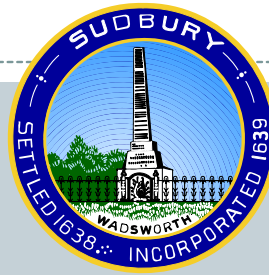


# FY09 BUDGET

Protecting Public Safety, Public Assets, Public Health,  
and a Special Quality of Life



**TOWN OF SUDBURY**

**JANUARY 17, 2008**

**[WWW.SUDBURY.MA.US](http://WWW.SUDBURY.MA.US)**

**PRESENTATION TO FINANCE COMMITTEE**

# Goals for Budget Presentation



1. To provide details, data and transparency on Town programs and budgets
2. To provide clarity and more information on services and work expectations that most residents don't know about.
3. Recognize and give credit for the work of the C.A.R.E. efforts to the Town employees
4. To create better knowledge of impacts of reductions
  - **Risks the Town is charged with minimizing or eliminating**
  - **Service mandates we face**
5. Not to forget the Board's vision for future of the town



Also Barnstable, Boston, Boston Water & Sewer Commission, Brookline, Cambridge, Chelsea, Concord, Lexington



**Government Finance Officers Association**  
 203 North LaSalle Street, Suite 2700  
 Chicago, Illinois 60601-1210  
 312.977.9700 fax: 312.977.4806

August 23, 2007

**PRESS RELEASE**

For Further Information Contact  
 Stephen J. Gauthier (312) 977-9700

Chicago--The Government Finance Officers Association of the United States and Canada (GFOA) is pleased to announce that **Town of Sudbury, Massachusetts** has received the GFOA's Distinguished Budget Presentation Award for its budget.

The award represents a significant achievement by the entity. It reflects the commitment of the governing body and staff to meeting the highest principles of governmental budgeting. In order to receive the budget award, the entity had to satisfy nationally recognized guidelines for effective budget presentation. These guidelines are designed to assess how well an entity's budget serves as:

- a policy document
- a financial plan
- an operations guide
- a communications device

Budget documents must be rated "proficient" in all four categories to receive the award.

When a Distinguished Budget Presentation Award is granted to an entity, a Certificate of Recognition for Budget Presentation is also presented to the individual or department designated as being primarily responsible for its having achieved the award. This has been presented to **Maureen G. Valente, Town Manager and Andrea L. Terkelsen, Finance Director**.

For budgets including fiscal periods 2005, 1,069 entities received the Award. Award recipients have pioneered efforts to improve the quality of budgeting and provide an excellent example for other governments throughout North America.

The Government Finance Officers Association is a nonprofit professional association serving 16,800 government finance professionals throughout North America. The GFOA's Distinguished Budget Presentation Awards Program is the only national awards program in governmental budgeting.

Washington, DC Office  
 1301 Pennsylvania Avenue, N.W., Suite 309 • Washington, DC 20004 • 202.393.8020 • fax: 202.393.0780  
[www.gfoa.org](http://www.gfoa.org)

**Four Key  
Parts of  
Award  
Budget**

**Financial Plan**

**Operations Guide**

**Policy Document**

**Communication  
Device**

**TOWN OF SUDBURY**

**FY08 BUDGET AND FINANCING PLAN**

**July 1, 2007 – June 30, 2008**



**Board of Selectmen**

**William Keller, Jr., Chairman  
John Drobinski  
Lawrence O'Brien**

**Prepared by**

**Maureen G. Valente, Town Manager  
Andrea Terkelsen, Finance Director/Treasurer-Collector**

**December 29, 2006**



# CONTENTS

SECTION.....	PAGE.....
Transmittal Letter from Town Manager.....	iv
<b>ONE: Overview of the Town of Sudbury</b>	
Mission and Values for Determining Goals of the Board of Selectmen.....	2
Board of Selectmen FY07 Goals and Implications for FY08 Budget.....	3
Sudbury at a Glance.....	7
Governmental Structure.....	8
Economic & Demographic Characteristics of Sudbury.....	9
Number of Employees, Town and Schools.....	11
Organizational Chart.....	12
<b>TWO: Budget Calendars, Procedures and Policies</b>	
Finance Committee Instruction Letter.....	14
Phases of Budget Preparation and Development.....	17
FY08 Budget Calendar.....	19
Board of Selectmen Budget and Financial Management Policies.....	20
Appropriation and Budget Amendment Procedure.....	26
<b>THREE: Budget Overview</b>	
A Reader's Guide to the Budget.....	28
FY08 Budget Summaries.....	31
Backdrop for Budget Discussions	
Expenditure Pressures.....	34
The Revenue Situation.....	38
Revenue Projections for FY08.....	44
Revenues and Fund Accounting.....	45
<b>FOUR: Town Operating Departments</b>	
Introduction.....	54
General Government.....	59
Public Safety.....	93
Public Works.....	105
Human Services.....	116
Culture & Recreation.....	124
Unclassified & Transfer.....	134
<b>FIVE: Shared Programs &amp; Costs</b>	
Benefits and Insurance.....	142
Stabilization Fund.....	145
Cherry Sheet Charges and Offsets.....	146
Snow/Ice Deficits.....	147
Abatements/Exemptions.....	148
<b>SIX: Enterprise Funds</b>	
Transfer Station/Recycling Center.....	151
Atkinson Pool.....	153
<b>SEVEN: Educational Budgets</b>	
Summary of Sudbury Public Schools.....	158
Summary of Lincoln-Sudbury Regional High School.....	159
Minuteman Regional Vocational Technical High School.....	161
Other Regional High School Assessment.....	161

<b>EIGHT: Capital Investment Budget</b>	
Debt Service.....	164
FY08 Annual Capital Budget.....	167
Five Year Capital Plan.....	171
<b>NINE: Appendices</b>	
One: Budget Terms and Definitions.....	176
Two: History of Proposition 2 ½ Overrides.....	180
Three: Residential Tax Rate History, 1990 – 2006.....	181
Four: Population History of Sudbury – 1790 – 2006.....	182
Five: Town Energy Management Program (Draft).....	185
Six: C.A.R.E. Program - Cost Avoidance and Revenue Enhancement.....	186
Seven: FY06 Audit, Management's Discussion & Analysis.....	193
Eight: Middlesex Retirement System.....	194

# Bringing Best Practices Together



## **I. GOAL SETTING**

### **1. By Elected Board**

- a) Annual Retreat/Session
- b) Report on Accomplishments

### **2. By Town Manager**

- a) Following Selectmen
- b) For performance plan

### **3. By Department heads**

- a) From annual review and performance plan

SAMPLE

Board of Selectmen  
FY07 Goals, Progress and  
Budget Implications for FY08



1. ***Complete the Town's plans for emergencies, including pandemic planning, continuity of operations and disaster recovery.***

Progress: The Town has taken a number of steps to improve our readiness for emergencies, and recently reported these to the community at a televised forum, and through guest columns in the Sudbury Crier. In particular, an Assistant Fire Chief has been hired, and an additional patrol officer has been added to the Police Department. Staff has attended a number of training programs and the Town is now certified as NIMS compliant (National Incident Management System). The Local Emergency Planning Committee (LEPC) has received start-up certification. The Board of Health has begun the extensive work necessary to create a Medical Reserve Corps in Town.

Budget Implications: The demand for a wide variety of preparation activities, in terms of mandates, grant requirements and our own priorities, is substantial and time consuming for staff in many different departments, including the Fire Department/EMS, Police, Board of Health, Council on Aging, Technology, Public Works, Law Office and Town Manager's Office. A part-time staff person (15 hours per week) has been added to the Board of Health to cover soil testing and related activities for the Health Director while he works on pandemic planning. And the question of a new Police Station will be brought to Town Meeting in April, which includes provisions to improve the Dispatch and Emergency Management capabilities of the Police Department. Finally, a staff firefighter position has been requested in the Recommended FY08 budget.

Fire Chief MacLean notes that mandates continue to come for emergency preparedness, besides becoming NIMS compliant and establishing the LEPC. In addition are the, CERT, eCEMP, MRC, Civil Defense, EMD, Nicole's Law, 4550 Sprinkler Law, CMR 10.09, Service Zone Planning, tabletop exercises, pandemic planning, Continuity of Government, and other requirements designed to make the community safer but each takes considerable staff time. The Town has just about the same number of firefighters and police officers and Health Department employees as we did before all these mandates were created and before the population of the Town grew so rapidly in the last two decades.

# Bringing Best Practices Together



## II. Policy Setting

- a) Financial Policies
  - i. Drafted by Town Manager
  - ii. Adopted by Selectmen
- b) Mission Statement and Values
  - i. Selectmen developed
  - ii. Has evolved



# TOWN OF SUDBURY

## Statement of Mission and Values for Determining Goals of the Board of Selectmen

*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 by relying on the professionalism of our staff and volunteers, and use of long-term, strategic planning and enhanced communications in our governance. The Board is dedicated to protecting and enhancing the unique sense of place found in Sudbury and protecting and encouraging tolerance and diversity. The Board of Selectmen, as the chief policy making and governance body of the Town of Sudbury, will provide leadership for staff, volunteers, residents and other stakeholders in the Town by advancing goals, programs and decisions that are based on these values.*

**Ensure the Safety and Well-being of the Community**

**Protect and Enhance the Financial Health of the Town**

**Protect and Enhance the Educational Excellence offered by the Town**

**Protect and Enhance the Environmental Quality of the Town**

**Protect and Enhance the Professionalism of the Town's Staff, Boards and Committees**

**Enhance Relationships and Communications**

**Emphasize Long-Term, Strategic Planning**

**Protect and Enhance the Unique Sense of Place offered by the Town**

**Protect and Enhance a Climate of Acceptance and Tolerance within the Community of Sudbury**

**Encourage Diversity of Housing Opportunities within the Community of Sudbury**

*First adopted by the Board of Selectmen May 10, 2000*

*Amended and reaffirmed by the Board of Selectmen, 5/23/02, 6/1/04, and 6/10/05*



# Bringing Best Practices Together



## III. Planning

- a) Master Plan
- b) Short Term Planning
- c) Other Plans

## IV. Performance Measurement

- a) Difficult and complex
- b) Simplest at this time – workload measures

## V. Performance Reviews for Staff

- a) Incorporate goals and work plans
- b) Incorporate accomplishments

# Sample Budget Page



## **PUBLIC SAFETY: Fire Department**

### ***MISSION OF THE DEPARTMENT***

The mission of the Sudbury Fire Department is to protect the lives and property of the community from emergencies involving fire, medical, hazardous materials, and environmental causes.

