received.



SBRTF Meeting list
060908 pdf.pdf

Rating System: 3 - Greatest Impact, 2 - Medium Impact, 1- Low Impact

Enter number for each consideration in 5 right-hand columns

Potential Savings - most beneficial outcome would be a large potential savings. Impact on Services - most beneficial outcome would be a low impact on services. Timing - most beneficial outcome would be a short time to implement. Ease of Implementation - most beneficial outcome would be an easy implementation. Resources - most beneficial outcome would be a low need for resources.

	Potential Savings	Impact on Service Levels	Timing	Ease of Implementation	Resources
Benefits/Collective Bargaining					
By using insurance companies and HMOs, the current system of self-insurance requires premium payments that are independent of the actual cost of care. Explore the potential cost difference associated with true self insurance, whereby through a 3 rd party, the town and L-S pay the actual bills associated with the costs. (Catastrophic insurance should still be maintained.) (Pakos)					
Reform of public employee salary and benefit packages to align more with private sector (Massey, Ragones) (Do research to find good model.), Reduce benefits of public employees while increasing salaries (Haarde) Pension/retiree benefit reform, replace outdated benefits with modern ones with grandfather provisions (Massey) (For new hires.)					
Move toward participation in Group Insurance Commission (GIC) (Crary)					
Offer incentives for employees to use spouse's health plan (Crary, DiFelice), Streamline healthcare options (for premium reductions), do cost shifting (higher copays and deductibles) and offer healthy outcome incentives to employees (Jacobson)					
Finance Committee					
Require cost centers to develop and submit appropriate measures of efficiency trends along with submitted budgets (Pakos), Require schools to submit sensitivity analysis which reveals marginal cost savings associated with marginal increases in class size (Pakos)					
School committees should bargain accordingly so there is no disconnect between future teacher contract compensation requirements and funds expected to be available. (Pakos)					
Review by a joint panel of the Finance Committee and School Committee members of existing employment contracts with the objective of providing guidance to the schools to eliminate or modify aspects of those contracts that the Finance Committee considers to be an obstacle to cost control. (Pakos)					
Legislative Efforts					
Lobby the legislature to allow for negotiation rather than bidding of individual town purchases <\$500K to help with equipment town purchases. (Jacobson) (Permanent Bldg. Comm – Elaine Jones)					
Enlist our representatives to give us relief from mandates (Massey, Pakos)					
Lobby for changing the law (Chapter 32B, Section 10) which prevents a town from ever altering its contribution to retiree health insurance (Pakos)					
Force the transition from defined benefit to defined contribution plans and the establishment of a VEBA by threatening mediation/arbitration if the concept is not accepted (Gannon, Jacobson, Pakos) (Contrary to state law.)					
New teachers entering the system should be moved from defined benefit to defined contribution system. If law prohibits this, add to list for legislative discussion. (Pakos)					
Regionalization					
Implement town and school wide comprehensive energy mgmt program (DiFelice)					
Review of LSRHS agreement: When Dr. Ritchie retires, investigate one superintendent for both school systems, House Master becomes HM/principal, business manager positions for schools combined, Transportation Office/coordinators combined, HR functions consolidated within Sudbury HR (Obrien, Ragones)					
Consolidation					
Initiate discussions with surrounding towns to implement a regional approach to public safety, where all facilities, staff and operating and capital expenses in the region would be subject to a regional public safety commission. This commission would present budgets to various towns for approval, much like the Sudbury Water District. (Just as most residents don't care who provides the water, most would not care what uniform a policeman or fireman wore as long as they showed up when called. (Pakos)					
Consolidate departments/functions/facilities to save costs on duplicative efforts (DiFelice), Fire, police chiefs, school and town administration (Massey), Explore opportunities for consolidation of "back office" (payroll, bill paying, etc) svcs for Town, SPS, L-S (Jacobson)					
Regionalization					

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Potential Savings	Impact on Service Levels	Timing	Ease of Implementation	Resources
Explore opportunities for regionalization wherever feasible (Jacobson, Ragones, Verni), Establish committee to aggressively review regionalization opportunities, Regionalize fire and police dispatch, town maintenance, animal control (Crary, Dufault), Shared service police dep't at low risk times (Dufault), Through regionalization, each town could downsize one station. Keep ambulances at full capacity (Dufault)				
Outsourcing				
Centralize maintenance of all facilities and outsource to 3 rd party supplier (Dufault), Outsource prisoners to Acton or Wayland (Dufault)				
Town General				
A broad examination of space needs should be performed, examining the long term costs of staying in inefficient historical buildings vs a lease/purchase of modern office space with more efficient layout (Pakos)				
Replace town/public safety equipment and vehicles less frequently (Massey) (Metrics will help with this.)				
Develop online permitting, self check out in library and other automated processes (DiFelice)				
Encourage centralized purchasing of bids over \$5K (Dufault)				
Public Safety				
Consider going to a volunteer fire dept (Beeler), Reduce costs of fire department, benchmark to communities with far lower costs (Dufault)				
Perform a sensitivity analysis on the marginal cost savings if policy and fire time targets were increased from current standard (Pakos)				
Public Works				
Output measures for DPW should be established (cost/mile road maintenance, cost/mile of snow removal) and trends measured. (Pakos) (Establish standards.), 2. Reduce road paving scope. Minor cracking and potholes should not result in repaving. (DiFelice)				
Require developers/others to pay cost and post bond for multi-yr maintenance fees in the event an area of roadway requires repaving resulting from utility connections or in any new or rehab project (DiFelice)				
Monitor snow removal with benchmark payments for various rates of snowfall so "overplowing" does not occur (DiFelice)				
SPS - Assign an SPS school committee member to liaise with Stand for Leadership Center, an organization whose mission it is to advocate for relief and reform in public education (Gannon)				

