

**LINCOLN-SUDBURY REGIONAL SCHOOL DISTRICT COMMITTEE  
JOINT MEETING WITH LINCOLN AND SUDBURY FINANCE COMMITTEES**

7:30 P.M.

Minutes of Meeting  
January 17, 2002

Library

**PRESENT:** Lauri Wishner, Chair  
Jack Ryan, Vice Chair  
Renel Fredriksen  
Andrew Schwarz  
Eileen Glovsky  
Dr. John Ritchie, Superintendent/Principal

**ABSENT:** Chuck Schwager

**ALSO**

**PRESENT:** Pauline Paste, Business Manager/Treasurer; Carleen Shaldone, Secretary; Kerry Speidel, Sudbury Director of Finance; Lincoln Finance Committee: Mary Cancian, Chair, Pat Phillips, Susan Brooks, Al Schmertzler, Paul Giese, John Robinson; Sudbury Finance Committee: Jim Carlton, Co-Chair, Sheila Stewart, Co-Chair, M. Tracy Billings, Michael Grosberg, Donald Hutchinson, John Nikula, Larry Rowe; Kirsten Roopenian, Sudbury Selectman

The meeting was called to order at 7:38 p.m.

**I. INTRODUCTION**

- Lauri Wishner reviewed the agenda and thanked Dr. Ritchie and Pauline Paste for all their hard work in formulating the FY'03 Budget. Everyone around the table did introductions.

**II. TOWN OF LINCOLN FINANCIAL SUMMARY**

- Mary Cancian reported that the financial scenario in Lincoln “just keeps getting worse”. She then recapped last year’s K-8 financial crises requiring emergency town meetings to correct a huge deficit. Mary Cancian further reported that a review of the budgets submitted to them from Lincoln Selectmen, Lincoln K-8 and L-S reveals that the Finance Committee is \$700,000 short of the sum total. She noted that this may not appear to be a large amount in certain scenarios, but is considered to be “too big a number” for the Town of Lincoln and would more than likely be defeated in an override. Mary Cancian indicated that the goal of the Lincoln Finance Committee is to lower the number. She also indicated that they have recently learned that revenue is \$150,000 less than previously expected due to a reduction in state aid and a drop in investment income. Mary Cancian concluded that this does not affect the size of the override, but does reduce the base budget for the town, K-8, and L-S. At this point, the Finance Committee is unable to support a 3.5 percent increase in the base budget and will give the cost centers a new number of 2.8 percent above Fiscal '02.

### **III. TOWN OF SUDBURY FINANCIAL SUMMARY**

- ❑ Jim Carlton reported that, like Lincoln, the financial scenario for Sudbury has also grown steadily worse and noted that the “well of overrides” has been tapped so often that he could not envision the Sudbury voters being overjoyed with yet another one. He noted that level effort budget needs for Sudbury’s three cost centers would require a 4.8 million dollar override.
- ❑ Kerry Speidel, Sudbury’s Finance Director, reported that back in October, she and Maureen Valente had compiled a three-year financial forecast showing a 2.6 million dollar deficit. She explained that, at the time, it was expected that state revenues would continue at the same level as they had been in the past. Kerry Speidel noted that, despite concerns over a drop off in local receipts, it was still hoped that the 2.6 million dollar “gap” could be closed as a result of the budget process in the hopes of preventing an override. Kerry Speidel further reported that when the state passed its budget, Sudbury lost approximately \$300,000 from what it had expected to receive. She noted that the town’s investment receipts had also significantly dropped. She then explained what the income had been. She also noted that an override of 4.8 million dollars would cost the average taxpayer an additional \$800 a year in property taxes.
- ❑ A discussion ensued whereby the finance committees questioned one another on the way they respectively dealt with budgeting. Also discussed was how to best address the need for an override in regards to the roles of the Finance Committees and citizens of the towns. Andrew Schwarz indicated that the role of the School Committee is to point out the results if an override does not pass. Susan Brooks initiated a discussion with Dr. Ritchie regarding sharing resources with the K-8 school districts. Mary Cancian indicated that cost centers might need to reconsider the way they configure their budgets if overrides continue to be necessary for supporting level-effort. She also indicated that Lincoln had asked its budget centers back in December to submit a base budget with “adds” that would be considered override items. Dr. Ritchie noted that budget guidelines without an override would render us incapable of doing the very things for students that is expected of us.