### **DESCRIPTION OF SERVICES**

The Fire Department is responsible for fire prevention/education, fire suppression, ambulance and emergency medical services, as well as fire inspections, disaster preparedness and mitigation.

### **STAFFING**

Currently the Department consists of 1 Chief, 1 Assistant Chief, 4 Captains, 4 Lieutenants and 24 firefighters, as well as 3 civilian dispatchers and a 3/4 secretary. Thirty-three personnel are certified Emergency Medical Technicians.

## **FY08 GOALS AND INITIATIVES**

- Continue to establish and train a Community Emergency Response Team (CERT) to augment our force should an event overtax our ability to respond to simultaneous emergencies
- Update and supplement the Standard Operating Guidelines by which we conduct operations
- ~~Renew the Comprehensive Emergency Management Plan with strategic partners~~
- Work with the Town Manager, Police Chief and other department heads to comply with all Homeland Security Directives and responsibilities within required due dates.
- Continue efforts to upgrade and replace aging fire apparatus

## **FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- The Sudbury Fire Department became National Incident Management System (NIMS) compliant per Presidential Directive 5 issued after 9/11. Training provided by us for other town departments.
- The Local Emergency Planning Committee (LEPC) became certified as "Startup" and received an operational stipend from the Massachusetts Emergency Management Agency (MEMA).
- Developing a Regional Emergency Planning Committee (REPC) called "Crossroads" to respond to and mitigate cross-boundary hazardous materials incidents and other emergencies.
- Developed and implemented security systems for headquarters, the Town's Emergency Operations Center (EOC).
- Developed Service Zone Plan for ambulance operations under mandate from the Office of Emergency Medical Services

## **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
Calls for Assistance	1817	1793
Structure Fires	8	8
Calls for Ambulance	988	952
Permits Issued	531	535

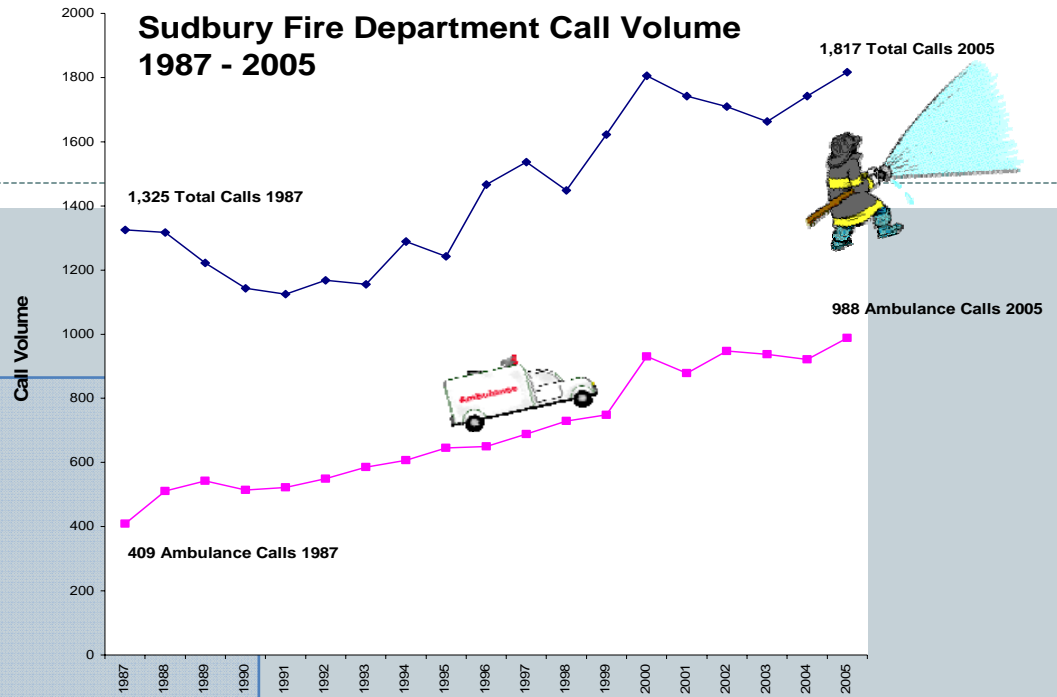
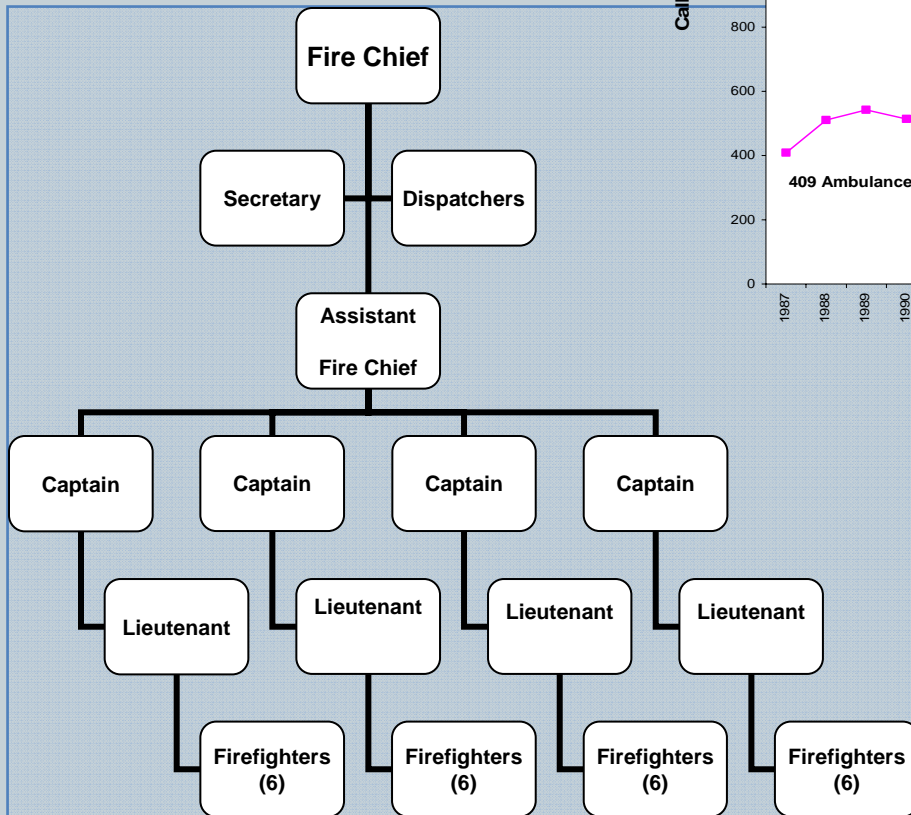
## ***BUDGET ISSUES***

The Fire Department budget should be considered both on a gross and net basis. Expenses for the ambulance operation are offset from the ambulance reserve for appropriation fund. Items within different expense categories related to ambulance operations are matched with funding from the reserve account.

The Town Manager's Recommended Budget includes funds to add one position which will help reduce overtime expenditures, keep open all three fire stations and allow for the expenses of providing the same level of fire protection and emergency medical services as is currently provided in FY07. Note that due to the anticipated savings on overtime from adding one more firefighter position, the net on this budget is less than \$15,000, plus there is an increase in the benefits budget for one additional position. Replacement of the Chief's vehicle occurs under this budget and will result in the release of a retired but good quality emergency response car to another department, relieving budget pressures elsewhere. This budget contains no cost of living adjustment for the unionized employees of this department, although step increases under the contract are included. Salary increases are by contract negotiation. Since energy costs have continued to increase, the budget for gasoline and diesel fuel has been increased, as has the cost of utilities for the three stations operated by the Fire Department. And the amount for tuition for courses taken by firefighters has been increased, as departmental personnel have indicated their intention to take courses and the language of the contract requires that funds be available for those courses.

The Level Services budget does not include most of these increases, particularly the additional position, so that overtime funds are planned to be higher to account for increases in steps for employees.