Benefits/Collective Bargaining

1. Evaluate municipal debt issuance to fully fund pension fund (spread on earnings should easily service and eventually pay off the debt). (Verni)

1. Prior to FY10-12 contract negotiations, BRTF studies possible changes to agreements that might be used as ideas in negotiations to reduce the town's structural deficit (Merra)

Finance/Accounting

Ragones, Verni)

2. Ensure payments for expenses not deferred to next budget cycle (Dufault)

3. Develop more accurate estimates of free cash to avoid surprises (Pakos)

Finance Committee

1. Raise town awareness of structural deficit through public discussions on benefits, judicious capital planning; discourage spending on limited use projects (Crary, Gannon)

2. Require increased transparency of budgets by having budgets submitted by SPS by Program, Function and by Facility and L-S by Program and Function (Pakos)

1. Take a long range view of future revenues and expenses and communicate to the cost centers the amounts that can be reasonably expected in future years with no override. (Pakos)

should recommend that the town contribution to the schools be reduced in similar amounts in order to freeze or reduce property taxes, helping to reimburse taxpayers for the yrs they made up the shortfall. (Pakos)

Legislative Efforts

1. Create a committee to lobby the legislature to increase state aid, correct inequities, allow additional local taxes (Beeler, Ragones)

1. Invite our representatives to a BRTF session (Massey)

1. Join the Mass Municipal Association in an effort to fund education more from state revenues and less from property taxes. (Pakos)

relief (Massey)

2. Make Town Meeting later in the year to cost centers can budget on actual data (Beeler)

1. Move town and school administrative staff pension funds to PRIM whose record, staffing and oversight are exemplary vs Middlesex. (Verni)

Regionalization

become SPS administration bldg, senior center expand into former school administration space (Obrien)

Meetings

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Date	Location	Comments	
8/25/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
8/18/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
8/11/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
8/4/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
7/28/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference room (Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
7/21/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
7/7/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference room (Revenue working Group) for materials please refer to 6/2/08 materials.	Edit Delete Archive
6/30/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
6/23/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
6/9/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	BRTF Working Group Meetings, Flynn Bldg, 2nd floor conference rooms (one Revenue working Group; one Expense Working Group), for materials please refer to 6/2/08 materials.	Edit Delete Archive
		[Agenda]	
6/2/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Brainstorming Session 5: for materials see materials contained within Agenda Document.	Edit Delete Archive
		[Agenda]	
5/12/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Brainstorming Session: 4th. for materials reference materials of 2/25/08	Edit Delete Archive
		[Agenda]	
4/28/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	SBRTF Brainstorming Session 3	Edit Delete Archive
		[Minutes]	
3/3/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	SBRTF Session 2. For materials to be reviewed, see "Meeting Agenda and Materials from 2/25/08 meeting".	Edit Delete Archive
		[Agenda]	
2/25/2008 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	SBRTF Brainstorming Session 1.	Edit Delete Archive
		[Agenda]	
12/10/2007 7:30	2nd Floor Meeting Room (Silva),	CPA, Affordable Housing, Commercial Development, Sudbury Water District, Sr. Property Tax Relief, Wayland-	Edit Delete Archive

PM	Flynn Building	Sudbury Septage. Presented by Larry O'Brien et al. [Agenda] [Minutes]	
11/26/2007 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Lincoln Sudbury Regional High School presented by John Ritchie, Superintendent; Judy Belliveau, Dir Finance; Jack Ryan, LS Committee Member. [Agenda]	Edit Delete Archive
11/5/2007 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Sudbury Public Schools, presented by John Brackett, Superintendent; Mary Will, Dir. Finance; Debbie Dixon, Dir. SPED, Jeff Beeler, Bill Braun, both SPS Committee Members. [Agenda] [Minutes]	Edit Delete Archive
10/29/2007 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Maureen Valente, Town Manager, presents Debt / Revenue, Prop 2 1/2 Override, Structural Deficit. Co-Chairs: Bob Jacobson & Marty Ragonese, Sudbury Finance Committee [Agenda] [Minutes]	Edit Delete Archive
10/22/2007 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Maureen Valente & Andrea Terkelson present: Town of Sudbury Departmental Budgets & Capital Projects. Bill Kneeland & Ralph Verni, both Sudbury Finance Committee Members serve as Acting Chairs of this discussion. [Agenda] [Minutes]	Edit Delete Archive
9/24/2007 7:30 PM	2nd Floor Meeting Room (Silva), Flynn Building	Various Town Services Present information on mission and key information. Specific Town Service to be determined. [Agenda] [Minutes]	Edit Delete Archive
9/10/2007 7:30 PM	Conference Room, Department of Public Works Building	Establish Process for Task Force Review and Topics for Presentation on Town Services (to gain better understanding of Town Services). Agenda contains Meeting Materials. [Agenda] [Minutes]	Edit Delete Archive
8/29/2007 7:30 PM	Conference Room, Department of Public Works Building	Sudbury Budget Review Task Force Kick-Off Meeting. Agenda to include introductions, mission statement, review method, and open discussion. [Minutes]	Edit Delete Archive

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