### **IV. LINCOLN-SUDBURY FINANCIAL SUMMARY**

#### a. Overview of Budget Request

- ❑ Pauline Paste reported that since presenting our level-effort budget to the Lincoln and Sudbury Finance Committees, we have had to make some adjustments to our budget. She noted that such items as School Choice, SPED Out-Of-District Tuition, SPED Transportation and Middlesex County Retirement have collectively increased the budget by \$79,621. Pauline Paste also reported that Kerry Speidel had advised her that evening the Sudbury override for budget requests had changed from 4.6 to 4.8 million dollars determining an increase in the levy limit of 9.69%. She then reviewed a methodology she had configured depicting L-S budget cuts required for 5%, 3.5%, and 2.5% increases to Sudbury’s levy. The budget cuts required ranged

from \$547,438 - \$872,317. She noted that with no increase to Sudbury's levy and no override, the L-S Budget would require a \$1,197,196 + \$79,000 putting us just under 1.2 million for a total budget cut.

- Dr. Ritchie reviewed Budget Guidelines used in preparing the budget and noted that classroom teaching and learning was our first priority. Other guidelines he covered dealt with learning and experience; class size in core academic areas; maintaining athletic and extra-curricular activities; maintain mainstreaming opportunities for students with special needs; continued development initiatives for students who struggle the most; preserving educational opportunities for all students; maintaining a safe environment; providing a supportive professional work environment and adhering to contractual obligations.

**b. Impact of Overrides**

- IV. Pauline Paste reminded the group that the override amount depicted was \$260,000 higher this being the result of the override going from 4.6 to 4.8 million dollars.
- V. Dr. Ritchie explained the impact on L-S that budget cuts would cause, such as, class reductions, a significant decrease in supplies and equipment, eliminating more positions, buses, and club/activities. He also offered some of the solutions for counteracting these cuts such as raising activity and parking fees. Dr. Ritchie explained that a no override scenario would result in the loss of 20 – 25 current positions school wide.
- VI. A discussion ensued where Don Hutchinson suggested considering the long-term results of action being taken to curtail costs. Pauline Paste indicated that a preliminary three-year projection had been done last fall reflecting a continuous increase in enrollment and consequential increase in staff over the next 5 years. Paul Giese suggested that salary increases be reviewed particularly during a contract year. There was a brief discussion regarding his suggestion. Jack Ryan noted that the Finance Committees, Selectmen, and school districts need to “come together” to ultimately agree on a figure. Al Schmertzler indicated that the voters also need to be a part of the solution.

**c. Dates and Deadlines**

- VII. Mary Cancian noted that Lincoln's warrant closes the end of January after which there is a two-week period to decide an override amount and have it put on the ballot.
- VIII. Kerry Speidel noted that Sudbury's time frame was similar to Lincoln's.

**V. FUTURE**

- Susan Brooks asked if there were ways in which “these three entities” could work together in telling our story. Dr. Ritchie added that the need to tell the story is absolutely critical.
- Pauline Paste reviewed a graph depicting the number of English Sections at various class sizes.

- ❑ A discussion ensued on strategies of getting the word out. Mary Cancian noted that it was more effective to attend the meetings of other organizations rather than waiting for them to come to a fincom meeting.
  - ❑ Dr. Ritchie, referring to the mood of the meeting, noted that it would be good for the towns to see the high school and finance committees working together.
  - ❑ Discussion continued on Lincoln's override scenario. Pauline Paste noted their 2.8% level without an override would equate to approximately a \$400,000 cut for us. She further noted that the 3.5% is a \$305,000 cut and depending upon the Sudbury scenario, Lincoln might not have to include the high school at all in an override, because its assessment would be lower.
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- ❑ The meeting adjourned at 9:05 p.m.

Respectfully Submitted

Carleen Shaldone, Secretary