# Organization Chart



# Graphics



Spending  
Benchmarks

Workload  
Equivalents

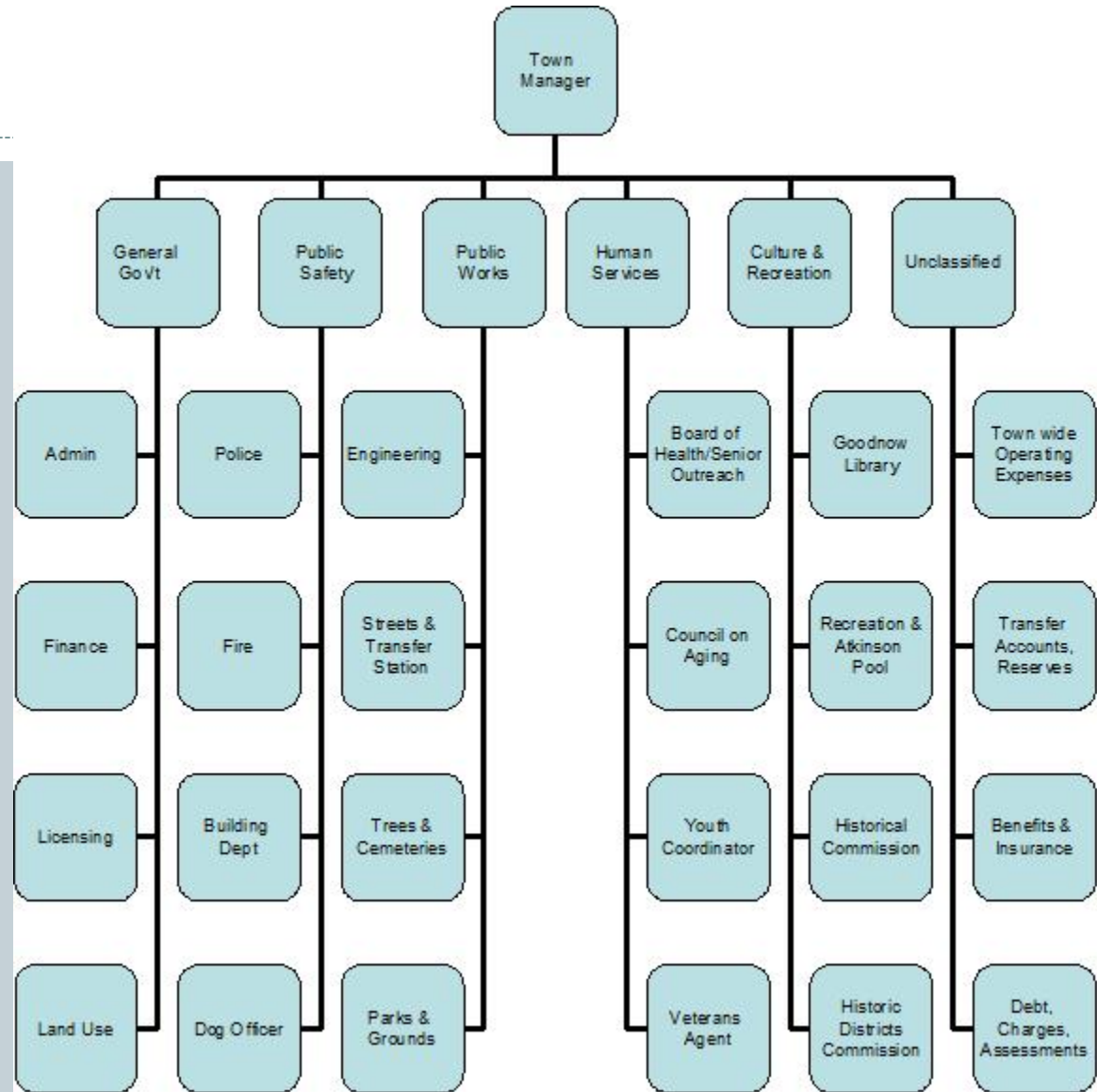
Mandates



## Data and Benchmarks

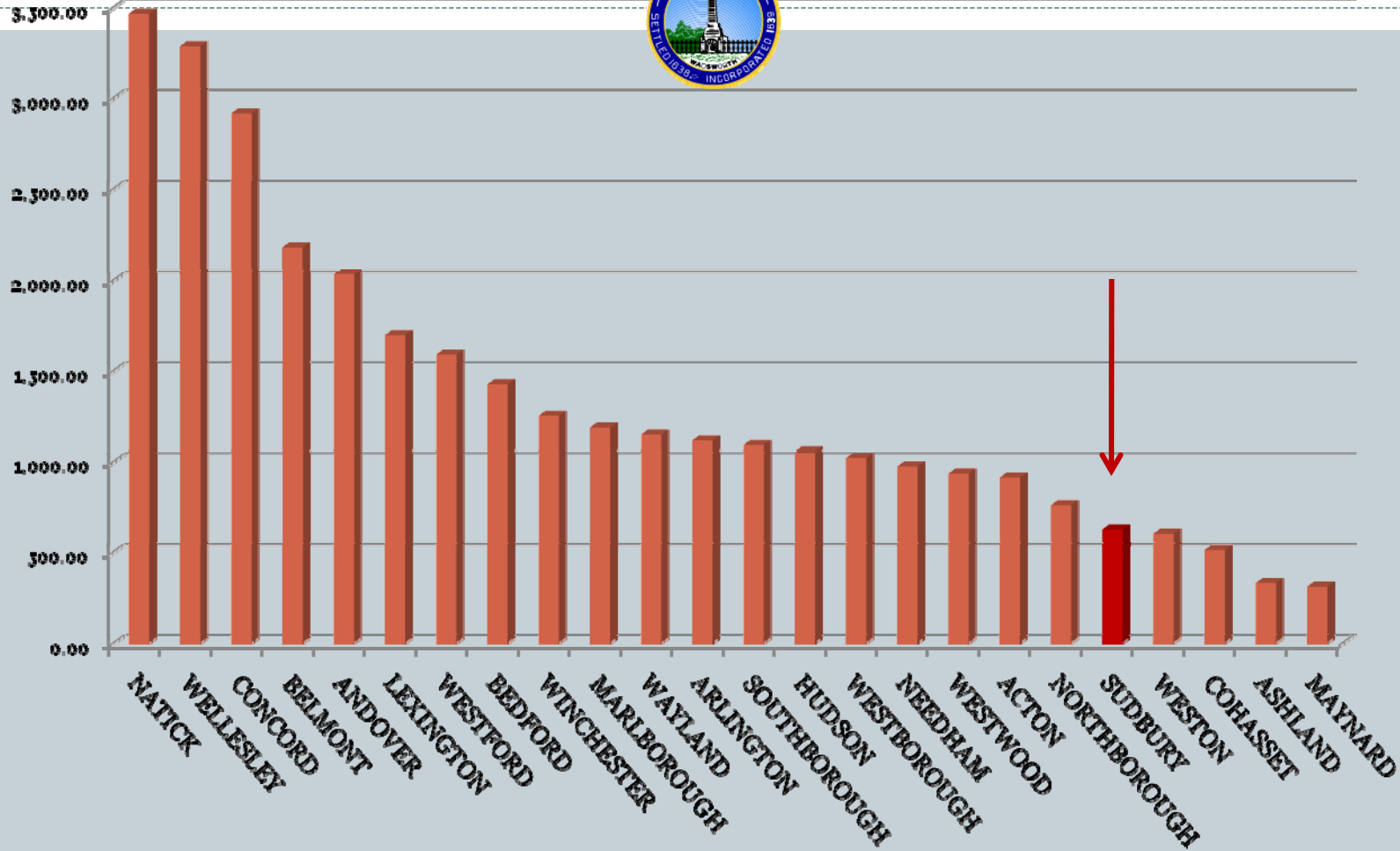


# Budget Accounts Under the Town Manager



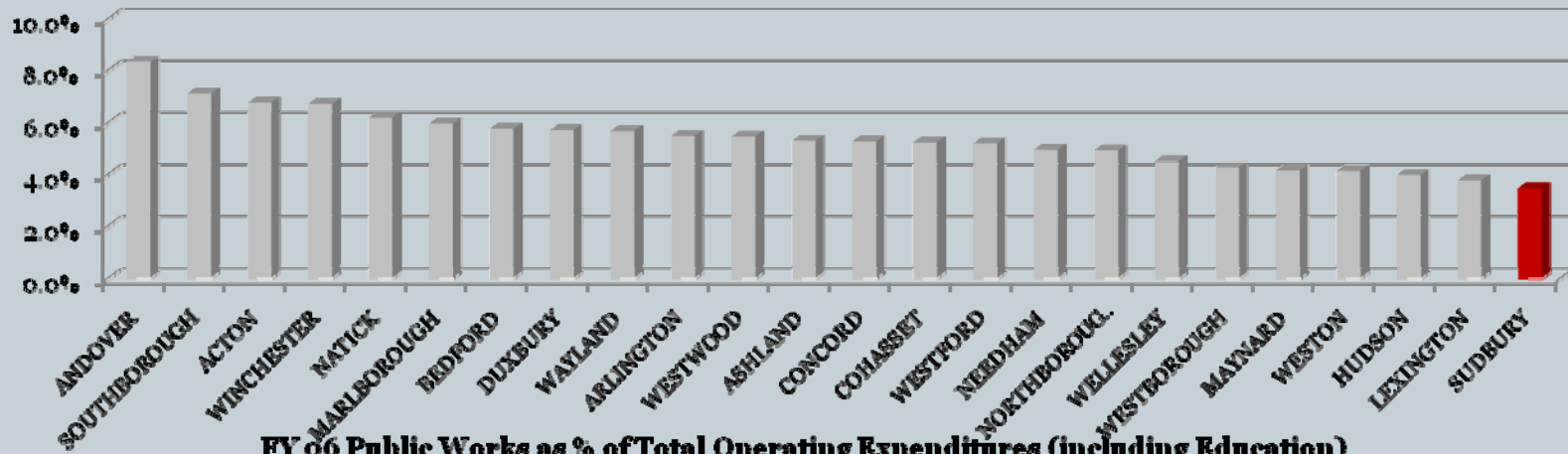


### FY 06 Total Municipal Per Capita (not including benefits or debt)

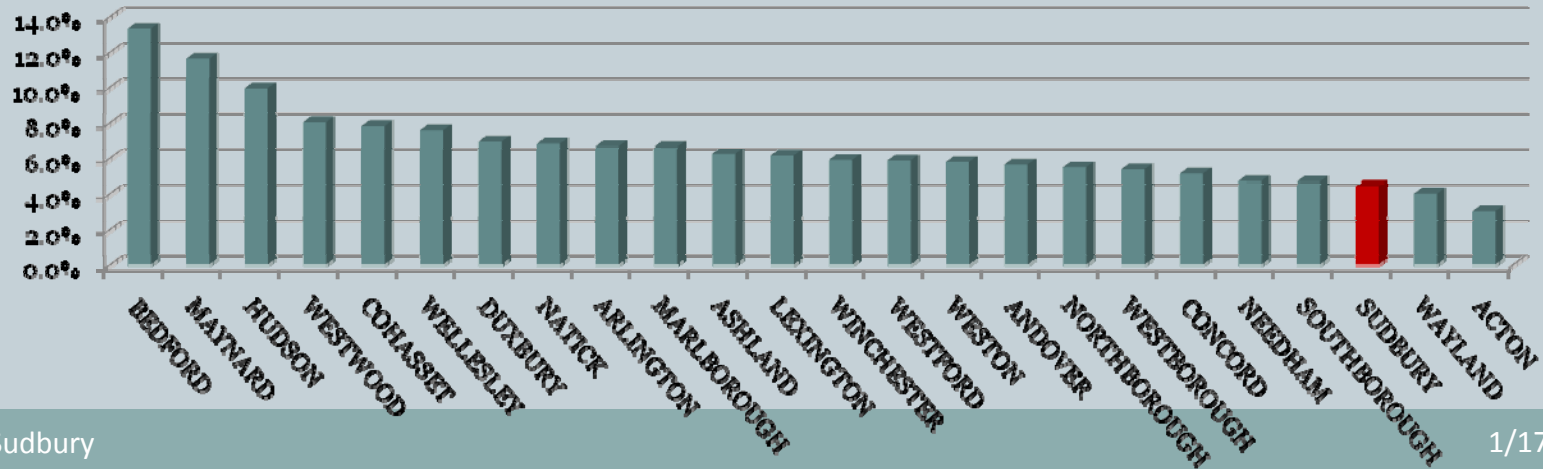




**FY 06 Gen Gov as % of Total Operating Expenditures (including Education)**

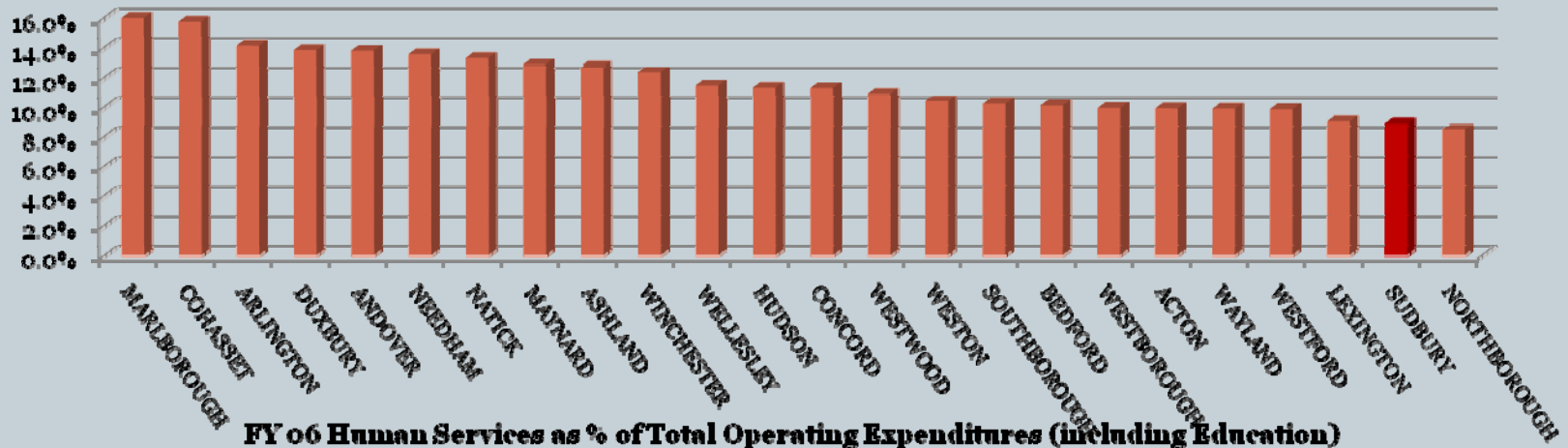


**FY 06 Public Works as % of Total Operating Expenditures (including Education)**

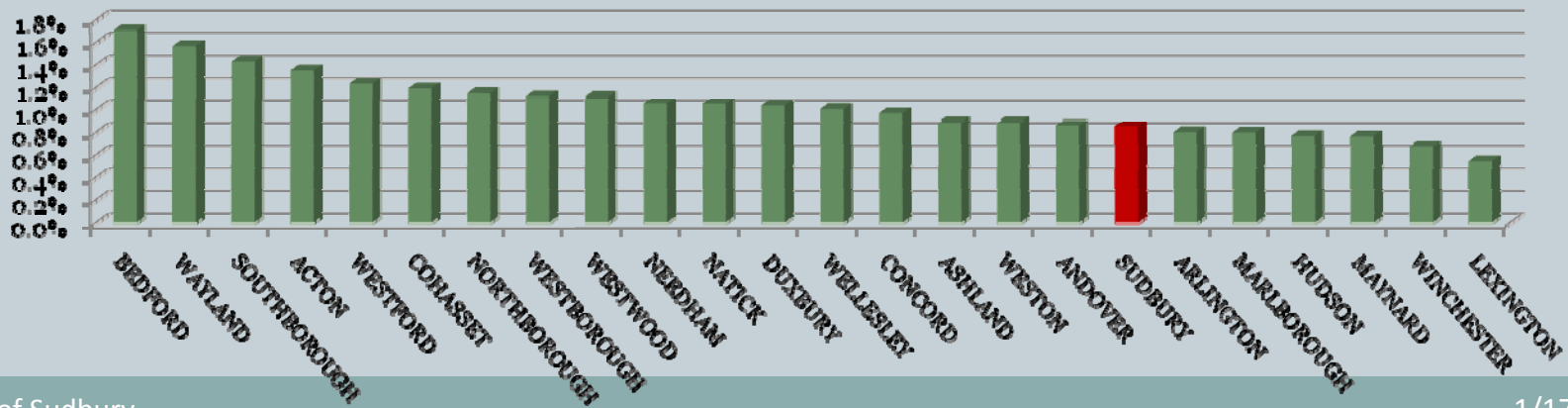




**FY 06 Public Safety as % of Total Operating Expenditures (including Education)**

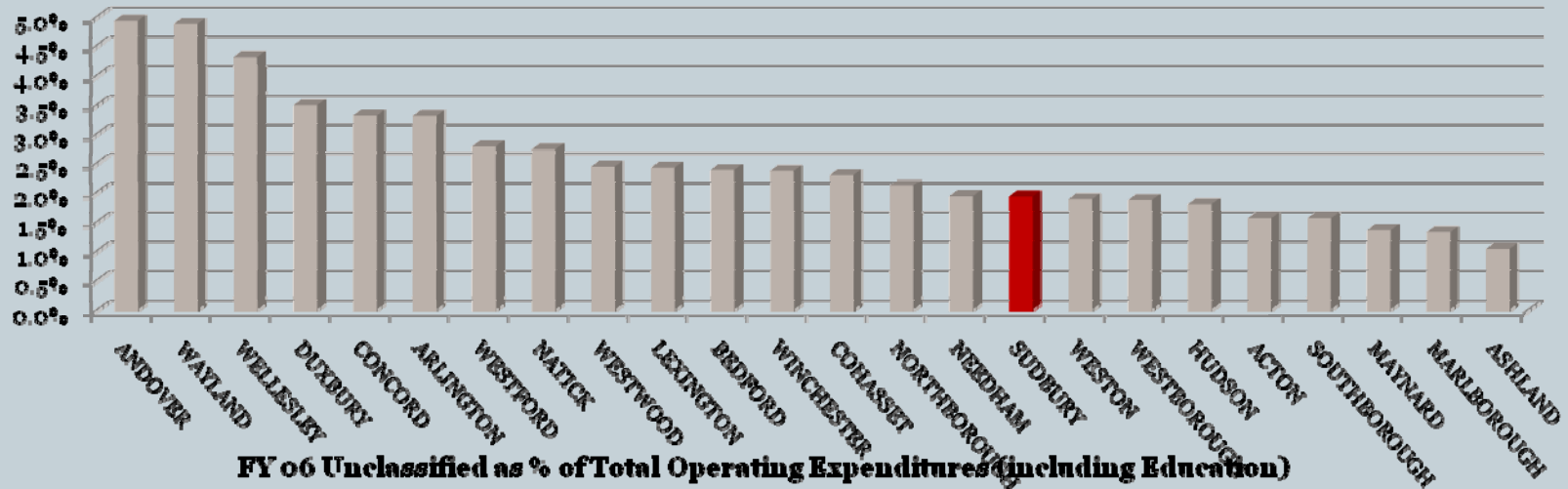


**FY 06 Human Services as % of Total Operating Expenditures (including Education)**

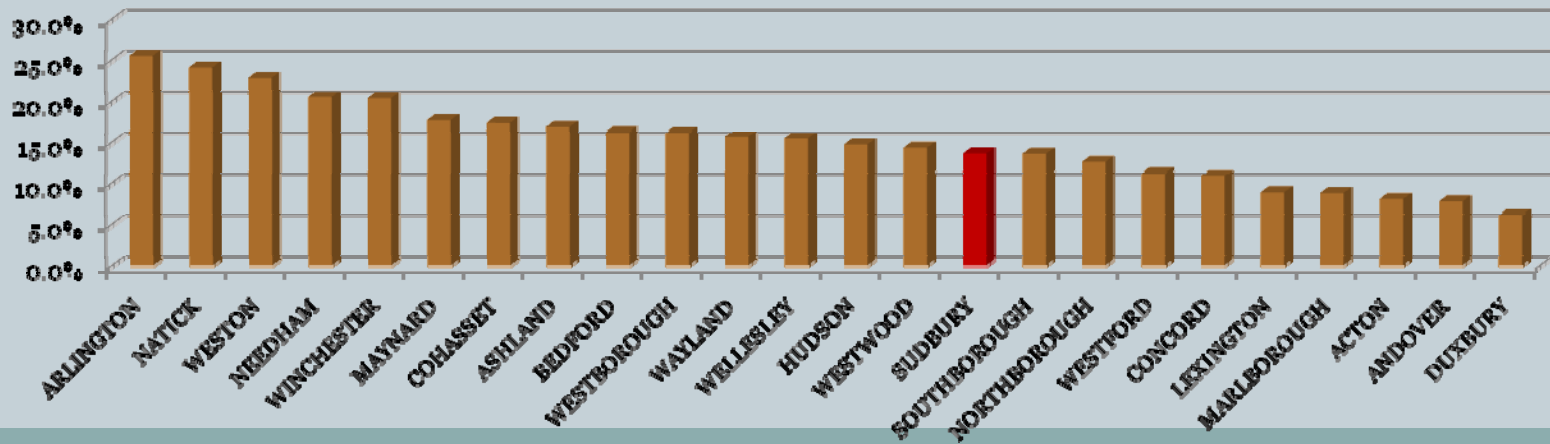




**FY 06 Culture & Recreation as % of Total Operating Expenditures (including Education)**



**FY 06 Unclassified as % of Total Operating Expenditures (including Education)**

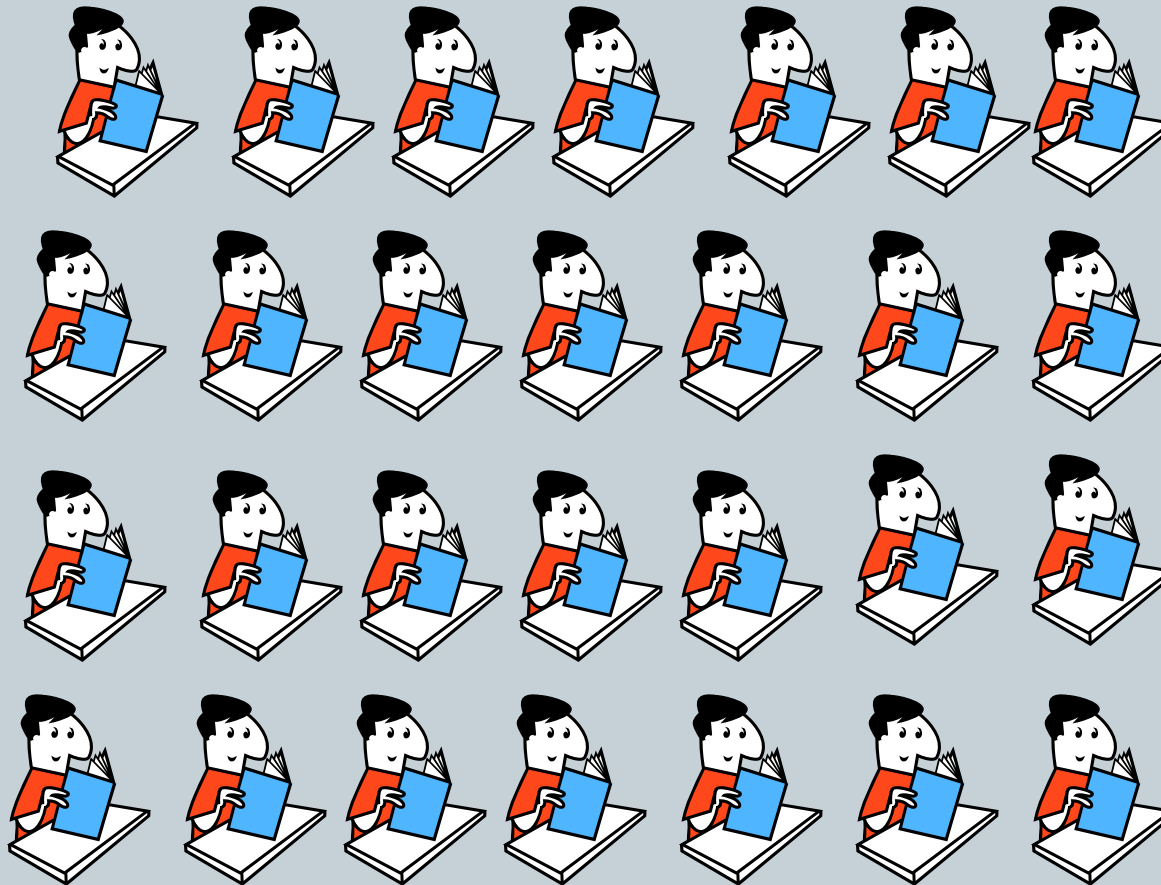


# 1990

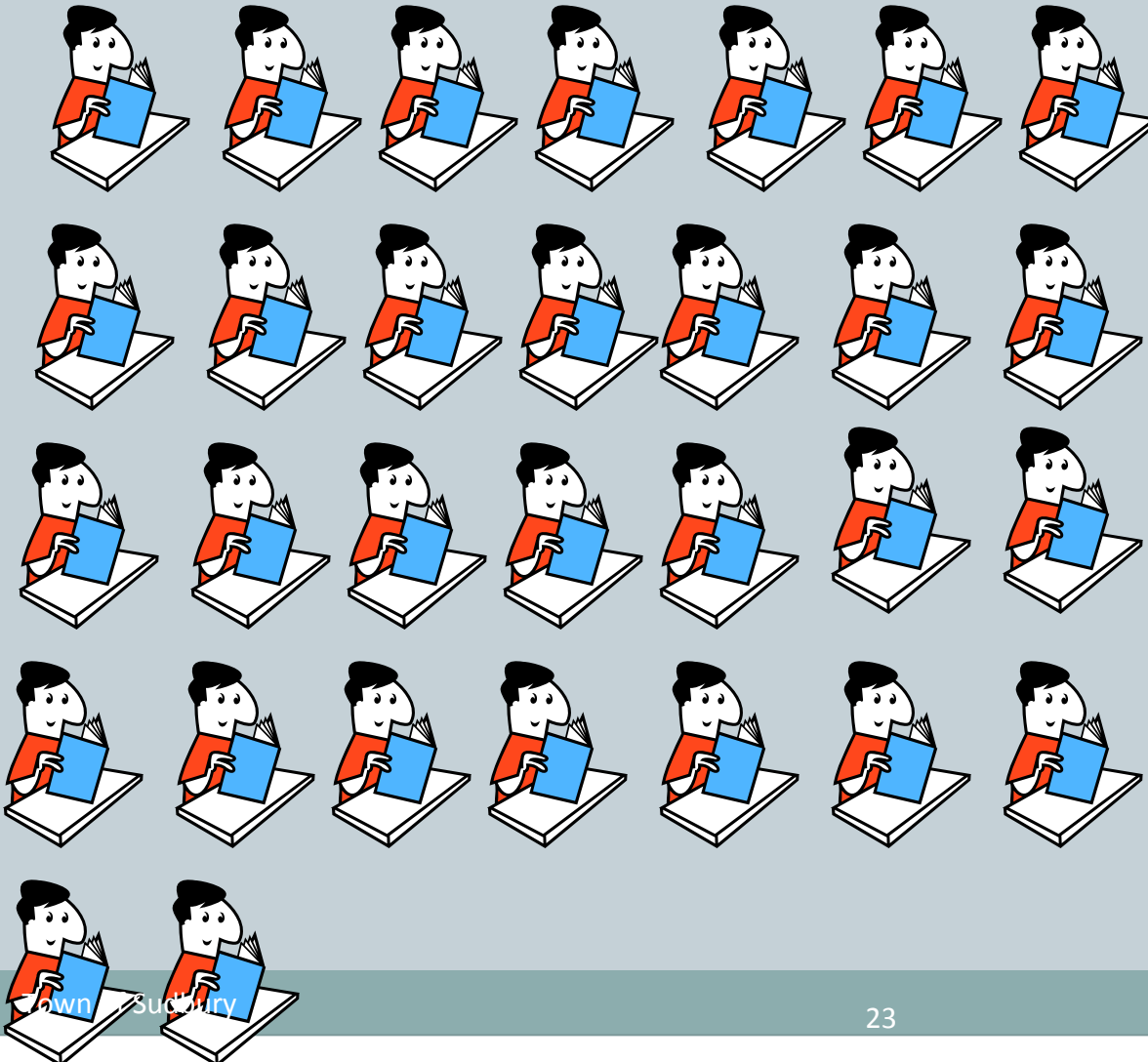


Our ratio of employee workload as if it were a student teacher ratio.

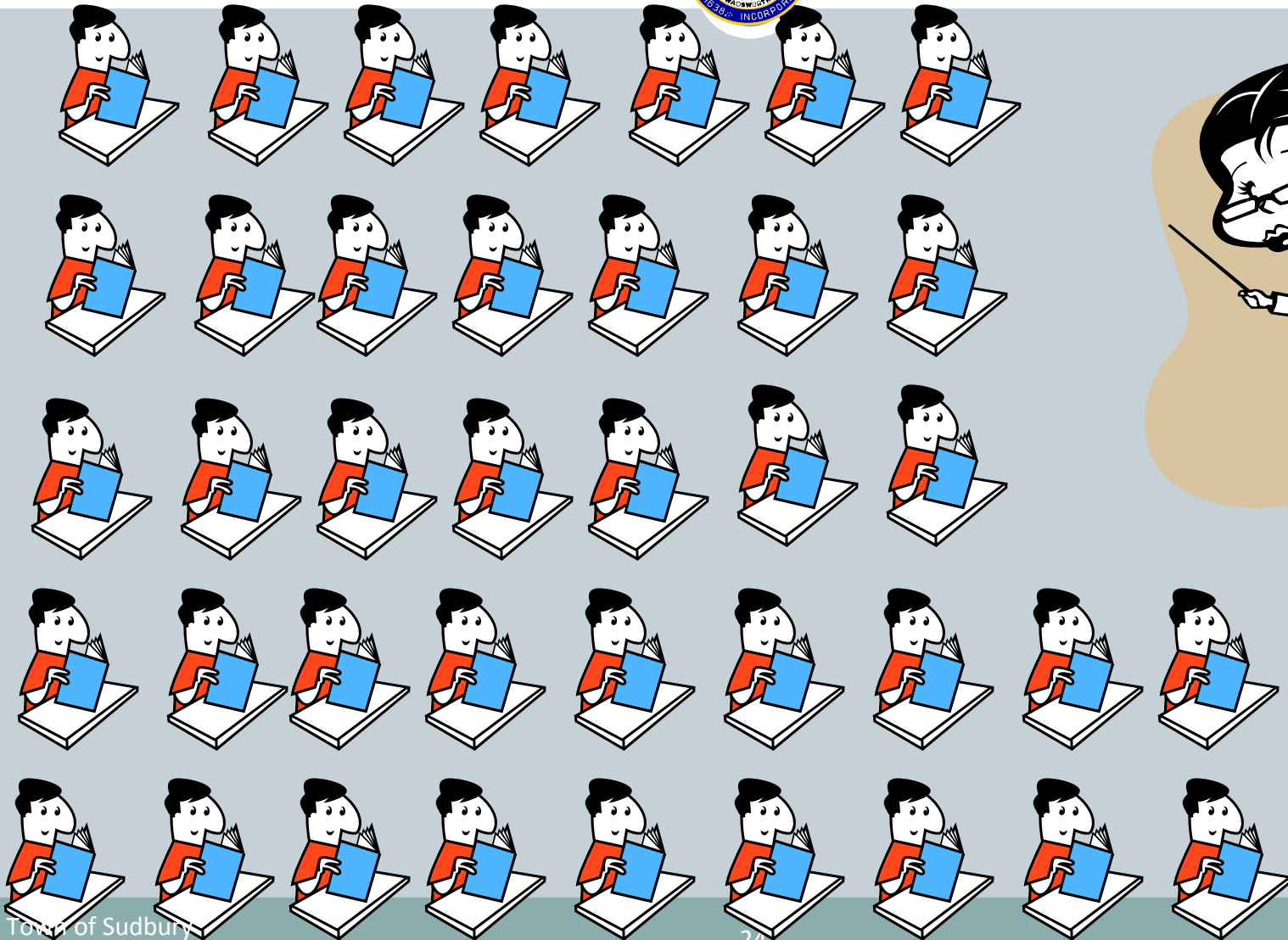
# DPW – Force reduction of 37% increases workload per employee



# Sudbury Fire Department – 50% increase in call volume



# Sudbury Police Department – 75% increase in call volume and 10% reduction in force





# Work Load Information



## Mandates - Examples

- National Pollutant Discharge Elimination System (NPDES) General Permit for Storm Water Discharges from Small Municipal Separate Storm Sewer Systems 33 U.S.C. 1251 as amended; s. 101-607 Clean Water Act;
- *M.G.L. Chapter 131 s.40 Wetlands Protection Act and 310 CMR 10.00 Wetlands Regulations* - Public Hearing must be held within 21 days of receipt of application; Permit issued or denied within 21 days of hearing close
- 310 CMR 15.00 The State Environmental Code Title 5. Issuance of septic system construction permits within 45 days of plan submittal. Site evaluation, plan review and construction inspections conducted on a daily basis. All properties with septic systems require Title 5 inspection review by the Board of Health prior to transfer. (Regulation changes occurred in March 1995 and April 2006)
- Massachusetts Department of Environmental Protection (Fuel Requirement) Bureau of Waste Prevention – Stage II Vapor Recovery Program Stage II System Documentation and Testing System must be assessed weekly for signs of non-compliance by a DPW Employee.; tested for in-use compliance and certified annually by a Stage II Testing Company and Stage II Form D2 submittal requirements forms must be completed, signed and forwarded to the DEP.

## Mandates - Recent

- MGL c.82A, Excavation and Trench Safety Permit, 2007
- Center for Emergency Preparedness established. All local health staff must participate in hours of planning /trainings each year for potential emergencies – 2003
- 430: Summer camps & 435: Swimming Pools: Licensed and inspected by BOH. In 2006 all previously exempt municipal sponsored summer programs were required to be licensed by BOH.
- M.G.L. chapter 148A and 780 CMR(the State Building Code) require any premise, licensed by the ABCC and from which alcoholic beverages are sold and are consumed on the premises, is to be inspected annually and said annual certificate of inspection is to be signed by the Building Official and by the Head of the Fire Department. 2006 after Station Nightclub Fire.
- GASB 34 – Infrastructure; GAAP – Time & Attendance: tracking sick & vacation time on a centralized and perpetual basis.
- IRS – Track 403B & 457 contribution limits. More responsibility falls on the employer.

# Work Load Information



## Assessors

### Triennial Certification Program Ch. 40, S56, Ch59, S2A(c)

Requires full field and office review of all property.  
Requires development of sales/assessment model.  
Full review of all sales.  
Complete file audit by Department of Revenue with full documentation.  
Assisted Appraisal of Commercial/ Industrial and Exempt Properties.  
Model development for Business and Utility Personal Property.

### Interim Year Adjustments (since 2005) IGR-07-401

DOR now requires interim sales analysis and adjustments.  
Documentation is not required for all property, only sales and analysis results.

### Chapter Land CH61-61B

New legislation has completely changed processes regarding farm, forest and recreational land assessments. New courses are ongoing for training in this area.

### Cyclical Inspection Program IGR-07-401

DOR mandates Sudbury re-inspect 1/9 of its properties each year. This full measure and list is not part of any other inspection program. Contract data collectors are necessary to meet this requirement.

### Equalized Valuations/State Owned Land Ch 58, S10C

Ch 59 S 5 G

The valuation of State owned land determines the appropriation received by the State as shown on the Cherry Sheet.

There is a new process for setting value for Sudbury state owned land. DOR has set up training sessions to learn new valuation procedures. Historically these values are used to determine county assessments and other costs and receipts.

### Exemptions/Deferrals CH 59 S5

Under Clause 41A Tax Deferral and Recovery agreements must be filed for each new application. At a cost of \$75 per lien we expect incurred costs to run \$4,500 for the upcoming year.

### Personal Property

Full inspection of all Sudbury businesses as of January 1, 2009.  
Pending court cases for telecommunications now require detail knowledge of these entities.  
Services are contracted for the valuation of these property types.

### Assessor Training CH 59, S 21A–21B

Costs for courses, material, lodging and gas are maintained in the budget due to the required training programs for Assessors under this MGL section.

# Work Load Information



## Fire Department

### **Homeland Security Presidential Directive Number 5 The National Incident Management System – NIMS**

NIMS requires that all functional departments with a role in mitigating an emergency both be trained in the use of the Incident Command System (ICS) and use it in their responses. This has placed a large burden on the fire department getting our men trained and providing training to other departments for compliance. All personnel have been trained in ICS 100 and 200 as well as IS 700. In 2007 we trained all line officers and Assistant Chief Carroll to the ICS-300 level and Chief MacLean to the ICS-400 level.

### **MGL Chapter 148, section 26F1/2: Installation of Carbon Monoxide Alarms**

When Nicole Garfalo died from carbon monoxide poisoning in Plymouth in 2005 the Legislature responded by creating Nicole's Law which requires carbon monoxide detectors in every residential dwelling in the state. It is the responsibility of the fire department to enforce this law, most importantly at the time of sale or transfer of property.

### **MGL Chapter 148, section 26G1/2: Nightclubs, dance halls, discotheques, bars; adequate system of automatic sprinklers**

The disastrous 2003 Station Nightclub fire in Warwick, Rhode Island gave rise to this new law that required the retrofitting of sprinklers in public assembly facilities of 100 person occupancy or more. The fire department is responsible for identifying those properties affected and applying the new law. As findings have evolved through contest, Sprinkler Appeals Board interpretations now form the basis for some decisions as to whether or where sprinklers are required. A simple reading of the law does not provide the absolute answer for each circumstance and substantial study of these decisions is required before mandating sprinklers or allowing or rejecting a permit.

### **105 CMR 170.500: Service Zone Plans and MGL Chapter 111C, section 10: Regional EMS councils; service zone plans; designation of service zone providers; primary ambulance service**

The service zone plan has been one of the most challenging of recent, unfunded mandates which leaves total discretion to the Office of Emergency Medical Services (OEMS) as to acceptance of our plan. We worked diligently to complete our plan on time, submit it by the deadline, only to have it rejected because we listed destination hospitals in violation of the premise that we cannot respond to a hospital not in our town. Then OEMS extended the deadline for one year because so few departments had submitted their plans, all while they were also telling the SFD that we could not under any circumstances take into consideration a patient's request for a particular hospital, even if their medical records are present there. These were the two major reasons for rejecting our plan – hospitals outside of Sudbury and patient requests. This well meaning law has become an absurdity which in all likelihood will simply result in 351 white binders lining someone's wall in Boston. Even so, many hours and meetings have been devoted to satisfying this mandate.

### **OSHA Occupational Safety and Health Standards: Respiratory Protection 1910.134(g)(4) – Procedures for interior structural firefighting. (Known as two in-two out or Rapid Intervention Team [RIT])**

Part ii of this section requires that at least two personnel remain outside a burning building ready to immediately respond to rescue the first two firefighters who have gone inside the building. This important standard has been adopted in Massachusetts even though we are not an "OSHA State". This means that we are limited, except in cases of life safety, from entering a building for firefighting purposes before we have the requisite RIT team in place. To accomplish this, we need to have 14 firefighters on the fireground for a residential fire, potentially delaying our work as we assemble our team. The consequence is to require hiring more personnel, relying more heavily on mutual aid, and working harder with decreasing resources.

# Updated Building Code



“The state is always trying to improve codes and regulations to protect people and insure safety, but the town bears the costs and obligation to enforce. The new licenses will add paperwork and office time to provide proper review and enforcement.

An interesting fact about the building department is that the more we do, the less residents would be aware of us, meaning there are no issues or accidents. The more diligent we are in issuing and inspecting, the less likely there will be problems.

The Town will receive permit fees, however, which *should* offset much of the towns costs”.

*Jim Kelly, Sudbury Building Inspector*

# Work Load Information



## Committees – Planning Director

- Planning Board
- Design Review Board
- Community Preservation Committee
- Housing Trust
- Board of Selectmen – Site Plan
- Board of Appeals – 40B applications
- Sudbury Centre Improvement Advisory Committee
- Open Space and Recreation Plan Update Committee
- Traffic Safety Coordinating Committee
- Sewer Assessment Technical Committee
  
- **By extension**
  - Historical Commission
  - Historic Districts Commission
  - Permanent Landscape Committee

## Committees – DPW Director

- Sudbury Centre Improvement Advisory Committee
- Solid Waste Management Options Committee
- Traffic Safety Coordinating Committee
- Local Emergency Planning Committee
- Rail Trail Conversion Advisory Committee



# C.A.R.E Program



## C.A.R.E. ESTIMATES SUMMARY

### I. Cost Avoidance Estimates

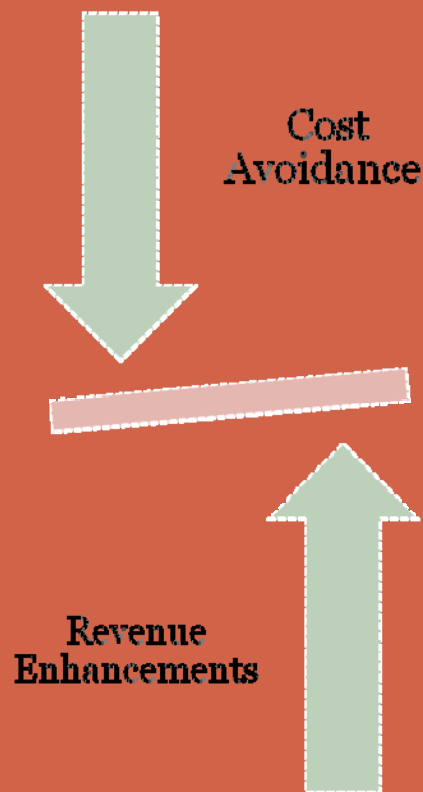
Debt Refinancing	\$ 787,000.00	life of bond estimate
Street Light Purchase	\$ 145,000.00	5 year estimate
Streamlined tax processing	\$ 70,000.00	5 year estimate
Energy Management	\$ 350,000.00	FY05 and FY06 estimate
Fleet Management	\$ 34,380.00	5 year estimate
Regional Purchasing	\$ 75,550.00	5 year estimate
Self insurance for unemployment	\$ 1,428,000.00	5 year estimate
Contracting out cleaning services	\$ 70,000.00	5 year estimate
Bi-weekly payroll	\$ 75,000.00	5 year estimate
MIIA Rewards program	\$ 44,000.00	5 year estimate
Leasing town building	\$ 18,162.00	2006 savings
DPW Reorganization	\$ 40,000.00	5 year savings
<b>Total</b>	<b>\$ 3,137,092.00</b>	

### II. Revenue Enhancements

New Burning Fee	\$ 50,000.00	5 year estimate
Cell tower leases	\$ 600,000.00	5 year estimate
Gravel sales	\$ 500,000.00	5 year estimates
Land sales	\$ 50,000.00	One time revenue
Grants and Gifts	\$ 347,391.00	FY05 and FY06
<b>Total</b>	<b>\$ 1,547,391.00</b>	



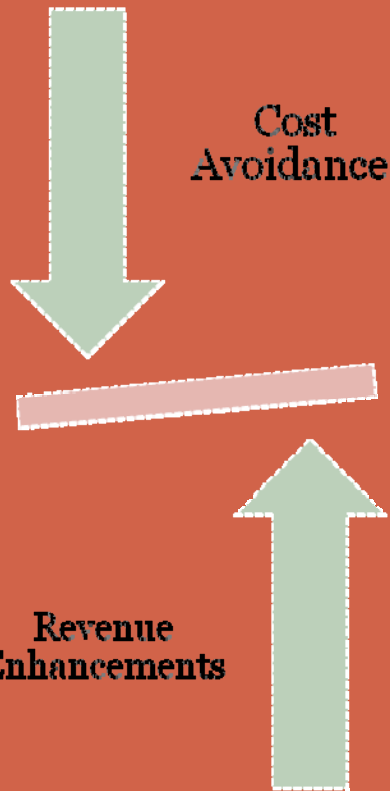
## C.A.R.E Program



### Principles of the C.A.R.E. Program

1. There are no “sacred cows”. Town staff will consider all alternatives to current business practices if they seem likely to reduce costs, or enhance revenues, *without* sacrificing any of the values articulated by the Board of Selectmen.
2. Town staff is viewed as key tools needed for the achievement of quality, revenue enhancement and cost containment efforts.
3. Town staff will rely on proven “best practices” for management operations and decisions. We are committed to continuously striving to improve the quality and efficiency of municipal services.
4. A return on investment mentality will be used in our decision making. We will examine both the short and long term costs and implications of implementing any changes.
5. The job of C.A.R.E. is never done. All programs and decisions will be re-visited periodically to look for opportunities.
6. Tools such as benchmarking and performance measurement will be used to assist in assessing effectiveness and efficiency.





C.A.R.E. POSSIBILITIES			
Potential Projects		Potential Dollars	
I. Cost Avoidance and			
	Shared Facilities Management with SPS		?
	More "E" services		?
	Cash Incentive NOT to take health insurance		?
	Regionalize/consolidate services		?
II. Revenue Enhancements			
	Passport Office	\$ 100,000	5 year estimate
	Cost recovery program involving accidents, hazardous waste incidents, illegal drugs, false business alarms		?
	Sponsorships: advertising/sponsorships on town owned property or media		?
	Donate to Town Program		?

## C.A.R.E Program

Transit Program Funds





## C.A.R.E Program



# Donation List

## Columbia Trust

### *Central to the future of Columbia, Missouri*

The Columbia Trust is a charitable donation program sponsored by the City of Columbia to elevate the quality of life in Columbia, Missouri. Quality of life is integral to our future. It affects, perhaps more than any other attribute, the economic, social and emotional well-being of our community. The Columbia Trust is committed to ensure that the award-winning qualities of Columbia do not become a gloried past. Quality of life is directly related to opportunity. The Columbia Trust aspires to nurture a community thriving in a climate of opportunity; opportunity to enjoy recreation, art, culture, and personal growth. Opportunities available for everyone. Through private donations, we will continue to build upon the foresight of our founding fathers and the innovation of our leaders. Your donations support a vision for new and enhanced opportunities for all citizens.

### Restricted Gifts

You may have a special interest in an area of the City and choose to give a restricted or designated gift whose purpose is to strengthen a particular program, department or capital need. A restricted gift, if approved by the City Council, is used solely for the project(s) that you specify.

### Unrestricted Gifts

An unrestricted gift allows the City to address its areas of greatest need. This type of gift provides the most flexibility when distributed. Such gifts may be combined with other funds to permit the City to initiate major institutional goals.

### Memorial Gifts

A thoughtful way to honor a loved one, friend or colleague is through a memorial gift. Contributions may be made to any area of the City. The individual being honored or family of the deceased individual will be notified of the contribution and a permanent record of such gift will be maintained in the official records of the City. [Learn more](#)

### Endowments

To provide an ongoing revenue source for existing or new City programs, gifts may be used to create an endowment. An endowment agreement generally indicates that the principal be held in a fund and



Proposed

Level  
Staff

Non-  
Override



## FY09 Budget Scenarios

# Non-Override Budget Implications



1. Town services are essential
2. None of these reductions are good, none are recommended, all
3. There are 30 General Fund budget areas in Section IV of your budget book – except for Police, Fire, DPW and Library, they are small entities with few staff – many one person staff

# Budget Scenarios



## Three Scenarios Prepared – Two Presented

- I. Proposed
- II. Level Staff compared to FY08 (current year)
  - a. Same FTE as FY08
  - b. Expenses held to FY08 level EXCEPT where outside entity/costs requires change
  - c. Pensions and insurance at projected levels
- III. Non-Override (1% decrease)
  - I. Decrease of 1% from FY08 operating budget
  - II. Pensions and insurance at projected levels

# Level Staff and Non-Override Requests



	FY08 Budget	FY09 Sudbury Level Staff	% change	FY09 Sudbury Non-Override Scenario	% change
<b>Operating Budget</b>	13,993,771	14,671,314	4.84%	14,006,461	0.09%
<b>Less: Offsets</b>	(230,342)	(270,715)	17.53%	(380,701)	65.28%
<b>Total Net Operating Budget</b>	<b>13,763,429</b>	<b>14,400,599</b>	4.63%	<b>13,625,760</b>	-1.00%
<b>Difference vs. FY08</b>		<b>637,170</b>		<b>(137,669)</b>	
<b>Pensions &amp; Insurance</b>	4,003,678	4,234,129	5.76%	4,202,129	4.96%
<b>Total Budget Within Levy</b>	<b>17,767,107</b>	<b>18,634,728</b>	4.88%	<b>17,827,889</b>	0.34%
<b>Budget Offsets:</b>					
Ambulance Reserve		(237,252)		(347,238)	
Transit Service		(33,463)		(33,463)	
<b>TOTAL</b>		<b>(270,715)</b>		<b>(380,701)</b>	

# Level Staff and Non-Override Requests



	<b>FY08 Budget</b>	<b>FY09 Level Staff</b>	<b>% change</b>	<b>FY09 Non- Override Scenario</b>	<b>% change</b>
<b>Salaries</b>	9,691,900	10,208,946	5.33%	9,974,540	2.92%
<b>Expenses</b>	3,523,620	3,645,407	3.46%	3,352,425	-4.86%
<b>Capital</b>	363,596	385,560	6.04%	264,842	-27.16%
<b>Snow &amp; Ice</b>	414,655	431,401	4.04%	414,655	0.00%
<b>Less: Offsets</b>	(230,342)	(270,715)	17.53%	(380,701)	65.28%
<b>SubTotal</b>	<b>13,763,429</b>	<b>14,400,599</b>	4.63%	<b>13,625,761</b>	-1.00%
<b>Pensions &amp; Insurance</b>	4,003,678	4,234,129	5.76%	4,202,129	4.96%
<b>Total Budget Within Levy</b>	<b>17,767,107</b>	<b>18,634,728</b>	4.88%	<b>17,827,890</b>	0.34%
<b>Total FTEs</b>	185.71	185.71	0.00%	179.66	-3.26%

# Level Staff and Non-Override Requests



	<b>FY08 Budget</b>	<b>FY09 Level Staff</b>	<b>% change</b>	<b>FY09 Non- Override Scenario</b>	<b>% change</b>
<b>General Government</b>	2,288,472	2,396,822	4.73%	2,253,566	-1.53%
<b>Public Safety</b>	6,377,174	6,568,460	3.00%	6,399,676	0.35%
<b>Public Works inc. snow&amp;ice</b>	3,376,966	3,555,694	5.29%	3,279,124	-2.90%
<b>Human Services</b>	607,659	633,774	4.30%	603,724	-0.65%
<b>Culture &amp; Recreation</b>	1,089,936	1,146,864	5.22%	1,112,696	2.09%
<b>Unclassified and Transfer</b>	253,564	369,700	45.80%	357,675	41.06%
<b>Less: Offsets</b>	(230,342)	(270,715)	17.53%	(380,701)	65.28%
<b>SubTotal</b>	<b>13,763,429</b>	<b>14,400,599</b>	<b>4.63%</b>	<b>13,625,760</b>	<b>-1.00%</b>
<b>Pensions &amp; Insurance</b>	4,003,678	4,234,129	5.76%	4,202,129	4.96%
<b>Total Budget Within Levy</b>	<b>17,767,107</b>	<b>18,634,728</b>	<b>4.88%</b>	<b>17,827,889</b>	<b>0.34%</b>

# Planned Reductions



## Staffing reductions - \$234,406, affects 10 positions

- Police Department – 1.75 (one position + overtime)
  - ✦ Back to 2006 level of staffing, already lowest in the area, more uncovered shifts, and only 2 sector cars to cover Sudbury, traffic issues
- Staff Planner
  - ✦ Director of Planning and Community Development can't work on the projects that could enhance revenues, achieve goals and long term change
- GIS Administrator
  - ✦ Town/water district can't move forward with this productivity and information enhancement, can't use expense already in special fund
- Budget Analyst (PT)/ Personnel Analyst (PT)
  - ✦ Back to Finance Director and Assistant Town Manager/Personnel Director working without staff support; impacts health insurance bargaining, development of budget information, workload on these employees



# Planned Reductions



- Heavy Equipment Operator in DPW
  - ✦ Affects ability to get work down
- Parks & grounds – summer position/hours
  - ✦ No coverage for employees taking vacation, or achievement of summer projects
- Streets & roads – summer position/hours
  - ✦ No coverage for employees taking vacation, or achievement of summer projects
- Reductions from various part time positions
  - ✦ Work does not get done or is shifted to someone else.
- Would include one fire fighter equivalent position – ambulance receipts used instead
- Would include COA Van Driver – Contract with Transit Authority should cover that position

# Planned Reductions



- Expense Lines - \$309,729 in reductions
  - 50% from DPW - Living on the edge (or over it) in areas
    - ✦ Vehicle maintenance
    - ✦ Roadwork
    - ✦ Gasoline/diesel held level
    - ✦ Street Lighting
    - ✦ Snow and Ice
  - Other Significant Items
    - ✦ Hazardous Waste Day - \$18,700
    - ✦ Printing of Town Report - \$9,500
    - ✦ Professional Development/training of staff
    - ✦ Computer replacement / equipment funding
    - ✦ Tree Replacement - \$5,000

# Planned Reductions



- Capital Spending - \$120,718 reductions
  - Police Cruiser
  - Building Maintenance
  - Fire Vehicle – Captain’s Car
  - DPW – some lease payments picked up by Capital Committee
  - Boat – coming out of Ambulance Receipts

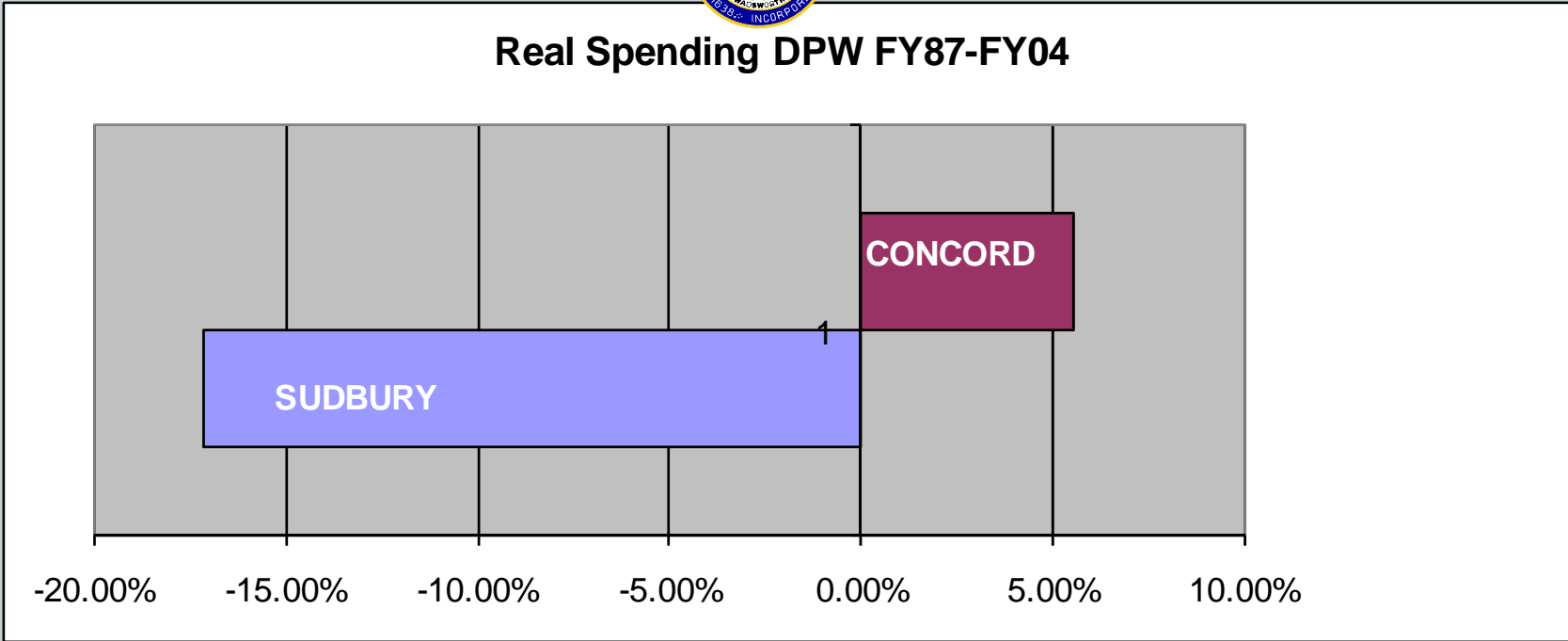
# Planned Reductions



- **Police Department**
  - Back to covering only 45-50% open shifts – goal was to get to 75%
  - Cruiser replacement schedule impacted – more time lost, costs up due to repairs, worse shape when traded in or passed down to other departments
  - Specialty programs scaled back – DARE, Traffic can't be staffed
  - Preparation for emergencies, training, etc. cut back
- **DPW**
  - Too few employees for growing workload
  - Roadwork account – sanding, line striping, all are part of safety
  - Need work teams to use all employees effectively



### Real Spending DPW FY87-FY04



Concord – 103 road miles, 24 employees

Sudbury – 150 road miles, 20 employees

# Examples From Last Year



## Concord

## Sudbury

Health Department (4 FTE)

Conservation (3.5 FTE)

Personnel (2.8 FTE)

Fin. Director/  
Budget/Purchasing Office  
(4.2 FTE)

Engineering (6 FTE +)

Library (21+ FTE)

Health (1.75 FTE)

Conservation (1.5 FTE)

Personnel (1.25 FTE)

Fin. Director/Budget/  
Office (1.0 FTE)

Engineering (4.5 FTE)

Library (12.3 FTE)

Added PT  
staff in  
FY08

# Residents Demands



- Roads & walkways cleared of snow and ice
- Potholes filled, roads maintained
- Library open at hours similar to other Towns
- Walkways constructed, maintained and repaired
- Playing fields and conservation areas maintained
- Environmental issues addressed
- Information instantly available to them on the website, or via email
- Traffic and speeding dealt with
- Recreation programs – lots of them!
- Trees! Removal and replacement
- Historical Assets preserved

# Choices for Reductions



- Take out of personnel costs? Already lower than staffing than peers.
- Expenses – Garage the trucks? Shut down the buildings? Close a station? Not maintain computers? Not make the roads safe? Reduce ability to generate income?
- Walk away from outcomes? Roads? Bridges? Environmental programs?
- Not comply with mandates?
- Employee compensation? Arbitration case
- Benefits – subject to negotiations



# The Challenge



IF - you don't need Town services or you are unaware of when you are using them, they may not seem important to you

BUT - if you do need them, at that moment they are very important

WE – the Town's leadership - need to act responsibly to make sure critical services are there, even if we don't think we need them or we hear from residents who think they need other things more.

# The Board of Selectmen



Responsible for implementation of Master Plan, long range goals, vision for Sudbury

Set Goals for Town Manager and Departments

See a better future for Sudbury

Our Staff and our resources are our tools for making that happen



Protecting Public Safety, Public Health, Public  
Assets and a Special Quality of Life

**Thank You**